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Industry Surveys 2004: A Review of the Best (Part I)

During the past year some very impressive industry surveys have emerged in the International HR field—and along with the better known reports, a new breed of survey has joined the ranks. Yvonne McNulty reviews six surveys from this core group in a two-part series.

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Introduction

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Industry surveys are an excellent tool for benchmarking. In addition to surveys already published by PricewaterhouseCoopers, Cendant Mobility, and GMAC/NFTC/SHRM Global, there has emerged a new breed of interesting surveys from ORC Worldwide, KPMG, and Prudential.



Surveys are an excellent tool for benchmarking

The statistics they present can inform our thinking and understanding of the way things currently are in international HR management (IHRM), whilst stimulating us to consider how our own policies or practices can be improved. But industry surveys are only as good as the people who participate in them. And what precisely is a good survey anyway?

Whilst there may seem to be an abundance of surveys on the market at the moment, which contributes to a growing problem of 'survey burnout', there remains a core group who continue to provide a



consistently high quality product. This month in a two-part series, we review six surveys from this core group of industry leaders and explain why participation in these surveys is necessary, and what you can gain from being involved.

Of course, the 'who and how many rule' applies to any industry survey we may read or any survey you are considering participating in (see '[Using expatriate industry surveys: What to look for](#)'). This means always asking two important questions.

First ask 'who is being asked to participate in the survey and do the respondents match the topic of investigation?'

For example, if the survey is investigating accompanying spouse issues, are spouses being asked to participate? If the survey is about global mobility practices, are the respondents multinational companies with expatriate populations?

The second question to ask is, 'how many respondents did, or are likely to, participate?'

A respondent pool (or sample) of 30 or more is considered statistically representative of the general population at large, which means that the findings can be considered statistically reliable.

Samples smaller than 30 can still provide good data but must be interpreted with caution; experts would certainly consider them less representative.

It is also important to note that a sample can be reported in many ways, which can sometimes be misleading. For example, a survey can report that 450 respondents were invited to participate with a response rate of 35 percent. If one does the mathematics, the sample actually consists of only 158 (which is still impressive, but it's not 450). As practitioners the important point is not how many were invited to participate but how many did or are likely to actually participate in the survey.

In part 1 of this series we review three industry surveys from GMAC, ORC Worldwide, and Prudential, including what makes these surveys so good, and why you should consider participating in them.

GMAC Global Relocation Trends 2003/2004 Report

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The [GMAC/NFTC/SHRM Global Relocation Trends Report](#) is in its 11th year of publication, is freely available on the GMAC GRS website (www.gmacglobalrelocation.com), and has a track record of consistently providing solid data on some of the most topical and important global mobility issues.

The broad range of topics covered in this latest survey is impressive, as is the number of questions asked. For example, in the 1999 Report only 54 questions were asked; in 2005 this has doubled to 118 questions, an

increase of 25 percent in just one year, says Mike Gorski, Global Marketing Manager of GMAC Global Relocation Services.

"This represents a growing trend in global mobility for us," says Gorski, "That new issues are constantly arising which we must be prepared to investigate."

"Our Global Leadership Council, which operates like an industry focus group, is especially important when we add new questions to our survey. The senior level managers from 30 organisations who are members of our council bring to our attention the burning questions of the moment, and help us to develop the newer topics we should be investigating."

This includes the hot topic of expatriate return on investment.

"We first introduced expatriate ROI in our 2000 Report with two questions," says Gorski. "But we didn't ask organisations how they defined ROI. So in 2002 we introduced a definition of ROI that 96 percent of respondents agreed with. Then last year we received a frustrating result with these two questions, where only 10 percent of the respondents agreed that they measured ROI using our definition."

Gorski admits, "We acknowledge that the dramatic difference between the 2002 and 2003/2004 results may have something to do with the way we asked the question and how it was interpreted."

First ask 'who is being asked to participate in the survey and do the respondents match the topic of investigation?'

"In the 2005 survey we believe we've corrected the problem by asking five ROI questions, including how ROI is defined and the measures that organisations factor into their ROI calculations. We've learnt from 11 years of experience with surveys that research is never really as simple as a yes or no answer."

For that reason GMAC is asking more exploratory questions this year which will advance current thinking in the industry, rather than simply reporting back what is already known. "The findings this year should provide practitioners with much needed valuable data on what are very important topics in international mobility," says Gorski.

Yet, the 2003/2004 Report falls short in one very important area: the size of the respondent pool seems to be decreasing. The most recent report has only 134 respondents, down from 181 in 2002, 150 in 2001, and 154 in 2000.

The 2003/2004 Report has actually decreased in respondent size by nearly 50 percent since 1999, when 264 respondents participated.

This seems puzzling given the size of the other organisations which sponsor the report, including SHRM Global with a membership of 7,000, and NFTC with 300 member companies.

"I can't explain why the respondent size is decreasing," says Scott Sullivan, Senior Vice President, Global Sales and Marketing at GMAC GRS. "Except to say that, despite our experience and credibility, we are not aggressive marketers and perhaps we should be."

"What I can tell you is that we are striving for a larger global response, particularly in the Asia Pacific region and in Europe, so we're looking to partner with HR organisations in those countries (Australia, Singapore, and Japan in particular) to increase awareness of our survey. Our goal is to achieve a participation level where 80 percent or more of our respondents are located outside North America."

Says Sullivan, "We'd also like to think that our current sponsors are doing their best to encourage their members to participate in the survey, but ultimately we don't have any control over it. What we do recognise is that we need to provide some kind of benefit to those organisations who do participate in the survey."

This year, for the first time, GMAC is offering two new reports. It has just released a companion report to their annual survey that benchmarks trends from surveys during the past 10 years.

The survey "[Ten Years of Global Relocation Trends: 1993-2004](#)" can be accessed from the GMAC website and is free.

GMAC is also offering all participants in the 2005 survey a customised benchmarking report that will compare each organisation against the entire respondent pool based on an analysis of 12 key findings.

To participate in the survey and be eligible for this customised report, participants can use a generic URL at www.gmacgrsglobalsurvey.com or send an email Mike Gorski at Mike_Gorski@gmachs.com to obtain a unique URL so that answers can be saved online in the event the survey cannot be completed in one sitting.

The deadline for participation is until the end of May 2005, as the report is scheduled for publication later in the year.

Stay tuned. It promises to be one of the best surveys yet.

ORC 2004 Worldwide Survey of International Assignment Policies and Practices [↑ TOP](#)

One of the most well-known and prolific publishers of industry surveys is Organization Resources Counselors, Inc, an international human resources consulting firm dedicated to advancing the art, knowledge, and practice of organisational and human relationships.

Not surprisingly, ORC's surveys attract very large and impressive samples which are always a sign of a good survey. ORC also publishes surveys on some of the most interesting and topical issues, including repatriation (2002 Survey on Repatriation After an International Assignment), dual-

careers (2002 Dual Careers and International Assignments Survey), expatriate housing (2003 Global Survey of Expatriate Housing Policies), short-term assignments (2003 Global Survey of Short-term International Assignment Policies), and localisation policies (2004 Survey of Localisation Policies and Practices).

In 2004 ORC published their Worldwide Survey of International Assignment Policies and Practices, with a sample of nearly 900 respondents. One of the unique features of this survey is the way the data is presented, with both global and regional breakdowns, including Asia Pacific, Europe/Middle East, Japan, and The Americas. In fact, where possible, ORC does regional breakdowns for all of its survey, which is a valuable and unique feature for practitioners.

Another impressive feature of the 2004 Worldwide Survey is that participants can request special data cuts by industry or select a number of companies against whom they wish to be benchmarked. Whilst ORC will not provide details of any single company's response, these data cuts will compare other companies' responses to the participant's responses.

Yet the size of the sample in the 2004 worldwide survey is the real selling point for ORC, with the largest sample yet since the survey's inception nearly 50 years ago, and the largest sample of any worldwide survey published in 2004.

The second question to ask is, 'how many respondents did, or are likely to, participate?'

"The secret in our numbers is that we work very hard at marketing," says Siobhan Cummins, Managing Director of ORC Worldwide. "We call clients up and tell them we are running the survey, we mail them, we chase them," she says.

"When we launch a new survey each ORC office will send an announcement to their clients. We will also announce it on our website and at our roundtable meetings. We have a large client base which means we can tap into a potentially large population," says Cummins.

"Without sounding arrogant, we also get the large samples because ORC's surveys are respected," she says.

"We've been doing them for a long time. We choose survey topics that companies are dealing with now to ensure a good response. Whereas other firms try to copy us, including the tax and relocation firms who do consulting and therefore need data as a necessary evil, for us it is our core business. We live and breathe it. International assignments and expat management are all we do."

ORC's respect in the industry is probably best reflected in it being mentioned in other industry surveys. For example, the 2004 KPMG Global Assignment Policies and Practices Survey (which will be reviewed in part II of this series), asks respondents to indicate from whom they receive international assignment data (see page 14 of the survey).

ORC was rated as the top provider of assignment data (COLA and Housing) by nearly 50 percent of the respondents; outnumbering its next closest competitor by 20 percent (AIRINC/Runzheimer received 26 percent of the vote).

Cummins says that another reason for ORC's large sample is that they make it easy and quick for companies to participate.

"The real selling point is the back load facility," she says. "Anyone who completed the 2002 worldwide survey can have those responses back loaded into the 2004 survey. A company can then update their responses only if their policy has changed. It saves a lot of time."

Although ORC's surveys must be purchased (they range in price from about USD 150 to USD 250), companies who participate in them are provided a copy free of charge.

This, says Cummins, is another reason why ORC obtains high participation rates. "Companies are more likely to participate in our survey if we charge for them, because participation means they will get the survey for free. Participation can therefore save them money."

Most surveys can be purchased online using a credit card or invoice, and all surveys can be provided in an online PDF format or in paper if preferred.

As for new surveys planned for 2005, ORC is scheduled to undertake a tax survey for the US, Canada and the UK. There will also be a location specific survey which will look at certain host cities, identified by their clients, to find out the specific terms and conditions for assignments to those cities. Of course, existing surveys are routinely updated as well, with the dual-career, repatriation, and short-term assignments surveys due for release later this year.

But what about survey burnout? "It can be a problem, but we are very mindful of it," says Cummins.

"We know our clients are busy and after a big survey like the Worldwide, which is run every two years, we tend to have a lighter year of surveying to avoid overload," she says.

"We know our clients get requests from all over the place to participate in surveys," Cummins adds. "So to avoid them getting annoyed or irritated by the sheer volume of it, we make sure that participation in our surveys is worth their while."

Judging by the consistently high samples ORC is able to achieve, it shows.

Prudential Financial 2004 Many Expatriates Many Voices Survey

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Another recent survey of particular interest has just been released by Prudential Financial. The ['Many Expatriates Many Voices'](#) survey is freely

available on the Prudential website (www.prudential.com/referencelibrary - click on Global Mobility), was conducted by the Interchange Institute in 2004, and reports the experiences of foreigners coming to work in the USA.

The purpose of the survey is to examine the experiences of accompanying spouses who have moved to the United States, in order to understand what kinds of things influence the ease of their adjustment in that region. The sample of 101 respondents (92 women, 9 men – all accompanying spouses) is impressive. A typical participant is married, well educated, with an average of 1.4 children (in ages from 0 to 4). The average time in the US on assignment was 1.7 years at the time of the survey.

But what is most impressive about this survey is that it builds on a previous survey published in 2002 – Prudential Financial 'Many Women Many Voices' survey. That survey (with a sample of 194) focused on accompanying spouses living outside the US. This latest survey focuses on spouses moving to the US, which has recently become a topic of interest for many companies.

Dr Anne Copeland, Executive Director of the Interchange Institute (www.interchangeinstitute.org), a not-for-profit research organisation focused on the study and support of people in intercultural transition, is entrusted by Prudential Financial to manage their surveys.

"The US has been a region of increasing interest for many companies lately—mainly because of the heightened security issues now surrounding a move to the US," says Copeland

"With this latest survey we wanted to get a perspective on what it's like to move to this region. It was partially a replication of the 2002 study we did on accompanying spouses relocating outside the US, to test if the findings from that study were robust (such as did the same findings appear). We found that the findings were similar which means that both studies can contribute valuable data that can make a big difference in international assignments."

"But we also expanded this latest study to include male accompanying spouses (of which a few participated)," says Copeland. "And we asked more questions about services received, the respondent's views of Americans, and what things influenced those views."

The major theme of the research findings is that the spill over effect of work/home and home/work domains is confirmed explains Copeland. "For example, we found that if spouses have been involved in the decision to move, not only are they better adjusted, but they said the transferring spouse enjoys their job more, and is more satisfied with their work assignment," she says.

Other findings conclude that spouses with more local friends said the transferring spouse feels more loyal to their employer and has lower

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absenteeism. Spouses who receive cross-cultural and/or language training have a more positive experience and better mental health, and more positive views of Americans.

Overall, those who have cross-cultural training that includes a discussion of the emotional side of relocating appear to have lower depression scores.

The credibility of the study is largely due to the Interchange Institute's independence from commercialism, not to mention Copeland's nearly thirty years experience as a researcher, and licensed psychologist. These credentials go along way towards producing the high quality of research Prudential expects.

In terms of new surveys for 2005, Prudential has just launched a study on the family and personal side of short term assignments and extended business travel. Participation is welcome from those currently on an international short-term assignment or extended business travel, and their spouses and children (age 8 -21).

These assignments include people who have moved unaccompanied by any family member to a new country for 3 -12 months or who travel 10 or more days per month with periodic visits home. Go to www.interchangeinstitute.org and you will be directed to the correct version of the survey. The published survey is due for release in early 2006.

In part II of this series, Yvonne McNulty reviews industry surveys from SHRM, KPMG and Cendant Mobility.

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