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Using expatriate industry surveys: What to look for

PART I

Industry surveys on all aspects of expatriation have proliferated over the past five years. Global companies such as PricewaterhouseCoopers, Prudential, Cendant Mobility and KPMG have joined the ranks of organisations like GMAC/ NFTC/ SHRM and are now publishing statistical data on everything from current mobility trends to new expatriate policies and practices. Yvonne McNulty takes a look at eight of the major industry surveys and provides some key tips about what to look for in these reports.

Who, and how many?

As impressive as most surveys often appear at first glance, especially when a name like Mercer or Prudential appears in the title, there are two important criteria that a published survey should meet.

The first is the 'who?' question. What key problem was the survey intending to address, and who was asked to participate in the survey to shed light on those concerns? For example, Cendant's *International Assignment Policies and Practices Survey Asia Pacific 2001* provides an extensive explanation on page two of not only the objectives of the survey, but also the methodology used to collect the data.

As this was an Asia Pacific survey, the reader can immediately determine two things: that an appropriate population was used to collect the data (HR professionals responsible for international assignment policy within the Asia Pacific region), and that these professionals were located in countries appropriate to the region being investigated.

Yet, believe it or not, many a study has been published that has fallen short of meeting the 'who?' criteria. For example, until very recently most studies exploring accompanying spouse or dual-career issues in expatriation failed to include the accompanying spouse as a key respondent. Instead, the employee or a HR professional was asked to participate in lieu of obtaining data directly from the source of concern (spouses).

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One excellent survey, which has recently addressed this problem, is Prudential's *Many Women Many Voices* survey in which nearly 200 accompanying spouses participated in a study about spousal adjustment. Another study, *The Trailing Spouse: Barrier to Mobility or International Asset?* used 216 trailing spouses as sole respondents.

What these studies recognised was that the best person to shed light on a key concern was the person currently experiencing it. So, whilst employees and HR professionals might be fully aware of the issues, their point of view was not considered to be as valid as the trailing spouse who was living the experience daily.

The second criteria that published surveys should meet is the 'how many?' question – How many respondents participated in the survey? This question is extremely important because, to the untrained eye, cleverly presented statistics can fool even the most experienced practitioner.

Take, for example, the Cendant survey mentioned above, in which it was reported that 44 percent of organisations indicated that they had had assignment failures (see page five of the survey). We know from page two that 62 HR professionals participated, so we know that 44 percent of 62 equates to approximately 27 HR professionals reporting assignment failures.

Compare this to a population of, say, ten HR professionals, of which 44 percent reported assignment failures. The actual number reporting failures would come down to only four respondents, which is not a number you would want to rely on to make changes to your own expatriate policy.

The point of the 'how many?' question is to ask yourself how much faith you should have in the statistics you are reading. Is the input of 62 HR professionals reliable enough for you to make changes to your own expatriate policy based on those statistics? Can you sit in front of your boss and confidently argue a point, safe in the knowledge that you have the statistics to back it up?

In most instances, the 'population' size (of 62) in the Cendant survey would be considered reliable. But would you have the same confidence if a population comprised 10? Probably not, and you would not be overly critical for coming to that conclusion.

In academic circles, it is widely acknowledged that a good survey strives to achieve a minimum population size of 30. This is because 30 respondents are considered representative of a 'normal population', that is, the views of 30 respondents is general enough that it should represent the entire population with some reliability.

Hence, populations above 30 are considered 'normal' or

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'large', and populations below 30 are considered 'small'. Naturally, large survey populations (especially those in the 100's, or even 1,000's) are considered especially reliable. For instance, the famous academic culturalist Geert Hofstede published a study that used a population of over 65,000 respondents. Is it any wonder that his work is the most often-cited study of its kind in the world?

The major point to be made is that the quality of a survey is only ever as good as the 'who?' and 'how many?' question. As a famous researcher once said, "the right answer to the wrong question may be entirely pointless."

Similarly, an impressive statistic from the wrong population would be just as pointless, particularly if that population was considered too small to be truly representative of the general population overall.

Part II of this two-part feature looks at the best industry surveys of the last five years.

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