

Liisa Mäkelä · Vesa Suutari *Editors*

Work and Family Interface in the International Career Context

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Chapter 3

Expatriate Family Narratives on International Mobility: Key Characteristics of the Successful Moveable Family

Mila Lazarova, Yvonne McNulty, and Monica Semeniuk

Abstract While the body of research that confirms the importance of family as a factor in expatriate success is growing steadily, organizations with expatriate employees do not appear to have utilized much of the knowledge generated by researchers. Expatriates still face just as many, if not more, family-related challenges as they did several decades ago. According to industry reports, organizations provide a wide variety of support services to address and hopefully ease many of the expatriation challenges. However, it is less than clear whether data provided by human resource (HR) managers and global mobility divisions is truly reflective of the experiences of expatriate families and whether the support that is offered is actually helpful. Further, despite increased attention to expatriate support issues, one thing has not changed: organizations and families generally underestimate, by a wide margin, the challenges of international assignments. Based on qualitative data from a sample of 656 respondents (primarily trailing spouses) in this chapter we explore family narratives on international mobility. We unpack issues such as key challenges and opportunities presented by international mobility as a family, the organizational support families receive – and the support they wish they could receive – during international relocations, the key characteristics of the successful “moveable family”, and the importance of family dynamics to successful assignments. We conclude by discussing emerging themes and ideas for future research on international mobility.

Keywords Expatriation • Family • Spouse • Support • Qualitative • Married • Divorce • Children

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Introduction

While in recent years long-term expatriation has been supplemented, and in some cases replaced, by alternative expatriation in the form of short-term, commuter, frequent traveler or virtual team assignments (Meyskens et al. 2009), ‘traditional’ (long-term) assignments are still the norm in many organizations, and the most common expatriate profile is still that of an expatriate who is married or attached, often accompanied by children (Brookfield Global Relocation Services 2013). International assignments are a strong catalyst for changes in both the family and work lives of expatriates, and prior research has determined that spouse and family adjustment is an important contributor to overall international assignment success. Study after study have suggested that the trailing spouse in particular plays a key role during expatriation in terms of willingness to go, assignment completion, expatriate adjustment, and expatriate performance (Andreason 2008; Black and Gregersen 1991; Black et al. 1991; Brown 2008; Caligiuri et al. 1998b; Cole 2011; Lazarova et al. 2010; Takeuchi 2010). Recent industry surveys (e.g. Brookfield Global Relocation Services 2013; Cartus and Primacy 2010) show that ‘family and personal circumstances’ and ‘partner’s career’ remain the top reasons for refusing to accept an international assignment, thus representing a critical relocation challenge.

Expatriate families (and in particular, expatriate spouses) have been an important topic in expatriate research for over four decades (e.g., Brown 2008; Hays 1974). It is now commonly accepted (at least by researchers if not by corporate HR departments) that family-related issues (notably spouse and family adjustment and satisfaction issues) can bear directly on the success of international assignments (Chiotis-Leskowich 2009; Lazarova et al. 2010; Mäkelä and Suutari 2011; McNulty 2012; Shaffer and Harrison 2001; Takeuchi 2010). Nevertheless, the literature has been criticized for being too “expatriate-centric” and for neglecting other stakeholders, and in particular, families, where the experiences of families are often examined only in so far as it detracts from, or adds to, the expatriate’s performance. There is relative lack of research providing more in-depth understanding of the work-family interface, of the complex crossover and spillover processes involved, and of the strategies that families use and the resources they need to counteract the many stressors of the relocation experience they face (Mäkelä and Suutari 2011; Takeuchi 2010). The family as a resource, its structure, and internal functioning during relocation have received far less attention (Haslberger and Brewster 2008).

Given the large amount of transference between the work and non-work spheres of families during international assignments (Lazarova et al. 2010), it is important to better understand the ways in which organizations can help expatriates and their families. Research has highlighted that expatriate support programs contribute to enhanced expatriation outcomes for both assignees and their families (e.g., Guzzo et al. 1994; Harvey 1996, 1997; McNulty 2012). While much has been said about how organizations can improve the non-work aspects of assignees and their families regarding work-life balance and their overall well-being (e.g., Caligiuri 2005; Glanz and van der Sluis 2001; Shaffer and Harrison 1998), few academic studies have

identified which aspects of support are most helpful. Industry consulting reports suggest that great strides have been made by listing, year after year, the types of relocation support being offered: there are more look-see visits than ever before, more training is provided, and more companies are making it easier for female executives to take overseas jobs by recognizing the needs of the male accompanying spouse. Indeed, issues not seen a few decades ago—security, work permits for accompanying partners, special needs children, split families, even elder care—are all being noticed and addressed by some organizations (Brookfield Global Relocation Services 2012; Cartus and Primacy 2010; Mercer 2011). What remains less clear is whether data provided by HR managers and global mobility departments who contribute to these industry reports is truly reflective of the experiences of expatriate families. HR practitioners may know what is contained in a company's relocation policy, but may remain unaware if the policy is being implemented sufficiently well through outsourced third-party vendors, or whether the policy provisions are actually effective.

In this chapter, we re-visit the issue of organizational support through the eyes of expatriate families. Our research is grounded in theoretical perspectives on perceived organizational support (Armeli et al. 1998; Aselage and Eisenberger 2003; Eisenberger et al. 1990), work/life balance (Greenhaus and Beutell 1985; Greenhaus and Powell 2003, 2006), family systems theory (Caligiuri et al. 1998a, b; Olson 1993; Rosenbusch and Cseh 2012), crossover theory (Westman 2001; Westman et al. 2004), and the job demands-resources model (Bakker and Demerouti 2007; Demerouti et al. 2001; Karasek 1979). Drawing on these theoretical perspectives, we explore and interpret expatriate family narratives on international mobility. Specifically, we focus on the key challenges and opportunities international mobility presents to expatriates and their families (in their roles as “family members” first, rather than as “expatriate employees” or “accompanying partners”), the organizational support families receive – and the support they wish they could receive – during international relocations, the key characteristics of the successful “moveable family”, and the importance of family dynamics to successful assignments.

Our goal is to give voice to the human dimension of relocation for families that undertake global mobility. Our findings can be used to determine what types of support are essential for expatriate families and what can be considered superfluous (Haslberger and Brewster 2008; van Erp et al. 2013). Our study is in line with calls for research investigating in-depth experiences of multiple stakeholders and the crossover and spillover processes involved, and examining how aspects of global work relate to work-life conflict and work-life enrichment (Greenhaus and Kossek 2014; Mäkelä and Suutari 2011; Schütter and Boerner 2013; Takeuchi 2010). Our work is consistent with the broader research goal of investigating factors that contribute to sustainable careers and sustainable lives (Greenhaus and Kossek 2014).

Our findings are based on data from an online survey of 656 respondents (expatriates, their spouses, and several teenage children) on assignment in 77 countries with origins in 51 home-countries (see Table 3.1 for sample characteristics).

Table 3.1 Sample characteristics

	n = 656	%		n = 656	%
<i>Gender</i>			<i>Relocated for what purpose</i>		
Female	473	72	Partner's career	395	60
Male	181	28	Own career	198	30
			Both careers	35	5
<i>Respondent's age</i>			<i>Type of organization</i>		
14–18	11	2	Business/corporate	409	62
19–25	14	2	Government agency	65	10
26–35	190	29	Non-profit agency	13	2
36–45	253	39	Academic institution	8	1
46–55	150	23			
56 and over	36	5			
<i>Marital status</i>			<i>Stage of assignment cycle</i>		
Married/relationship	609	93	Pre-departure	16	2
Single-parent	10	2	Presently on assignment	417	64
I am a child	18	3	In location less than 3 months	38	6
			Repatriated	74	11
			About to be repatriated	46	7
			Relocating again in 6 months	60	9
<i>Number of children</i>			<i>Home country</i>		
I am one of the children	15	2	North America	259	39
None	226	34	Europe	156	24
One	111	17	Asia & Middle East	47	7
Two or more	297	45	Australia & New Zealand	42	6
			South America	12	2
<i>Ages of accompanying children</i>			Africa	11	2
Newborn	38	6			
1–4	143	22	<i>Host country</i>		
5–9	181	28	North America	174	27
10–14	174	27	Europe	243	37
15–18	108	16	Asia & Middle East	151	23
Over 18	35	5	Australia & New Zealand	32	5
			South America	27	4
			Africa	23	4

Note: Due to missing responses, not all percentage calculations add to 100 %

Data Collection

Data for the study was collected in 2008 using Survey Monkey as a web-hosting platform. Adopting a convenience sampling approach (Creswell 2003), industry contacts were used to secure an initial sample of about 200 expatriates from a large multi-national corporation (MNC) headquartered in Canada. Using the snowballing

technique (Denzin and Lincoln 2005), all of the respondents were then asked to forward the survey (via a link) to other expatriates they knew. A link to the study was also posted on an expatriate resource website inviting expatriates and their families to participate. Given this approach, it is not possible to calculate an exact response rate for the study. However, it should be noted that the sample size compares favourably to sample sizes reported in other expatriation family studies (McNulty 2012; Shaffer and Harrison 2001; Tharenou 2008).

Sample Characteristics

Seventy-two per cent of the respondents were women and 93 % were presently married or in a committed relationship. The majority of respondents (60 %) had moved because of their partner's career. However, there were differences between men and women: 83 % percent of the female sample had moved because of their partners' career, 12 % because of their own career, and 5 % because of both careers. Among the men 82 % had moved because of their own career, 10 % because of their partners' career, and 8 % because of both careers. The largest group of respondents were in the 36–45 year age group (39 %). Sixty-two percent of respondents were accompanied on their assignment by one or more children. The sample also contained 18 teenage children (3 % of total sample) and 10 single parents (less than 2 % of sample). Sixty-two percent of respondents had been relocated by corporations, 10 % by government agencies, 2 % by non-profit agencies, and less than 1 % by academic institutions. The large majority of the sample (79 %) were currently on assignment and 11 % had repatriated. Nine percent were between assignments. More than two thirds of respondents had had multiple assignments with the majority originating from home-countries that included USA, UK, Australia, Canada, Germany and France.

Question Development

The online survey contained a mix of Likert-type scales and open-ended questions that solicited information about the support expatriates receive during international relocations, the logistics of support and moving, and relocation-related tension and its impact on family relationships. We asked the respondents' opinions on what makes relocation successful and on the skillset of the successful "movable family". The original version of the survey was designed by an HR practitioner but the advice of two academic consultants specialising in expatriation was sought and subsequently used as an "orienting framework" (Creswell 2003, p. 30). Questions were developed based on the consultants' deep knowledge of the expatriation literature and the central issues and challenges faced by those relocating abroad. To facilitate a narrative account that is central to the qualitative approach adopted in this

study (see Gertsen and Söderberg 2010; Holt 2010 for similar approaches), a wide range of open-ended questions were included. These questions allowed respondents to provide as much detail as possible in order to convey more richly the depth of their experiences while living abroad. The stories arising from the detailed data are recounted in our findings section.

Data Analysis

Given the large amount of data collected, three steps based on content analysis were adopted to constrain the meaning of the respondents' opinions and attitudes in an organised way (Tharenou et al. 2007; Sommer and Sommer 2002). Analysing qualitative data was based on data reduction and interpretation, which involved taking the information provided by respondents and reducing or "de-contextualising" it into specific categories (Tesch 1990, p. 123). The information was then interpreted or re-contextualised to form themes from which key outcomes could be determined.

In the first step, data were coded and themed by reading through all the survey responses and then sorting and clustering data to arrive at emergent key themes. This often involved re-grouping and re-linking ("theming") to consolidate the meanings emerging from the data (i.e. emergent analysis). Topics that related to each other were grouped together and re-labeled to reduce the number of categories. The most descriptive wording for that particular topic was used. The category system enabled us to maintain a clean and organised structure.

For the second step, interpretative analysis was utilized in which data were linked to the findings of existing literature to form the research outcomes (see Eisenhardt 1989). Analysis of the themes involved searching for patterns in the data and for ideas that could explain why those patterns emerged (Saldana 2009). As required, themes were re-organised, re-named and/or re-grouped, and further refined and modified as data analysis progressed.

The third and final step involved frequency counts of Likert-type questions to determine how strongly some key themes were manifested (Tharenou et al. 2007).

Findings

Organizational Support

What Expatriate Families Receive

Most broadly, our analyses suggest that despite years of research illustrating that organizational support is hugely beneficial during international relocations (e.g., Fischlmayr and Kollinger 2010; Gomez-Mejia and Balkin 1987; Guzzo et al. 1994; Lazarova and Cerdin 2007; McNulty 2012; Tung 1987), organizations appear to have learned very little. Our findings show that while support may be written down

in a policy, it is neither being communicated nor implemented to those that need it, in particular the trailing spouse. Thus, although the respondents in our study experienced a lot of demands (from major stressors, such as marital tension, to daily hassles, such as being unable to contact a service provider) and expected organizational support to help ease the strain, the majority perceived that the support they received was largely inadequate.

To illustrate our point, 76 % of family members received no direct communication from the sponsoring organization (other than via the employee) before undertaking an international relocation. Further 70 % received no direct communication from the company about the relocation after they had arrived in the new location. As one respondent said,

I don't trust HR and would not want to rely on them (six moves so far, all in different countries, on five continents). I find out all the information on expat websites now.

More than 60 % of respondents were also not offered cross-cultural training (CCT) before undertaking their current international relocation. However, this finding must be interpreted with caution on the basis that we did not control for company-assigned versus self-initiated expatriate status (CAEs versus SIEs), wherein CAEs would likely expect CCT but SIEs would not (the same might also apply for direct communication). Nonetheless, and on the bright side, whenever CCT was offered, it was more likely to be extended to all family members as opposed to only the employed spouse. Those who had received CCT considered language training to be the most valuable, followed by culture shock training and country-specific information briefs.

While many respondents reported the availability of onsite host-country support, this support was focused predominantly on practical and logistical issues. Typical components of practical support included real estate assistance (67 %), help with obtaining necessary work permits (55 %), help with setting up bank accounts (42 %), medical referral services (29 %), school search (25 %), and handyman services (15.5 %). Several respondents also reported being offered language lessons (or help with arranging them). These numbers do not compare favourably to the picture painted by industry reports at the time the survey was conducted, which showed that practical and logistical support was extensively provided (e.g., GMAC and NFTC 2008; Brookfield Global Relocation Services 2009).

Overall, our results suggest that consistent with other recent academic studies, the practical and logistical support offered to respondents is “patchy” and inconsistent (Kupka et al. 2008; McNulty 2012). Comments in this regard indicate that whilst some support was provided, it was not what the expatriate family needed:

I got a packet of information that listed shopping information, areas of interest and some services but I probably could have gotten most of the same info from the yellow pages and the visitor center.

Additionally, many respondents shared that they felt the burden of the international relocation was on their shoulders alone with little if any support from an organization. Several respondents indicated that while they were well compensated during the assignment, this still did not negate the need for support:

I think they figure we must be used to it and as long as his package is high enough in terms of salary then we have nothing to complain about. They are paying for us not to be a problem.

And in the words of another:

The company gave us money and washed their hands off the entire situation so it was a very difficult transition.

Or as one respondent expressed it more humorously,

I said to my husband after our third move: I think the company would prefer to send me in the container as well, much easier.

What Expatriate Families Would Like to Receive

To explore this question we included a list of typical assignments support initiatives and asked that respondents indicate whether such support was available and/or desired. The survey also included an open-ended question, asking what support they personally preferred to have received during relocation. While a small minority of respondents indicated that no specific support was needed (*“None at all. None required. These are all routine life tasks. If you need help with any of this then stay at your parent’s house”* was the quote that best illustrated this position), the majority of respondents discussed specific programs they wished had been available to them.

- **Social support**

When asked what needs to be included in a relocation policy in order to meet the needs of the family, 66 % of respondents indicated that a contact at the new destination to help them settle in is the most important type of support. Such social support initiatives topped the “wish list” of programs our respondents would advise future expatriates to seek from their companies. Many talked about being assigned a “local buddy”, the “ability to talk to other folks”, and the benefits of facilitating social introductions. As one respondent put it, she needed “*someone I can call even with questions that may seem minute details of the move.*”

There were a number of comments regarding the social time needed for families to settle in and the challenges that arise when the employed spouse begins working right away, often with gruelling hours and traveling away from home on business trips. More manager support and flexibility at work are called for, as is more time off for the working expatriate in the days immediately following the relocation. There is a clear sense of frustration that companies do not understand that relocations are not completed in 2 weeks, and that “*throwing money at the problem*” does not solve the challenges expatriate families face.

- **Practical support**

Our data also indicated a strong focus on practical support. Funding for look-see visits (64 %), funding for school searches (64 %), language training where necessary (57 %), and involving the spouse in preliminary discussions about any

new relocation (56 %) were listed as important. Look-see visits in particular are seen as an important way to reduce education and housing stresses which impact on families, yet was offered to only 50 % of families. In terms of pre-relocation preparation, look-see visits enable families to “*choose home and school in advance of arrival*” and avoid “*poor choice of housing in relation to distance from school/work*”. Another important area where support was insufficient was school searches. As indicated above, less than 30 % received school search assistance – a major failing considering the high number of families relocating with children (65 % of our respondents were accompanied by one or more school-aged children).

Access to local practical information, be it from other individuals or formalized as a relocation handbook specific to the assignment location, was equally important. One respondent would have liked a “*five things I wish I knew when I arrived*” manual (compiled by expatriates currently at the location), while another wished for “*a map with the bank and the grocery store on it*”. Among the most highly sought types of support were information on the local housing market and on local schools, followed by medical referral information and a list of “*favorite spots*”. The desire for local information was not limited to clarifying logistical issues, however. Working expatriates would have appreciated informal information and tips on the work culture and the rules of the local workplace.

Respondents also discussed at great length the need for on-site practical support, starting with interim housing and transportation (and, where needed, interim daycare, followed by help when unpacking, especially for families with very young children). Next was help in setting up the basics of day-to-day life (internet and TV, connecting utilities, “*mobile phone upon arrival*,” getting driver licenses or help securing a car and a driver, “*access to a handyman*,” opening bank accounts, or applying for credit cards). Further, there was a shared opinion that such support should be ongoing and that relocation companies should not “*say good-bye in two weeks*”. Respondents talked about the need for regular check-ins between the company and the families and about the “*flow of care*” – from expatriation decision, throughout the assignment, and ending with a debrief post-repatriation.

- **Support for family members**

Support for family members – including spouses, children, elderly parents, and even pets – was another important “*wish list*” item. Perhaps not surprisingly, support for spouses was required mostly in the career domain, with most respondents looking for career counselling, and more importantly, help finding jobs and applying for work permits (less than 10 % of respondents had access to spouse career counselling). Most commonly, support for children was needed in terms of finding the right schools, but respondents also talked about the challenges of finding daycare options for young children. Another topic was special needs children and obtaining support specific to their issues and challenges. Another area that appears to represent a “*blind spot*” in organizational support and policy development is that of single-parent expatriate families. Although accounting for less than 2 % (n = 10) of the sample, respondents vividly described their challenges in the face of non-existent support for their unique situation. Several respondents also talked about

the assignment removing them from aging parents who required ongoing attention and care, and the need to address this issue for current and future assignments that might be undertaken. As many respondents consider their pets to have the standing of family members, many wished for better support for “*relocating pets.*”

- **Financial support**

There were also a surprisingly high number of comments about the unexpected financial costs of an international move for which expatriates are not reimbursed (e.g., driving license fees, fees for car leases, or the fees involved in renting an apartment for a period shorter than a standard lease period) and the burden of these costs to the families. These issues are rarely, if ever, examined in the academic literature, and only glossed over in industry reports. Respondents not only commented on the high price tag of relocating abroad but also expressed surprise that they were expected, in most instances, to cover some expenses out of pocket. Many said that their company policies were unclear or misleading, thereby suggesting that families considering a move abroad need to request generous relocation budgets with all the costs to be covered being explicitly spelled out, or to be mindful of ambiguity in policy wording and to seek clarification early and in writing. In the absence of direct financial reimbursement, there is a suggestion to request a relocation-only credit card or an extra cash allowance in countries where the lack of credit history may create an obstacle in credit card applications. While the expectation is that many expatriates undertake international assignments on full packages, the reality is that an increasing number are doing so today on local-plus and localization packages, where compensation is significantly reduced, and many are living as locals in the host-country (ORC Worldwide 2008; Tait et al. 2014).

- **Communication support**

As briefly alluded to earlier, many respondents feel that there is a lack of transparency in international relocation policies. One respondent referred to living with uncertainty and unpredictability brought about by lack of information (“what happens next”) as living in “*limbo-land*” (see also, Brown 2008). There were calls for more clarity about the expatriate contract as well as detailed explanations of the types of relocation support to be expected – what the relocation package contains, what the relocation policy will cover, where to seek support, who to contact in case questions arise (especially during the move and in the immediate period after arrival), information as to what can be shipped and related customs implications (e.g., China restricts personal books to a maximum of 500 per shipment and does not allow photocopiers), tax implications of the move, home leave policies, and so forth. Along the same lines, respondents wished that the expatriating company would also provide information regarding any relevant rules and regulations in the host country that may affect the family.

Another important aspect of communication support is that of a direct contact between the expatriating company (and the third-party relocation company, if applicable) and the trailing partner, as it is the latter that typically bears the lion’s share of responsibilities regarding pre-departure preparation and post-arrival settling

in. Leaving spouses “*fumbling around in the dark*” while necessitating that the working spouse is “*the go-to person for everything*” even though they have little to do with every day relocation tasks and are often “*traveling on the other side of the globe*”, appears to be rather common – and predictably, it is a cause for much frustration, tension, and, eventually, deep resentment. As one trailing spouse said:

Since I am not an employee, I can’t even request a plumber by myself! It’s as if the regular components of everyday life no longer have anything to do with me.

Communication support cannot be overstated. As perhaps the least expensive type of support that can be offered to expatriate families, the value of clear communication channels that directly involve the expatriate family is immense, particularly in providing peace of mind. Many of the respondents said that their move would have been much easier if they had had “*regular status updates*,” “*good regular communication with the people involved*”, and “*a single point of contact who is in full control*.” The respondents therefore advocated very strongly that not only was it necessary that a contact between the company and the trailing spouse be established, but that it also be fully formalized, with the trailing spouse being given proper authorization to make important decisions related to the relocation. This includes being copied on all important (non-job-related) briefings and being “*kept in the loop*” regarding the move.

The Causes of Assignment Failure

We asked respondents two related questions as to the factors that contribute most to their family’s adjustment during an international relocation and, conversely, the factors they consider to be at the root of assignment failure. In response to adjustment, assignees agreed that how financial issues were handled (76.7 %), culture shock (72 %), support after the relocation (71.6 %) and spousal career concerns (70.4 %) were all important. In terms of failure, the responses focused squarely on family-related issues such as spousal career concerns (90 %), spousal resistance to the move (90 %), and marital breakdown (90 %). Open-ended comments were very much in line with these themes, as discussed below.

Financial Concerns

The dominance of financial issues is consistent with the concerns regarding unexpected financial costs arising from an international relocation. This may come as a surprise given the widely reported generous compensation packages expatriates are said to receive (Chen et al. 2002; Leung et al. 2009; Puccino 2007; Reynolds 1997; Toh and DeNisi 2003). Related comments suggest that the most common cause of financial difficulties is the loss of a second income as a result of moving, due to an inability of the trailing spouse to get a job in the new location arising from

work permit restrictions or other barriers (e.g. qualifications not being recognized, language difficulties, or local licensing requirements). This often leads to marital tension for the expatriate couple (McNulty 2012) or identity problems for the trailing spouse (Shaffer and Harrison 2001). Financial stress, for example, may exacerbate the loss of identity and independence family members feel as a result of giving up paid employment. In the words of one respondent:

My husband began working horrendous hours, I had difficulty finding a job, and I received no career support. It created a very stressful environment for our new marriage without any counseling or support from the company.

Another said,

Work has become the focus of my husband's life. This is to be expected but since I don't have a job to consume my life, there is a division . . . it is no longer OUR money (even though it is) – we both know it's his. And that is very difficult to accustom one's self to.

Another reason for financial difficulties is that, in an attempt to rein in costs, corporate generosity appears to be dwindling. For example, an increasing number of organizations are introducing local-plus or other hybrid compensation packages. A local-plus package is one where assignees are paid according to the salary levels, structure, and administration guidelines of the host location, as well as being provided with limited 'expatriate-type' benefits such as transportation, housing, and dependents' education in recognition of their 'foreign' status (Stanley 2009). The downside of local-plus is that it is often coupled with being relocated to a city where there is "*a dramatic change in the cost of living between [home and host] locations*" which reduces expatriates' buying power for everyday goods and services. As one spouse explained:

We had a really healthy and strong marriage for a long time before the relocation [but] our family grew apart (coming close to divorce) . . . definitely over finances – I was not working and it was stressful to realize how much more expensive this city is than the one we left . . . I felt isolated and missed my friends and was resentful that we felt "broke" and it appeared to be on me to get a job – when there were so many things we needed to do that required me to be home.

Spousal Career Concerns

Consistent with much past research (Harvey 1996; Mäkelä et al. 2011; Reynolds and Bennett 1991; Riusala and Suutari 2000; Stephens and Black 1991), respondents indicated that spousal career concerns were a major factor that may be related to assignment failure:

The key source of tension has been my change in circumstances from full time employment to struggling to find work. This combined with my partner working long hours and travelling a lot has made it very difficult for us.

Findings illustrate the link between spousal career concerns and changes in the marital relationship. McNulty (2012) alluded to marital power struggles in her study of trailing spouses. Our study provides further evidence for this:

The relationship is no longer equal. The working partner works long hours, receives substantial recognition for his work . . . it's as if the regular components of everyday life no longer have anything to do with me. The working partner, while trying to be incredibly supportive, simply doesn't quite understand the change in status we've each gone through.

Findings here point to prior research (Harvey 1997; McNulty 2012; Moeller et al. 2013; ORC 2005) showing that professional support in the form of job search, career counseling, resume preparation, work permit assistance, and retraining/tuition reimbursement are highly valued by expatriate family members. It is worth considering also that the Permits Foundation (2009) found that employed trailing spouses perceive working during an assignment as having a positive impact on their adjustment, family relationships, health and wellbeing, as well as on their willingness to complete or extend their current assignment, and go on a new one.

Marital and Family Stress

Marital stress and marital breakdown have rarely been looked at in the expatriate literature (see McNulty 2012 for an exception). As previously mentioned, many respondents in our study were candid about marital stress. One clear theme was that when *“things are not quite right to begin with”* or *“your marriage is on the rocks before a move”*, then relocating abroad *“will break your marriage up.”* This is because *“relocation isolates the family from known outside support networks”* further increasing the tension. In other words:

If the marriage is already weak or the ability to communicate is poor, then the relocation heightens intrinsic weaknesses or flaws. I don't think it causes a marriage to fail – but often it is the straw that breaks the camel's back.

A frequent complaint by expatriate families that causes considerable marital tension is the absence of working spouses due to excessive job demands and the feeling that they need to *“prove themselves”* in the new location by spending a lot of overtime at the office. This leads to stay-at-home spouses *“feeling lonely at times”* and being *“sad that he is losing out on raising his children”* because of the 24/7 work cycle that often involves multiple time-zones. For others, there is resentment towards the company, and sometimes their spouse, for *“promises about time spent together not [being] kept”* and for failing to see that these types of habits can cause longer-term problems. As one trailing spouse said:

Just because it may be expensive to have the employee on a project doesn't mean the employee owes the company 80 hours a week.

Another candidly confessed:

My husband works long hours. I'm lonely and I can't tell him because I don't want to add to his stress. We hardly talk anymore.

Working spouses too feel the pressure as this respondent explains:

It is difficult for the family to understand why I am working so many hours. I'm trying to do my part in what I know can be a very successful deployment. [But I] just do not have the level of support that is needed from the team here who needs to take ownership of the process.

A lack of trust in a marriage is also a key factor in assignment failure, particularly when there is a change in the working culture for the employed spouse. Changes in some countries include *“heavy drinking like in Korea and Japan, womanizing, or even second wives”*. There are also infidelity-related problems arising from *“things that happen when mom and the kids leave for the summer!”* and the *“availability of cheap local options!”* that can create longer-term problems for expatriate families. One respondent went so far as to suggest that *“men end up having affairs and women end up being lonely”*.

Undoubtedly, happiness of family members is key to many aspects of assignment success, and conversely a key factor in assignment failure when family members are unhappy, particularly where the happiness of the accompanying spouse is considered by many to be pivotal to family closeness after relocation (McNulty 2012). As one respondent said:

[...] while I wanted to move, my wife did not [so] settling in and integrating has been a challenge for her, and she hasn't really embraced living in the new location because she wasn't very happy to be moving there in the first place.

It is important to note that while family happiness entails many different factors, there is considerable research showing that these factors do not exist in isolation but are in fact inter-related: there is crossover between the partners and spillover of family and work issues (Lazarova et al. 2010; Shaffer et al. 2001). Respondents in the study agreed that tension *“definitely impacts the whole family – stress begets stress”* and that *“basic family systems theory says that tension affects homeostasis of the family unit; it affects everyone. Even little kids know that something is different.”* The resulting stress can impact on family members level of adjustment, satisfaction, marriage quality, physical and mental health, and willingness to re-assign. Consider, for example, the following example where the trailing spouse's loss of self-esteem creates conflict in the marriage:

My husband started work immediately and I was left with the task of settling us in. Without support I felt lost and in a foreign language and culture sometimes it was scary. My husband would get impatient because I seemed less confident than usual and was taking a long time to cross things off the list. The tension began there. Had I had someone to meet with, to support me and help guide me through, I would have had a much better experience. My husband was the only support and he was frustrated with me. I resented this and our relationship changed.

Children, too, can be a source of stress, as these parents candidly shared:

The middle child was very angry at having to leave his school and friends behind. He chose to rebel and make life miserable for himself, and consequently, the rest of us.

Almost anyone who makes a big move will face tension at some point – it may come from the couple or the children, but at either level it affects everyone. In our case, the big issue lies

around our daughter who hates her school (justifiably as far as I'm concerned). As changing school would mean moving house for us, that's not an option now. Her unhappiness has weighed heavily on me, which affects the whole family. It only takes one person to start the snowball effect – be that person child or adult.

The majority of respondents (92 %) believed that relocation-related marital tension filters down to the family: *“kids can sense the tension no matter how hard you try to protect them from it”* and *“[we have] less patience with the kids; we all get frustrated and much more arguing goes on.”*

Children's own comments were in line with the idea that stress crosses over across family members: *“any stress between Mum and Dad has an impact on the children!”* Despite these findings, there are no industry reports and only very limited research (Weeks et al. 2010) touching on the subject of children's stress during international relocations. Our findings therefore reveal some unique data that cast light specifically on the experiences of expatriate children, as these teenagers explain:

I would like more help for the children. It was left to my parents, but they were so busy organising everything, that they had little time to tell us where we were going, or even prepare us for the shock of moving to a country where it's so culturally different to what we were used to.

My parents restricted us from talking to our friends about our move until they had made it public. It was awful. AWFUL. We couldn't talk to [our parents] (because they don't understand), or our friends, or anyone. It still hurts just thinking about it. Parents are key – if they minimize your pain, they don't realize that they are just adding to it.

Related to this, the child respondents shared that they often feel relocation stress more keenly than their parents may be aware of:

Make sure that your children have help with adjusting to the change. It was very hard on me and I hope that other people will have an easier time of it.

Children also shared their concerns and views about frequently changing schools:

When I went to an international school it was great, they were prepared for resistance and confusion. But non-international schools are not and they didn't know how to cope with my lack of education from a previous system or how to get me to catch up. Do not leave the kid struggling to catch up in a more advanced education system thus leading to poor educational self-esteem, which leads to all kinds of problems.

In addition to constantly changing schools, as well as the loss of friends through each subsequent move, children experience stress through a parents' work-related absence or when families engage in a split assignment across different countries:

My father now works in China (before, we lived with him wherever he worked), whilst I live in England with my Mum and sisters, so we see him for about a week every two or three months. My sisters and I are all at separate boarding schools (we used to all go to the same day school), so during term time we see each other for one or two days a week.

I had a hard time with the move, and then I went to boarding school while my brother stayed at home. It made our family grow apart.

Not surprisingly, our data indicate that relocation-related tension affects everyone in the family negatively, as summed up eloquently by this expatriate child:

Dad gets caught up in work, mum gets caught up in unpacking, brother plays his games, I read my books. No one really goes out of their way to talk to each other.

As noted above, our study also found evidence of unique challenges faced by expatriate single parents. Consider, for example, the following comment:

In my case, as a single parent, it has been much harder than I ever imagined and there is no appreciation for this. I worry every day about the safety of my daughter. Policies assume one is either single with no kids or that there is a spouse that will be able to take care of things.

Another respondent, a divorced father and assignee, describes:

Relocation packages are normally aimed at the traditional nuclear family. Being divorced with two young children, a lot of the benefits are not relevant, and yet additional expenses and difficulties arise (for example, my children are still in my source country, so I have the obligations to travel and videoconference that most relocatees do not have). Recognition of the increasingly nontraditional family structures would be a benefit.

It must be noted that not everyone had a negative perspective of the impact of the relocation on the family. Although in the minority, several respondents suggested that the shared experience of a relocation can bring a family together no matter how unfavourable the circumstances may be, as illustrated by the following quotes:

We bonded because it was a crisis situation; we had no assistance, and we (mother and kids) were basically dumped in a foreign country and left to fend for ourselves. It was a ‘survivor’ situation.

[We] got close because of the challenges we faced.

Characteristics of the Successful “Moveable Family”

What do successful moveable families look like? When answering this question some respondents provided several stereotypical images: a family that does not relocate with children, a family with a spouse with a portable career, and a ‘Stepford-type’ family with a non-working spouse. Others suggested that success is dependent on the female partner being a “*strong, independent, unflappable woman*” ready to manage the logistics of the relocation. But instead of focusing on *images* of an ideal expatriate family most respondents discussed several family *characteristics*. Many suggested that the core is provided by a healthy relationship between the partners, where the “*family must be water-tight*”. Others suggested:

Relocation support is only a small factor . . . if your marriage is not strong, you shouldn’t relocate overseas. People try and escape their problems and realities by going abroad only to have them re-surface elsewhere.

Next comes the right attitude towards the move. Assignments can be derailed by:

inherent lack of “adventurous spirit” among those participating in the move. If the people moving see the glass half empty [and] not half full, it will be more difficult to see the changes to come as anything but irritating.

The critical role of attitude is also illustrated by comments suggesting that as long as all family members are “*on the same page*”, the relocation is a lot easier. For example, some trailing spouses viewed long hours at the office by their partners as part of the agreement for undertaking the assignment, and were therefore comfortable with the arrangement:

Although my husband works long hours and is frequently away, I understand that we can't “have it all” – I can't expect to live in another country with my husband earning an excellent salary, and be able to afford for me to stay at home with the children, and be able to afford frequent travel for shopping, a cleaner, a gardener etc., and have my husband not work long hours. My children know how lucky we are, and know why their Daddy works so hard. We accept this, it works for us, and we are happy.

Another trailing spouse suggested that:

some people just work harder at coping with new surroundings and living them realistically rather than treating the overseas experience as a long-term holiday.

Other family characteristics include having a sense of adventure, good communication that involves sharing and active listening with no blame or judgement, everyone being committed to the move, a sense of humour, a conscious effort to socialise outside of the family rather than focusing constantly on the family unit, a family where all members “*pull in the same direction*” and where all members are treated as important and “*come first*” in family decisions. As one respondent said, “*a moveable family succeeds as a family, not as a spouse with a big career and trailing appendages.*” The remaining characteristics for family success refer to an expatriate family's expectations, and include having few expectations that things will be the same as the home-country with checks in place to ensure there is minimal “*craving of things from home*”, not expecting that everything will be perfect, and an organized family that can still “*go with the flow*” when something does not go according to plan.

Implications for Research and Practice

Our study examines data from more than 650 expatriate family members who drew on many combined years of first-hand expatriation experience. Findings relating to the characteristics of a successful moveable family therefore represent a depth of understanding that is quite rare in research to date, and is typified in comments such as the following:

Everyone is on edge and feeling vulnerable . . . we may all have similar needs but they surface at different times. Some of our worst arguments have occurred during the pre/post move times, but as well, some of the most bonding moments have happened also. I have loved our expat life, but have always felt that ‘moving sucks’ . . . everyone tries to put on a brave face and show the world how well they are coping, when secretly, the ‘wheels may be falling off’, behind closed doors.

What can companies do to be more effective in supporting moveable families? Many respondents talked about improving communication between non-employed members of the family (the trailing spouse) rather than funnelling information

about a move only through the assignee. Also important is professional support for the career-oriented spouse, better practical support that is meaningful and targeted at actual (as opposed to perceived) family needs, and social support to engage with others in the expatriate community, aging parents in the home-country, and improved pet relocation support. A new finding not yet widely reported in the literature is the need for financial support, particularly when policy does not cover certain unexpected expenses, and/or when a family is compensated on a reduced package. Local-plus and localization represent new challenges for expatriate families that research is yet to catch up on (Tait et al. 2014), hence more research is needed to investigate the implications of reduced compensation packages and how companies can better support families 'on the ground.'

Related to this is the idea that the assignee's partner deserves appreciation for their efforts during an international relocation, considering that the burden of relocating usually falls on their shoulders – and that such recognition is in relatively short supply (less than 20 % of respondents said that they were thanked by the company for their role in the move). Responses to this question varied from “*you have got to be kidding! My husband's pay check was sufficient!*” and “*I am used to being ignored*” to “*it was not necessary*” or “*it was impersonal – but it still made me feel good.*” Unfortunately, most respondents reported a general lack of appreciation and goodwill gestures on behalf of the company. Undoubtedly, this form of support is one of the most inexpensive components of the relocation package, as is connecting families to each other and clarifying policy considerations, among other things, largely because even the smallest gestures of appreciation and/or support can lift the spirits of someone that is stressed out and overwhelmed by the many aspects that an international relocation entails. Yet, the lack of even a small amount of effort can leave family members feeling 'flat' and ready to give up, as these spouses candidly explain:

[I am] sometimes angry, sometimes sad, but all the time sorry about the company's stupidity and believing that my husband would succeed in this post if I was not taking care of all the rest.

[I feel] like I don't matter. My husband is just a cog in a wheel. I am a non-entity.

One area of support that we found to be especially important is awareness by all stakeholders in the relocation process (i.e., the company, third-party vendors, other expatriates already in the host-location, and working spouses) that often it is the little things that count, as this spouse explains:

The company threw a party to welcome all the families that had relocated to Spain to set up the company's new headquarters location. It was very well received by the families. It gave the non-working members of the families (spouses and children) an opportunity to meet the other families; to commiserate about the hassles of the move; to share info and tips about newly found sources (where to buy appliances; where to buy certain foods or clothing). It provided a recognition that it was not just the worker who had moved, but the whole family. The General Manager thanked the families for having made the move. It was a good feeling.

When families do struggle, family counselling is seen as one area to which respondents would like access. For example, while nearly 90 % of respondents

indicated that training/support with regards to family/marriage counseling was ‘not applicable’ to them, nearly 70 % still said that relocation policies should include the funding of transition counseling or coaching for the family.

Organizations must also recognize that the image of ‘Mom, Dad and the children’ no longer applies universally. Children, for example, may be left behind in their home country to continue schooling, be sent to a boarding school in a third country so that their education is not interrupted by continuous relocations, or be away at university, none of which diminishes a parent’s responsibilities to that child. Aging grandparents also place demands on expatriate families who are responsible for their care. Split family arrangements can be particularly onerous, largely because expatriate benefits are typically not extended to family members that stay behind in the home-country (Brookfield Global Relocation Services 2013), despite the enormous stress that the absence of the assignee places on the family.

A key point here is the changing face of expatriate families. McNulty (2014) found that there is virtually no support for single-parent non-traditional families, with their needs being addressed on a case-by-case basis and resting largely on the sympathy and understanding of a caring decision-maker or boss. Thus, while most relocation support is geared towards traditional nuclear families, more help is needed to support single-parent families, and to encourage single-parents to consider engaging in international relocations. More research is needed to understand the unique needs of these segments of the global talent pool. Single parents, divorced parents, new families formed after the separation of prior families, and couples committed to each other, yet not legally married, all have an impact on the needs of expatriates, and underlines the need for flexible relocation packages. As van Erp et al. (2013) suggest, the challenges of international assignments must be examined from a more comprehensive family perspective.

A last recommendation is for more research that examines expatriate marital tension and stress, the causes and consequences of expatriate divorce, and conversely the characteristics of high performing expatriate families, none of which has been well addressed. Research on the needs of expatriate children, including their perspectives on relocating and living abroad are rarely, if ever, explored but much-needed as the expatriate family remains a formidable factor in international assignment success.

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