

Prudential Relocation's Many Expatriates Many Voices



Research conducted by:



Prudential  Financial

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Accompanying Spouses and Partners Relocating to the USA

Executive Summary

Ninety-two women and nine men from 26 countries who had moved to the United States primarily because of their spouses'/partners' jobs were queried in an on-line survey about their expatriate experience. Supplementary data for some analyses were provided from 29 singles and 47 transferees as well. Attention was paid to the relationship between spouses'/partners' adjustment and families' experience. We found that:

- ♦ Accompanying spouses/partners generally described their families' experiences positively, yet 30% said their own experience was "mixed" or worse. Such a negative experience was clearly related to all aspects of the families' expatriate assignment.
- ♦ Spousal adjustment was unrelated to how long families had been in the U.S., or to how similar they felt their home countries were to the U.S. However, accompanying spouses/partners who had lived in more countries had better adjustment than newcomers to the experience.
- ♦ Male and female accompanying spouses did not differ on any of our adjustment or experience measures.
- ♦ Spouses'/partners' expatriate experience was consistently related to transferees' work experience — their loyalty to their employer, their satisfaction with the assignment and their amount of responsibility and travel, their productivity, their absenteeism due to family problems, and their level of enjoyment of work and co-workers.
- ♦ Spouses' employment status was not directly related to their own mental health adjustment although those who described themselves as "not employed" had lower levels of satisfaction with their job situations than those who were employed or who described themselves as "homemakers."
- ♦ While visa restrictions are an important obstacle to employment, other obstacles exist as well — for example, restrictive licensure laws, poor English facility and lack of available child care.

- ♦ Spouses/partners with local, American friends had better adjustment than those who relied on long distance sources of support like e-mail and international telephone calls.
- ♦ Americans were described as friendly, self-sufficient, and good at thinking of new solutions to problems. But they were also seen as overly concerned about money, wasteful, selfish, and verbally aggressive.
- ♦ Those who received cross-cultural and/or language training had more positive views of Americans which, in turn, was related to better mental health.
- ♦ Those who said they had needed cross-cultural or language training or career counseling but were not offered it had poor adjustment.
- ♦ Other services that were especially important included informal talks with other expatriates, a pre-departure trip to the host country, destination services, and written materials about the host country.

Recommendations for sponsoring organizations and families are included throughout the report.

Preface

(Why) Should Companies Concern Themselves With Expatriate Family Adjustment?

Is it a company's place to be sure employees consult their spouses or partners and listen carefully to their replies before accepting a new assignment? Should companies get involved in a spouse's job search? Should a company be in the business of helping accompanying spouses find friends in a new city?

If you have ever watched an international relocation go awry — with resulting loss of employee productivity, damaged customer relations, lowered staff morale, and increased personal stress — or if you have been reading the many reports about causes of failed international assignments, then you will understand that the answers to these questions may well be “yes.”

How do you ensure that your employees' spouses will feel like this:

“I gave up my career to get settled in the USA — and found my true self in the process! I would never have known that life could be so worthwhile without work, until I decided to make the most of my life without it.”

and not this:

“I have heard a lot of people who have come to the US say, ‘They should put the relocation people through this so they would have an idea of how hard it is.’ It sounds harsh but there are a million small things that create problems that you wouldn't think of unless you are going through the relocation. Even as an English person I experienced many communication problems when I first came here.”

These two women were living in the same country, but with radically different experiences. The first will be a cheerful asset to her husband's productivity, the second a constant worry for him.

It may be a new role for human resource managers to be so involved in an employee's family life, and of course it is a role that must be played carefully. No one wants to be intrusive in someone else's life and marriage. But the overriding finding from our research, and that of virtually every other research study available, is that most families appreciate — indeed, demand — a company's concern and involvement when they make an international move.

Of course, families themselves have a responsibility to watch over their own mental health, and be active in getting their own needs met. But families do not have control over all the factors that will influence their lives. Sponsoring organizations must be proactive in assuring not only a family's getting settled into daily life, but in optimizing their adjustment at the deepest level. One might think, at first glance, that a spouse's ability to complete the daily tasks of living in the host country is all that a sponsoring organization need be concerned with. But it is the spouses' deeper adjustment — their ability to take care of their families and themselves, to communicate and radiate a sense of optimism and vigor — that is likely to have the most profound influence on the family and hence on employees' productivity.

The goal of this report, therefore, is to demonstrate the factors that influence accompanying spouses' adjustment as they and their families move to the United States from another country, and to extract from the findings concrete, tangible, trustworthy advice about what families and sponsoring organizations can do to maximize the chances that the experience will be fulfilling and positive, productive and successful for all.

Accompanying Spouses and Partners Relocating to the USA

The *Accompanying Spouses and Partners Relocating to the USA* project focused on the experiences of women and men who had moved to the United States from some other country to live temporarily, primarily because of their spouses' or partners' jobs. In the belief that spousal adjustment is critical to the overall success of an international assignment, our goal was to learn about the relocation from the spouses'/partners' point of view, to understand their experiences and to help them voice their views to sponsoring organizations.

Participants. This report includes results from surveys received from 92 women and 9 men who were mostly (but not exclusively) white, middle class, well-educated, and financially secure (see Table below)¹.

PARTICIPANTS IN THE STUDY

	<i>Typical</i>	<i>Range/Other</i>
Number of Children	1.4	0-4
Age of Children	8.1 years	infant to adult (24.8% families with pre-school children, 20.8% families with school-age children, 13.9% families with adolescent children, 9.9% families with adult children)
Marital Status	married (97%)	co-habiting (3%) (one same-sex couple)
Race/Ethnicity	White (72.3%)	Hispanic (9.9%), Asian (including Indian) (6%), Black (2%), Multiracial (2%)
Education	university (45.5%)	secondary or less (5%), some or finished 2-year post-secondary (10.9%), some university (7.9%), some or finished graduate school (25.8%)
Length in USA to Date	1.7 years	1 month to 12 years (98% less than 5 years)

Note on Terminology. Because the great majority of participants were married, we often use the term “spouse” throughout this report rather than “spouse or partner.” We assume that our conclusions apply equally to spouses and partners. The term “participant” refers to the person who completed the survey — unless otherwise noted, this means the accompanying spouse or partner. The term “transferee spouse” refers to the person in the family whose job elicited the relocation — that is, the person the accompanying spouse was accompanying!

¹We invited participation from any interested party. In addition to those included in this report, we received surveys from 20 Americans, 47 non-Americans who had moved to this country primarily because of their own jobs, and 29 singles. We have excluded these participants from most sections of this report because of its focus on expatriate accompanying spouses. Exceptions are clearly marked.

COUNTRIES OF CITIZENSHIP OF PARTICIPANTS

Argentina (3%)	Czech Republic (1%)	India (6%)	Peru (1%)	UK (15%)
Australia (3%)	Denmark (1%)	Indonesia (1%)	Russia (1%)	Venezuela (1%)
Belgium (1%)	Ecuador (1%)	Italy (2%)	Spain (2%)	Bi-national (8%)
Brazil (4%)	France (12%)	Jamaica (1%)	Sweden (1%)	
Canada (8%)	Germany (6%)	Mexico (7%)	Switzerland (1%)	
Colombia (1%)	Hungary (1%)	New Zealand (1%)	The Netherlands (11%)	

(numbers add to 101% due to rounding error)

Collecting the Surveys. We collected surveys on line from September 2003 to January 2004. Announcements about the survey were sent to individual families known to have relocated to the U.S. from another country and to companies who support them, with a request to circulate the link to the survey to their families. Links to the survey were also placed on a number of Websites that serve the expatriate community. No identifying information was sought or collected; all responses were anonymous.

Measures. Our goal was to understand the factors that influence accompanying spouses' experience while living on an international assignment in the U.S. Toward that end, we included a wide range of measures:

- ♦ **Demographics.** Participants reported on their gender, marital status, citizenship, race/ethnicity, and number and age of children. They also reported on prior overseas living experiences, and the reason for and expected length of the current assignment. They described their host language proficiency. And finally, they described their employment and salary histories and their current and previous work status.
- ♦ **Family Measures.** Participants described the process of how their families made the decision to move internationally, and their assessment of various gains and losses that had resulted from the overseas move.
- ♦ **Social Support.** Participants detailed for us the sources of the emotional and practical support they received, as well as the nationality of their support network members. They also completed a measure of loneliness.
- ♦ **Values, Beliefs and Attitudes.** Participants completed several widely-used research measures of values, beliefs and attitudes, including measures of locus of control and the importance of the occupational life role.

♦ **Views of the United States.** Participants described “the typical American they had met” on a number of dimensions chosen to reflect common negative and positive views of American culture. They also described how similar the U.S. was to their home country.

♦ **Transferees’ Work Experience.** Participants described their view of their transferee spouse’s work experience on 5-point scales (from 1 “not at all true” to 5 “very true”) measuring:

- ♦ How much their transferee spouses enjoy their current work
- ♦ How much their transferee spouses enjoy their current co-workers
- ♦ How happy their transferee spouses are that they accepted this assignment
- ♦ Whether their transferee spouses are able to work at maximum efficiency
- ♦ How loyal their transferee spouses feel to their employer
- ♦ How satisfied their transferee spouses feel with the amount of travel they have to do
- ♦ How satisfied their transferee spouses feel with the amount of responsibility they have
- ♦ How much work time their transferee spouses have had to miss due to family problems

♦ **Pre-departure and Onsite Services Received.** Participants reported on the following services:

- ♦ Cross-Cultural Training: whether they and their transferee spouse received it, what topics were covered, how long it lasted, and how useful they found it
- ♦ Language Training: whether they and their transferee spouse received it, how long it lasted and how useful they found it
- ♦ Career Counseling: whether they received it, what kind of assistance was offered and how useful they found it

In addition, participants rated the usefulness of any of the following services they received:

- ♦ Pre-move trip to the U.S.
- ♦ Written materials about the U.S. (delivered pre-move or onsite)
- ♦ Informal discussions with other expatriates living in the U.S. (pre-move or onsite)
- ♦ Formal discussions with other expatriates living in the U.S. (pre-move or onsite)
- ♦ Destination services
- ♦ Payment of club membership fees

Finally, participants were asked to describe the single most important service they received and to name any service they did not get that would have been helpful.

- ♦ ***Accompanying Spouses' Adjustment.*** We approached the issue of outcome — how the spouses were “doing” — by including several measures of mental health adjustment:
- ♦ A widely-used research measure of their current mood (including subscales of depression and dejection and vigor —a sign of positive mental health)
- ♦ The Mental Health Inventory, a short, widely-used research measure of mental health adjustment, designed for use in the general public
- ♦ A 7-point rating of how they (and their children and spouses) felt about life in their host countries

Findings. Each chapter in this report focuses on one pertinent question about spousal adjustment and how to maximize the likelihood that a relocation will be successful. “Key Findings” summarize the results in the subsequent sections. Charts illustrate the findings; each is explained in the text as well.¹

Recommendations. The report concludes with practical recommendations for sponsoring organizations and accompanying spouses based on our findings. Because of the greatly varied resources and constraints facing different sponsoring organizations, we have kept the recommendations thematic rather than concrete. For example, we say, “Help spouses establish and maintain connections to local residents” rather than “Try for spouses to join the nearest Women’s Club.” While some recommendations for sponsoring organizations require some expenditure of funds, many do not. We do not presume to suggest the best expatriate family support policy for all families. Rather we present our data about what matters to spouses, and suggest ways to leverage this information into more successful assignments.

We also have included recommendations for accompanying spouses themselves, in the belief that families must take an active role in the success of their own relocation. When sponsoring organizations and families each pull hard in the same direction, their common goal of a successful relocation can be met.

¹*Statistical note.* We have written this report with non-statisticians in mind. To make complicated findings easier to visualize, we have presented bar graphs rather than tables of correlations and multiple regression statistics. Almost all the charts in this series refer to statistically significant differences. Occasionally, for contrast reasons or because the finding was so unexpected, we do present non-significant findings, but these are always clearly marked. Questions about methodology and statistics should be addressed to The Interchange Institute.

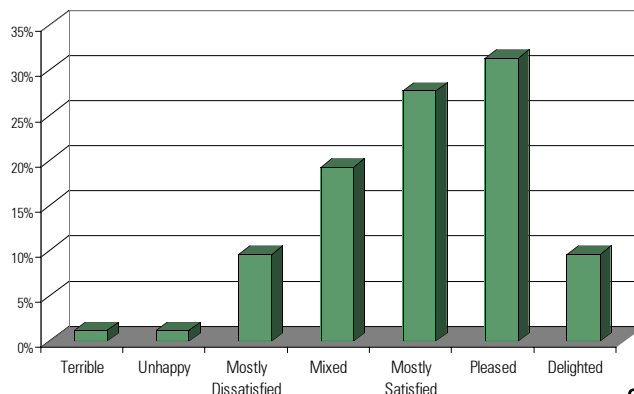
Preliminary Findings: It's Not So Simple.

First, we present some information about how the participants rated their own, their transferee spouses' and their children's U.S. experiences overall. On seven-point scales, the accompanying spouse participants answered the question, "Taking all things together, how would you say you, your transferee spouse, and each child feels about living in the U.S.?"

KEY FINDING:

Participants described their own and their families' experiences in the U.S. generally favorably, yet more than 30% called their own experience "mixed" or worse.

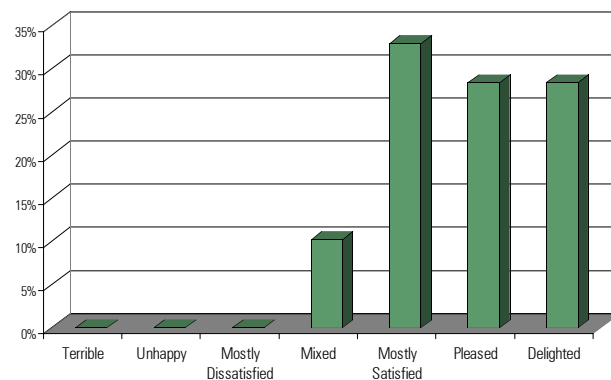
Overview Rating of Assignment: Self



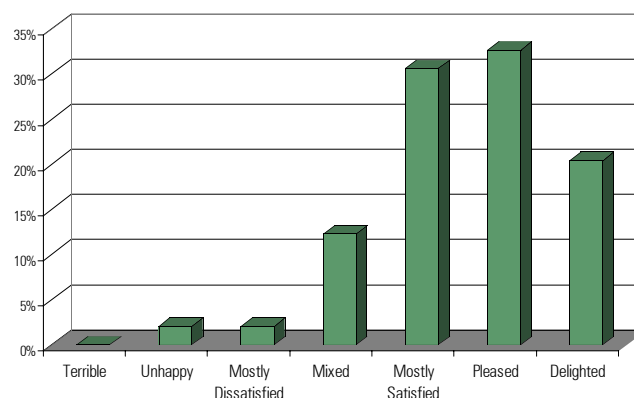
The participants were **generally satisfied** (or better) with their experiences, although relatively few gave it the top rating.

They actually described their transferee spouses, ...

Overview Rating of Assignment: Transferee Spouse



Overview Rating of Assignment: Children



...and their children as even *more satisfied* than they were themselves.

It is encouraging that so many of the participants had generally positive descriptions of their families' experiences. Still, note that over 30% of the participants called their own experience mixed or worse; given the known importance of spouses' experiences, this is a group to be concerned about and to understand. The remainder of this report focuses on those factors that influence and/or are influenced by accompanying spouses' adjustment.

Many people assume that a family's adjustment to an expatriate assignment will follow simple rules — “Just give it some time, then you'll feel fine” or “Moving to the U.S. from Canada is easier than moving from Brazil,” for example. We began our analysis with some of these simple questions, and found some surprising answers. Specifically, we investigated whether any of the following demographic, historical, and/or core personality or attitudinal measures were related to spouses' adjustment:

Demographic:

- ♦ participant's sex
- ♦ number and age of children

Relocation History:

- ♦ length of time in the U.S. to date
- ♦ similarity of home country to the U.S.
- ♦ previous experience with expatriate living

Core Personality or Attitudinal Measures:

- ♦ internal locus of control
- ♦ career role commitment

KEY FINDING:

Accompanying spouses' adjustment was unrelated to their sex, the age or number of their children, how long they had been in the U.S. at the time of the survey, or to how similar to their home country they perceived the U.S. to be.

Spouse's Sex. We did not have enough male accompanying spouses or partners participate in the study to be able to make more than tentative statements about the role of spouses' sex on adjustment. But in our initial analyses, we found no sex differences on any adjustment or satisfaction measure. That is, our small sample of male accompanying spouses/partners were no better or worse adjusted than the female accompanying spouses/partners. Neither did males and females differ in the source of their social support, on their view of Americans, or in the gains and losses they perceived having incurred as a result of the move.

Number and Age of Children. Number and age of children were similarly unrelated to spouses' adjustment. This is somewhat surprising, as in previous research in countries other than the U.S., we found expatriate mothers of adolescents to have had significantly poorer adjustment than mothers of younger children and for children to open doors to the community for expatriate parents. It may be that the U.S. offers opportunities to spouses without children and mothers of all ages that counterbalance the impact of their parenthood status.

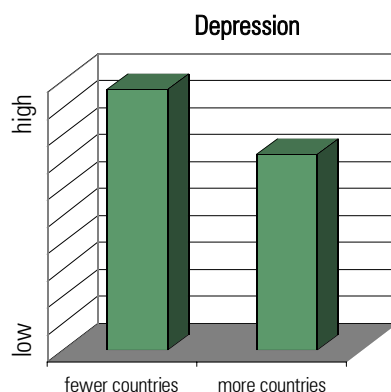
Length of Time in the U.S. There was no relationship between participants' adjustment and how long they had been in the U.S. at the time of completing the survey. The simple admonition to "give it time" is not supported.

Similarity of Home Country to the U.S. Participants rated the similarity between their home countries and the U.S. on the following dimensions: major religion, race, child-rearing values, attitudes toward money, available income, ways of socializing with friends, gender attitudes, level of education, ideas about modesty, clothing, climate, food, and standard of living. Interestingly, none of these, nor a measure that totaled the perceived similarity across dimensions, was related to any adjustment measure. There may be other factors that we did not measure whose similarity is important, of course, although the consistency of our findings suggests that factors other than similarity are what matter for spouses.

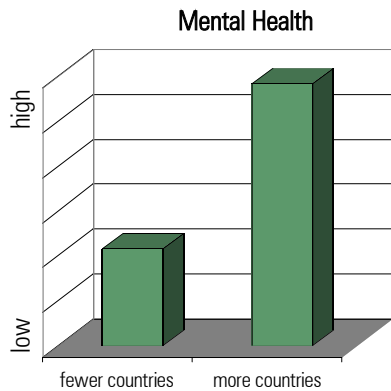
KEY FINDING:

Accompanying spouses who had more experience living outside their home countries had better adjustment than those for whom this experience was new.

Previous Experience With Expatriate Living. 18% of our participants had lived in the U.S. prior to this assignment but, interestingly, this experience was unrelated to their adjustment. On the other hand, general experience with expatriate living was related to how participants were feeling:

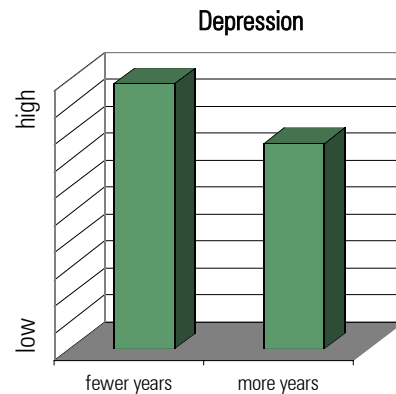


Those who had **lived in more countries** as adults were significantly **less depressed** now, ...



...and had significantly **better mental health** than those who had lived in fewer (or no) other countries.

On a related measure, those who had **lived a longer time outside their home countries** as adults were now significantly **less depressed**.

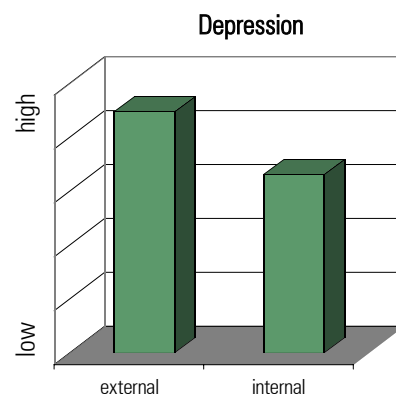
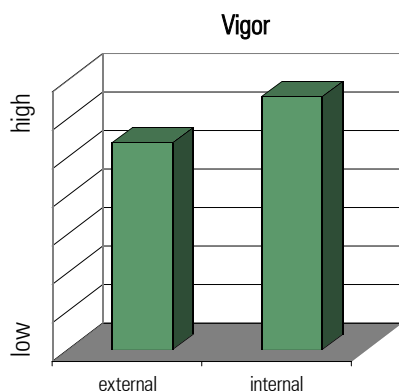


KEY FINDING:

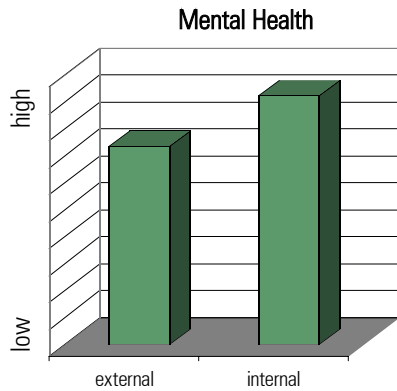
Accompanying spouses with more internal locus of control had better adjustment than those with more external locus of control.

Internal locus of control, the belief that you have the power to affect your own future and that planning is likely to be helpful in reaching your goals, is often seen in people with positive mental health. We found a similar result. Participants with a more **internal locus of control** were...

...less depressed,...

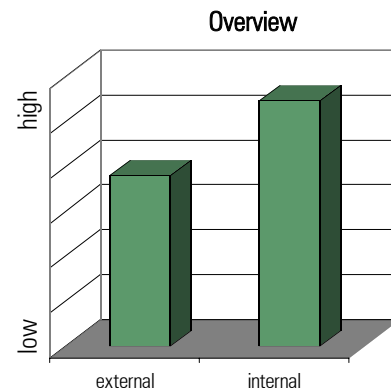


...more **“vigorous,”** an indicator of positive mood, ...



...had **better mental health**,...

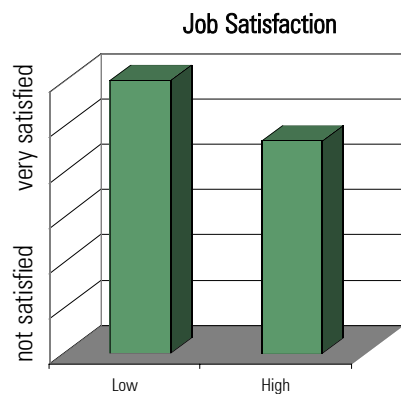
...and had **higher Overview** ratings of the assignment.



KEY FINDING:

Accompanying spouses with higher career role commitment were less satisfied with their job/education situation than those with lower career role commitment, but these groups did not differ in adjustment.

Those participants who said that having a career was very important to them (on our measure of career role commitment) did not differ in adjustment from those who said it was less important. However, ...



...those with **higher career role commitment** were **less satisfied with their current job or education situation** than those with lower levels of career role commitment. These issues are discussed in more detail later in the chapter on participants' work experience.

In the following chapters, we examine those factors that may have an impact on a family's adjustment more than these simple characteristics do. Specifically, we ask these questions:

- ♦ How are spouses' /partners' experiences related to transferees' job satisfaction?
- ♦ What happens when spouses cannot work?

- ♦ How important are friends to accompanying spouses?
- ♦ How do newcomers to the U.S. view Americans?
- ♦ What services are most important for expatriates?

RECOMMENDATIONS FOR SPONSORING ORGANIZATIONS:

- ♦ Do not assume that any particular employee will not consider an international assignment because of his/her spouse or children. Factors like gender, age and number of children and work status can have an idiosyncratic impact on a family. Offer international assignments to those who could do a good job there, and then offer support to their families to make these assignments work.
 - ♦ Do not ignore a family's early difficulties making a relocation transition, assuming that "time will heal all." The challenges families face are not addressed simply by the passage of time but rather by pointed consideration and planning.
 - ♦ Offer first-time relocating families extra support that is sensitive to the needs they have at differing points in the relocation — practical solutions, cultural interpretation, emotional support — and that varies in format — printed or internet materials, personal assistance and training, access to cultural interpreters. They will benefit from your helping to foresee trouble spots and challenges.
 - ♦ Talk with accompanying spouses about their career plans during the international assignment. Offer career planning assistance to those who want it.
-

RECOMMENDATIONS FOR ACCOMPANYING SPOUSES:

- ♦ If moving to a new country is new for you, talk to others who have been through it successfully before. Ask them what has helped. Try to surround yourself with people who have a positive approach to the experience.
 - ♦ Try to get immediate help for difficulties you encounter. The mere passage of time will not be as effective as your taking specific actions to solve your challenges.
 - ♦ If you feel that you have the power to affect how this new experience turns out, you can make the best of the situation. Try to be clear about what, in your situation, you can influence or control, then be sure you are taking all the steps you can to have the best experience possible.
 - ♦ Be open and clear about the role of your career in your life. If you know that it is important to you, take steps to continue your career and sustain your professional identity (through working, education, training, or volunteering).
-

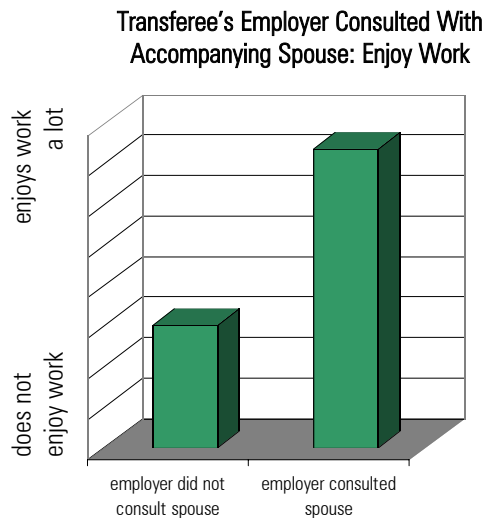
How Are Spouses' Experiences Related to Transferees' Job Satisfaction?

There are many reasons to be concerned about a family's adjustment on international assignment. From the sponsoring organization's point of view, the most important of these may be that the family has a critical influence on the success of the assignment.

In this chapter, we focus on the ways in which accompanying spouses' experiences and attitudes are related to the transferee spouses' work satisfaction and productivity. This link between spousal personal experience and transferee work experience has received relatively little direct focus by researchers, despite its being an important element in encouraging strong family support policies.

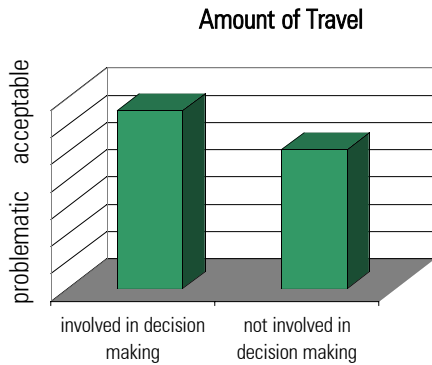
KEY FINDING:

Accompanying spouses who were more involved in pre-move decision-making reported that their transferee spouses had better work experiences.



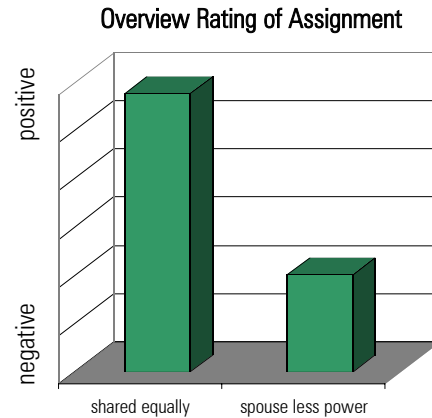
Participants were asked if their employed spouses' **employers had consulted them** (that is, whether the employer had consulted the accompanying spouses/partners) prior to making the final decision about this assignment. 30.7% said that they had been consulted. Those who *were* consulted reported that their employed spouses were **enjoying their work** significantly more than those who were not consulted.

Statistical Note: Because these analyses were all based on spousal self-report, we statistically controlled for participants' own overall rating of the assignment in all analyses.



In addition, accompanying spouses who said they had **discussed the potential move in great detail** with their transferee spouses prior to the move said that the **amount of travel** the transferee spouse now had to do was less problematic.

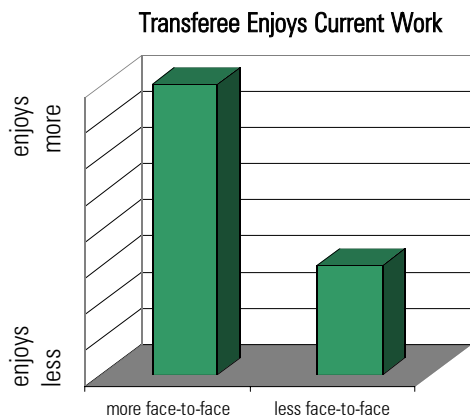
And those who said they **shared equally with their spouses in the decision** to take this assignment said their spouse's **overall assessment of the assignment** was more positive.



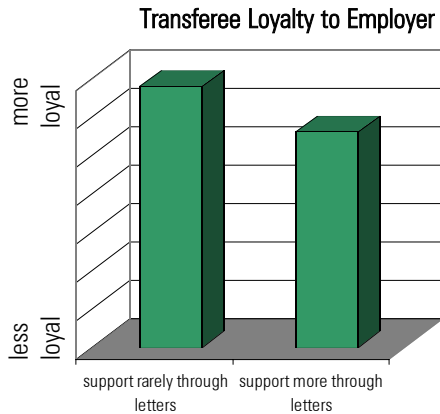
In short, accompanying spouses who were involved in making the decision to move to the U.S. had transferee spouses with higher work satisfaction. It is possible that being involved from the beginning — “buying in” to the plan — set the stage for a more successful approach to work by the transferee. It is also possible that people in more open and mutual relationships (and who share major life decisions with each other) are simply healthier and happier in all that they encounter, including new work situations.

KEY FINDING:

Accompanying spouses who used local, rather than long-distance, sources of social support reported that their transferee spouses had a better work experience.

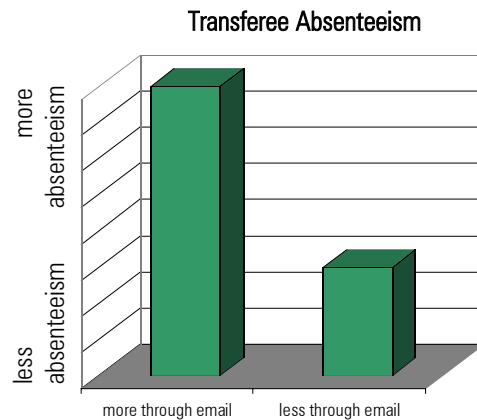


Accompanying spouses who got a greater proportion of their social support through **local, face-to-face contacts** (rather than e-mail or letters) said their transferee employed spouses were **enjoying their work more**.



In contrast, accompanying spouses who got more of their social support from **long-distance sources** like letters or e-mail (presumably from people living far away) said their spouses felt **less loyal to their employer, ...**

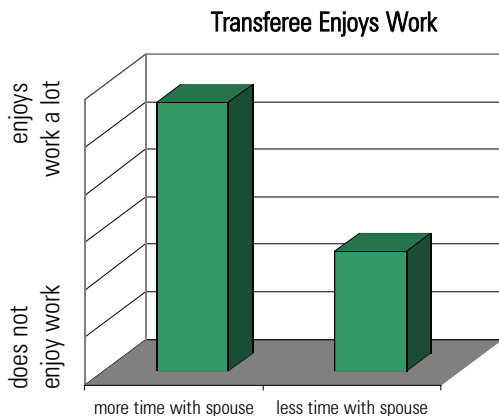
... and had **missed more work** because of family problems.



It is likely that when accompanying spouses are involved in fulfilling, local relationships with new friends, their transferee spouses are more able to commit themselves to their work. The reverse may also be true — if a new international assignment is going well, the accompanying spouse may feel less distress and therefore more like establishing local connections.

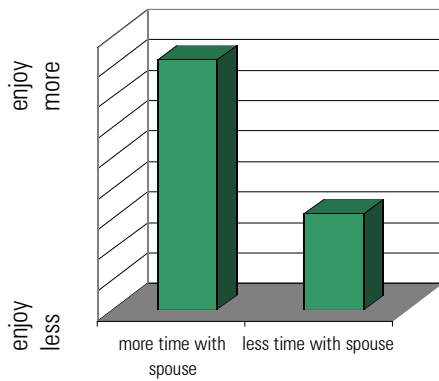
KEY FINDING:

Accompanying spouses who reported a gain in the amount of the time they had with their transferee spouses and for themselves reported that their transferee spouses had a better work experience.



Accompanying spouses who reported a gain in the **amount of time with their transferee spouses** as a result of the move said that their transferee spouses were **enjoying their work more,...**

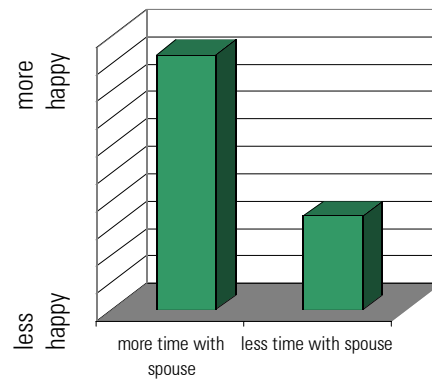
Transferee Enjoys Co-Workers



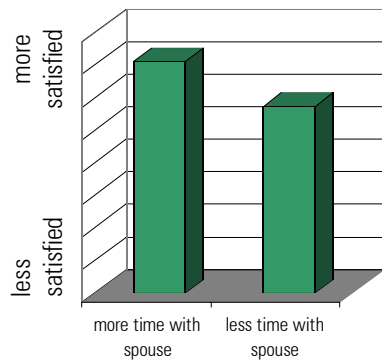
...were **enjoying their co-workers more**,...

...were **happier that they accepted the assignment**,...

Transferee Happy With Assignment



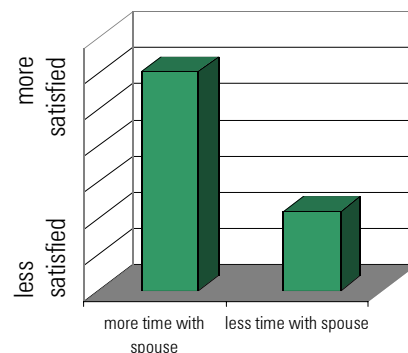
Amount of Responsibility
Transferee Has is OK



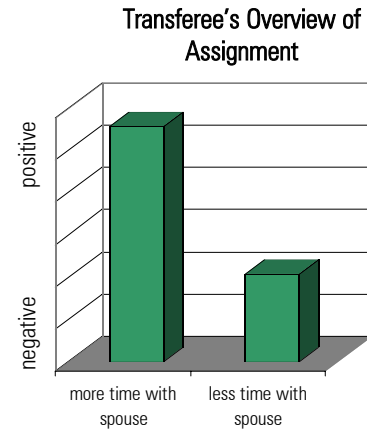
...and were **more satisfied with the amount of responsibility they had**, ...

... and with **the amount of work-related travel they had to do**.

Amount of Travel Transferee
Does is OK

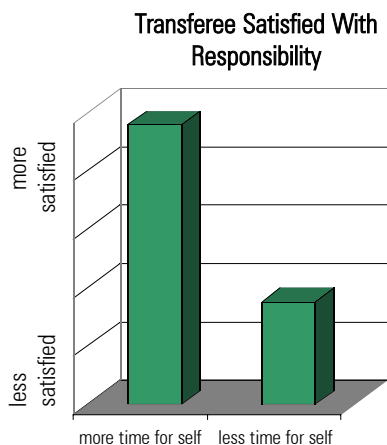
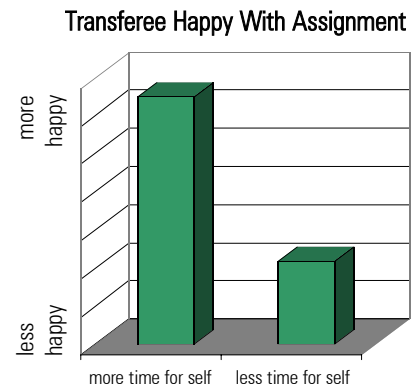


Finally, those participants with greater gains in **time spent with their transferee spouses** also rated those transferee spouses' **overall assessment of the assignment** as more positive.



Similarly, those who reported a **gain in the amount of time they had for themselves** as a result of the move said that their transferee spouses were able to **work more productively**,...

...were **happier that they accepted the assignment**,...

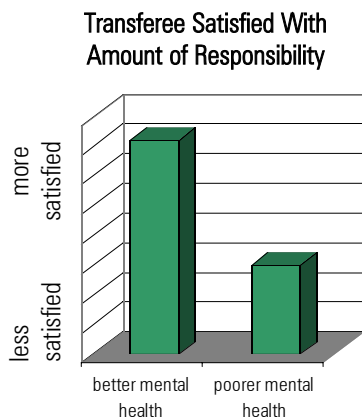


and were **more satisfied with the amount of responsibility** they had.

KEY FINDING:

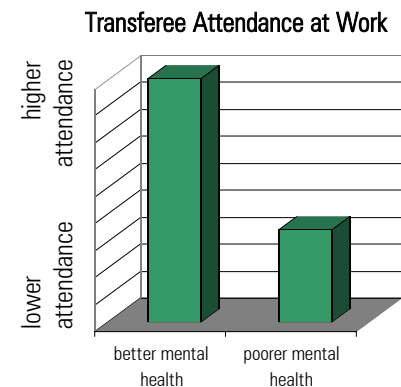
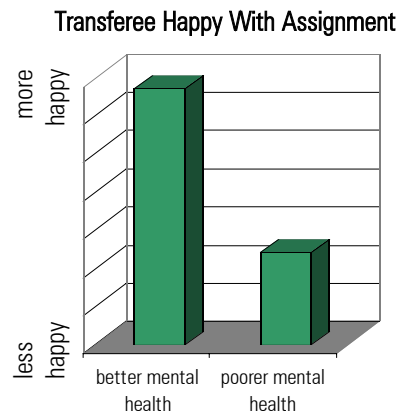
Spouses with better mental health said their transferee spouses had a better work experience.

Accompanying spouses who reported that they had **higher mental health ratings** said their transferee spouses were **happier they had accepted the assignment,...**



...were more satisfied with the amount of responsibility they had, ...

...and had better attendance at work, that is, missed less work because of family problems, compared to those with poorer mental health scores.



It is important to note that with these data, it is impossible to determine for sure the direction of causality between accompanying spouses' mental health and transferees' satisfaction — what is cause and what is effect? It is plausible to think that if an accompanying spouse's mental health is better, the transferee spouse would worry less about his/her family and be more able to commit him/herself to work. On the other hand, it is also plausible to think that if the transferee's work (that is, the reason for the relocation) were going better, the accompanying spouse's mental health would be consequently higher. It is likely that causality goes in both directions.

KEY FINDING:

Male and female accompanying partners and spouses did not differ in their ratings of transferees' work experience.

We compared the male and female accompanying spouses' ratings of their transferee spouses' work experience and their own adjustment. Men and women did not differ significantly on any measure.

Despite this finding, it is quite possible that male and female accompanying spouses and partners do, in fact, approach the experience of an international relocation differently. Their outcomes may show the same range of response — as we see in our data — but *how* they get there may differ significantly. With a larger sample of male spouses/partners, we will be able to examine patterns of relations among variables.

KEY FINDING:

Accompanying spouses contribute to transferees' work satisfaction both through direct attention to it, and indirectly by managing their own adjustment.

We asked participants to write answers to this question:

A family's adjustment can be very important to the success of an international assignment. Please help us understand the specific role you play in helping your spouse work productively and effectively in the U.S.

We coded participants' responses to this question into the following categories:

What Accompanying Spouse/Partner Does to Promote Success of Assignment

Manage Daily Life

- ♦ Household tasks (shopping, cleaning, laundry, etc.) and general "relocation tasks" (paperwork, unpacking boxes, etc.)
- ♦ Taking care of children (physical and emotional care, schooling, etc.)
- ♦ Organizing leisure time (entertainment, traveling, pursuing new experiences, etc.)
- ♦ Creating social circle (making new friends, communicating with neighbors, etc.)
- ♦ Making a "house" a "home" (creating a cozy home, preparing food and holidays from home, etc.)

Emotional Support

- ♦ Talk about and offer support about work
- ♦ Offer general emotional support

Promote Own Happiness

- ♦ Be happy, be independent, not be needy
- ♦ Appear to be happy even if really unhappy
- ♦ Find things to do to keep busy
- ♦ Get a job or go to school

Exploration

- ♦ Learn about American culture

Make Sacrifice

- ♦ Make sacrifice in own career
- ♦ Make sacrifice in lifestyle, other than career

Why Spouse/Partner Does

What He/She Does

For Spouse

- ♦ Help his/her work
- ♦ Allow him/her not to worry and to enjoy living in the U.S.

For Self

- ♦ Avoid depression, resentment and to enjoy living in the U.S.

For Family

- ♦ Help “couple” or “family” or “children” enjoy living in the U.S.
- ♦ No reason stated

Sample Responses

What the Accompanying Spouses Did

Manage Daily Life

I manage everything at home, for our leisure time, outings with friends, etc. He appreciates my running the household.

I will make sure we join a sport club to do sports with the whole family. I will organize activities to discover the U.S.

Emotional Support

I talk to him about how were the things at work.

I try to be there for him all the time. Listen to him if he has problems, try to advise him, etc.

Promote Own Happiness

If I am not positive, it is very debilitating. We try not to let the children know of our disagreements.

I think it is very important to have something to do — work, study, or joining an organization.

My getting a work permit and a job was the biggest help.

Exploration

I interacted with as many Americans as possible so that I could better understand life here.

Make Sacrifice

I gave up my career and took on the new role of 'housekeeper, accountant, landscaper, social secretary, professional shopper, student, travel agent, volunteer, and coach.'

Well, coming from a background where we had help for all chores, out here I have been doing all the household chores from A to Z.

Why the Spouse/Partner Does What He/She Does

For Employed Spouse

I made an effort to reduce the amount of distractions my husband had to deal with at home. This meant that he was able to concentrate on his work.

Making the home warm and clean with nice atmosphere so he can relax.

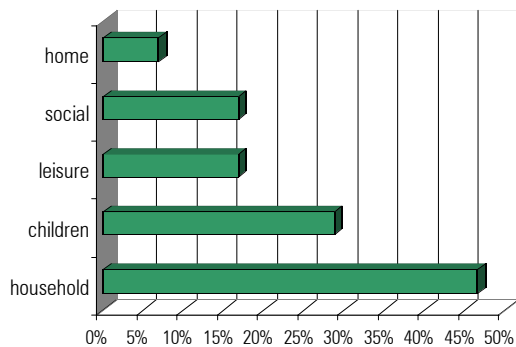
For Self

I create my own life so when he travels I'm not mokey and unhappy.

For Family

Keeping harmony at home makes all of us happy.

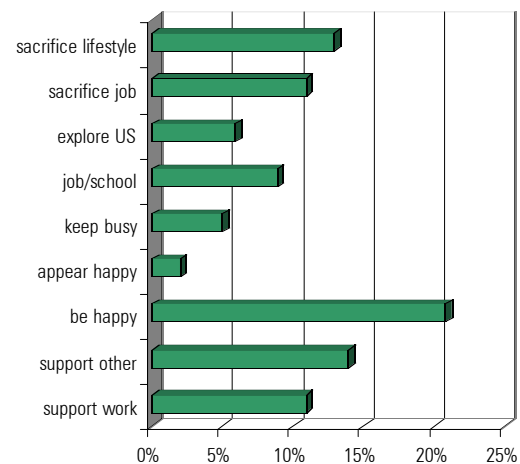
What Spouses Do: Daily Life



The category mentioned most often by participants was **doing household tasks**, that is, helping in the acts of daily living. In addition, ...

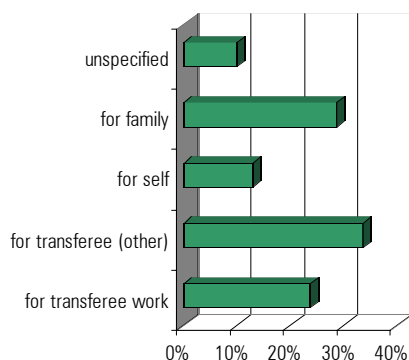
...they frequently noted **being happy themselves**, and **offering emotional and work-related support** to their transferee spouses, as activities they did to help improve the success of the assignment. In addition, about 24% of the respondents noted having made some kind of **sacrifice** (work- or lifestyle-related) in order to make the move.

What Spouses Do: Other



Participants were not specifically asked to identify *why* they did these activities (and in fact, the answer was implied in the question they were asked). Nevertheless, a majority did articulate their reasoning, as follows.

Why Spouse Acts

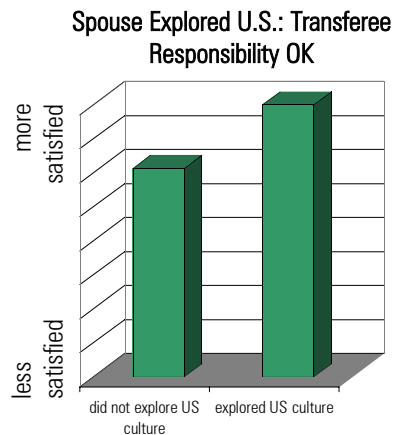


The most common explanation for their activity was that it would help their employed spouses in ways not directly connected to work and for the family's general welfare.

KEY FINDING:

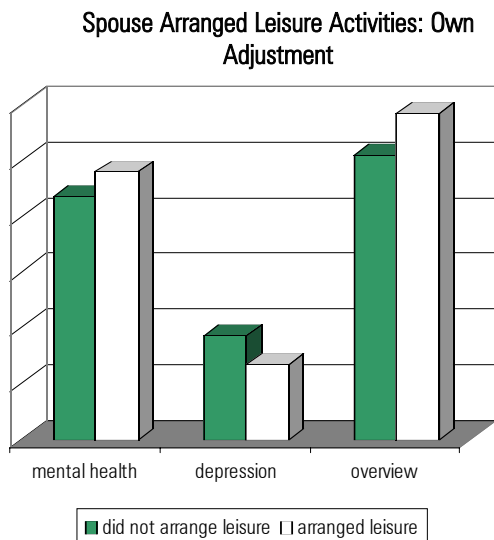
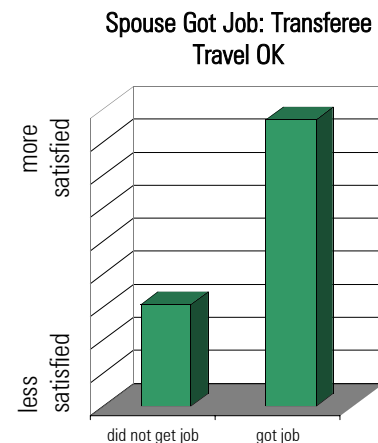
Accompanying spouses' level of energy and instrumentality were helpful to the employed spouses' work experience.

Were these different activities in fact related to the quality of transferees' work experience or to accompanying spouses' adjustment (which, as we have shown, is in turn related to transferees' work experience)? Yes, as follows:



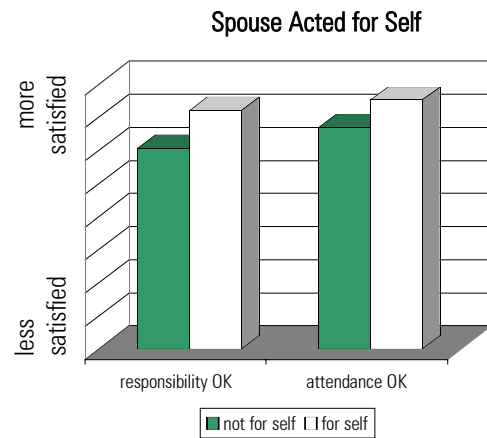
Accompanying spouses who reported that they **explored U.S. culture** had transferee spouses with higher work satisfaction (specifically, who were more **satisfied with the level of responsibility** they had at work).

Those who reported having **gotten a job themselves** described their employed spouses as having higher work satisfaction (specifically, being more **satisfied with the amount of travel** they had to do for work).

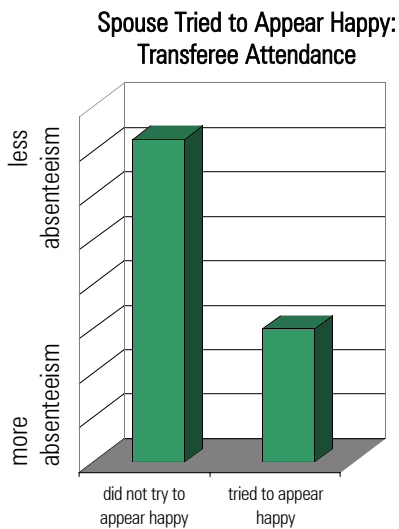


In addition, the accompanying spouses' level of energy appears to have been related to their own adjustment as well. Those who reported that they **arranged for leisure time activities** for the family/couple reported better **mental health adjustment** themselves. Again, cause and effect are unclear here — perhaps arranging the leisure activities improved their mental health, or perhaps those who were feeling better had the energy to arrange leisure activities. Probably both occur.

Finally, accompanying spouses who explained that they **did helpful activities for themselves** (so that they were happier, less needy, etc.) had employed spouses who were **more satisfied with the level of responsibility** they had and **who missed less work** because of family reasons. Interestingly, they were not significantly better adjusted themselves. It seems they accurately portrayed their actions as being in the interest of their employed spouses' work experience.

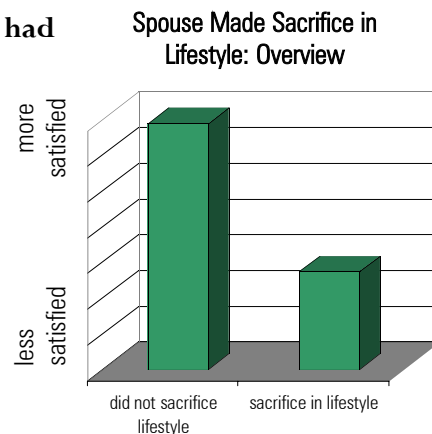


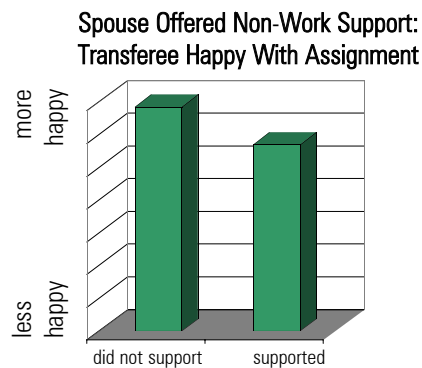
Some of the activities that the accompanying spouses reported were related to *poorer* transferee work experience:



Accompanying spouses who said they tried to **appear happy even when they were not** had employed spouses who **missed more days of work** due to family problems. Trying to appear happy when not happy is apparently a marker for a problematic situation.

Accompanying spouses who mentioned the **sacrifices they had made in their lifestyles** reported that their transferee **spouses' Overview** rating of the assignment was poorer. It may be that a spouse who freely enumerates the sacrifices he/she has made is adding to the sense of burden of the employed spouse. Or, perhaps, when transferees' assessments of the assignment are negative, accompanying spouses respond by mulling over all their sacrifices.





And finally, accompanying spouses who reported **offering more emotional (nonwork-related) support** had employed spouses who were **less happy they had accepted the assignment**. Perhaps when work assignments are not positive, accompanying spouses recognize this and offer support to them in a general way.

In summary, accompanying spouses' and partners' experiences are closely linked to their transferee spouses' work experience. In particular, transferees' job satisfaction was higher when accompanying spouses/partners:

- ♦ *had been involved, from the beginning, in the decision to accept the international assignment*
- ♦ *had access to local friends and family who could offer social support, and enough time for themselves*
- ♦ *had better mental health adjustment.*

Further, the results support the importance for transferees of spouses'/partners' attending to their own needs and adjustment.

Findings of this sort do not allow definitive analysis of the direction of causality. Especially in the case of the mental health findings, we presume that causality is bi-directional — that is, probably accompanying spouses with better mental health relieved their transferee spouses of worry so they, as a result, could have higher job satisfaction. *And* transferees whose jobs were going better probably caused their accompanying spouses/partners to have better adjustment. Indeed, a third possibility — that both factors (job satisfaction and mental health) were a result of some third factor (like employer support or overall general health) — cannot be discounted.

Still, the consistency and logic of the findings supports the recommendation for sponsoring organizations interested in maximizing transferees' job satisfaction to attend to accompanying spouses' experiences as well.

RECOMMENDATIONS FOR SPONSORING ORGANIZATIONS:

- ♦ Include accompanying spouses/partners in decisions about the international assignment, from the beginning. Their early buy-in will have long-reaching effects on the success of the work.
 - ♦ Give your employees as much choice as possible about the nature, timing and whether to take the international assignment. If they truly have a choice in the matter, they may be able to have more egalitarian discussions with their spouses/partners.
 - ♦ Insist on relocation services that assist spouses/partners in making local connections in the host country. This may involve paying club membership fees, but may be simply a matter of introducing the spouse/partner to aspects of their new community that will naturally welcome them.
 - ♦ Ensure that your employees have time with their families. It will pay off for you and them in the end.
 - ♦ Recognize that it is important for spouses/partners to take care of their own mental health, and that doing so can have a direct impact on your employee's work satisfaction. Support the spouse/partner by publically and directly acknowledging their contribution to your business. Have direct contact with the spouses/partners so you learn about their needs.
-

RECOMMENDATIONS FOR ACCOMPANYING SPOUSES:

- ♦ Play as active a role in the plans and decisions involved in an international move as possible. Ask to be included in discussions with the employer. Ask to be copied on relevant e-mail. Learn as much as you can from your spouse/partner about what challenges you will face and what support you can expect.
 - ♦ In your new location, do everything you can think of to meet new people — host nationals, people from your own country, people from other countries. Do not rely exclusively on e-mail for support.
 - ♦ Recognize the important role you play in the success of international assignments. Take care of yourself in whatever ways that work for you — exercise, meaningful work, friends, contributions to society, involvement with your children.
-

What Happens When Spouses Cannot Work?

We asked participants to describe their employment status prior to the move and currently, choosing among the following categories:

- ♦ Full time employed (FTE)
- ♦ Part time employed (PTE)
- ♦ Homemaker (HM)
- ♦ Not employed (NE)
- ♦ Student (STU)
- ♦ Volunteer (VOL)

(Note that the difference between “homemaker” and “not employed” may be a matter of self-definition, one that, it turns out, has important consequences.) The proportion of the total sample of 101 accompanying spouses was as follows:

	Current Work Status					
	FTE	PTE	HM	NE	STU	VOL
Work Status Before Move						
FTE	9.6%	9.6%	8.4%	19.3%	7.2%	0%
PTE	0%	0%	3.6%	7.2%	3.6%	0%
HM	0%	0%	12.0%	0%	1.2%	0%
NE	0%	0%	2.4%	4.8%	0%	0%
STU	0%	1.2%	1.2%	1.2%	0%	0%
VOL	0%	0%	2.4%	0%	0%	4.8%

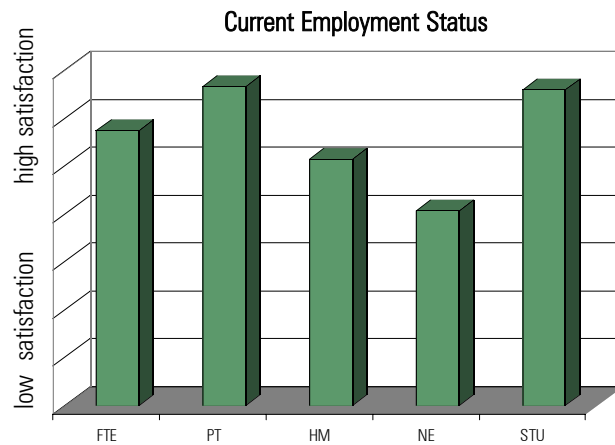
The largest groups, then, were spouses who had worked full time prior to the move and now described themselves as not employed (19.8%) and those who were homemakers both prior to the move and currently (12%).

KEY FINDING:

Spouses who described themselves as currently “not employed” had lower levels of satisfaction with their current job situation than other groups, but did not differ in mental health adjustment.

We first asked whether the spouses in these different employment status groups differed in their mental health adjustment or their satisfaction with their current work situations.

The groups did not significantly differ from each other on any of our mental health measures. However,...



...spouses who described themselves as **“not employed”** had significantly **lower levels of satisfaction with their current job/education situation** than any of the other groups.

That this “not employed” group nevertheless maintained its level of mental health adjustment suggests that even those who were frustrated by their lack of employment were generally coping well. Still, attention to their employment needs is important.

KEY FINDING:

Spouses who had been employed prior to the relocation and now were not employed had lower levels of satisfaction with their current job situation than other groups, but did not differ in mental health adjustment.

We next asked whether spouses who reported a decrease in level of employment compared to before the move differed in their satisfaction or mental health from those whose work status remained the same. For example, we wondered whether those who went from full time employed to not employed or homemaker would have poorer adjustment or satisfaction than those who had also been not employed or a homemaker prior to the move. We formed the following groups:

No Change

- ♦ Full time employed before, full time employed now (**FT-FT**)
- ♦ Homemaker before, homemaker now (**HM-HM**)

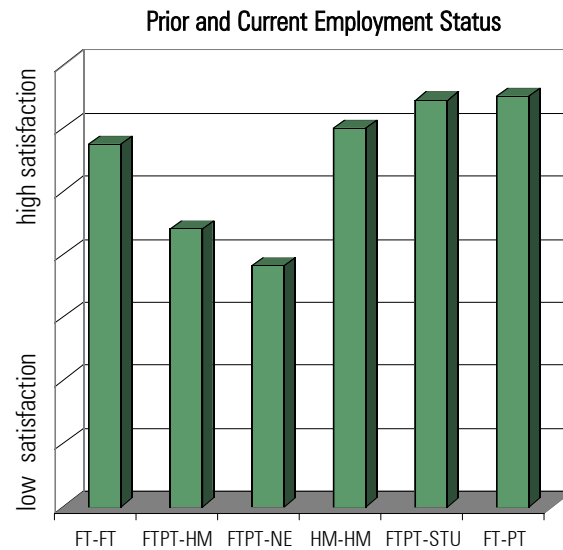
Change in Employment Status

- ♦ Full or part time employed before, homemaker now (**FTPT-HM**)
- ♦ Full or part time employed before, not employed now (**FTPT-NE**)
- ♦ Full or part time employed before, student now (**FTPT-STU**)
- ♦ Full time employed before, part time employed now (**FT-PT**)

(There were not enough participants in every category to make a group representation for every possible combination.)

These groups did not differ from each other in mental health adjustment, but...

...the FTPT-NE and FTPT-HM groups — that is, those who had been employed full or part time prior to the move and were now homemakers or not employed — had significantly **lower levels of satisfaction with their job/education situations** than any of the other groups. Still, as these groups did not differ in mental health adjustment, it seems that despite their frustration, they were coping well.



KEY FINDING:

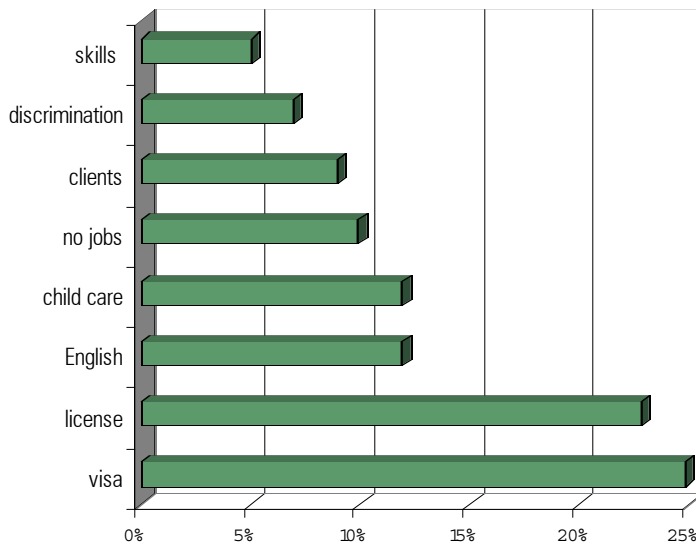
The most common obstacles to employment were lack of visa and lack of required licensure or certification. Nonjob-related obstacles were also common.

We asked spouses about whether any of the following were obstacles to their continuing a career in the U.S.:

- ♦ My visa does not allow me to work in the U.S.
- ♦ I do not have the license or certification required by the U.S.
- ♦ My career requires a long time to develop clients/customers.
- ♦ There are few jobs in my field where I live in the U.S.
- ♦ My career involves a skill that is not in demand where I live in the U.S.
- ♦ My English is not good enough.
- ♦ People discriminate against me because of my nationality, race or language.
- ♦ I cannot find child care I trust or can afford.

We examined responses to this question both for all spouses and for only those spouses who were not currently working (that is, excluding the full time and part time employed groups). Results presented here are for the entire sample of spouses; the results were nearly identical when non-employed spouses were examined alone, except that **lack of English facility** and **lack of trustworthy child care** were mentioned more often (16.4% in each case) among the non-employed subsample. These obstacles appear to be particularly important barriers.

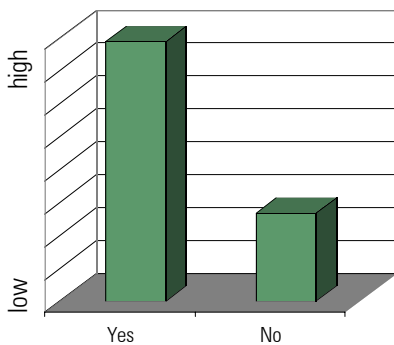
Percent of Spouses Who Named Each Issue as an Obstacle to Employment



The most commonly perceived obstacle was **visa status**, but this was followed closely by **lack of licensure** or appropriate **certification**. Non-job-specific obstacles were the next most common: lack of **English facility** and **child care**. Note that our survey was in English; all respondents therefore had fairly adequate English. Lack of English fluency may well be underrepresented as an obstacle here.

We next asked whether those who encountered these obstacles differed in employment satisfaction or mental health adjustment from those who did not encounter such obstacles. For example, did those who said “finding child care” was an obstacle to their employment have higher or lower adjustment compared to those who said finding child care was not an obstacle?

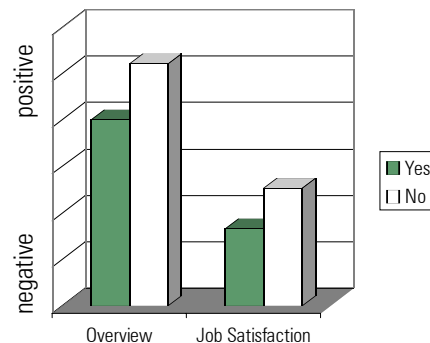
Few Jobs in My Field: Adjustment

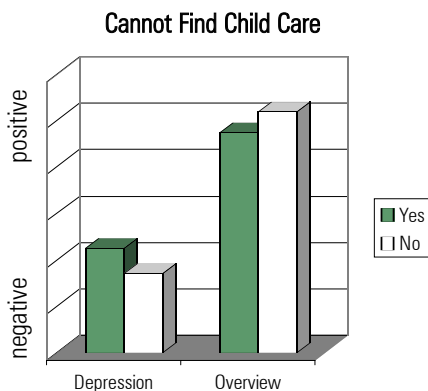


Those who said “There are **few jobs in my field** where I live in the U.S.” had **higher mental health adjustment** than those who did not claim that as an obstacle. This is a perplexing finding — for some accompanying spouses, perhaps there is some relief (and subsequent adjustment) that comes from feeling that not having a job is out of one’s control rather than being a reflection on one’s self-worth or degree of effort.

Those who said, “My **career requires a long time to develop clients/customers**” had **lower Overview** ratings of the assignment and **lower levels of satisfaction with their job/education situation**, compared with those who did not claim this as an obstacle.

Long Time to Develop Clients





Those who claimed “I **cannot find child care I trust or can afford**” as an obstacle to employment were significantly **more depressed** and had significantly **lower Overview** ratings of the assignment than those who did not claim this as an obstacle.

RECOMMENDATIONS FOR SPONSORING ORGANIZATIONS:

- ♦ Help accompanying spouses with job placement and career planning. Keep in mind their previous jobs, but do not limit this assistance to those who have been employed full time prior to the relocation. People’s needs and career plans change with time.
- ♦ Offer professional assistance in understanding any visa issues that may pose an obstacle to accompanying spouses’ employment.
- ♦ At the same time, do not assume that having a visa that allows an accompanying spouse to work solves every employment issue. Licensure, child care, English facility, and job market obstacles can also pose considerable difficulties. Explore what other obstacles to employment a spouse may face, and work creatively to surmount these obstacles.
- ♦ Offer language training and/or stress its importance to spouses.
- ♦ Help spouses establish connections within their new communities to facilitate their building client networks and finding resources for child care.

RECOMMENDATIONS FOR ACCOMPANYING SPOUSES:

- ♦ Be prepared for changes in employment status that may accompany a relocation.
- ♦ Research the process of securing a job in the host country. Be sure you understand any visa and professional licensure issues you will face. Get professional advice on this because the rules can be complicated. You may have opportunities that are not obvious.
- ♦ Join expatriate groups or other organizations to help build your network of connections. These can help you find jobs, child care and clients.
- ♦ Learn the host language. It will help you find a job and open many doors as well.

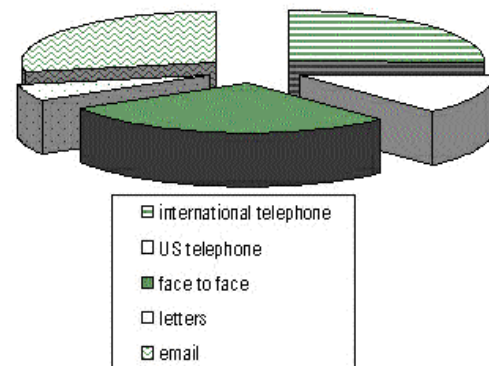
How Important Are Friends to Accompanying Spouses?

Leaving behind one's extended family and friends is an inherent part of moving to a new country. It is important to understand how this loss affects the families of expatriates and what they can do to adjust to this change. We included several measures designed to describe the friendship and support network of these participants.

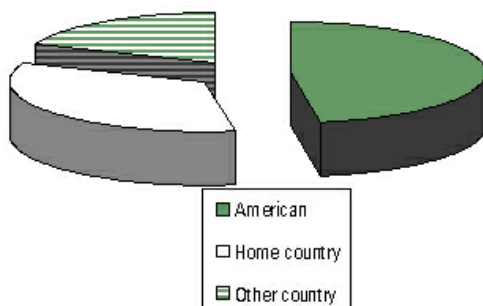
We first asked participants to describe the proportion of their emotional and social support that they received from the following sources while in the U.S.:

- ♦ International telephone calls
- ♦ Telephone calls within the U.S.
- ♦ Face-to-face interactions
- ♦ Letters
- ♦ E-mail

On average, participants reported getting the largest share of their support (almost one third each) from **e-mail**, **international telephone calls** and **face-to-face interactions**. In other words, if we assume that the e-mail was sent to people far away, about two thirds of their support was coming from distant sources rather than local friends.



We also asked participants to describe the nationality of the people they spend time with in the U.S. (besides their families and co-workers).



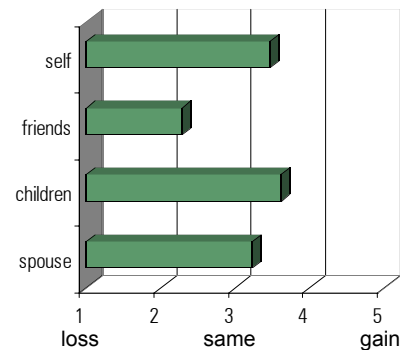
On average, participants reported that almost **half their friends and acquaintances in the U.S. were American**. More than a third were from their home country.

Next, participants were asked to describe whether, compared to the last place they lived, they now had more or less time with their children, their spouse, and their friends, and to compare the amount of time they had for themselves as well.

In the following chart, a score greater than three signifies a *gain* in amount of time spent with that person compared with the previous residence. An average score less than three signifies a *loss*.

On average, participants reported **losses** in the amount of **time spent with friends** but small **gains** in the amount of time spent with their **children, spouses, and for themselves**. It is unclear whether participants were referring to the time they spent with friends in their home countries (which of course decreased) or to having less time with local friends.

Change in Time With Others and Self



Finally, participants completed a loneliness measure that included items such as:

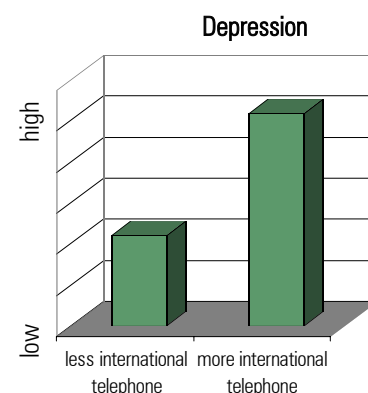
- ♦ I wish I had a really close friend but I don't.
- ♦ There is always someone that I can talk to about my day to day problems.
- ♦ I feel my circle of friends and acquaintances is too limited.

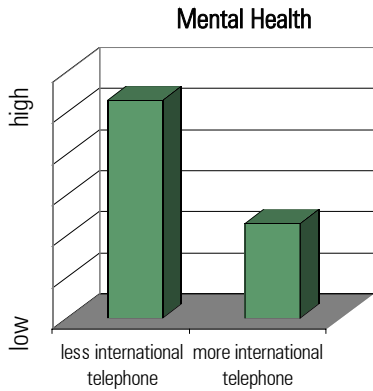
We used all these indicators to examine the role of social support on accompanying spouses' overseas adjustment.

KEY FINDING:

Accompanying spouses who had local, American friends in their networks had better adjustment than those who relied on friends in other countries.

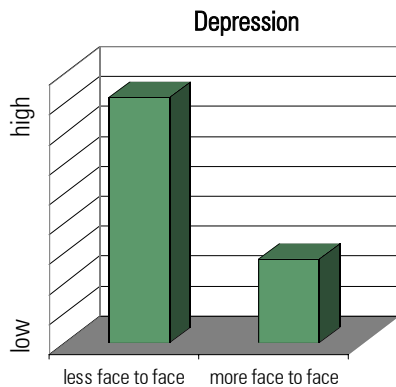
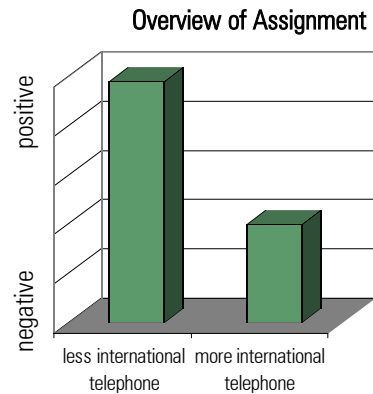
Participants who reported getting more of their social, practical and emotional support from **international telephone calls** were significantly more **depressed**, ...





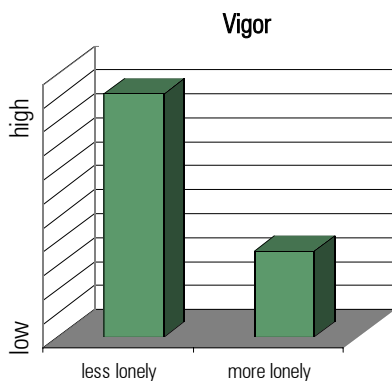
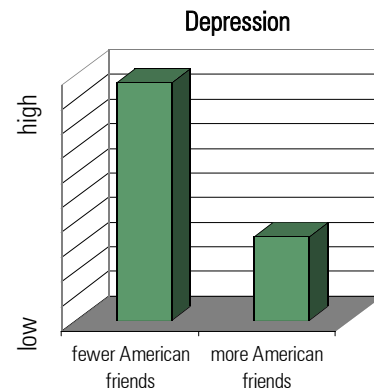
... had **lower scores on the Mental Health Inventory**,...

...and gave more **negative Overview** ratings of the assignment than those relying on other, more local sources of support.



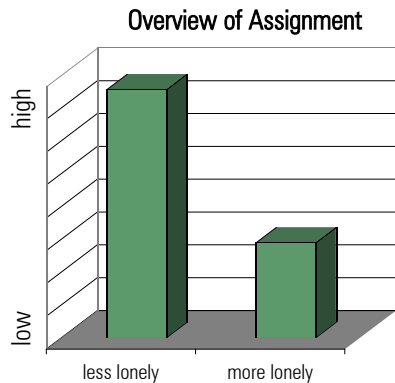
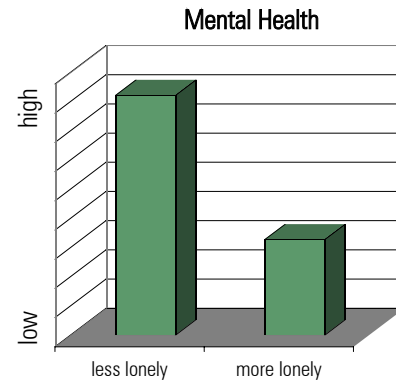
Conversely, those reporting that more of their social, practical and emotional support came from **face-to-face conversations** were significantly **less depressed** compared to those with fewer face-to-face interactions.

Participants with **more American friends** were significantly **less depressed** than those with fewer American friends.



Participants who were more **lonely** were **less “vigorous,”** a measure of positive mood,...

...had **lower mental health** scores, ...

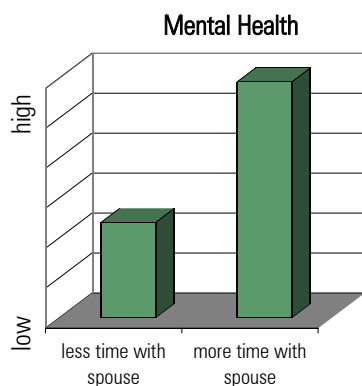


...and **lower Overview** ratings of the assignment.

The relationship among these factors is probably complex and multi-directional. Probably those who found support from local friends felt, as a result, more positive about the assignment and better adjusted. Those who could not find local friends they liked probably relied more on friends and family far away and were, in turn, more depressed and poorly adjusted. And probably those who present themselves as positive and happy have an easier time making local friends. In any case, establishing and maintaining local support is clearly important.

KEY FINDING:

Gains in the amount of time to spend with one's spouse or by oneself were related to a more positive adjustment.



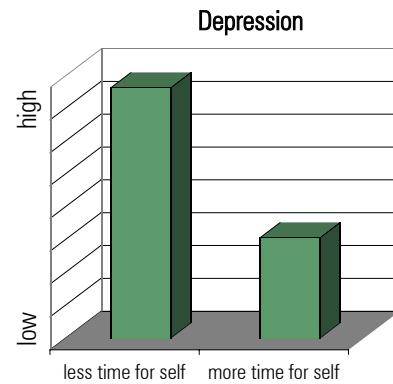
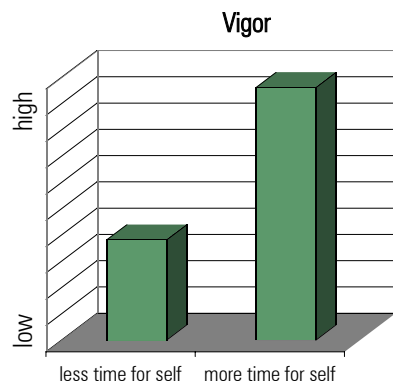
Those who experienced an **increase in the amount of time with their transferee spouses** had significantly **better mental health adjustment**, compared to those spending less time with them.

This finding is consistent with those reported in our chapter about the link between accompanying spouses' experiences and their transferee spouses' work satisfaction — there, too, we saw that when transferees were available to their families, the work assignment went more positively.

Note that the findings reported earlier that showed the importance of having local friends are not contradicted here — it is the amount of time with friends, not changes relative to the last residence, that appears to matter.

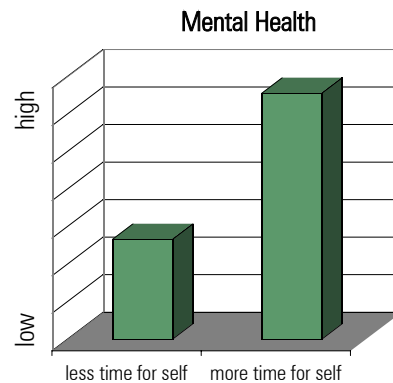
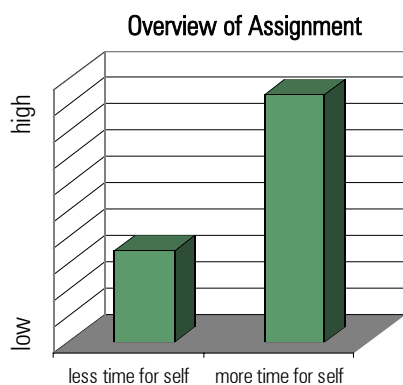
Next, we found that the **more time these accompanying spouses had “for themselves,”** the better their adjustment was on every single mental health indicator:

less depression, ...



more vigor (a measure of positive mood),...

higher mental health,...



... and a more **positive Overview** rating of the assignment.

RECOMMENDATIONS FOR SPONSORING ORGANIZATIONS:

- ♦ It is very important to a family's adjustment for the transferee to have time with them. Institutionalize family-friendly work, weekend and vacation schedules. Ensure that job requirements do not preclude your employees from spending time with and helping their families.
 - ♦ Offer help in getting accompanying spouses connected to their local communities. Help them find clubs, sports associations, classes or other opportunities to make friends and acquaintances.
-

RECOMMENDATIONS FOR ACCOMPANYING SPOUSES:

- ♦ Make it a high priority to find people in your host country you like, and find ways to spend time with them. The positive consequences of having a local network of friends are enormous, for your own mental health and the adjustment of your family.
 - ♦ While e-mail and international telephone calls can be important in keeping you in touch with your friends and family in other countries, do not rely exclusively on them for your support.
 - ♦ If it feels important to you, do what you have to do to have plenty of time for yourself. Again, this will have positive consequences for both you and your family.
-

How Do Newcomers to the U.S. View Americans?

We asked participants to describe “the typical American they had met” on a series of 16 dimensions chosen to represent both positive and negative aspects of American culture. These aspects were chosen on the basis of a review of intercultural writing and research, which pointed to some consensus about how the U.S. is seen by those outside the culture, both positively and negatively. Specifically we asked for ratings on the following dimensions:

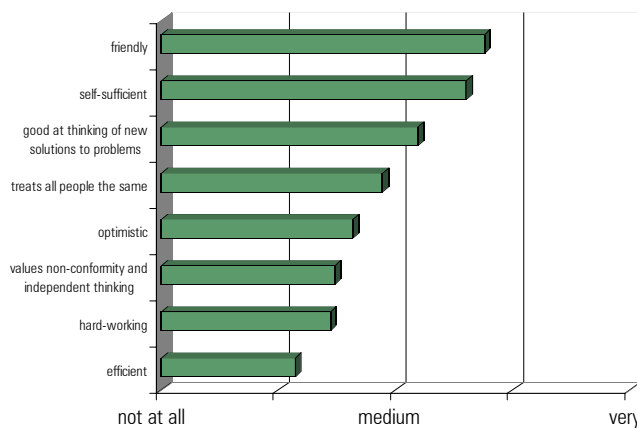
- ♦ good versus poor at thinking of new solutions to problems
- ♦ verbally aggressive versus passive
- ♦ impolite versus polite
- ♦ hard-working versus lazy
- ♦ treats all people the same versus treats some people much better than others
- ♦ thinks money is important versus unimportant
- ♦ not interested in or knowledgeable about other cultures versus interested and knowledgeable
- ♦ optimistic versus pessimistic
- ♦ values non-conformity and independent thinking versus non-conformity
- ♦ selfish versus selfless
- ♦ disrespectful versus respectful of others
- ♦ friendly versus unfriendly
- ♦ self-sufficient versus comfortable depending on others
- ♦ wasteful versus careful not to waste things
- ♦ impatient versus patient
- ♦ efficient versus inefficient

KEY FINDING:

Americans are viewed as friendly, self-sufficient and good at thinking of new solutions to problems. But they are also seen as too interested in money, wasteful, selfish and verbally aggressive.

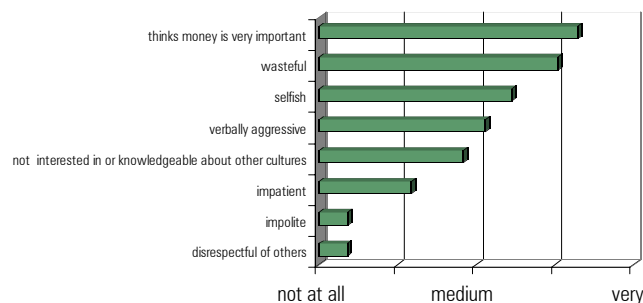
For these analyses, we included all non-Americans who replied to our survey (not just the accompanying spouses).

We first examined participants' responses on the eight dimensions that are often considered strengths of the American culture:



As expected, participants described Americans as **friendly, self-sufficient** and **good at thinking of new solutions to problems**. Unexpectedly, ratings of several positive traits were not as high as predicted: treating all people the same, optimism, valuing independent thinking, being hard-working, and efficiency.

Next, examining traits that are often offered as criticisms of Americans, we found that participants did indeed describe Americans as being **too concerned with money, and as being wasteful, selfish** and **verbally aggressive**. They did not see Americans as particularly uninterested in other cultures, impatient, impolite, or disrespectful of others, however.

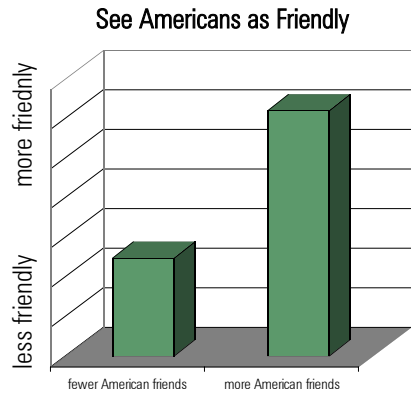


We next compared these results with the ratings given by a small sample of Americans who completed the survey (and who otherwise are not included in our analyses). Interestingly, the American participants did not differ significantly in their views of Americans compared to the non-American participants. That is, like the international newcomers, they described Americans as especially friendly and self-sufficient, and agreed with the criticism that Americans are very wasteful and focused on the importance of money.

KEY FINDING:

Participants' views of Americans were generally unrelated to the proportion of their friendship network that was American.

To explore the role of American friendships in shaping perceptions, we compared the views of participants who had many American friends with those who had few American friends. They were similar, with one exception:

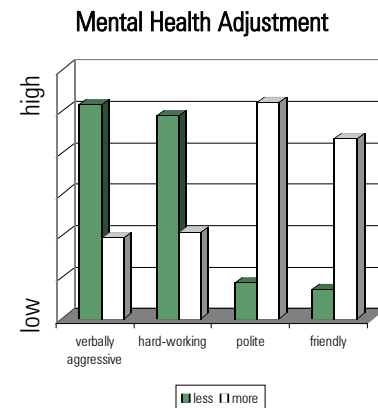


Surprisingly, those who had **more American friends** viewed Americans as **more friendly** than those with fewer American friends.

KEY FINDING:

Participants who saw Americans as less hard-working and verbally aggressive and as more friendly and polite had better mental health adjustment than those who saw them as aggressive and impolite.

We next asked whether participants with more positive views of Americans had better adjustment.



Participants who described Americans as **less verbally aggressive, less hard-working, more polite, and more friendly** had **better mental adjustment** than those who described them in opposite ways.

At first, the finding that seeing Americans as less-hard-working was associated with positive mental health seemed surprising, at least to us hard-working American researchers. But the findings are consistent in suggesting that those who have had friendly, polite, calm experiences with Americans, perhaps seeing them as accessible and welcoming rather than driven and aggressive, have better adjustment. It may be that these positive relationships lead directly to improved adjustment. But the opposite direction of causality is possible too — happier, better adjusted expatriates are probably more likely to be able to see others positively and establish rewarding relationships with host nationals.

RECOMMENDATIONS FOR SPONSORING ORGANIZATIONS:

- ♦ Help expatriate families meet host nationals. Informal and relaxing relationships with host nationals may be especially beneficial.
 - ♦ Help expatriate families understand the host culture and its values. This will improve the chances of their having positive experiences with host nationals.
-

RECOMMENDATIONS FOR ACCOMPANYING SPOUSES:

- ♦ Do what you can to meet and have positive experiences with host nationals. You may have to take the first step to pursue friendships — do not be offended, if so. Try to learn the norms of socializing in your host community. Do adults gather in restaurants, bars or in their homes? Invite host nationals to join you in some way that is consistent with these norms and is comfortable for you.
 - ♦ Even if you have a negative experience with one or several host nationals, do not give up. In the U.S., Americans are generally friendly and are used to making new friends, due to the great geographic mobility that characterizes their culture. See if you can find an American who is interested in discussing cultural differences with you.
-

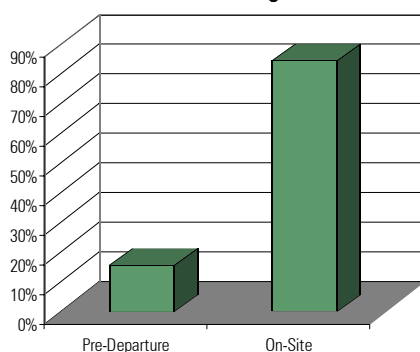
What Services Are Most Important For Expatriates?

Because the issue of pre-departure and onsite services pertains equally well to the transferees and accompanying spouses, both married and single, for most analyses in this chapter we have added the 69 transferees who responded to our survey to the core group of accompanying spouse participants.

Cross-Cultural Training

25.9% of this sample received Cross-Cultural Training of some sort.

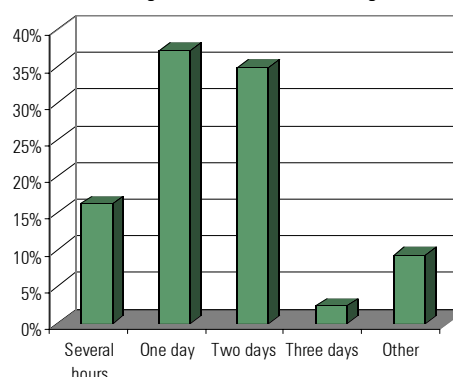
When Cross-Cultural Training Was Received



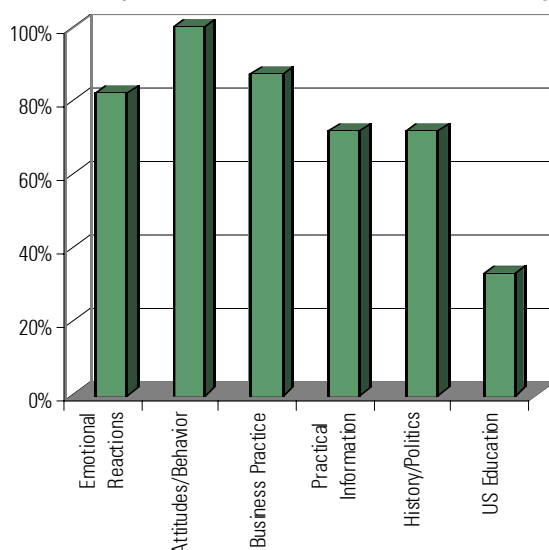
Most of those who received **Cross-Cultural Training** received it **after arriving in the U.S.**

Most of the Cross-Cultural Training lasted for one (37.2%) or two (34.9%) days. In about 9% of the cases, it was delivered in some other format (like a series of 2-hour sessions, or along with Language Training.)

How Long Cross-Cultural Training Lasted



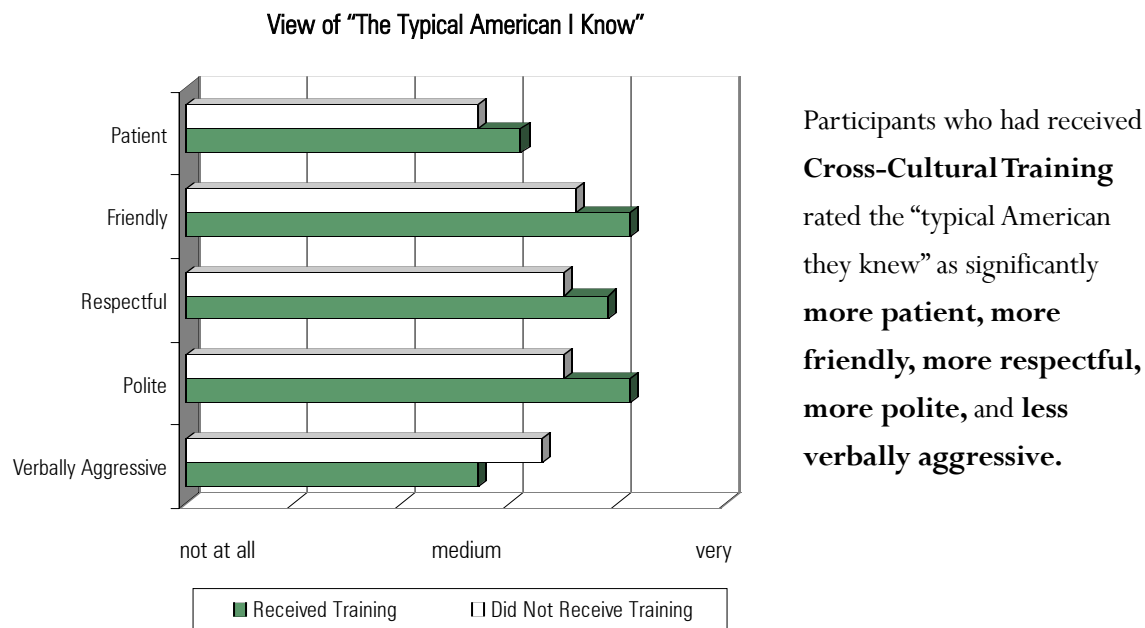
What Topics Were Included in Cross-Cultural Training



Every Cross-Cultural Training program included a discussion of **American attitudes and behavior**. Most also included a review of likely **emotional reactions to moving**, **common U.S. business practices**, **practical information**, and an overview of **U.S. history and politics**. A smaller number of programs covered U.S. educational issues.

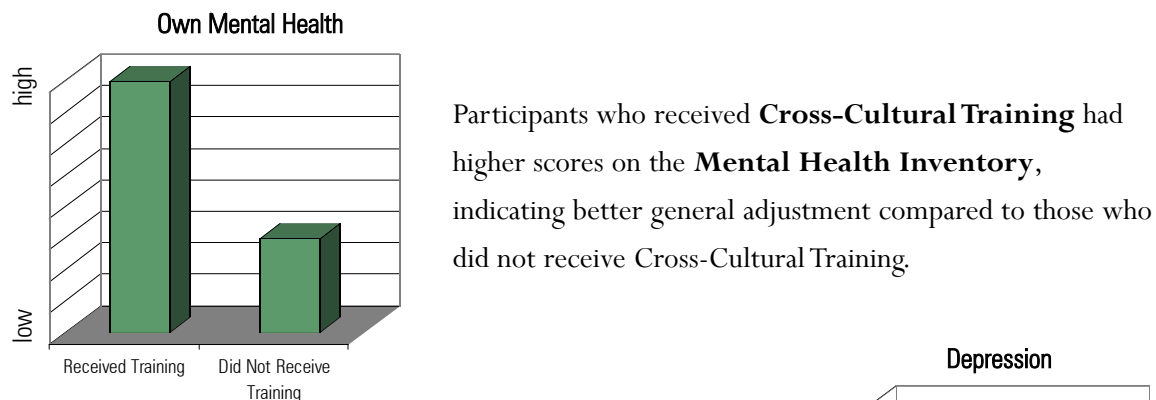
KEY FINDING:

Expatriates who received Cross-Cultural Training had more positive views of Americans than expatriates who did not receive such training.

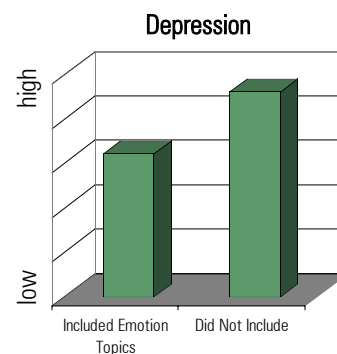


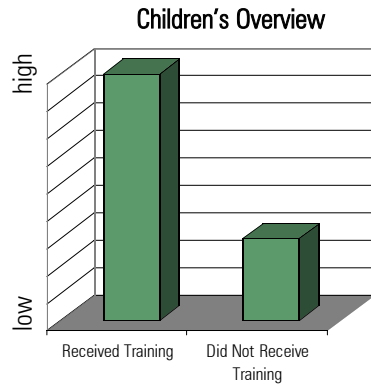
KEY FINDING:

Expatriates who received Cross-Cultural Training described themselves, their children and their spouses as having a more positive experience than expatriates who did not receive such training.



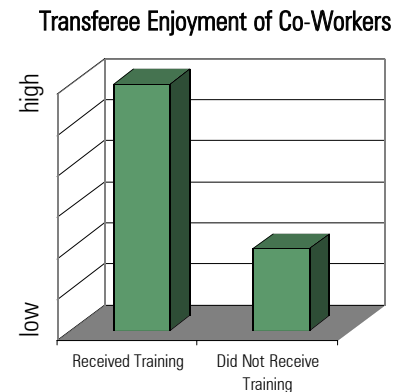
In particular, when the Cross-Cultural Training included coverage of the **common emotional reactions** people have to entering a new culture, participants had **lower levels of depression.**



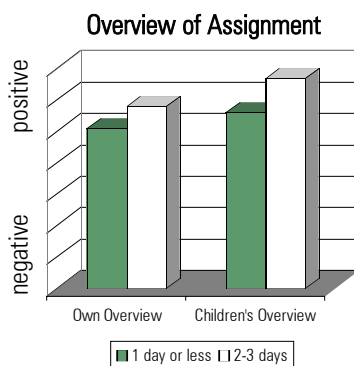


In addition, participants who received **Cross-Cultural Training** reported that their **children's experience** on this international assignment were **more positive** compared to those who did not receive Cross-Cultural Training.

Accompanying spouses/partners who received **Cross-Cultural Training** also described their **transferee spouses** as **enjoying their co-workers more** compared to those who did not receive Cross-Cultural Training.³



We asked whether those who received longer Cross-Cultural Training sessions had different outcomes from those who received shorter ones.



Participants who received **Cross-Cultural Training that lasted one day or less** had significantly **lower Overview** ratings of their assignment, and they rated their **children as having similarly lower Overview** ratings, compared with participants who received Cross-Cultural Training that lasted two or three days.

KEY FINDING:

Of those who did not receive Cross-Cultural Training, some were not offered it and some felt they did not need it. Those who were not offered but felt they had needed it had poorer adjustment and said their spouses were less productive on the job than those who were offered it or did not need it.

³For this particular analysis, we report only the results from the accompanying spouses/partners, not the transferees themselves, as we want to maintain our focus on the impact of service to the family on the assigned transferee. However, the finding is the same when we include the transferees in this analysis — those who received Cross-Cultural Training also report that their spouses enjoy their co-workers more than those who did not receive Cross-Cultural Training.

We took a closer look at those participants who did not receive Cross-Cultural Training.

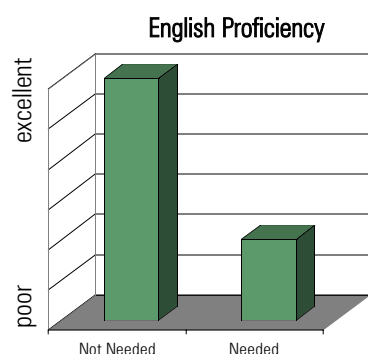
Participants Who Did Not Receive Cross-Cultural Training

	Needed	Not Needed
Offered	14.1%	17.2%
Not Offered	59.6%	9.1%

First, we asked why they had not received the training. 26.3% said they did not need it and 68.7% said it had not been offered to them. As seen to the left, however, almost 60% of those who did not receive Cross-Cultural Training felt they needed it but it had not been offered to them.

To try to understand why some felt they did not need such training, we examined how these groups differed from each other.

Of those who did not receive Cross-Cultural Training, those who said they **did not need it** described their **home countries as more similar to the U.S.** (in such ways as child-rearing values and standard of living).

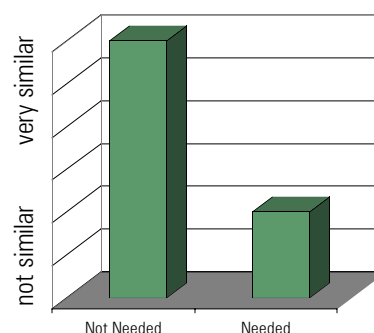


In addition, those who said they **did not need Cross-Cultural Training** tended to have **higher proficiency in English** (especially reading proficiency) than those who said they did need training.

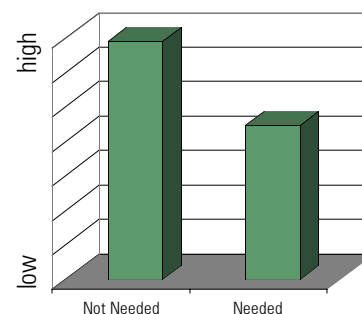
Surprisingly perhaps, it was *not* the case that those saying they did not need Cross-Cultural Training were all from Canada, the U.K., Australia, or New Zealand. In fact, 63% of the participants from these countries who did not get Cross-Cultural Training said they, in fact, needed it (compared to 37% who said they did not need it). Those who said they did versus did not need Cross-Cultural Training did not differ in the number of countries they had lived in as adults, or the number of years they had lived outside their home countries. Were they right in their perception that they did not need Cross-Cultural Training? Perhaps so. Looking again only at those who did not receive any Cross-Cultural Training,...

...those who said they had **not needed Cross-Cultural Training** reported having a **higher proportion of American friends** (as opposed to friends from their own or other countries) than those who felt they had needed such training.

Similarity of U.S. to Home Country



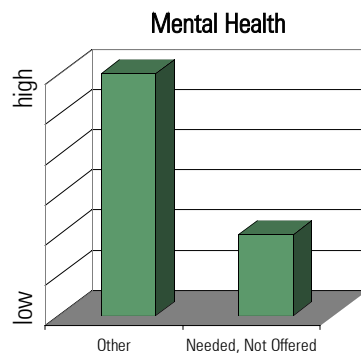
Proportion of Friends Who Are American



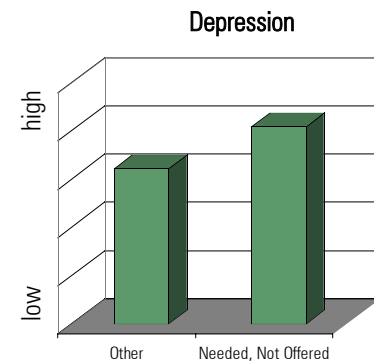
It may be that this familiarity with Americans pre-dated the relocation to the U.S. and led to a high level of confidence at being able to manage the new culture. Alternately, perhaps the higher similarity to home country and language proficiency noted above made it easier for them to make American friends.

We were particularly interested in the potentially vulnerable group of those who said they had needed Cross-Cultural Training but were not offered it. We compared them on our adjustment measures to those who also had not received such training but either said they had not needed it or had been offered it (but for some reason declined it). The groups differed in interesting ways.

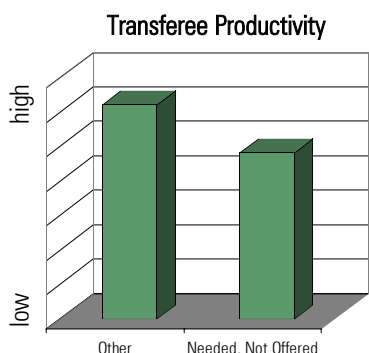
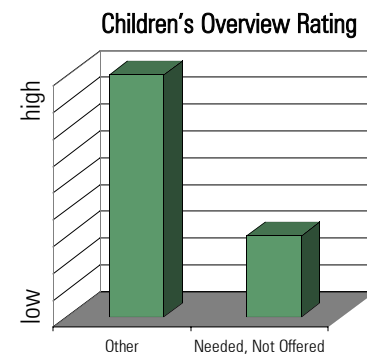
Those who said they had needed Cross-Cultural Training but were not offered it were now **more depressed**, ...



...and had **lower scores on the Mental Health Inventory**, indicating poorer mental health, than those who said they had not needed Cross-Cultural Training or had declined it.



Further, those who needed but were **not offered Cross-Cultural Training** described their **children as having a less positive experience in the U.S.**, ...

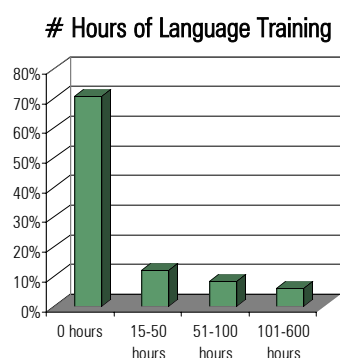


... and described their **transferee spouses as less productive** on the job compared to others who said they had not needed Cross-Cultural Training or had declined it. Cross-Cultural Training may lead directly to better adjustment and more productivity. Or, perhaps those with more positive experiences look back at the pre-departure period and remember it differently in light of their current satisfaction, and report that they had not needed Cross-Cultural Training then.

In short, Cross-Cultural Training was associated with positive effects in those who received it. Of those who did not receive it, adjustment was especially poor in those who said they had needed it but were not offered it.

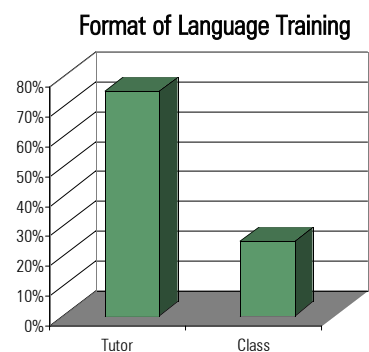
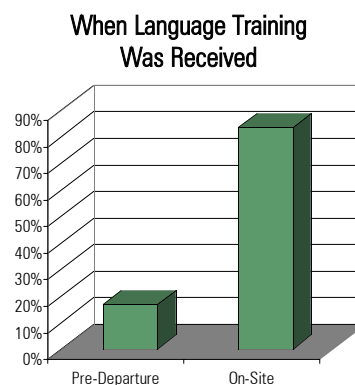
Language Training

To examine the role of Language Training in expatriates' experiences, we restricted our sample to non-American, non-native speakers of English. We included both accompanying spouses/partners and transferees in most analyses. Of this group, 29.3% had received some kind of Language Training.



The number of hours of Language Training received ranged **from 0 to 600**.

Most of those (83.3%) who received Language Training received it **after arriving in the U.S.** Only 16.7% received it prior to leaving home.

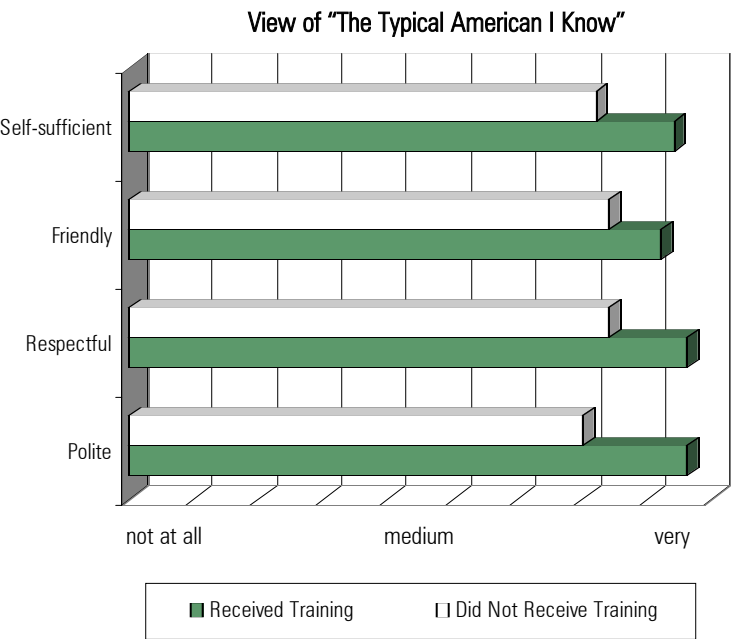


Of those receiving Language Training, 75% had **individual tutors** while 25% received their training **in a class**.

Those receiving Language Training did not differ in their adjustment from those who did not receive it, but did differ in some other interesting ways.

KEY FINDING:
Expatriates who received Language Training had more positive views of Americans than expatriates who did not receive such training.

Participants who had received Language Training saw Americans as more self-sufficient, more friendly, more respectful, and more polite than did participants who had not received Language Training. It may be that the Language Training they received included cultural interpretation of American habits, resulting in this more positive view.



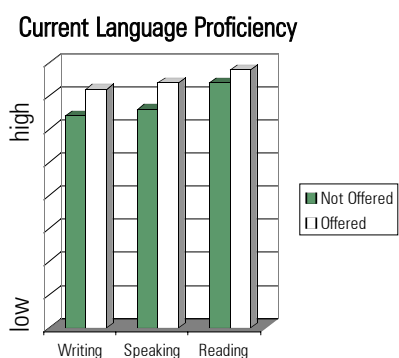
KEY FINDING:
Of those who did not receive Language Training, some felt they did not need it and some reported that they were not offered it. Those who were not offered it reported having poorer English proficiency and poorer adjustment than those who were offered it.

Next, we took a closer look at those participants who did *not* receive Language Training.

Participants Who Did Not Receive Language Training		
	Needed	Not Needed
Offered	6.9%	51.7%
Not Offered	19%	22.4%

When asked why they had not received this Training, 74.1% (of these non-native English speakers) said they did not need it and 41.4% said it had not been offered to them. As seen to the left, Language Training was offered to 51.7% who refused it, believing that their English was good enough. However, 19% of those who did not receive Language Training felt they needed it but it had not been offered to them.

Of those not receiving Language Training, those who felt their English was good enough did not differ from those who felt their English was not good enough on their level of English proficiency (reading, speaking or writing). Note that the proficiency indicator assesses current proficiency; it may be that the groups did differ in proficiency at the onset of the assignment when the decision whether or not to accept offers of Language Training was made.

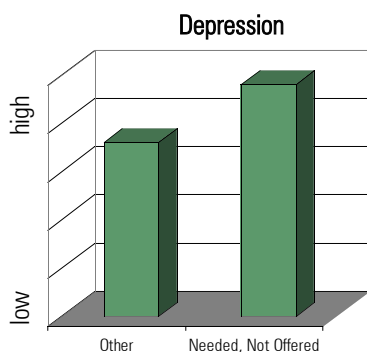


On the other hand, those who were **offered Language Training (but did not take it)** had significantly **better writing and speaking proficiency in English** compared to those to whom Language Training was not offered. (Reading proficiency, shown here for comparison, did not differ in the two groups.) At first, this finding appears illogical — one might expect Language Training to be offered to those whose proficiency is *worse*. But, remember that this group who was offered Language Training turned it down.

Perhaps this group surmised that their English was good enough and therefore turned down the offer.

What of the potentially vulnerable group who felt they needed Language Training but were not offered it?

Those who **needed but were not offered Language Training** had significantly **lower levels of satisfaction about their own job situations, ...**



... and were significantly **more depressed**, compared to those who did not need it or were offered but declined it.

In sum, those receiving Language Training had more positive views of host nationals than those who did not receive it. The group who felt they needed but were not offered Language Training felt dissatisfied and unhappy, compared to those who did not need it, or had been given the chance to have training but turned it down.

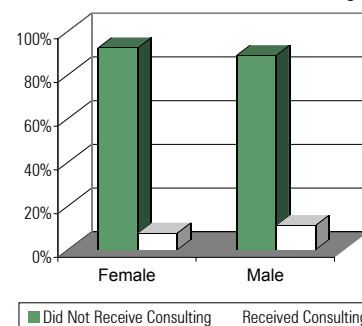
Career Counseling for Accompanying Spouses/Partners

We next asked about the experience of those who received Career Counseling. For these analyses, we restricted our analyses to the 92 female and 9 male accompanying spouses/partners in our sample. Of this group, only 7.9% received Career Counseling, making detailed analysis of those who did receive it impossible.

Female and male accompanying spouses/partners received Career Counseling in similar proportions.

11.1% of the males and 7.6% of the females received such Counseling; this was not a statistically significant difference. Those who received Career Counseling had almost all been employed full time prior to the relocation.

% Who Received Career Counseling



KEY FINDING:

Of those who did not receive Career Counseling, some said they had not wanted it and some reported that they were not offered it. Those who had wanted it but were not offered it reported lower satisfaction with their job situations. They also described their transferee spouses as considerably less content with the assignment.

In the next analyses, we looked only at those who did not receive Career Counseling.

Participants Who Did Not Receive Career Counseling

	Wanted	Not Wanted
Offered	21.7%	12.4%
Not Offered	60.2%	5.6%

Of those who did not receive Career Counseling, 65.8% were not offered it, and 18% said they did not want it. The largest group (60.2%) said they had wanted it but were not offered it — we were especially interested in this potentially-vulnerable group.

As shown here, it is not only the formerly full time employees who wanted Career Counseling. In all pre-relocation work status groups, the majority said they could have used Career Counseling but were not offered it.

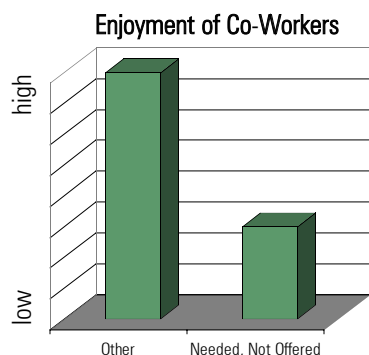
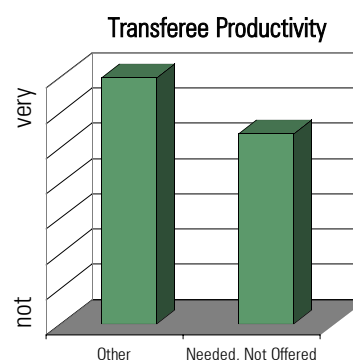
Pre-relocation status	Career Counseling	
	Needed, Not Offered	Other
Employed full time	79.5%	20.5%
Employed part time	81.8%	18.2%
Full time homemaker	81.2%	18.2%
Volunteer	71.4%	28.6%

Those who **needed but were not offered Career Counseling** had **lower levels of satisfaction with their job situation** than those who either did not need it or were offered Career Counseling but declined it.



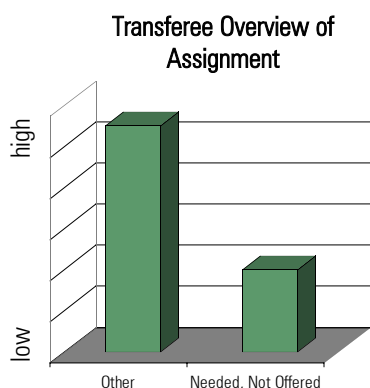
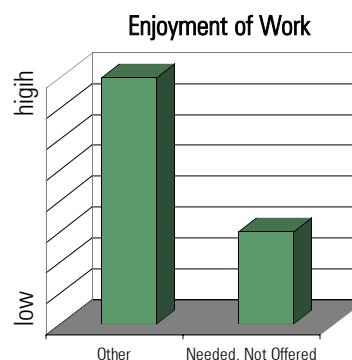
In addition, the group who had wanted Career Counseling but had not been offered it described their transferee spouses as having a less positive assignment than any of the other groups. Specifically, they described their **transferee spouses** as:

...less productive,...



...enjoying their co-workers less,...

...and **enjoying their work less** than those who did not need Career Counseling or needed and were offered it but declined it.

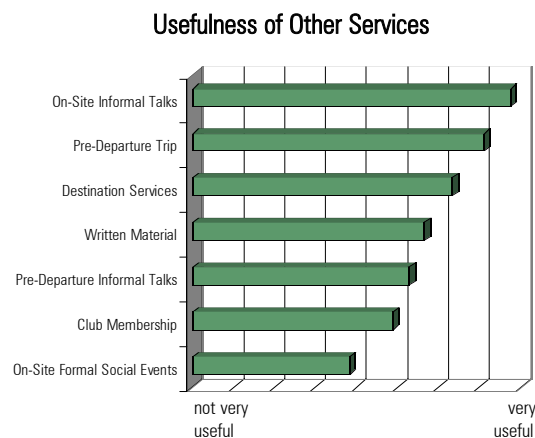


They also said their **transferee spouses' Overview** rating of the assignment was significantly **lower** than the other groups.

It is possible that the participants' negative assessment of their own situations simply “spilled over” into reporting that the transferees' job experience was also negative. However, it is also likely that participants' unhappiness at feeling unsupported caused the transferees to worry and therefore be less productive at work. Another explanation is that companies that are generally supportive of their expatriates — as evidenced by their offering support services to the spouses, as well as positive work environments for the transferees — reap the benefits of this approach in generally satisfied expatriate families and workers.

Usefulness of Other Services

Participants who received various other routinely-offered services were asked to describe their usefulness. **Informal discussions** with other people (especially after arrival in the U.S.), a **pre-move trip** to the U.S., **destination services** and **written materials** were described as particularly important.



Finally, we asked two open-ended questions about the services participants received, or wished they had received. While the responses were wide-ranging, the majority fell into a handful of categories. These categories are listed below *in order of decreasing frequency*, along with some representative sample responses:

What was the single most important thing you did or service you received to help you relocate?

Relocation Assistance and Destination Services

- ♦ *A woman takes care of us and she helps us very often when we had some questions. She was great and we were happy to rely on somebody.*
- ♦ *Our mentor helped with our social security numbers. She was great and such a big help.*
- ♦ *Having a professional assisting me in my first days in the U.S.: walking me through the basic things one needs to live in the U.S.*
- ♦ *A caring and helpful relocations agent in the U.S.A.*
- ♦ *My relocation company provided me with a credit card; you cannot do anything without a credit history in the US.*

Help in Finding a Home

- ♦ *Finding a home very quickly by a relocation agent.*
- ♦ *The realtor agent. It was the only assistance we had and I don't know what we would of done without her.*
- ♦ *The professional that was responsible to assist me in finding a place to live and how things work in the U.S.*
- ♦ *Received excellent help from the real estate agent we got through the relocation company.*

Pre-move Trip to the U.S.

- ♦ *A visit over to the U.S. to look at schools and purchase a house — extremely important.*
- ♦ *We had a pre-move trip to find a place to live. A person who knew the area helped us with finding places, stores, etc.*
- ♦ *Taking the house hunting trip before our final move helped me to go around the area we had to settle.*
- ♦ *My wife came down here on her own and went to a number of schools and apartments. We then came together three months later to solidify our decisions.*
- ♦ *The most important thing we did was our initial trip to tour the city. It opened my views and I realized from the things we saw that this was going to be a good move.*

Moving of Furniture and Household Goods

- ♦ *Shipping of our personal belongings.*
- ♦ *Having the shipment of my belongings being taken care of by a third-party.*
- ♦ *The relocation itself; our move involved a move within the states for my wife, as well as my own shipment from the U.K.; both were extremely well managed.*

Making Friends/Informal Support

- ♦ *I contacted other expatriated wives when I arrived.*
- ♦ *The most important thing we did was listen to people who had already relocated out here with the company. They helped a lot.*
- ♦ *Joined the French expatriate association.*
- ♦ *I met people in my religious congregation and was welcomed and helped by them.*
- ♦ *Informal information and advice from neighbours/friends speaking our native language and knowing our native culture.*

Child-related Services

- ♦ *The educational consulting was by far the most useful to us. This determined where we would live, where I could work, etc.*
- ♦ *Company support in arranging care for my child.*
- ♦ *We put our three kids into an American summer camp in New England.*

Job Assistance/Employment for Accompanying Spouse

- ♦ *Consultation on career development.*
- ♦ *For me, the most important help I had was information about how I could ask for my work permission here in the U.S.A.*
- ♦ *Getting a work permit after 1.5 years.*

Other

- ♦ *Having temporary accommodations and car provided on arrival.*
- ♦ *Getting our pets moved over.*
- ♦ *Kept an open mind.*
- ♦ *Admit to new friends (from home country) how hard I was finding it.*

Were there any services you did not receive that would have been important in helping your family adjust to life in the U.S.?

Local, Practical Information

- ♦ *Information on what all the stores are e.g., what can I get in a drug store. It sounds stupid now even to me but it took a while to know what was best to get in various places (where to buy shampoo, etc.). A guide on tipping would have been useful — do you tip the gas attendant? How much do you give and how much at hotels, etc. Reassurance that if I didn't get a car/license/house in one month that I would be able to extend the rental agreement (car and condo).*
- ♦ *I think that the spouses need a mini list of the different services like house cleaners, baby sitters, plumbers, electricians, etc. but people with references.*
- ♦ *Insuring house contents and car. Setting up telephone and number to call for directory enquiries, etc. Information on what to do if have car accident or are pulled over by police. Postal redirection.*

Help in Establishing Accounts and Getting Proper Documentation

- ♦ *About all the problems which concern the phone company, banking, social security, etc. My husband was alone to find everything and it wasn't a good time for him because every contract is done by phone; my husband was just starting to speak English and it was a hard time for him to take care of everything.*
- ♦ *Biggest issue appears to have been how to deal with banks, mobile phone, credit or debit card, buying a car, utilities, etc. without having a social security number.*
- ♦ *No services were offered by my spouse's place of work so therefore, there were many questions to be resolved on our own: banking/credit, drivers licenses, etc.*
- ♦ *More support in settling basic services like utilities.*

Help in Finding and Making Friends

- ♦ *Help linking with a local newcomers group. It took a year to find one.*
- ♦ *I had to approach strangers to make friends mostly in the playground where my daughter went to play, and people are not always very friendly; it took me five months to actually have a few friends.*
- ♦ *Other than the human resources department contacting me by phone to see if all was well, I received absolutely no help from the company at all. I was disappointed that there was nothing done to introduce me to the other spouses in my husband's company. I still have not met a single one of them.*
- ♦ *Getting connected to other expatriates.*

Career Assistance

- ♦ *Someone to focus on ME - to help me figure out what I wanted to do with my life and how to make the most of my time in the U.S.A. Career Consulting.*

- ♦ *It would have helped if we were provided assistance to apply for a work permit for me. I had to work through this process, and am yet to receive it. Once I get it, I will not be eligible to go for the career counseling, which we were eligible for within one year of relocating!*
- ♦ *Career planning and help.*

School Consultation for Children

- ♦ *We needed more information about the school system. The children found the transition very difficult. No help was given through the school because we are English speaking. More information was needed about the curriculum and how the whole system works. No help with moving with a handicapped child from schools or the medical profession. I had to search for information I needed. Nothing was freely forthcoming.*
- ♦ *Having school counseling from an individual who was knowledgeable and up to date about the system my children had come from and the system they were entering.*
- ♦ *What facilities are there for toddlers to mix around with other toddlers her age? The toddler programs in my neighborhood and other facilities — all these I had to search for after I moved in and that was not easy.*

Cross-Cultural Training

- ♦ *I should have started earlier to know more about the culture. Being my husband is American, I assumed I knew about the country and I realized afterwards I was wrong.*
- ♦ *A more comprehensive, practical initial cross-cultural training.*
- ♦ *My children got English tutoring lessons but the knowledge of the civilization, the way of living was missing completely. This was hard for them.*

Home-finding Services

- ♦ *Realistic advice on the availability of rental property; we wasted a lot of time.*
- ♦ *More help with finding a home.*
- ♦ *Better recommendations on apartments.*

Financial Advice

- ♦ *A better idea of how much cash I would need and that I would have to maintain access to overseas banks would have helped with the budgeting.*
- ♦ *Some financial planning could be real useful, since cost of living is high. Depending on this, they could make recommendations on where to live.*
- ♦ *What a 401k plan is, and general information on investments for the 401k (such as what is a bond, a stock, a mutual fund).*

Information About Medical Care

- ♦ *How health care plans work, how to get a primary care physician, the differences between emergency rooms and walk-in services in a hospital for urgent care. I was very surprised when I realized one has to apply to become a doctor's patient.*
- ♦ *Health insurance related topics.*
- ♦ *A reliable doctor or consultant about the medicines used here and known by us from our home country.*

Other

- ♦ *Pre-move visit, more honest introduction to the area.*
- ♦ *Learning how to get volunteer work.*

- ♦ *Rather than getting tons of pieces of paper with information about the relocation itself it would have been better to get the information bit by bit when it was actually needed. I feel we overlooked quite a few things because of that.*

RECOMMENDATIONS FOR SPONSORING ORGANIZATIONS:

- ♦ Offer a continuum of services to relocating families, starting with very practical information and language training, and involving ongoing access to cultural interpretation and support. The kinds of practical information at the beginning of an assignment that are particularly helpful involve (a) a pre-move trip to the host country, (b) destination services, (c) home finding assistance, and (d) educational and career assistance for spouses and children.
- ♦ Help accompanying spouses with job placement and career planning. Keep in mind their previous jobs, but do not limit this assistance to those who have been employed full time prior to the relocation. People's needs and career plans change with time.
- ♦ Offer cross-cultural and language training to employees and spouses unless it is very clear they do not need it. The result is likely to be more positive views of host nationals, better adjustment for the spouses, a better work experience for the transferee, and a more optimistic assessment of the assignment by the whole family. Conversely, not being offered services can result in resentment.
- ♦ Let the transferee and spouse have input into which services they receive. Their insight into what they need is valuable and can help you expend your resources in the most effective ways.
- ♦ At the same time, recognize that transferees and spouses may not understand the challenges they are going to face during an international relocation, especially if they have not done it before. Use your experience to encourage them to take advantage of the services you offer.
- ♦ Do whatever you can to help accompanying spouses/partners get connected into local networks of friends. These networks will offer emotional support and practical information that will be invaluable. Insist that this kind of assistance is part of your relocation service.

RECOMMENDATIONS FOR ACCOMPANYING SPOUSES:

- ♦ If you feel you need cultural, language, career, or other services, tell your spouse/partner's employer explicitly. There may be more help available than you know, especially if you explain your needs.
- ♦ If offered cultural training, language training or career consulting, seriously consider accepting this help, even if you are busy. Those who have used these services often have closer connections to people in the host country and a better international living experience.
- ♦ Do whatever you can to get connected into local networks of friends. These networks will offer emotional support and practical information that will be invaluable.

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