Stream 6, Human Resource Management
Competitive Session

"We choose to come here": Questioning assumptions of expatriate trailing spouses' willingness to relocate

Heidi Collins

Faculty of Business & Design, Swinburne University of Technology, Sarawak Campus, Malaysia

Email: hcollins@swinburne.edu.my

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ABSTRACT

Within expatriate adjustment literature little attention has been paid to the question of why some unwilling expatriate spouses agree to relocate internationally, and how this impacts their adjustment experience while abroad. This paper reports on case studies of the adjustment experiences of two female expatriate spouses living in Sarawak, Malaysia. Assumptions regarding the amount of influence trailing spouses have in decisions to relocate internationally are questioned, and links between willingness to relocate and adjustment processes are discussed.

Keywords: International human resource management, talent management, selection, retention

LOCATING THE STUDY

The willingness of accompanying spouses to relocate internationally has been widely found to have a significant impact on expatriate employees' willingness to accept international postings (Brett & Stroh, 1995; Dickmann, Doherty, Mills, & Brewster, 2008; Dupuis, Haines, & Saba, 2008; Harvey, 1995; Konopaske, Robie, & Ivancevich, 2005; Richardson, 2006). Having a favourable pre-departure opinion of the relocation has also been found to play a significant role in the adjustment of 'trailing spouses' when they do move abroad (Black & Gregersen, 1991; Mohr & Klein, 2004). Given the significant influence a spouse's adjustment has been found to have on their working partner's adjustment (Bhaskar-Shrinivas, Harrison, Shaffer, & Luk, 2005; Black & Gregersen, 1991; Black & Stephens, 1989; Mohr & Klein, 2004; Takeuchi, Yun, & Tesluk, 2002), the willingness of expatriate spouses to relocate is an issue of interest and importance to employers seeking to attract and retain international staff. Despite this importance, little attention has been paid to the question of why some unwilling spouses do relocate, and how this impacts their adjustment experience while abroad.

This paper reports on longitudinal case studies of the adjustment experiences of two female expatriate spouses living in Malaysia. Assumptions regarding the amount of influence trailing spouses have in decisions to relocate internationally are questioned, and links between willingness to relocate and adjustment processes are discussed.

'Adjustment' in the context of this paper refers to cross-cultural adjustment, which is viewed as being a complex process of becoming capable of functioning effectively in a culture other than the one a person was originally socialized (Haslberger, 2005). During this process expatriate spouses must adjust to a new physical and cultural environment (Black, Mendenhall, & Oddou, 1991; Brown, 2008; Caligiuri, Joshi, & Lazarova, 1999), and must become competent at communicating and building social support networks in the new socio-cultural environment (Black et al., 1991; Copeland & Norell, 2002; Searle & Ward, 1990; Ward & Kennedy, 1993). Importantly, they often need to reconstruct their identities to allow them to function in the new roles they may face (McNulty, 2012; Mohr & Klein, 2004; Shaffer & Harrison, 2001).

Adjustment occurs in the context of broader social networks. Well-adjusted expatriates have a network in place that will respond to their varying perceived needs (Copeland & Norell, 2002; Farh, Bartol, Shapiro, & Shin, 2010). Social and professional support have been found to be important factors in supporting spouses' identity reconstruction, although employer assistance with creating such networks is seldom provided (McNulty, 2012; Mohr & Klein, 2004).

Motivations to accept or pursue an international posting

While the many published motivation theories each come with their own focus and definition of the concept of motivation, in this paper I focus on motivation as the reasons people engage in different achievement tasks (Eccles & Wigfield, 2002). Personal challenge, career and professional development are among the oft-cited motivations given by expatriates in their decisions to move abroad to work (Dickmann et al., 2008; Stahl, Miller, & Tung, 2002), with opportunities for travel and adventure also being particularly important for self-initiated expatriates (Richardson & McKenna, 2002; Jan Selmer & Lauring, 2012; Thorn, 2009). Factors impacting decisions to relocate are varied and multifaceted (Thorn, 2009), including motives based in the person, the country and the tasks in both old and new positions (Doherty, Dickmann, & Mills, 2011; Hippler, 2009; Kim & Froese, 2012; Lin, Lu, & Lin, 2012; J. Selmer & Lauring, 2011).

While industry surveys indicate that around 70% of expatriates globally have a spouse or partner accompanying them (Brookfield Global Relocation Services, 2014; Cartus Corporation, 2014) little attention has been paid to spouses' motivations to relocate beyond the identification of factors that predict willingness to relocate. Willing-to-relocate expatriate spouses have been characterized as being older, educated, having no children at home, having adventurous personalities, and whose spouses work for companies with well reputed relocation policies (Brett & Stroh, 1995; Konopaske et al., 2005). Braseby (2010) did explicitly question why the many highly educated, professional American women in her study consented to becoming trailing spouses. While economic motivations were described by most spouses that she interviewed, another motivation identified in some spouses was a longing for change. Whether that longing for change was driven by a desire for adventure, or wanting a change or break in career, Braseby (2010) concluded that gendered societal forces drove many of these relocation decisions; be it for example because professional women had hit a glass ceiling, or because they felt that they needed to devote more time to their children. Similarly, in a study of Indian expatriates around the world Gupta, Banerjee & Baur (2012; 2012) also found strong gender role ideologies had a significant impact on spouses' decisions to relocate and give precedence to their husbands' career over their own.

Couples' decision making

Studies on expatriation decisions have supported to some extent the application of economic theories of family migration decisions (e.g. Mincer, 1978) which predict couples will make decisions which will maximize gains to the family unit (Challiol & Mignonac, 2005; Harvey, 1998; van der Velde, Bossink, & Jansen, 2005). They do not however, account for gender differences observed in decisions to move (Bielby & Bielby, 1992; Tharenou, 2008). Bielby and Bielby (1992) for example, concluded that in facing career advancing positions in a new location, men with traditional gender role beliefs tended to pursue their own self-interest, while woman tended to evaluate what is best for the economic wellbeing of the family unit.

Following in-depth interviews with French couples faced with a decision to relocate, Challiol and Mignonac (2005) found that if the initial reaction of both partners to the idea of moving was

positive, the relocation was automatically accepted. Yet in 13 out of 16 cases in their study where the accompanying partner held an initially negative or mitigated attitude, the relocation was accepted anyway. Challiol and Mignonac (2005) concluded that how the partners resolved attitude divergence was closely related to the way the partners reconciled their respective professional and family roles.

While findings in several studies have indicated that the spouse's willingness is likely to impact the employee's willingness to relocate (Brett & Stroh, 1995; Konopaske et al., 2005; Richardson, 2006), it has been common in such studies to seek only the perspectives of employees about the willingness of their spouses to relocate, rather than directly asking the spouses for their perspective (e.g. Dupuis et al., 2008; Mäkelä, Känsälä, & Suutari, 2011; Richardson, 2006; Riusala & Suutari, 2000). One of the few researchers to have asked female trailing spouses how much influence they felt they had in the decision to relocate, Copeland (2003) found that in almost 30% of cases their husbands had more influence in the decision to relocate than they did, and that in 13% of cases the women felt they had no choice but to move. In considering decisions made to relocate internationally, Braseby (2010) concluded that although many spouses in her study felt they had some choice in the decision, the 'choice' the spouses seemed to have made to relocate should be plotted along a continuum between the endpoints of coercion and desire. These findings call into question assumptions that are often made that a willing-to-relocate expatriate will also have a willing-to-relocate spouse (e.g. Konopaske et al., 2005; Tharenou, 2008).

Relationship dynamics during expatriation

The stresses of expatriation can clearly take a toll on couples' relationships (Brown, 2008; McNulty, 2015). Within the context of family systems (Brown, 2008; McNulty, 2012), crossover effects between spouses (Takeuchi et al., 2002) and levels of family flexibility or adaptability have been observed to impact the adjustment of expatriate family members (Caligiuri, Hyland, Joshi, & Bross, 1998; Rosenbusch & Cseh, 2012). Particularly for dual-career couples (Harvey, 1995, 1996, 1997, 1998; Riusala & Suutari, 2000), the loss of an accompanying spouse's career, loss of social support networks and altered financial status can all place strains on relationships during expatriation (Cole, 2011; Lazarova, Westman, & Shaffer, 2010). In the face of stressors related to expatriation,

role differentiation and leadership structures within the family have been identified as important factors that should be considered in relation to the adjustment of expatriate families (Rosenbusch & Cseh, 2012). While expatriate spouses have rated strong marriages as being the most critical factor in adjustment during an international assignment (McNulty, 2012), little research attention has yet been paid to changing relationship dynamics within expatriate relationships (McNulty, 2015).

Willingness to adjust

Willingness to adjust is seldom directly addressed in expatriate research. Rather, it has often been assumed that willingness to relocate indicates a motivation or willingness to adjust to the host environment (Selmer, 2001b). Questioning this assumption, Selmer (2001b) examined the association between willingness to adjust and problem focused and symptom focused coping strategies (Lazarus & Folkman, 1984; Pearlin & Schooler, 1978). He found that willingness to adjust has a negative correlation with the coping mechanism of engaging in social involvement with host country nationals. Links between motivations to expatriate and adjustment were also explored by Froese (2012), who found that academic expatriates in Korea who moved with a personal interest in the host location were better adjusted than those driven by poor overseas labour markets.

In the case of trailing spouses, Braseby (2010) concluded that motivations and degree of agency in the relocation decision were reflected in attitudes and behaviours during the adjustment process, particularly in relation to sociocultural adjustment. Braseby's (2010) conclusions are consistent with perspectives on social identity development that emphasise important life changes as requiring integration of new identities, which require the use of effortful coping strategies such as actively engaging with a new social group (Amiot, de la Sablonnière, Terry, & Smith, 2007; Amiot, Terry, Wirawan, & Grice, 2010; Smith, Amiot, Smith, Callan, & Terry, 2013). It follows then that in the case of expatriate spouses, motivations to move and related perceptions of personal agency will likely impact on their willingness to relocate (Tharenou, 2008) as well as influencing the coping strategies used (Amiot, Blanchard, & Gaudreau, 2008; Selmer, 2001a).

So how willing are they?

It is within the context of this literature that the study reported in this paper explores the questions of how some expatriate spouses become unwilling participants in their partner's international relocation, and how this impacts on their adjustment over time.

METHOD

In response to calls to use longitudinal studies to track adjustment of expatriates over time (Bhaskar-Shrinivas et al. 2004; Caligiuri et al. 2001; Haslberger 2005; Shaffer et al. 2001), the stories of the two expatriate spouses' adjustment presented here were recorded as part of a larger study of the adjustment of expatriate spouses during their first year of living in a city in Sarawak, a Malaysian state located in Borneo. Based on symbolic interactionist assumptions (Blumer, 1969), the study was designed to focus on the lived experience of individual actors, while being mindful of the individual's relationship with society.

Semi-structured interviews

The research participants were interviewed at four intervals throughout their first year of living in Sarawak; approximately three, six, nine and twelve months after arrival. Interviews were semi-structured, modelled after Flick's (2000) episodic interviewing method, the central element of which is the periodic invitation to present narratives of situations. An interview guide was prepared to orient the researcher to the topical domains of the interview. By including interview questions around critical incidents (Flanagan, 1954) the participants were invited to tell stories of events of recent months which they remembered as being meaningful. Interviews began with open-ended questions aimed at eliciting narratives which foreground the relevancies of the interviewee (Jovchelovitch & Bauer, 2000). Further questions probed the narratives by asking for the participant's subjective definitions and exploring topics further (Flick, 2002). These questions arose from the narratives provided by the participants, and echoed their own language.

Data Collection & Analysis

The researcher, an insider in expatriate spouse networks in Sarawak, conducted the interviews which lasted between 35 and 70 minutes each. Interviews were recorded on a digital voice recorder and transcribed verbatim by the researcher. Names, places and identifying features were removed or changed to ensure anonymity of the participants. Interview transcripts were coded thematically using Atlas.ti software in an iterative process, comparing emerging themes with stress and coping theories (Carver, Scheier, & Weintraub, 1989; Lazarus & Folkman, 1984), identity theories (Burke, 2006; Stets & Burke, 2000; Tajfel, 1982), and comparing data within and across cases. Participants chose the pseudonyms used in the cases presented here.

CASES

Jennifer

Jennifer is an Asian woman in her mid-40's who had migrated to Europe with her European husband over ten years ago. While she has had previous experience with cross-cultural adjustment, it was clear from the outset that she had been very reluctant to move to Sarawak. In her adopted home country she had a job that she 'really loved', an active social life with a close-knit circle of friends and colleagues, and a son attending university. Her husband is in his mid-60's. He had retired a year before moving to Sarawak, but had quickly become bored and wanted to work again. Given a lack of his specialist work being available in their home country at that time, he began to look abroad for work opportunities. Jennifer felt she had to support her husband's wish to move abroad, given that it would be his last opportunity to work. In the first interview she stated (interviewer's voice in *italics*);

> I feel, um…I feel I am not ready at that time. But I know I have to move. I…[Long pause] I is feel confused. I don't want to move.
>
> *You told him that?*
>
> Yes, yes. But he says "OK, we bought the land in [Asian home country]."
>
> *OK*
>
> I…I have my family house and my mother in [Asian home country]. And now she is old. "OK" he say "now is the time to live close to your Mum". Yes it's true. If in two years, if we are enjoying here, we

> can extend more, or we can retire in [Asian home country], since we, our future will be in [Asian home country]. That's, he gives the reason! [laughs]. And, my reason to follow him, now he is 65, I guess he don't want to work until 70. At least maybe two or three years. My age is 43, I can work until 60. But now for him he is ah, important thing, important, how do you say, the last chance to work…. And so that's why I say "OK, OK I go."

Feeling pressured by her spouse who was willing to move to Sarawak without her, Jennifer resigned from her job to follow him, although leaving her friends, son and co-workers was very difficult for her. Prior to moving and throughout the first weeks of her arrival, Jennifer found herself crying often, and spent much of her time alone while her husband was working. As the year progressed Jennifer came to rely heavily on one expatriate friend who lived in her apartment complex for support and companionship, and together with this friend became involved in fundraising for a local charity. This was not enough however, for Jennifer to feel that she was part of the local or expatriate community. While her failure to establish a satisfactory new social network was surprising given how much of her pre-move identity was built around being a very sociable person, the sudden and unwilling removal from so many of the aspects of her life from which she received confirmation of her identity (Burke, 2006) was more than she could successfully cope with. As she described during the first interview;

> I am alone… alone. And that moment, always thinking about the past, way I WAS.

Despite 'trying to be happy' with her situation, Jennifer was never able to successfully adjust. Throughout the year she spoke of loneliness, homesickness, and feeling increasingly frustrated by interactions with host country nationals. In the early months she tried distracting herself with setting up her apartment and tried to talk herself into enjoying her free-time and wanting to be there, but these coping mechanisms were not effective. She then disengaged from or avoided her stressors by frequently travelling outside of Sarawak 'to breathe', as she described it. Towards the end of the year she increasingly used alcohol to cope and described herself as feeling depressed. She began to experience tensions in her marriage, complaining to her husband, 'Why did you have to bring me here?' At the end of one year Jennifer's husband's contract was unexpectedly terminated. To

Jennifer's relief, she and her husband returned to her adopted home city and within a few weeks she had been rehired by her former employer.

Angel

Angel's husband was employed in a Sarawakian town where their family had been living for the past three years. Angel spoke of her husband as having limited job opportunities in their home country, and viewed Asia has having good long-term career prospects for him. Perceiving the only available international school in the town they had been residing to be unaffordable, the decision was made that Angel and her children would move to another city in Sarawak where the children could attend another school. While this option was more expensive than if Angel and her children had returned to their home country, it allowed her husband to commute so that the family could be together for weekends. While Angel was already familiar with the local cultural context given that she had been living in another Sarawakian town for three years, throughout the year of our interviews she still had to adjust to a new city, new people, and a new role of being a single-parent throughout the week days. She had left behind a close-knit group of friends and a part-time job that she had enjoyed.

Angel spoke initially of 'we' having had to decide where to relocate to, but her tone of voice suggested that even if she had been part of that decision, she did not want to have moved;

> If you've got no choice, then what do you do? It's either that or going back to [home country].

By the third interview as Angel spoke of increasing tensions in her marriage, it became clear that her influence in the relocation decision made a year ago had been limited. When I probed further she now described this as having been her husband's decision, and not one that she was happy with.

> *Was he also feeling that this was the only choice that you've got?*
>
> No, I'd say, for him it was, it was a decision that we had to come here a) because of the school, and b) so that we can save extra money, which is total BS, as far as I'm concerned.
>
> *Right*
>
> But um, yeah, but the thing is, my husband doesn't think emotionally about things like this. You know, he just thinks, "OK, there…it's cheaper for the school…you're right close to the school. We've got security blah blah blah, you'll be taken care of." And he doesn't think about the emotional state.

Within their relationship Angel's husband occupies a traditional male breadwinner role, and leads in decision making. She described him as 'the man of the house' who 'takes care of everything'. Angel perceived that she had little control over her situation. She arrived in the city stating repeatedly that 'we'll see' what would happen to her. While waiting to see what would happen, Angel made few attempts to engage with people outside of a small circle of expatriate spouses who lived in her apartment complex. She spoke often of activities that she would like to be doing, or that she felt she should be doing, but seldom followed through on engaging in them. Instead, she waited for her husband to decide whether she and her children should remain in their present location, re-join him, or repatriate back to their home country. By the end of the year she displayed reduced self-esteem and showed signs of depression.

> *If you compared that to say, even to when you moved here a year ago, has the way that you sort of view yourself changed?*
>
> (Long pause) No…sometimes I don't think so. I don't know. It's hard for me to actually…describe. I mean my social life is quite good. I mean I've got friends, we go out, we do things… But I mean sometimes it's a bit too much for me. Sometimes I just want to stay at home. Like I mean two weeks ago it took me two days to literally get out of bed. I would go and drop the kids off, and then I would go straight home and climb back in to bed until I have to go and fetch them again. For two days I did that…. And I said "No, I can't. I have to stop." It's just like you are going into depression…

The decision was made at the end of the year that Angel and her children would repatriate to their home country while her husband remained working in Malaysia.

DISCUSSION

The cases presented in this paper indicate that motivations for, and the related willingness to relocate can have an important impact on expatriate spouses' adjustment. Neither Jennifer nor Angel had been willing to relocate. In both cases their agreement to move was motivated to a large extent by wanting to preserve their marriages. Their negative feelings toward the relocation when they first arrived appeared to influence their willingness and effort to engage with new activities and networks of people. On the eve of her repatriation, Jennifer reflected on the expectations she had arrived with;

> I know already this city is very quiet. Yeah. And I imagine I have to be very quiet in this city. And when it's very quiet, it's for me too…it's like the mind is still thinking, "Oh"… It's in the head, "It's not the life I want, it's not the life I want, it's not the life I want".

Lacking in motivational resources both Angel and Jennifer tended to use emotion-focused coping strategies, often behaviourally and mentally disengaging rather than taking a problem-focused approach to the stressors they faced. With the subsequent lack of adequate social interactions they were unable to form strong new social identities.

On the surface, both Angel and Jennifer could be assumed to have 'decided' or 'chosen' to have relocated. As their stories unfolded however, it became apparent that Jennifer and Angel perceived having had little personal agency in the relocation decision. In both cases it had been their husbands who had made the decision to relocate, despite their wives' reluctance. Jennifer and Angel's stories suggest that there were factors at play in their decisions to relocate that may be better explained by theories of gender relations than by economic models.

These stories also highlight the need for close consideration of couples' relationship dynamics when researching and supporting adjustment in an expatriate setting. As has also been suggested by Rosenbuch and Cseh (2012), questions of how a couple's spousal role expectations, leadership structures and other relationship characteristics might impact their adjustment deserves further attention. This line of inquiry has important potential application for employing organisations, who may benefit from the subsequent refinement of self-selection tools not only for dual career couples as Harvey, Napier and Moeller (2009) have advocated, but for all couples considering expatriation.

Despite their narratives both containing statements indicating that they had low personal agency in the relocation decision, Angel and Jennifer also both made attempts at emphasising the choices they had made. Rather than viewing their evolving narratives as containing contradictions or deliberate exaggerations of spousal consensus, this can be viewed as a form of cognitive reframing, a coping mechanism to help them accept their situation. Jennifer for example, having spoken about how unhappy she was with the move in the first interview, attempted in the second interview to reframe it as having been her choice by echoing a fellow trailing spouse's position;

> And [Friend] she says we have the choice. We should be happy. It's true. We have choice, and we can stay in [home country]. We have job. But since we choose already to come here, we should be happy. This is ah, help me to remind also… Remind me…[long pause] I should be happy.

Viewing this as a coping mechanism indicates a level of willingness to adjust, but it also indicates the enormous level of adjustment faced by these spouses who were unwilling to relocate from the outset. From an organisational perspective, spouses such as Jennifer and Angel who do not have adequate personal coping resources to cope with the multiple challenges they face, require a larger degree of organisational support than others might require if they are to adjust satisfactorily. Providing social support and networking opportunities for example, could be crucial for unwilling spouses in the first days and weeks of arrival in a new location - before they spiral downwards into depression as happened with Angel and Jennifer. Further longitudinal research assessing the impact of the timing of support mechanisms offered to adjusting spouses, particularly unwilling spouses, may provide guidance for the future development of customised support programmes.

CONCLUSION

This paper contributes to our understanding of the experiences of expatriate adjustment by foregrounding the experiences of unwilling trailing spouses, a group whose stories are seldom considered. Neither of the women whose cases have been presented in this paper represent the spouses who may be assumed from extant literature to have been influential and willing participants in their working partners' decisions to relocate. As Jennifer and Angel's cases illustrate, spouses' willingness to relocate and their motivation to engage in activities likely to support their adjustment should not always be assumed. While such cases may be in the minority, not taking the motivations behind couples' decision making into account risks an underestimation of the numbers of expatriate spouses whose agency in the decision-making and whose willingness to relocate is low. Paying greater attention to expatriate couples' relationship dynamics prior to and during international relocation is recommended to gain a more nuanced understanding of trailing spouses' adjustment, and place us in a stronger position to provide the necessary support during this challenging process.

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