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## **The Adjustment of American Expatriate Spouses in Germany – A Qualitative and Quantitative Analysis**

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**THE ADJUSTMENT OF AMERICAN  
EXPATRIATE SPOUSES IN GERMANY -  
A QUALITATIVE AND QUANTITATIVE ANALYSIS**

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**ABSTRACT**

This paper reconceptualises the adjustment of expatriate spouses during overseas assignments and empirically analyses various factors influencing the level of spousal adjustment. It does so by using a combination of qualitative data collected through interviews/group discussions with expatriate spouses and quantitative data gathered by means of a questionnaire survey of American expatriate spouses in Germany.

## INTRODUCTION

The increase in international activities of companies has led to a growing number of people being sent on overseas assignments. The underlying motives for expatriation vary: the transfer of know-how from headquarters to subsidiaries abroad, the compensation for a shortage of qualified local personnel in a given host country and the attempt to standardise routines across organisational units are frequently cited as reasons for sending managers abroad (e.g. Kuehlmann, 1995; Tung, 1981). More recently, new forms for organising the activities of multinational companies such as network structures or heterarchies call for an increased exchange of personnel between organisational units to ensure that all parts of the company contribute to reaching the overall strategic objective (Bartlett & Ghoshal, 1987; Fenwick, DeCieri & Welch 1999; Hedlund, 1986; Manev & Stevenson, 2001). A more general motive can be seen in companies' desire to enhance their international competence by increasing the international exposure of its managers (Caligiuri, Hyland & Joshi, 1998). Finally, the recent wave of international M&As requires the exchange of personnel across borders to ensure a smooth integration of the merged or acquired companies.

However, anecdotal evidence as well as existing research implies that not all overseas assignments are successful, and studies analysing the prerequisites for successful overseas assignments abound in literature (e.g. Arthur & Bennett, 1995; Briody & Chrisman 1991; Nicholson & Imaizumi, 1993; Parker & McEvoy, 1993; Shaffer, Harrison & Gilley, 1999). These studies have repeatedly shown that one of the most important factors for the success of overseas assignments is the adjustment of the expatriate manager's spouse (Caligiuri et al., 1998; Shaffer et al. 1999). Fukuda & Chu, for instance, investigated Japanese managers and their spouse in East Asia and came to the conclusion, that "...family-related problems are the most important factors in Japanese expatriates' failure on international assignment" (1994, p. 43). Furthermore, anecdotal evidence suggests that the situation faced by the expatriate's spouse during an overseas assignment is considerably more difficult than the one encountered by the expatriate manager (Suutari & Brewster 1996). Although the number of studies that focused on the adjustment of expatriate spouses has increased (Shaffer & Harrison 2001; Black & Gregersen, 1991a; Black & Gregersen, 1991b; Fukuda & Chu, 1994; Harvey, 1985), there is still a lack of conceptual and empirical

research on the adjustment of expatriate spouses (Caligiuri et al. 1998). Hence, this paper contributes to closing this gap by reconceptualising the adjustment of expatriate spouses using in-depth interviews and group discussions with 14 American expatriate spouses in Germany and by empirically examining various factors influencing the level of spousal adjustment. The suggested relationships are tested against data gathered by means of questionnaire survey of American expatriate spouses in Germany.

The paper is structured as follows: In the following section the existing research on (expatriate) adjustment is evaluated in its usefulness for analysing the focal subject. Using qualitative data, a model proposed by Black, Mendenhall & Oddou (1991) is modified to account for the special situation of expatriate spouses. We then analyse the role of various factors that were identified (a) during interviews/group-discussions with spouses and/or (b) by examining existing (empirical) research on the adjustment of expatriate managers their spouses. The next section then outlines the two-stage research design chosen for this study in greater detail. Subsequently, the measurement of constructs is described before the results of the quantitative analyses are presented. Finally, the main results of the study are summarised and implications for future research are exposed.

## RECONCEPTUALISING THE ADJUSTMENT OF EXPATRIATE SPOUSES

So far there has been no definition of adjustment in the context of expatriation that a majority of researches has agreed upon (Searle & Ward, 1990). Suggestions were made by authors such as Eckert et al. (2001), Torbiörn, (1982), Ward & Chang (1997) or Ward & Searle (1990). The terms 'adaptation', 'acculturation' and 'adjustment' are used interchangeably and are generally referred to as the degree of a person's psychological comfort with "...various aspects of a host country" (Black & Gregersen, 1991a, p. 463), thus implying that comparatively better adjusted managers feel psychologically more comfortable than less adjusted expatriates. In our opinion, however, this relationship should not be assumed *a priori*, but has to be supported by empirical research. Therefore, we use a narrower definition, which limits the scope of the term 'adjustment' to the degree to which individuals on overseas assignments perceive their norms and behavioural patterns to be compatible with those common in

the host country (Eckert et al., 2001). In a similar vein, Jun, Gentry & Hyun (2001) underline the distinction between the mere adjustment and its outcome, i.e. a feeling of psychological comfort. In turn, although maladjustment, i.e. the perceived incompatibility of norms and behaviours, may cause individuals to feel uncomfortable, we do not a priori accept the reverse logic, that a perception of compatibility is sufficient for individuals to feel comfortable in new situations.

As most of the existing studies on adjustment have been carried out on the adjustment of expatriate managers and the most prominent concepts were developed in this field, a closer look at existing research on the adjustment of expatriate managers seems warranted. Some of the first authors to tackle the question of adjustment of managers abroad were Lysgaard (1955) and Oberg (1960) who suggested distinguishing between different stages of adjustment and suggested a U-curve shaped adjustment process of expatriate managers, which has since then been debated and empirically tested with no clear results emerging so far (Eckert et al. 2001; Ward et al., 1998). Seminal contributions to the literature on the topic were made in particular by Black (1988) and Black et al. (1991): Whereas Oberg (1960) and Lysgaard (1955) saw adjustment as one-dimensional, Black (1988) and Black et al. (1991) separated adjustment into three dimensions of adjustment: The *general living adjustment* reflects the expatriate's adjustment to differences in housing, shopping etc., whereas the dimension *interaction adjustment* takes into account the differences between home and host culture regarding the way people interact with each other. Finally, *work adjustment* refers to the expatriate's adjustment to work-related issues such as job responsibilities or supervision. Examples of employing this concept in the context of expatriate managers abound in literature (Black, Gregersen & Mendenhall, 1992; Harvey, 1997; McEvoy & Parker, 1992; Parker & McEvoy 1993; Selmer, 1999; Suutari & Brewster, 1996). McEvoy & Parker (1992), for instance, could support the existence of the three dimensions in their analysis of expatriate managers in twelve countries. Their study as well as a later study by Selmer (1999) also supported the reliability of the constructs suggested by Black et al. (1991) for measuring the three dimensions of expatriate adjustment.

Although many authors, such as Tung (1981), Black (1988), Black & Stephens (1989) or Suutari & Brewster (1996) emphasised the role of the expatriate spouse's adjustment and its

importance for the success of an overseas assignment, the adjustment of expatriate spouses during an overseas assignment has so far received only limited scholarly attention (Shaffer & Harrison, 2001; Black & Gregersen, 1991a; Fukuda & Chu, 1994). Black & Gregersen (1991a) were the first authors to analyse the determinants of the degree of expatriate spouses' adjustment. To this aim they used the two dimensions '*general living adjustment*' and '*interaction adjustment*' from the theoretical model proposed by Black & Stephens (1989). Since the importance of these dimensions was repeatedly mentioned during interviews and group discussions with the expatriate spouses, we use these two dimensions in this study. However, we modify the concept of Black & Gregersen (1991a) by adding a third dimension of spousal adjustment, which has been identified by analysing interviews with expatriate spouses. This third dimension accounts for the change in role, which a number of interviewees stressed as an important aspect of adjustment. Although studies of the adjustment of expatriates included the changes of the manager's role as part of the 'work adjustment' of expatriate managers (e.g. Black, 1988), this element was dropped in subsequent analyses of spouses' adjustment, because "...work adjustment is generally only an issue for the expatriate and not for the spouse (because most spouses do not work after an international transfer)." (Black & Gregersen, 1991b, p.678) However, as interviewees and other authors point out, spouses in particular are confronted with a major change in their role(s) (Adler, 1997; Bittner & Reisch, 1994; Briody & Chrisman, 1991; Suutari & Brewster, 1996). The following interview extracts show the sort of changes in role expatriate spouses usually experience:

*"You have to be ready for [the overseas assignment]. It is hard for people who have been working all day and then suddenly stopped working. It is a different kind of stress."*

*"The major adjustment for me was not going to work, from eight to seven. You feel you are almost back in that traditional position where the woman does everything in the house and man just goes out and works and then comes home. Now I feel I am responsible for everything. Everything is more complicated and I have a lot more things to do."*

*"It was very difficult. It's something completely different. Everything is new. I used to be in the office at this time and now I'm at*

*home. It was difficult to learn only to go shopping, to be there for the children the whole day doing homework etc. In the beginning it was really difficult."*

Though spouses are not required to cope with a new 'employment environment', their personal role is usually transformed substantially during an overseas assignment: Spouses that previously had their own career may find themselves in a position of (economic) dependence and regard it as "...frustrating to be a 'housewife'" again (Suutari & Brewster, 1996, p. 94). Role adjustment thus seems to be of most importance to spouses who used to work before going abroad since the extent to which these spouses' role has changed is comparatively greater. However, Bittner & Reisch (1994) showed that spouses who had not been employed in their home country are also faced with a new role and/or new tasks and expectations. Hence, in this study a third dimension of adjustment labelled 'role adjustment' is distinguished and added to the two dimensions of adjustment suggested by Black & Gregersen (1991a).

In the next section we analyse various factors in their relationship with the level of expatriate spouses' adjustment. The choice of factors was guided by information gathered through interviews/group discussions with expatriate spouses and by the results of existing research on the adjustment of expatriates and/or their spouses.

#### **FACTORS INFLUENCING SPOUSAL ADJUSTMENT**

**Age.** During the interviews and group discussions older expatriate spouses reported less frequently of problems regarding the adjustment to their new situation than younger women. Some authors argue that older expatriate managers or spouses are better able to adjust to the changes associated with an overseas assignment, as they are likely to already have experienced more changes (in their home country) as compared to younger spouses. This experience is seen as conducive for the adjustment to new situations (Black & Gregersen, 1991 b). Similarly, Furnham & Bochner (1986) suggest that older expatriate managers could better cope with new situations due to their generally greater living experience. The same arguments are applicable to the case of expatriate spouses.

**Knowledge of host-country language.** The spouses interviewed for this study expressed the importance of having some knowledge of the local language, i.e. German:

*"If I spoke German, I wouldn't have so many*

*problems. I could read about simple things such as the telephone zones - about every kind of information I need. I would know if something in the mail is important. Or if I get stuck I could ask for the directions, understand what they say. You are then just smart enough to get your things done. So speaking the language is very important. You can't communicate and it makes it hard to adjust, if you do not speak German."*

*"For my husband it's a lot easier. At his company they are all educated people, all speak English and ... he doesn't have any disadvantages. This is not always true in my life. You don't know how much of the world is the language, everything. In the beginning I think this was the hardest part."*

The inability to communicate efficiently can lead to frustration and a feeling of isolation. In their analysis of Japanese expatriate spouses abroad, Fukuda & Chu, for instance, found that spouses "... suffered from a lack of contact with the local community where they resided." (1994, p. 45) Equally, Baker & Ivancevich (1971) stressed that knowledge of the local language helps building a social network. Adler (1997, p. 274) recognised this problem as well when she stated, that "...in caring for her family's daily living needs, she often meets people who don't speak English...the wife must depend on her own skills and ingenuity ...many wives never become fluent in the local language and therefore have little possibility of becoming fully comfortable in the new culture." According to Suutari & Brewster (1996, p. 93) a lack of knowledge of the language leads to "...problems in creating contacts with local people and getting integrated." Similarly, Black & Mendenhall (1990a) and Shaffer & Harrison (2001) pointed out that an increase in the spouse's ability to interact effectively leads to better adjustment. Furthermore, language knowledge is necessary to cope with daily tasks, such as shopping or taking the children to the doctor.

Although language evidently is an important factor in the context of adjustment, so far only few studies have empirically analysed the importance of language proficiency on the adjustment of expatriate spouses (Shaffer & Harrison, 2001). The reason for this neglect seems to be the fact that most studies examine the adjustment of American spouses abroad, for whom knowledge of foreign languages was not seen to be relevant as English is "...a global

business language" and thus "...American spouses' adjustment may have been less affected by not speaking the language of the host nationals" (Black & Gregersen, 1991a, pp. 474-475). However, as outlined above, the interviews and group discussions indicate that the lack of knowledge of the host country language led to many problems in the daily lives of the expatriate spouses. On both occasions, the need for (early) language courses was reiterated by the expatriate spouses.

**Previous international experience.** Many expatriate spouses regarded previous international experiences as highly beneficial for adjusting to their current situation as can be seen from the following statement made by an interviewee: "We were raised moving from one place to another. So we didn't stay in the same country all our life, so we know how to break away from the family easier than others." Most authors suggest a positive relationship between the length of previous international experience on the one hand and the level of adjustment on the other hand. Black & Gregersen (1991a, p. 464), for instance, assumed a positive influence of the previous international experience on the degree to which spouses are adjusted, and argued that "[p]revious international experience can help individuals know generally what to expect relative to transferring and adjusting to a new culture." However, their data did not support the assumed relationship. A positive relationship was supported by the results of an empirical analysis of the adjustment of expatriate managers by Caliguri (2000). Generally, there is a strong case for a positive relationship as the challenge to adjust to a new environment is familiar and different coping strategies have already been tested for their potential to handle new situations. Those strategies that have proven successful can be employed anew to foster adjustment. Similarly, strategies that have turned out to be ineffective can be avoided. Hence, the longer the previous international experience, the greater the potential to have gained experience, which helps to cope with the current situation and promotes adjustment.

**Motivation.** Analyses of the interviews conducted for this study suggest that spouses' motivation to go abroad is not always as high as the expatriates' enthusiasm for the overseas assignment. Spouses often mentioned the positive effect the assignment has on the expatriate's career as motivating factor, rather than expressing their own, intrinsically held ambitions, as is

exemplified by the following statement: "My husband thought it was a good opportunity for *him* and *his career*." Another spouse stated: "We came because my husband was called to Germany. The career possibilities for me are terrible here. I am very unhappy about it, but as this assignment was the right move for him, I accepted." These extracts support the observation of Shaklee (1989) according to whom the career motivation of the man dominates the decision to take up the overseas assignments. Nevertheless, a number of spouses had a more positive attitude towards the assignment, i.e. showed that they too were interested in going abroad: "Both of us wanted to go. I really pushed it. We were both very excited. Maybe that is why it was so easy. The children were at the perfect age, we were not taking them out of school."

The issue of expatriate spouses' motivation has already been raised by Black & Gregersen (1991a) who found a positive and significant relationship between the level of motivation and the degree of interaction adjustment. The case for a positive relationship between the two variables rests on the assumption that a high degree of motivation leads to an interest in discovering new things and an increased willingness to adjust (Torbiörn, 1982). Furthermore, it can be expected that highly motivated spouses have prepared themselves better for the changes associated with the new living situation, as compared to spouses which have merely 'accompanied' their partners, and thus find it easier to adjust.

**Openness.** Many interviewees underlined the importance of specific personality traits. The majority of spouses raised the issue of open-mindedness and stressed its importance for facilitating the adjustment process. Correspondingly, previous studies on the adjustment of expatriate managers have repeatedly underlined the role of personal variables such as 'openness'. Some authors suggest a positive relationship between the degree of openness of the expatriate and the level of his/her interaction adjustment (Caliguri, 2000; McEvoy & Parker 1992). Caliguri (2000, p.65) defines 'openness' as "...one's receptivity to learn and change" in a new situation. Open-minded spouses might thus adjust faster to new situations. This positive relationship was supported by the results of a study on expatriate managers' adjustment conducted by McEvoy & Parker (1992).

**Degree of participation in the company decision-making process.** A large number of spouses mentioned the importance of being involved by the company during the decision-making process regarding the overseas assignment. Participation of spouses in the decision reduces the likelihood that spouses see themselves as mere "passive participants in relocation" (Fukuda & Chu, 1994, p. 43). Black & Gregersen (1991a) analysed this variable and found a significantly positive influence on the levels of interaction adjustment and general living adjustment. Equally, Black, Gregersen & Mendenhall (1992, p. 130) stated that "...the spouses with the highest levels of adjustment were also those who had been interviewed by the firm before the overseas assignment."

**Perceived cultural distance.** It is our contention that cultural distance does not exist detached from the people involved and thus cannot be adequately measured by using quantitative concepts such as the one suggested by Hofstede (1980); rather cultural distance reflects the spouses' perception of the extent to which their own norms and values differ from those dominant in the host country. This view was corroborated by the fact that interviewees - although having the same cultural background and now living in the same host country - assessed the cultural distance between home and host country differently and, related to that perception, reported of more or less problems in adjusting to their new situation. The notion that a greater (perceived) cultural distance hampers adjustment is based on the argument that "...the expatriate will simply not know, or even be able to identify, appropriate behavior" (Suutari & Brewster, 1996, p. 91) and thus be less adjusted. Various authors (Mendenhall & Oddou, 1985; Selmer, 1999; Shaffer, Harrison & Gilley, 1999) could show that the extent to which the host country culture differs from the home country culture influences the level of adjustment.

**Pre-departure Cultural Training.** Many of the expatriate spouses emphasised the role of cultural differences and the necessity to receive cultural training before going on an overseas assignment. Pre-departure cultural training widens the scope of potential problems that have been addressed before spouses are faced with them. Hence, the level of uncertainty can be reduced thereby improving the conditions for adjustment. Many authors stress the positive influence of pre-departure cultural training on the level of adjustment (e.g. Black & Gregersen, 1991a; Tung, 1981; Suutari & Brewster, 1996). Black &

Mendenhall (1990b), for instance, use social learning theory to argue that pre-departure training can improve interaction with host country nationals by enhancing the understanding of the host culture and by avoiding behaviour, which is not compatible with behavioural patterns common in the host country.

**Contact with host country nationals.** Many of the interviewed spouses stressed the role of contacts with locals in their adjustment to the host-country culture. Existing literature on short-term assignments emphasises the positive role of contact with host country nationals for the adjustment of sojourners (Church, 1982). But also for longer-term assignments, various authors highlighted the positive relationship between the support received from host-country nationals and the adjustment of expatriates and/or their spouses (e.g. Selmer, 1995): locals can actively facilitate the process of adjustment by providing help e.g. in coping with the local bureaucracy. Increased interaction with locals also enables spouses to get to know norms and values prevalent in the host country and appropriate behavioural patterns and thus allows for better adjustment (Black & Mendenhall, 1990b; Caligiuri, 2000). Although various empirical studies tested the relationship between the intensity of contact with host country nationals and the level of adjustment, results remain inconclusive.

**Length of stay.** Authors, such as Oberg (1960) and Torbiörn (1982) have analysed the adjustment process over time and suggested a U-shape curve regarding the level of adjustment over time. Whereas various authors found empirical support for this U-curve-model (e.g. Gullahorn & Gullahorn, 1963; Torbiörn, 1982; Selmer, 1999) others did not (e.g. Eckert et al., 2001). Despite the inconclusive results of empirical studies there seems to be a consensus that the adjustment follows a path in the form of an U, i.e. after a 'honeymoon stage', individuals sent on overseas assignments experience a 'culture shock' from which they recuperate over time to reach constantly increasing levels of adjustment. The cause for this rise in the level of adjustment can be attributed to learning processes, during which individuals become aware of the differences between their own norms, values and behavioural patterns and those dominant in the host country and - due to experiences with these differences - are required to reconstruct their own norms and values (Kuehlmann, 1995). In their empirical study, Black

& Gregersen (1991a) found a positive relationship between the length of stay and the level of adjustment for spouses who had already been abroad for more than two months.

**Living standard.** Many spouses mentioned the differences in general living conditions such as comparatively limited shopping facilities as an impediment to adjusting to the new living situation. The living standard played an important role for the spouses interviewed for this study and was in many cases seen as a crucial factor when deciding about whether or not to take up the overseas position. One spouse stated that "It is not like going to a third-world-country, so you know, you have electricity and everything", and "Coming to Europe was an easy decision, you know there a lot places in the world, where I don't want to live - like China." Similarly, various authors underline the role of the differences in living conditions encountered by the expatriate and the spouse for the level of their adjustment (Black & Gregersen 1991a,b; Black, Gregersen & Mendenhall, 1992; Shahnasarian, 1991). According to these authors, factors like consumption patterns and leisure activities influence the level of well-being.

#### **Adjustment of the expatriate manager.**

Whereas usually the adjustment of the spouse is seen as having an influence on the degree to which the expatriate manager is adjusted (e.g. Fukuda & Chu, 1994; Black & Mendenhall, 1990a), the reverse holds true as well.

Interviewees suggest that the adjustment of the expatriate and his/her spouse is a mutually reinforcing process. Using family systems theory, Caligiuri et al. (1998, p. 599), for instance, argue that "any one individual family member on a global assignment could potentially affect the psychological state of any other family member".

Based on this discussion, we propose the following hypotheses (*ceteris paribus*):

- Hypothesis 1: The age of the spouse and the level of adjustment are positively correlated.
- Hypothesis 2: The degree of knowledge of the local language and the level of adjustment are positively correlated.
- Hypothesis 3: The length of previous international experience and the level of adjustment are positively correlated.
- Hypothesis 4: The degree of motivation and the level of adjustment are positively correlated.

Hypothesis 5: The degree of spouses' openness and the level of adjustment are positively correlated.

Hypothesis 6: The degree of spouses' participation in the decision to take up the overseas assignment and the level of adjustment are positively correlated.

Hypothesis 7: Perceived cultural distance between home- and host-country and the level of adjustment are negatively correlated.

Hypothesis 8: The extent of pre-departure cultural training and the level of adjustment are positively correlated.

Hypothesis 9: The intensity of contact with host-country nationals and the level of adjustment are positively correlated.

Hypothesis 10: The length of the stay and the level of adjustment are positively correlated.

Hypothesis 11: The perceived quality of living conditions and the level of adjustment are positively correlated.

Hypothesis 12: The level of adjustment of the expatriate manager and the level of adjustment of the spouse are positively correlated.

#### **METHOD**

The method chosen for this study combines qualitative and quantitative research techniques in order to exploit the advantages of both approaches while minimising their respective drawbacks. A *qualitative stage* was carried out for various reasons. Due to the general complexity of the subject, i.e. the multitude of potentially relevant variables and relations between them, interviews and group-discussions were expected to allow for the emergence of a more holistic picture of the topic and hitherto neglected variables or relationships between them. As suggested by Lamnek (1989), the choice of interviewees among a group of expatriate spouses whose partner is working for a large MNE headquartered in Germany was not based on statistical but theoretical criteria and spouses were chosen to allow for potentially important differences in their characteristics, e.g. age. Interviews were carried out in a partially structured manner, which on the one hand tried to create comparability between interviews; on the other hand interviewees were thus given the opportunity to reveal new variables and/or possible new relationships. Interviews were

recorded, transcribed and subsequently analysed using the Atlas.ti software package. Expatriate spouses were also invited to participate in group discussions to share their experiences with other spouses and the authors. Additionally, a seminar was carried out with HR managers of the company. This first stage led - in combination with existing research findings - to (a) a reconceptualisation of spouses' adjustment and (b) the formulation of hypotheses regarding the role of various factors for the level of spouses' adjustment.

In order to test the hypotheses formulated in the first stage, the second research phase consisted of a *questionnaire survey*. Questionnaire items were chosen on the basis of their importance for interviewees and discussants during the qualitative research stage. In total, questionnaires were sent to 198 spouses of American managers working in Germany. In total 43 questionnaires were returned and could be used for statistical analyses using SPSS 9.0 (response rate 21.7%). Although the small sample size can be viewed as limitation to the generaliseability of study, it was seen as important to focus on this particular expatriate situation to eliminate effects stemming from cultural differences and/or different host country conditions.

## MEASUREMENT OF CONSTRUCTS

### Determinants

The questionnaires sent to American expatriate

spouses in Germany included a section for general statistical data on the respondents, such as their *age*, etc. Some variables were measured in a straightforward way, such as *length of stay* and the *length of previous international experience*. Additionally, respondents were asked to rate the following aspects on a Likert-type rating scale from one to six: *Knowledge of German, level of motivation, the degree of participation in decision-making, intensity of cultural training, the intensity of contact with host-country nationals, the intensity of contact with American, the general standard of living in Germany*. Some variables were measured by using multiple items that - in some cases - have been used in existing research or were identified by analysing the transcripts of the interviews and group discussions with the expatriate spouses. To measure the *perceived cultural distance*, eight items proposed by Torbiörn (1982) were employed (Cronbachs alpha .76). The level of *adjustment of the expatriate manager* was measured as proposed by Black & Stephens (1989), i.e. aside from the degree of general living and interaction adjustment the work adjustment of the expatriate manager was integrated. It has to be borne in mind, however, that the information on the level of adjustment of the expatriate manager was based on assessments made by the expatriate's spouse. Future research should integrate the opinions of each of the family members.

TABLE 1 – CONFIRMATORY FACTOR ANALYSIS

Item	Components		
	1	2	3
Food	-.212	.378	<b>.770</b>
Living conditions in general	.210	.227	<b>.830</b>
Housing conditions	.419	-.047	<b>.655</b>
Shopping	.337	-.370	<b>.677</b>
Interacting with host nationals	.165	<b>.920</b>	.087
Speaking with host nationals	.344	<b>.802</b>	.058
Socialising with host nationals	.044	<b>.879</b>	.081
Change of role in general	<b>.847</b>	.135	.279
New responsibilities	<b>.933</b>	.211	.069
New tasks	<b>.927</b>	.160	.142
Eigenvalue	4.19	2.17	1.59

**Spouse Adjustment**

In order to measure the degree of *general living adjustment*, four items were selected from the catalogue used by Black & Stephens (1989): food, living conditions, housing conditions and shopping. Whereas Black & Stephens (1989) use four items to measure the degree of *interaction adjustment* of expatriate managers (interacting with host nationals, interacting with host nationals on a day-to-day basis, speaking with host nationals, socializing with host nationals), the two items regarding the interaction with host country nationals were combined in this study. The new dimension *role adjustment* was measured using three items that were identified during the interviews. The following items were used: 'change of role', 'new responsibilities' and 'new tasks'. All items were measured by using 6-point Likert-type rating scales. The reliability of the constructs was confirmed by high levels of the respective values of Cronbachs alpha (general living adjustment .74; interaction adjustment .89; role adjustment .94), which exceed the .70-level generally seen as acceptable (Nunnally 1978). A principle component factor analysis with varimax rotation confirmed the existence of three conceptionally distinct dimensions (KMO .66; significance Bartlett  $p < .001$ ) (see table 1).

**RESULTS AND DISCUSSION**

To test the hypotheses regarding the relationships between various determinants and the level of spousal adjustment, the correlations between the respective variables were calculated (see correlation matrix, Table 2).

The empirical results regarding the age of the expatriate spouses show, that the degree of adjustment increases with rising age. *Hypothesis 1* is therefore supported. The relationships between the spouses' age and the adjustment dimensions were in all cases positive on a significant level (see table 2). The level of language knowledge was positively related to the degree of general living adjustment and interaction adjustment, thus generally supporting *hypothesis 2*. The coefficient was positive - albeit not significant - for the relationship between language proficiency and the extent to which the spouse felt adjusted to his/her new role (see table 2). These results underline the importance of providing expatriate spouses with knowledge of the host country language as argued above.

*Hypothesis 3* suggested a positive relationship between prior international experience and the level of spousal adjustment. The coefficients show that the level of general living adjustment and role adjustment increases with the length of previous international experiences supporting hypothesis 3. However, the coefficient between prior international experience and the level of interaction adjustment was negative though not significant. This might be attributed to the fact, that international experience gained in a specific country is not easily transferable to interaction situations in a new cultural context. Thus, future research should take into account in which countries/cultures the prior international experiences were made.

**TABLE 2 – CORRELATION MATRIX**

Variables	M	SD	1	2	3	4	5	6	7	8	9	10	11	12	13	14
<b>Antecedents</b>																
1. Age	40.02	9.87	1													
2. Language knowledge	2.26	.98	.34*	1												
3. Prior international experience	4.83	2.44	.45	.06	1											
4. Level of motivation	4.19	1.01	.22	-.02	-.09	1										
5. Openness	4.47	.55	.15	.07	.22	.49**	1									
6. Spouses' participation	2.07	.93	.01	-.09	-.13	.34*	.06	1								
7. Perceived cultural distance	2.93	.93	-.48**	-.30	-.63*	.06	-.09	.15	1							
8. Cultural pre-departure training	1.96	1.04	.31	-.07	.39	.10	.14	.04	-.35	1						
9. Interaction with locals	3.00	1.48	.38*	-.14	-.18	.34*	.17	-.16	.01	.10	1					
10. Length of stay (months)	17.27	21.30	.60**	.24	.45	.19	.21	-.38*	-.39*	.61*	.33*	1				
11 Perceived Living Standard	4.26	1.07	.38*	.05	.06	.27	.23	.21	-.26	.16	.05	-.20	1			
12. Expatriate Adjustment	3.75	.67	.33*	.17	.46	.13	.16	.12	-.45**	.32	-.04	.33*	.01	1		
<b>Spousal Adjustment</b>																
13. General Living Adjustment	3.36	.69	.48**	.40**	.57*	.21	.21	.26	-.55**	-.00	-.02	.30*	.33*	.50**	1	
14. Interaction Adjustment	2.92	1.15	.50**	.36*	-.20	.32*	.11	.01	-.14	-.06	.38*	.34*	.28	.20	.36*	1
15. Role Adjustment	3.12	1.27	.36*	.19	.45*	.30*	.18	.02	-.27	-.08	.16	.33*	.19	.36*	.45*	.36*

\*  $p < .05$ . \*\*  $p < .01$

As was expected in *hypothesis 4*, the level of motivation of the spouses was positively correlated with the level of interaction adjustment on significant levels. These results corroborate the results of Black & Gregersen (1991a). Equally, a significant positive relationship could be found for the level of role adjustment, lending further support for hypothesis 4. Regarding the level of general adjustment the relationship - though positive - was not significant (see table 2).

*Hypothesis 5* suggested a positive relationship between the degree of spouses' openness and the level of adjustment. As can be seen from table 2, however, there were no significant relationships with any of the adjustment dimensions. These results thus do not support the arguments of authors such as Caliguiri (2000) or McEvoy & Parker (1992). Further research seems necessary in order to clarify the role of spouses' personal characteristics for the level of their adjustment. Regarding the spouses' participation in the decision process, the empirical results show positive, though not significant relationships between the degree of participation - as perceived by the spouses - and the level of adjustment. Therefore, *hypothesis 6* is not supported by the empirical data (see table 2). The results thus do not corroborate the empirical findings of Black & Gregersen (1991a), who could show positive relationships between the level of spouses' involvement and the degree of interaction as well as general living adjustment. This would lead to the conclusion, that the positive effects expected from involving the spouse in the decision making process between the expatriate manager and the company do either not materialise or do not directly translate into higher level of spousal adjustment during the overseas assignment.

*Hypothesis 7* suggested a negative relationship between the level of perceived cultural distance and the level of adjustment. The coefficients calculated imply that there is a negative and significant relationship between the level of perceived cultural distance and the degree of general living adjustment. Relationships between cultural distance and the adjustment in the other dimensions - though negative - were not significant, thus limiting support for hypothesis 7 (see table 2). These results imply that cultural differences are of importance in particular with regard to aspects such as food, shopping, etc., rather than regarding the interaction with host country nationals. The level of cultural training that spouses received prior to departing to the host country was equally expected to be positively correlated with the level of adjustment

(*hypothesis 8*). The correlation coefficients showed that non-significant negative relationships exist between the variables (see table 2). This might be explained by the fact that spouses who received cultural training are more aware of the cultural differences between the home and the host country, thereby reducing possible positive effects on the adjustment level.

*Hypothesis 9* suggested a positive relationship between the intensity of interaction with host-country nationals and the level of adjustment. The empirical results regarding this relationship show that there is a positive and highly significant correlation between the level of interaction and the level of adjustment in this dimension, which is in line with the results of Black & Gregersen (1991a) (see table 2). Regarding the level of general and role adjustment, the correlations were not significant. Therefore, interaction with host-country nationals does not seem to help spouses in terms of their general and role adjustment. These latter results are similar to the results of Caliguiri (2000), who could find a significant negative relationship between the amount of contact with host country nationals and the level of adjustment. Caliguiri (2000) explained her findings by suggesting a moderating effect of the expatriate managers' personal characteristics.

As expected in *hypothesis 10*, the length of stay and the level of adjustment are positively correlated and significant on the .05-level for all adjustment dimensions (see table 2). This result corresponds with the findings of Janssens (1995), who tried to empirically show the existence of a U-curve shaped adjustment process over time, but found that the relationship between the two variables was linear with the level of adjustment constantly increasing. A positive relationship between these variables could also be shown by Black & Gregersen (1991a). *Hypothesis 11*, suggesting a positive relationship between the perceived living standard in the host country and the level of adjustment, could be supported for the general living adjustment. A positive but not significant relationship was found between the perceived living standard and the degree of interaction and role adjustment (see table 2). The results regarding the level of spouses' general living and interaction adjustment confirm the results of Black & Gregersen (1991a). In accordance with *hypothesis 12*, a positive and significant relationship was found between the level of general living adjustment of the spouse and the level of the expatriate's adjustment. A positive and significant relationship also existed

between the level of the expatriate's adjustment and the spouse's role adjustment. The relationship between the expatriate's adjustment and the spouse's interaction adjustment - though positive - was not significant (see table 2). This latter result might be due to the fact, that the expatriate manager plays a significant role regarding the spouses' adjustment to the general living conditions and the new role, whereas the spouses' adjustment to interacting may evolve with only little involvement of the expatriate manager.

#### **SUMMARY AND LIMITATIONS**

This study has modified the concept of adjustment by Black & Gregersen (1991a) in order to better account for the specific situation of expatriate spouses, which have so far been largely neglected in existing research. The identification of a new dimension labelled 'role adjustment' was based on analyses of qualitative data gathered through in-depth interviews and group discussions with American expatriate spouses in Germany. A principle component factor analysis could corroborate the existence of the new dimension 'role adjustment'. The suggested conceptual model is therefore suitable for future studies on expatriate spouses' adjustment. Additionally, this study has broadened the empirical support for the distinction between different dimensions of adjustment, as suggested by Black et al. (1991).

We analysed a number of contextual variables in their role for the adjustment of spouses. The choice of variables reflected their importance to the spouses during the interviews as well as the significance attributed to these variables within existing research on this subject. Our study showed that factors, such as the age of the spouse or prior international experience are more important than factors like pre-departure cultural training. These results have to be taken into account by IHRM departments when selecting and preparing expatriates and their spouses for overseas assignments.

There are a number of *limitations* to this study, which have to be borne in mind when evaluating the results but also open alleys for future research. *Firstly*, similar to the majority of existing studies, this study has focused on American spouses abroad. Although only American spouses in one particular country were included - thereby allowing for the elimination of influences which are due to inter-country differences - future research should include expatriate spouses from other countries and/or in different host countries. *Secondly*, the relatively small sample size was

accepted in order to eliminate the influence of cultural factors, by limiting the potential sample to American expatriate spouses in one specific host country, i.e. Germany. A *third* limitation concerns the measures and the methods of data gathering that were employed in particular the use of self-assessment of expatriate spouses that might have led to biases. Future research should increase triangulation of assessments and generally strive for new, more objective ways of measuring variables, e.g. by using the number of calls by expatriates/spouses to help lines provided by companies over time.

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