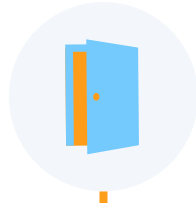


Expatriate Insider 2018 Business Edition

A Look at Global Talent Mobility Through Expatriate Eyes





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A New Perspective on Global Talent Mobility

I am pleased to present to you the very first *Expat Insider 2018 Business Edition*, based on the InterNations *Expat Insider* survey.

With the *Expat Insider* in its fifth year, there have been varying focus areas, but the people perspective remains a constant — the world through expat eyes. With this business edition, we aim to provide a new perspective on global talent mobility, while maintaining this expat point of view.

The report provides valuable insights for all companies that send employees and their families abroad, and recruit talent internationally. This is particularly relevant in an era of highly competitive markets, growing globalization, scarce talent, challenging and unwelcoming political climates for foreigners, and increasing employee demands.

Thus, it is important for employers to understand employee needs and adapt their offers to stay competitive. We believe this report will be a helpful resource for everybody involved in sending employees across borders, including global mobility and HR professionals and decision-makers. The findings can help to create expat policies, make decisions, and improve

expat support. It can also assist in understanding the needs of employees better and managing resources more efficiently.

While expats are often viewed as privileged, adventure-seekers, or career-driven, they are taken out of their comfort zone and away from friends, family, and their daily routine. This brings many personal challenges. The success of foreign assignments and international talent acquisition, therefore, also depend on how well they are (and feel) supported in these matters. It goes beyond just the physical move and practicalities, such as getting a visa. To support their employees in the best possible way, employers need to know how expats experience the relocation process and time abroad, and how happy they are. This report offers insights into these factors, focusing on expats that moved abroad for work-related reasons. These expats are most relevant to globally operating companies and local companies that hire internationally.

Some findings in the report might reaffirm known issues, such as the often-discussed underrepresentation of female working expats, and the fact that Relocating Spouses not only require different types of support but also need additional

support. Other findings may shed light on new issues, such as the challenges that International Hires face. This expat type is not as supported as Foreign Assignees, and is less satisfied in many regards. This could have a potential negative impact on long-term retention and company success. Many companies are, however, not fully aware of this new challenge and the potential need for action.

These and other insights should lead to new thinking by global mobility and HR professionals and decision-makers. This could include shifting focus to the “soft” aspects of relocation support, such as empowering employees to establish personal support networks and to make friends outside of work, or expanding their support beyond the initial onboarding phase. Our aim is to encourage and support this new thinking.

Enjoy reading the report and discovering a new perspective on global talent mobility.



Theresa Häfner

Head of Business Solutions at InterNations

Key Findings Raise New Questions

In 2018, *Expat Insider*, one of the world's largest and most comprehensive surveys on life abroad, achieved two major milestones for its fifth anniversary: firstly, the number of respondents reached a new record high and, secondly, a new report — this business edition — was established.

In total, 18,135 expats worldwide took part in the survey. They represent 178 nationalities and are living in 187 countries or territories.

While the *Expat Insider* report takes a look at the world through expat eyes in the form of an overall ranking of common expat destinations and information, the new *Expat Insider Business Edition* looks at global talent

mobility through expat eyes on a global level. Therefore, the business report zooms in on Foreign Assignees (respondents that were sent abroad by their employer), International Hires (respondents that found a job abroad or were recruited by a local company), and Relocating Spouses (respondents that moved abroad together with their partner) — See Profile References, p. 9.

The report also focuses on the expat types during various periods of their stay abroad and looks at those with dependent children. The following chapters are focused on: Relocation Support, Ease of Settling In, Happiness, and A Glance at Family Life.

The findings in this report are important to employers that send employees temporarily abroad and those that wish to retain international hires long-term — including global mobility and HR professionals and decision-makers.

Should relocation support go beyond just onboarding and be more ongoing? Do Relocating Spouses need better defined and more specific support? Is support with the social aspects of life abroad as important as the more practical types of relocation support? Should there be an overall shift in focus when supporting expat employees and their families? Addressing these types of questions may just be the missing link to improved foreign assignments and international talent retention.



Expat Statistics

International Hires the Youngest

For Foreign Assignees, the average age is 43.6, while International Hires and Relocating Spouses have an even lower average age of 41.7 and 42.4 respectively. Being the youngest expat type, the International Hires have lower percentages of respondents within the age groups of 41 to 50, and 51 and older, compared to Foreign Assignees. (See p. 21)

Working Female Expats In the Minority

From the results, it is evident that females are underrepresented when it comes to working abroad. While the total survey respondents are split quite equally in terms of gender at 51% females to 49% males, the picture is different for the Foreign Assignees and International Hires. Of the Foreign Assignees, 38% are female and 62% are male, and of the International Hires, 44% are female and 56% are male.

The survey results strengthen the notion that more females fall into the Relocating Spouse category than that of a working expat. The largest share of Relocating Spouses is female at 86%. (See p. 22)

All Expats Are Highly Educated

In general, the survey respondents are well-educated with 82% of the total respondents having a university degree. The Foreign Assignees, however, have the highest percentage of respondents with a degree at 91%, followed by International Hires (89%), and Relocating Spouses (85%). (See p. 23)



Relocation Support

Offered and Desired Support

Of the support types listed, there is a clear distinction between the types that employers offer and what expats would like to receive. Having their move organized by their employer or a service provider, and receiving a lump-sum payment are the support types most commonly offered by employers, with larger shares of respondents receiving these. Access to networking and socializing opportunities, as well as membership in an expat organization stand out as most desired, with high percentages of respondents indicating that they were not offered these types of support, but that they would have liked it. (See p. 32)

Foreign Assignees Receive Most Support

While there is existing support for all expat types, International Hires and Relocating Spouses are generally not receiving this as much as Foreign Assignees. Of the expat types, International Hires don't receive the moving assistance and lump-sum payment as commonly as Foreign Assignees and Relocating Spouses. Overall, the survey results consistently indicate that Relocating Spouses tend to have a bigger need for support. (See p. 32)

Support Received Considered Useful

Of the types of relocation support that the expats received, the overall usefulness of these is rated positively, with general ratings above three out of five. Respondents find having the move organized and receiving a lump-sum payment most useful and intercultural training least useful. (See p. 42)



Ease of Settling In

Settling in Takes Quite Some Time

The three expat types find it easier to get used to the local culture than feeling at home in it. While Foreign Assignees on average have the highest satisfaction ratings in all phases of the expat lifecycle when it comes to adapting to local life and settling down, International Hires and Relocating Spouses consistently indicate less satisfaction.

The survey results suggest that time does play a role when it comes to adapting to life abroad, and that settling in is an ongoing process that stretches beyond just the first months. Expats usually have the highest satisfaction ratings in the period of longer than five years. In most instances, there is some drop in satisfaction after the honeymoon phase, before increasing again as time progresses. In the expat lifecycle, the honeymoon phase is often referred to as the first months just after relocation, when everything is still new and exciting. (See p. 5 and p. 55)

Making Local Friends a Major Challenge

While making friends is a challenge, making local friends stands out as one of the biggest problems for all three expat types. This could lead to expats remaining within the expat bubble — staying exclusively within their expat community and not really understanding and immersing themselves in the local culture. On average, the satisfaction ratings for making friends are highest when the expats have been in their host country for longer than five years. (See p. 52)



Happiness

Foreign Assignees are Happiest

The expat types are quite happy with life abroad with high satisfaction ratings.

Overall, the happiness ratings of International Hires and Relocating Spouses are nearly ten percentage points lower than that of the Foreign Assignees, and their unhappiness ratings are also higher. (See p. 57 and p. 70)

Main Happiness Contributors

The easy practicalities of life abroad contribute most to the happiness of Foreign Assignees and International Hires. For them, the second most important aspect is that their partner and family are also happy. Relocating Spouses find the latter reason most important, followed by the ease of dealing with the practical aspects of living abroad. This is also influenced by whether the expats are in a relationship, as the most frequently cited reason for the happiness of those in a relationship is having a happy partner and family. (See p. 62)

Main Unhappiness Contributors

The largest shares of Foreign Assignees and International Hires cite the lack of socializing as a key reason for their unhappiness. A lack of a personal support network also makes them feel discontent. For Relocating Spouses, not having a personal support network and a lack of socializing mainly cause unhappiness. The need for socializing is prominent throughout for all expat types, regardless of where in the expat lifecycle they are. A lack of support remains a pain point for Relocating Spouse. (See p. 63)



A Glance at Family Life

All Expats are Generally Content

All expat types with dependent children abroad are generally satisfied with their family life and children's general well-being abroad. The satisfaction results are on average slightly higher for Relocating Spouses than the other two expat types. (See p. 72)

Relocating Spouses Mainly Taking Care of Family

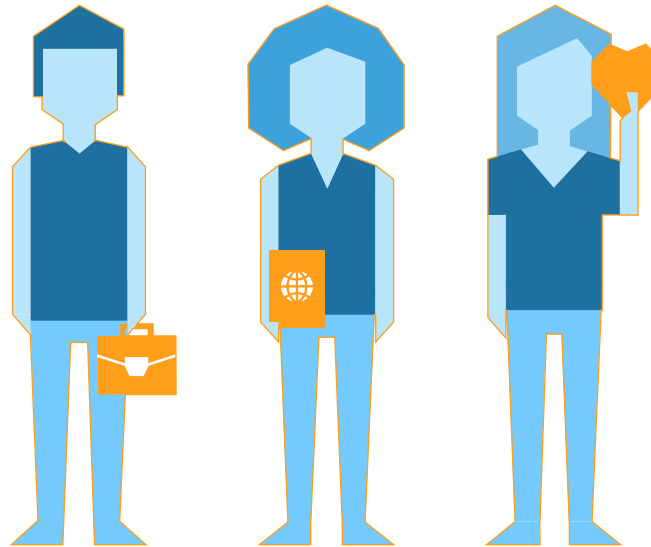
The largest share of Relocating Spouses is female (86%), and while there are working Relocating Spouses, the survey results indicate that this expat type is generally at home. In terms of their employment status, 27% of Relocating Spouses indicate they are taking care of their households or children and 17% state they are looking for work. A large share of Relocating Spouses (44%) are, therefore, not fully employed and over one third of this expat type devote most of their time and attention to their children and families. (See p. 73)

Profile References



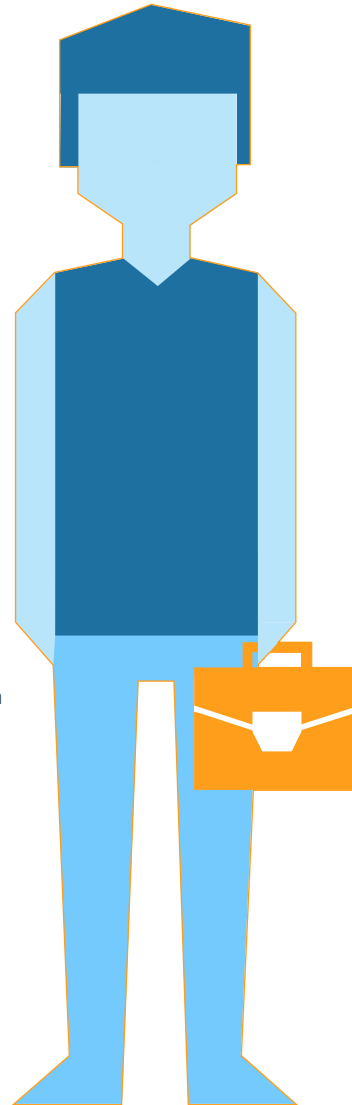
- 10 Expat Types
- 11 Foreign Assignees
- 12 International Hires
- 13 Relocating Spouses

Expatriate Types



Foreign Assignees (respondents that were sent abroad by their employer), International Hires (respondents that found a job abroad or were recruited by a local company), and Relocating Spouses (respondents that moved abroad together with their partner) are at the center of the report. The expat typology is based on the survey respondents' primary motivation for moving abroad. The emphasis is specifically on these expats as they are key figures in global talent mobility. Insights into challenges relating to them and their employers could, therefore, be of value to industry professionals. **Of the total survey respondents, 10% are Foreign Assignees, 19% are International Hires, and 8% are Relocating Spouses.**

Foreign Assignees



Reason for Moving Abroad

Sent abroad by their employer



Gender

38% female 62% male



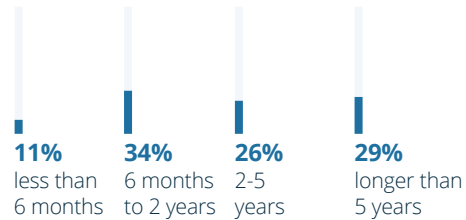
Relationship Status



63% in a relationship
37% single



Time in Host Country



Level of Education

91% have a university degree



Top 3 Industries

14% manufacturing & engineering
13% finance
11% IT



Average Age

43.6 years old



Relocation Support

64% want expat membership
61% want networking opportunities
60% want socializing opportunities
45% want intercultural training



Happiness

80% are happy with life in general

Happiness Contributor
easily dealing with practical aspects

Unhappiness Contributor
lack of socializing opportunities



Children

24% have dependent children living abroad with them



Ease of Settling In

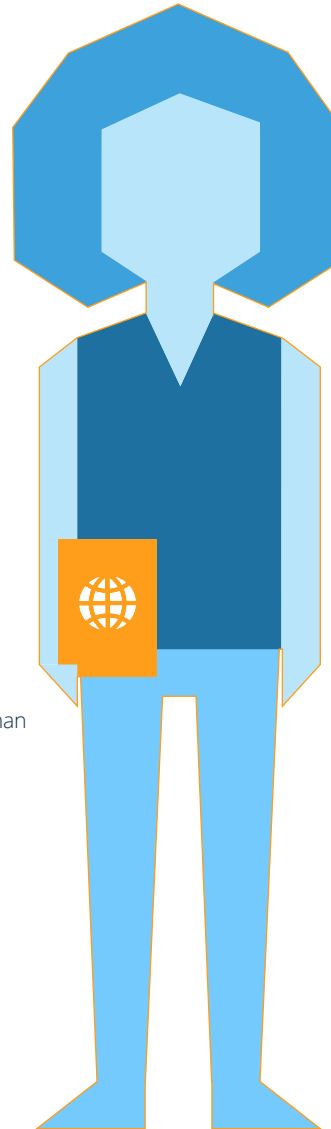
58% get used to the local culture easily
57% feel at home in the local culture
52% find making new friends easy
40% find making local friends easy



Family Life

76% satisfied with family life
78% satisfied with children's life

International Hires

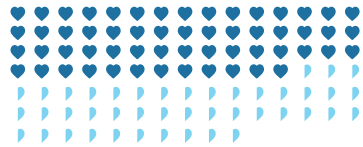


Reason for Moving Abroad

Found a job abroad / recruited by a local company



Relationship Status



57% in a relationship
43% single



Level of Education

89% have a university degree

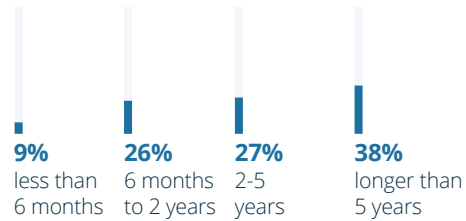


Gender

44% female 56% male



Time in New Home Country



Top 3 Industries

17% education
13% IT
9% manufacturing & engineering



Average Age

41.7 years old



Relocation Support

63% want expat membership
62% want networking opportunities
59% want socializing opportunities
52% want intercultural training



Happiness

71% are happy with life in general

Happiness Contributor
easily dealing with practical aspects

Unhappiness Contributor
lack of socializing opportunities



Children

18% have dependent children living abroad with them



Ease of Settling In

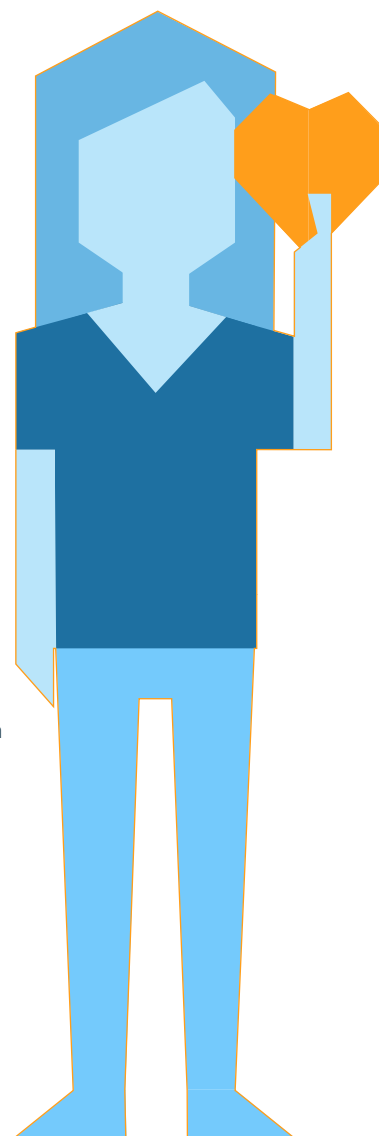
56% get used to the local culture easily
52% feel at home in the local culture
50% find making new friends easy
36% find making local friends easy



Family Life

77% satisfied with family life
78% satisfied with children's life

Relocating Spouses



Reason for Moving Abroad

For their partner's job or education



Gender

86% female 14% male



Average Age

42.4 years old



Children

45% have dependent children living abroad with them



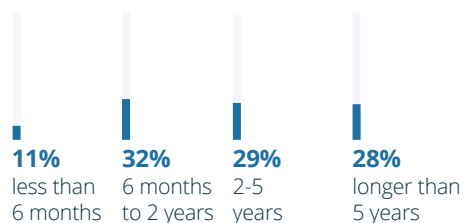
Relationship Status



94% in a relationship
6% single



Time in New Home Country



Relocation Support

68% want networking opportunities
67% want expat membership
65% want socializing opportunities
56% want spouse support



Ease of Settling In

53% get used to the local culture easily
50% feel at home in the local culture
50% find making new friends easy
31% find making local friends easy



Level of Education

85% have a university degree



Career: Mainly at Home

27% taking care of household or children
17% looking for work



Happiness

72% are happy with life in general

Happiness Contributor

happy partner and family

Unhappiness Contributor

lack of personal support network



Family Life

79% satisfied with family life
81% satisfied with children's life

Short Methodology

The *Expat Insider 2018* survey was conducted by InterNations. Running from 15 February through 7 March 2018, the online survey was promoted through the InterNations website, newsletter, and the company's social media profiles. The target audience included all kinds of expatriates: both Foreign Assignees — expats in the classical sense of employees on a corporate assignment — and people living and working abroad for various other reasons. Responses were not limited to members of the InterNations community.

A total of 18,135 expatriates took part, representing 178 nationalities and living in 187 countries or territories. Of the total survey respondents, 40% moved abroad for either their own or their partner's work or career.

The *Expat Insider 2018* survey results are published in the form of an overall ranking of common expat destinations and information regarding the following five topical indices: Quality of Life, Ease of Settling In, Working Abroad, Family Life, and Personal Finance. The *Expat Insider 2018 Business Edition*, however, specifically examines the following three expat types on a global level, based on their main reason for

relocating: Foreign Assignees (respondents that were sent abroad by their employer), International Hires (respondents that found a job abroad on their own or were recruited by a local company), and Relocating Spouses (respondents that moved abroad together with their partner). Of these expat types, the total number of respondents are as follows: 1,863 are Foreign Assignees; 3,426 are International Hires; and 1,503 are Relocating Spouses.

The survey results published in this report give an overview of these expat types compared to the total survey respondents. Additionally, the results focus on these expat types during various periods of their stay abroad and whether they have dependent children living with them. A total of 4,246 survey respondents, regardless of their expat type, have dependent children living with them.

The results also look into specific topics and challenges relating to the employers of these expats. There is information regarding four topical chapters: Relocation Support, Ease of Settling In, Happiness, and A Glance at Family Life. The survey questions for the Relocation Support chapter were structured around discussions with and feedback from

employers regarding the types of relocation support that companies offer. The focus for the Ease of Settling In, Happiness, and A Glance at Family Life chapters was based on the five years of expertise that the *Expat Insider* survey has on the expat perspective, and more specifically the social aspects of expat life.

Where respondents were asked to rate different factors concerning various aspects of life abroad, such as their happiness, this was done on a scale of one to seven. Respondents that moved abroad for either their own or their partner's work were asked specific questions about the types of relocation support they received and they could rate the usefulness of any support they were offered on a scale of one to five. The rating process emphasizes the respondent's personal satisfaction with these factors.

Please be aware that all percentages in this report have been rounded to full integral numbers. In some cases, this may lead to all responses to one question adding up to either 99% or 101%, instead of 100%. These instances are simply due to rounding and are not based on erroneous data.

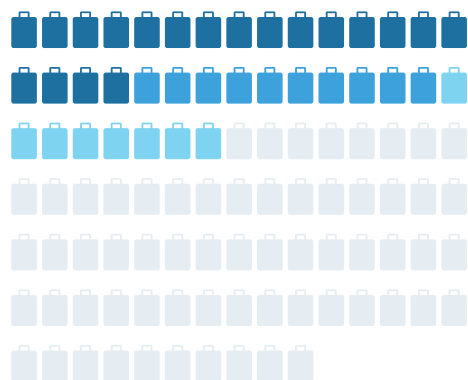
Survey Demographics



16	Expat Statistics
25	Top Findings

Expat Statistics

MOTIVATION FOR MOVING ABROAD*



Moving for Work

19%	found a job / was recruited by a local company (International Hire)
10%	sent abroad by employer (Foreign Assignee)
8%	moved for partner's job or education (Relocating Spouse)

12% wanted to live in partner's home country / moved for love

10% wanted a better quality of life

6% moved in order to go to school or university

6% was looking for an adventure / personal challenge

5% moved for financial reasons

5% moved for other family reasons

5% other

3% wanted to live in this particular country

3% simply enjoy living abroad

2% wanted to start own business abroad

2% moved because of political, religious, or safety reasons

2% wanted to retire abroad

1% wanted to improve language skills

1% moved for volunteering or missionary work

0.4% wanted to travel / wanted an extended vacation

* Total Survey Respondents: 18,135

ZOOMING IN ON RELOCATING SPOUSES

Of the Relocating Spouses that moved abroad for their partner's career or education, the following percentages indicate their primary motivation and what expat types their partners are:

39%	partner was sent abroad by their employer (Foreign Assignee)
50%	partner found a job or was recruited by a local company (International Hire)
12%	other (e.g. partner wanted to go to school or university)



Expatriate Statistics



TIME IN HOST COUNTRY



TOTAL RESPONDENTS

9% less than 6 months

25% 6 months - 2 years

25% 2-5 years

41% longer than 5 years



FOREIGN ASSIGNEES

11% less than 6 months

34% 6 months - 2 years

26% 2-5 years

29% longer than 5 years



INTERNATIONAL HIRES

9% less than 6 months

26% 6 months - 2 years

27% 2-5 years

38% longer than 5 years



RELOCATING SPOUSES

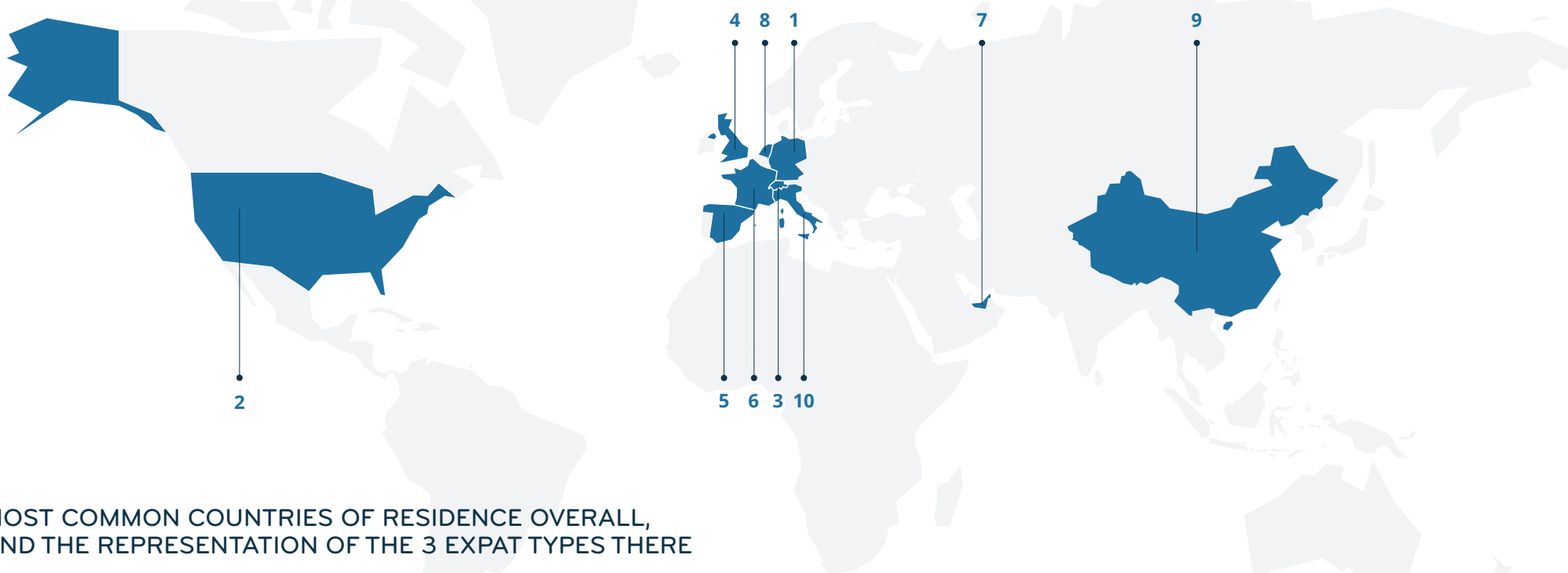
11% less than 6 months

32% 6 months - 2 years

29% 2-5 years

28% longer than 5 years

Expatriate Statistics



MOST COMMON COUNTRIES OF RESIDENCE OVERALL, AND THE REPRESENTATION OF THE 3 EXPAT TYPES THERE

1 Germany 7% Foreign Assignees 11% International Hires 11% Relocating Spouses	2 USA 8% Foreign Assignees 3% International Hires 7% Relocating Spouses	3 Switzerland 6% Foreign Assignees 9% International Hires 8% Relocating Spouses	4 UK 3% Foreign Assignees 5% International Hires 4% Relocating Spouses	5 Spain 2% Foreign Assignees 1% International Hires 2% Relocating Spouses
6 France 2% Foreign Assignees 2% International Hires 2% Relocating Spouses	7 UAE 2% Foreign Assignees 5% International Hires 3% Relocating Spouses	8 Netherlands 3% Foreign Assignees 3% International Hires 3% Relocating Spouses	9 China 5% Foreign Assignees 4% International Hires 3% Relocating Spouses	10 Italy 2% Foreign Assignees 1% International Hires 2% Relocating Spouses

Expatriate Statistics

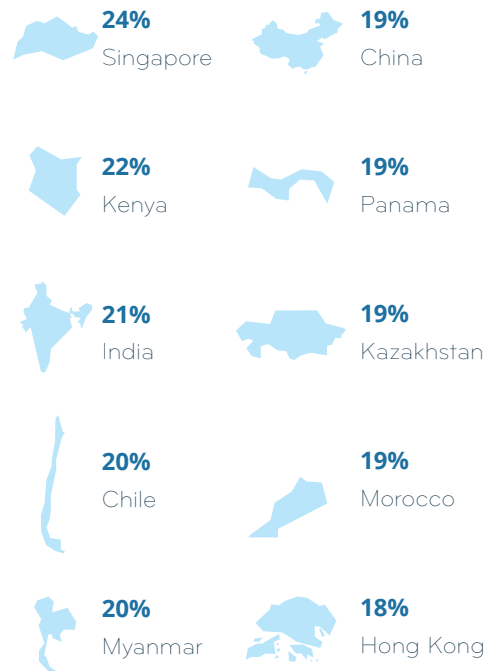


COUNTRIES OF RESIDENCE

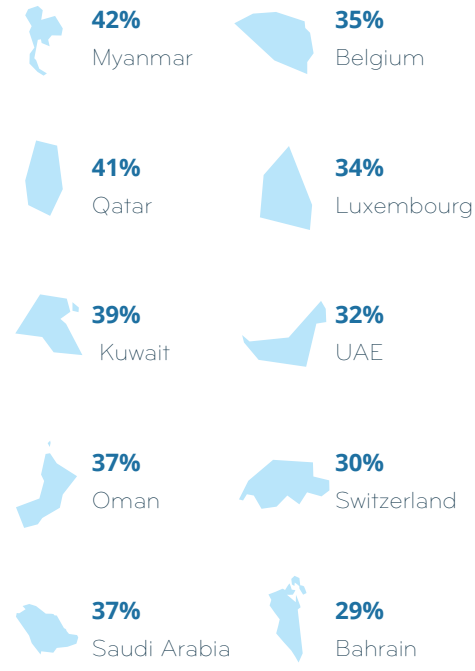
Countries with the highest representation of these expat types based there.



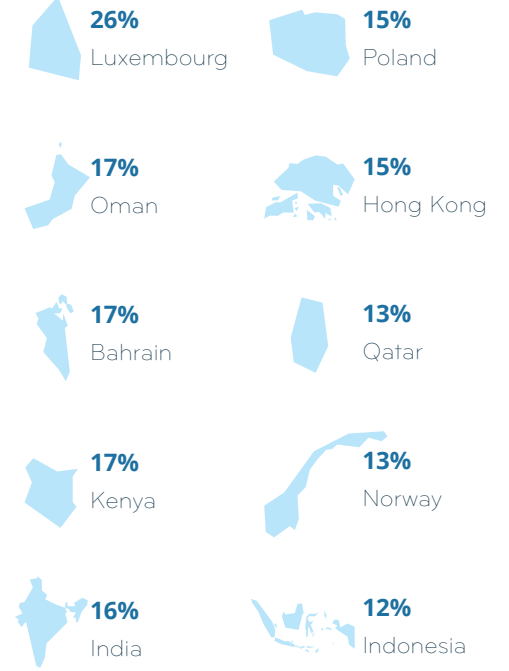
FOREIGN ASSIGNEES



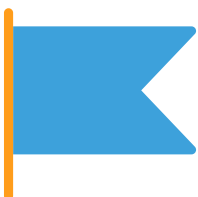
INTERNATIONAL HIRES



RELOCATING SPOUSES



Expatriate Statistics

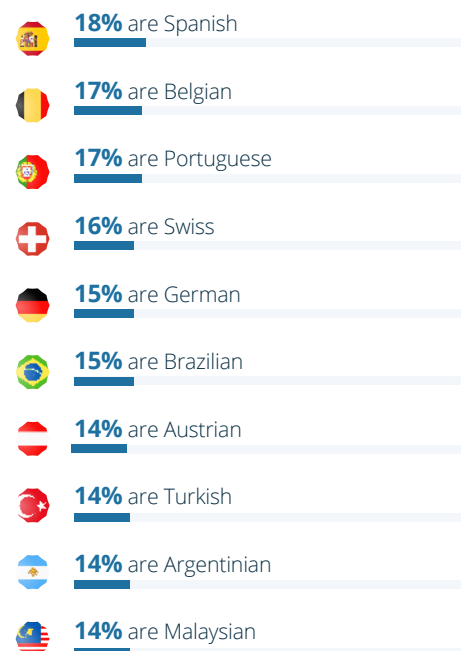


NATIONALITIES

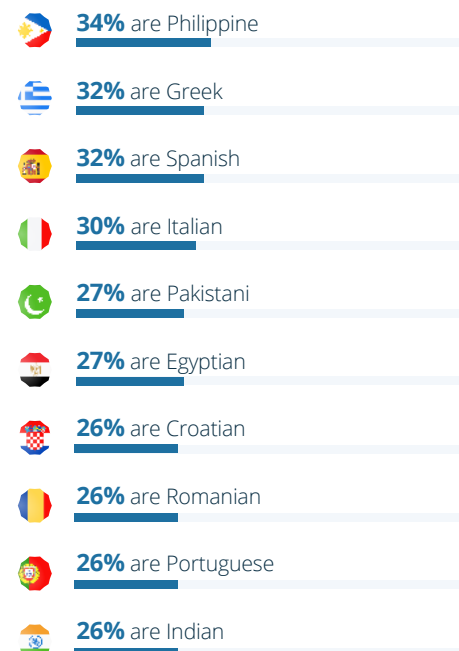
Nationalities with the highest representation of these expat types.



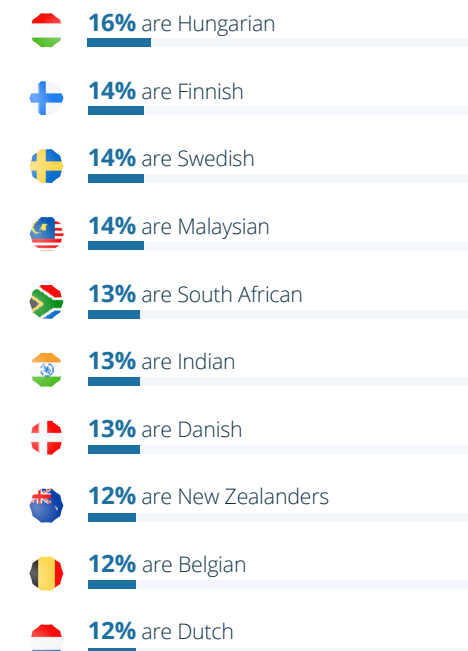
FOREIGN ASSIGNEES



INTERNATIONAL HIRES



RELOCATING SPOUSES



Expatriate Statistics



AGE GROUPS

Demographics of those that disclosed their age.



TOTAL RESPONDENTS

Average age
44.2 years

5% 25 and younger

13% 26-30

15% 31-35

14% 36-40

22% 41-50

31% 51 and older



FOREIGN ASSIGNEES

Average age
43.6 years

2% 25 and younger

10% 26-30

15% 31-35

17% 36-40

28% 41-50

27% 51 and older



INTERNATIONAL HIRES

Average age
41.7 years

3% 25 and younger

15% 26-30

18% 31-35

17% 36-40

24% 41-50

23% 51 and older



RELOCATING SPOUSES

Average age
42.4 years

1% 25 and younger

12% 26-30

18% 31-35

17% 36-40

28% 41-50

23% 51 and older

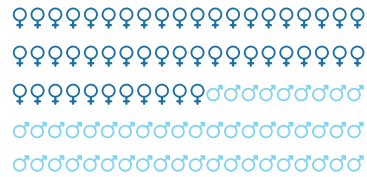
Expatriate Statistics



GENDER SPLIT



TOTAL RESPONDENTS



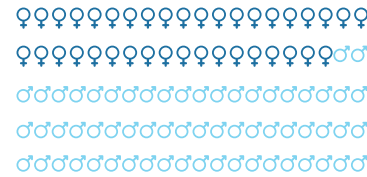
51% female 49% male



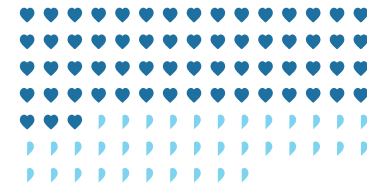
66% in a relationship 34% single



FOREIGN ASSIGNEES



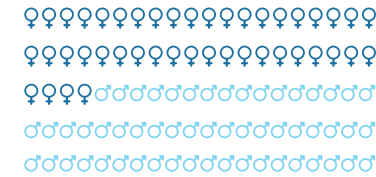
38% female 62% male



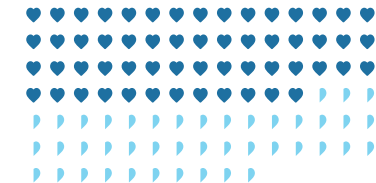
63% in a relationship 37% single



INTERNATIONAL HIRES



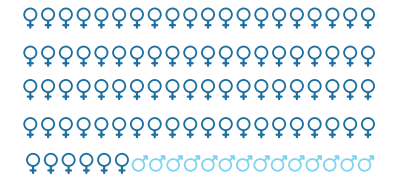
44% female 56% male



57% in a relationship 43% single



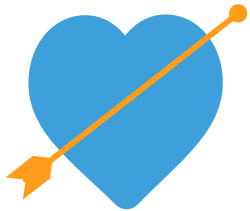
RELOCATING SPOUSES



86% female 14% male



94% in a relationship 6% single



RELATIONSHIP STATUS

Expat Statistics



LEVEL OF EDUCATION



TOTAL RESPONDENTS

2% no degree

8% high school graduate
(or similar)

8% commercial / technical /
vocational training

34% bachelor's degree (or similar)

41% postgraduate degree /
master's degree (or similar)

7% PhD (or similar)



FOREIGN ASSIGNEES

1% no degree

3% high school graduate
(or similar)

6% commercial / technical /
vocational training

31% bachelor's degree (or similar)

55% postgraduate degree /
master's degree (or similar)

5% PhD (or similar)



INTERNATIONAL HIRES

1% no degree

5% high school graduate
(or similar)

5% commercial / technical /
vocational training

32% bachelor's degree (or similar)

46% postgraduate degree /
master's degree (or similar)

11% PhD (or similar)



RELOCATING SPOUSES

1% no degree

7% high school graduate
(or similar)

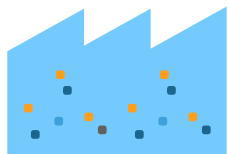
6% commercial / technical /
vocational training

37% bachelor's degree (or similar)

43% postgraduate degree /
master's degree (or similar)

5% PhD (or similar)

Expat Statistics



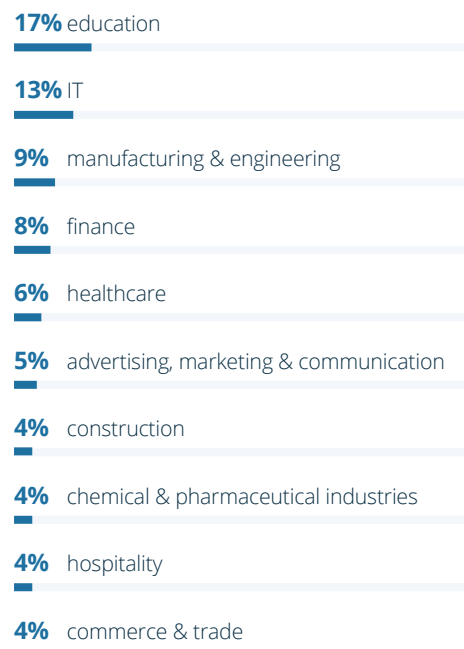
MAIN INDUSTRIES



FOREIGN ASSIGNEES



INTERNATIONAL HIRES



RELOCATING SPOUSES



Top Findings

Different Expat Types Have Different Lengths of Stay

Of the total respondents, about two out of five (41%) have been living in their host country for longer than five years. The largest share of International Hires — and a fairly similar percentage (38%) — have also been in their respective countries for longer than five years. The picture is slightly different for Foreign Assignees and Relocating Spouses, with the largest share of these expat types being in their host country between six months and two years at 34% and 32% respectively. These percentages could be an indication that Foreign Assignees and Relocating Spouses within this context usually have repatriation at some stage, while International Hires generally aim to stay longer or more permanently.

Western Countries are Most Prominent in the Top 10

The most common countries of residence are mainly western industrialized countries with Germany being the country of residence with the largest share of total survey respondents, followed by the United States of America, Switzerland, the United Kingdom, and Spain in the top 5. The rest of the top 10 comprise of mainly European countries with France, the

Netherlands, and Italy in 6th, 8th and 10th place respectively. The United Arab Emirates represents the Middle East in 7th place and China represents Asia in 9th place.

Some respondents in these countries share positive feedback about their time abroad, with one American female International Hire living in Germany saying: “I had a good job right from the beginning and opportunities to pursue my hobbies”. A German female Relocating Spouse living in the United Arab Emirates says she likes the “interesting people and expats” that she has met, and an American male International Hire living in China says: “The challenges of living abroad excite me. The people are friendly, and it is awesome to learn the new culture and try new things”.

International Hires are the Youngest

The average age of the total survey respondents is 44.2, with the largest percentage aged 51 and older (31%). For Foreign Assignees, the average age is 43.6, while International Hires and Relocating Spouses have an even lower average age of 41.7 and 42.4 respectively. Being the youngest expat type, the International Hires have lower percentages of respondents within the age groups of 41 to 50, and 51 and older, compared to Foreign Assignees.

“I had a good job right from the beginning and opportunities to pursue my hobbies.”



American female International Hire living in Germany

“I like the interesting people and expats I've met.”



German female Relocating Spouse living in the UAE

Top Findings

Working Female Expats Are in the Minority

From the survey results, it is evident that females are underrepresented when it comes to working abroad. While the total survey respondents are split quite equally in terms of gender at 51% females to 49% males, the picture is different for the Foreign Assignees and International Hires, especially for the former. Of the Foreign Assignees, 38% are female compared to 62% male, and of the International Hires, 44% are female compared to 56% male.

Moreover, the survey results strengthen the notion that a larger share of female respondents fall into the Relocating Spouse category than that of a working expat. Most Relocating Spouses are female at 86%. One survey respondent, an Indian female Relocating Spouse living in Oman, says she doesn't like the fact that "finding a job for an experienced female expat is a problem".

All Expats Are Highly Educated

In general, the survey respondents are well-educated, with 82% of the total respondents having a university degree. The Foreign Assignees, however, have the highest percentage of respondents with a degree at 91%. More than half of the Foreign Assignees (55%) even have a postgraduate qualification, such as a master's degree. Of the International Hires and Relocating Spouses, 89% and 85% respectively have a university degree.

These high levels of education indicate the quality of working professionals that are being sent abroad by their employers and of those that are internationally recruited. While an individual's level of education may be perceived as important for employers, it also seems to be important for other expats. One International Hire, an Italian male living in Luxembourg, states: "I like that there are highly skilled expats like myself. There are plenty of opportunities for socializing and creating an elite network here".

"I don't like the fact that finding a job for an experienced female expat is a problem."



Indian female Relocating Spouse living in Oman

"I like that there are highly skilled expats like myself. There are plenty of opportunities for socializing and creating an elite network here."



Italian male International Hire living in Luxembourg

Relocation Support



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Types of Relocation Support Received



TOTAL RESPONDENTS

Sum of respondents that moved for either their own or their partner's work.

METHODOLOGY

Survey respondents were asked questions about the types of support that employers offered during their relocation process. These questions were specifically asked to respondents who indicated that they moved abroad for either their own or their partner's work. Respondents could choose between the answers: yes, they offered it (received); no, but I would have liked it (wanted); and no, and I didn't need it anyway (not needed).



Language Classes

30% received 40% wanted 31% not needed



Access to Local Networking Opportunities

16% received 63% wanted 21% not needed



Information on Local Life

40% received 43% wanted 17% not needed



Intercultural Training

17% received 50% wanted 33% not needed



Access to Local Socializing Opportunities

18% received 61% wanted 21% not needed



Move Organized by Employer or Service

54% received 31% wanted 15% not needed



Additional Spouse Support

23% received 33% wanted 44% not needed



Membership in an Expat Organization

8% received 64% wanted 27% not needed



Lump-Sum Payment for Expatriation-Related Expenses

47% received 41% wanted 13% not needed

Types of Relocation Support Received



FOREIGN ASSIGNEES



Types of Relocation Support Received

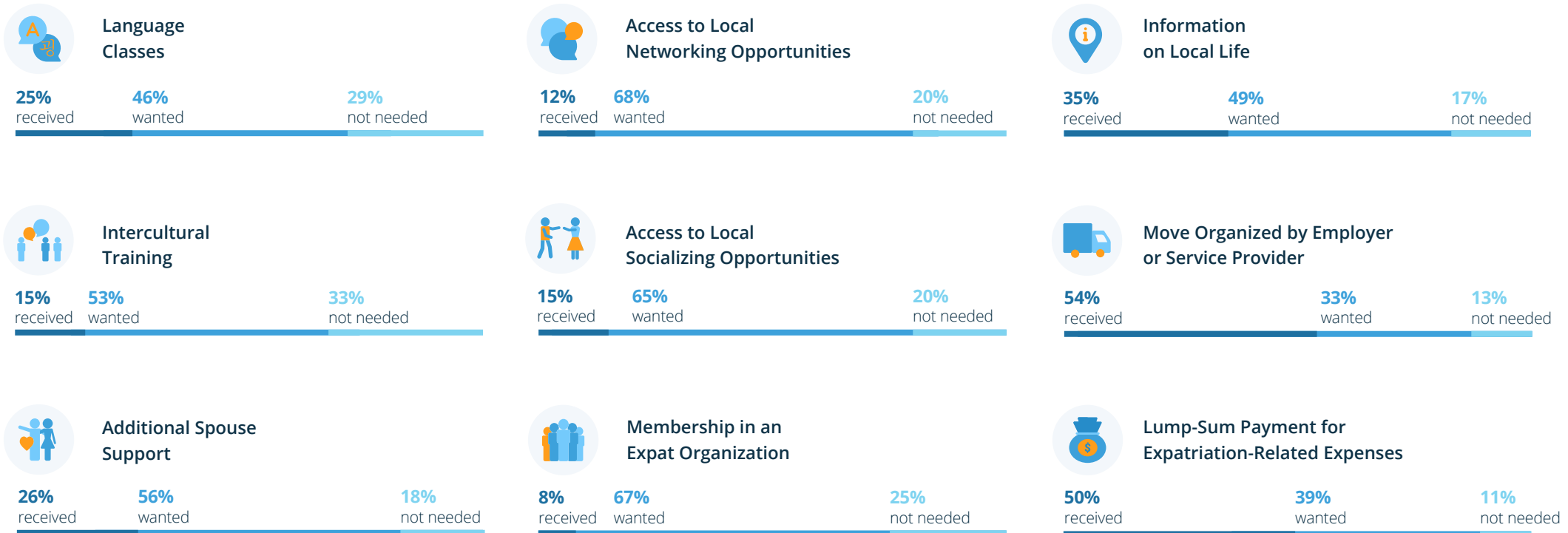
INTERNATIONAL HIRES



Types of Relocation Support Received



RELOCATING SPOUSES



What's Offered, What's Needed?

There is a clear distinction between the types of relocation support that employers offer and the types of support that expats would like to receive. While there is existing support, International Hires and Relocating Spouses are not receiving this as much as Foreign Assignees.

TOP FINDINGS

- **Support with organizing the move abroad and lump-sum payments are most commonly offered by employers.**
- **Foreign Assignees receive more relocation support than International Hires and Relocating Spouses.**
- **International Hires don't receive moving assistance and lump-sum payments as commonly as Foreign Assignees and Relocating Spouses.**
- **Networking, socializing, and membership in an expat organization are most desired by all expat types.**
- **Relocating Spouses indicate the biggest need for support.**

More Commonly Offered: Moving Assistance and Lump-Sum Payments

Two areas where larger percentages of respondents indicate they were offered support are firstly having their move organized by either their employer or a service provider, and secondly receiving a lump-sum payment for expatriation-related expenses.

In terms of the move, Foreign Assignees stand out as having the highest share of respondents (75%) indicating that they received this support. At the same time, only a little more than half of the Relocating Spouses (54%) were offered to have their move arranged. For International Hires, the percentage of those receiving support is lowest (43%).

Regarding the lump-sum payment, Foreign Assignees is yet again the expat type with the highest share of respondents receiving this at 65%. Exactly half of the Relocating Spouses also received this support. An even smaller percentage of

International Hires were offered the lump-sum payment, with 36% indicating they received it and 49% indicating they would have liked it as part of their relocation assistance. This could be because not all companies hiring international talent have established relocation packages, and that relocation support — such as organizing their move abroad and providing financial support — is not part of offer packages. This is clearly different in the case of Foreign Assignees, where this type of support is more commonly provided by companies that regularly send employees abroad.

"I like that my housing arrangements were supported by my company."



American Foreign Assignee
living in China

The comments of some respondents illustrate both the satisfaction of those that received support and the desire for support from those that didn't. As an American Foreign Assignee living in China says: "I like that my housing arrangements were supported by my company". A British female International Hire living in Italy, however, says she doesn't like her "employer's lack of experience in supportive strategies for employees". A New Zealand female Relocating Spouse living in the United Arab Emirates highlights the lack of financial support, saying she doesn't like "the expensive school fees, which are rarely covered by employers nowadays".

"I don't like my employer's lack of experience in supportive strategies for employees."



British female International Hire living in Italy

Most Desired: Networking, Socializing, and Expat Organization Membership

Access to local networking and socializing opportunities, as well as membership in an expat organization stand out as needs for all expat types. High percentages of respondents indicate that they were not offered these types of support, but that they would have liked it.

In terms of networking opportunities, 61% of Foreign Assignees and 62% of International Hires state that they weren't offered this as a type of relocation support, but they would have liked it. For the Relocating Spouses, this percentage is even higher at 68%. This might be related to a lack of networking opportunities through work and colleagues, as 27% of Relocating Spouses are taking care of their homes or children and 17% are looking for work (See A Glance at Family Life, p. 74). One Russian female Relocating Spouse living in Germany shares her opinion about this, saying: "There are no networking opportunities and it feels like social isolation".

This could also be a reason why Relocating Spouses have the highest percentage (65%) of respondents that would have liked access to local socializing opportunities. While lower percentages of Foreign Assignees (60%) and International Hires (59%) indicate that they would have liked this support, more than half of these respondents still have a need for it. As one American female Relocating Spouse living in Thailand explains: "I don't like the lack of social interaction and the lack of opportunities for enrichment of life". Another Relocating Spouse, a German female living in Sweden, says: "It is difficult to socialize and make friends". A Portuguese female Foreign Assignee living in Ireland agrees: "Socializing is definitely hard. I don't have much of a social life outside of work".

Some International Hires also feel this way, with one Canadian female living in Austria saying: "While I am sure the people are nice, the interactions are minimal and it's hard to

get to know people". Another International Hire, an Indian female living in Malaysia, has a similar problem, saying "it hasn't been easy to make friends and have company for an evening out".

"I don't like the lack of social interaction and the lack of opportunities for enrichment of life."



American female Relocating Spouse living in Thailand

When it comes to membership in an expat organization, this is the least common type of support provided with only 8% of respondents among all three expat types having received it. Of the Foreign Assignees, 64% didn't receive this but thought it would be useful, while 63% of International Hires and 67% of Relocating Spouses share this view. Again, Relocating Spouses is the expat type with the highest percentage indicating a need for this type of support. This desire to be part of an expat organization could be linked to the needs of all expat types for socializing and networking opportunities, with Relocating Spouses appearing to struggle most with connecting with other individuals. These social factors might be among the reasons that contribute to their overall difficulties with settling in (See Ease of Settling In, p. 51), as well as their happiness with life abroad (See Happiness, p. 60).

One Relocating Spouse, a British female living in Kazakhstan,

says “it is hard to find out what’s happening in the city”. Foreign Assignees and International Hires also describe their difficulties. An Italian male Foreign Assignee living in France says: “I hoped to create a richer network of people, but it’s hard to find new friends while working and not being 20 years old anymore”. One of the International Hires, a Singaporean male living in Germany, agrees: “The chances of meeting new people are not great”.

Information on Local Life Considered Relevant

Information on local life is the third most commonly offered type of support and it is considered as relevant by all expat types. Of the respondents, 40% received the offer, while 43% didn’t but thought it would be useful. Staying true to the trend, a larger percentage of Foreign Assignees (46%) received information on local life, followed by International Hires (38%), and Relocating Spouses (35%). Information on local life could be considered as a more standard and basic type of support that can be easily offered by employers. Nevertheless, the overall percentage of expats that didn’t receive this is slightly higher than those that received it and, therefore, represents a support requirement that employers should perhaps consider more strongly.

Spouses Not Well-Supported, Specifically Those of International Hires

The survey results consistently indicate that Relocating Spouses are not as well-supported with the relocation as the

other expat types and they tend to have a bigger need for support. In terms of additional spouse support, 26% were offered this, while 56% didn’t receive any additional support but would have liked it. This could be a strong indication that employers don’t focus as much on Relocating Spouses as they should.

Taking a more detailed look at Relocating Spouses of Foreign Assignees and International Hires, it is clear that spouses of the latter tend to receive less support (a difference of 16 percentage points). This could again suggest that, in general, the needs of Foreign Assignees are catered to more than International Hires — even in terms of spouse support.

As Relocating Spouses are a key part of family life abroad (See A Glance at Family Life, p. 73), their happiness is an important aspect for employers to consider, as this in turn has an effect on the Foreign Assignees and International Hires. One Canadian female Relocating Spouse living in Kazakhstan says: “My husband’s contract isn’t very family-friendly. There is very little support for the spouse and dependents”.

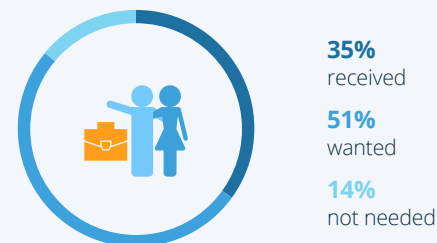
Language Classes Less Essential than Intercultural Training

The two types of support with the highest percentages of respondents not finding it all that necessary, compared to the other types of support, are language classes and intercultural training.

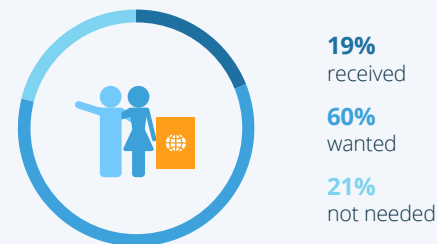
Of these two types of support, there seems to be a bigger

ADDITIONAL SPOUSE SUPPORT

Relocating Spouses of Foreign Assignees



Relocating Spouses of International Hires



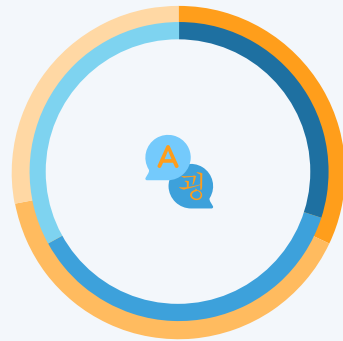
need for intercultural training than for language classes. More than half of the International Hires and Relocating Spouses didn’t receive intercultural training but would have liked it, at 52% and 53% respectively, and 45% of Foreign Assignees share this view. While language classes are more commonly offered by employers, intercultural training could be considered more needed, as indicated by the respondents, and particularly International Hires and Relocating Spouses.

Working Expats: Gender Highlights

METHODOLOGY

These results focus on the various types of relocation support in terms of the working expats and their gender. The Foreign Assignees and International Hires are combined and looked at from a female-to-male perspective.

LANGUAGE CLASSES



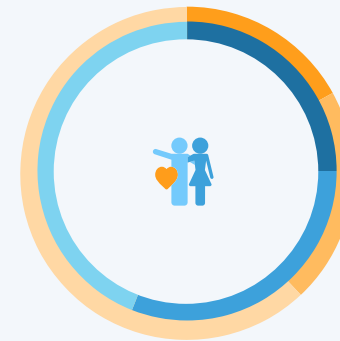
Female	Male
32% received	30% received
40% wanted	37% wanted
28% not needed	33% not needed

INTERCULTURAL TRAINING



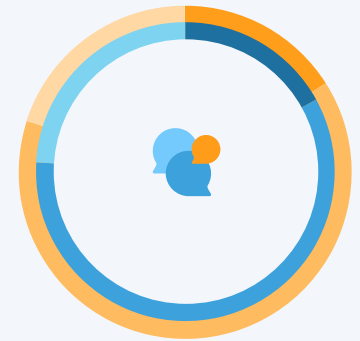
Female	Male
18% received	17% received
51% wanted	48% wanted
31% not needed	35% not needed

ADDITIONAL SPOUSE SUPPORT



Female	Male
17% received	25% received
21% wanted	31% wanted
62% not needed	43% not needed

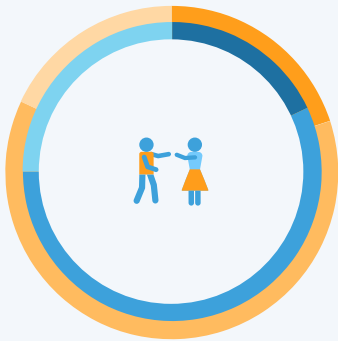
ACCESS TO LOCAL NETWORKING



Female	Male
16% received	17% received
64% wanted	59% wanted
19% not needed	24% not needed

Working Expats Gender Highlights

ACCESS TO LOCAL SOCIALIZING OPPORTUNITIES



Female **Male**

20% received **18%** received

62% wanted **57%** wanted

18% not needed **24%** not needed

MEMBERSHIP IN AN EXPAT ORGANIZATION



Female **Male**

8% received **9%** received

66% wanted **62%** wanted

26% not needed **30%** not needed

INFORMATION ON LOCAL LIFE



Female **Male**

43% received **40%** received

43% wanted **41%** wanted

15% not needed **19%** not needed

MOVE ORGANIZED BY EMPLOYER OR SERVICE PROVIDER



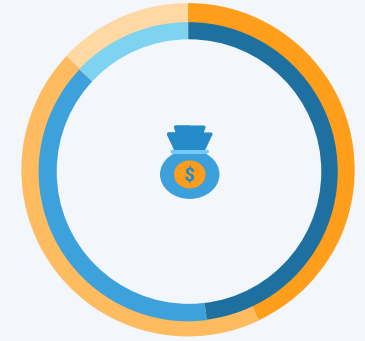
Female **Male**

51% received **57%** received

34% wanted **27%** wanted

15% not needed **16%** not needed

LUMP-SUM PAYMENT FOR EXPATRIATION- RELATED EXPENSES



Female **Male**

43% received **48%** received

44% wanted **39%** wanted

13% not needed **13%** not needed

The Gender Perspective

While relocation support offered to working female and male expats is generally similar, there are some gender differences in terms of the support required.

Looking at the most common types of support offered by employers, as seen in this section, a higher percentage of men received help in terms of having their move organized (57% compared to 51% of women), as well as the lump-sum payment for expatriation-related expenses (48% compared to 43% of women). On the other hand, a larger share of women state that they would have liked these two types of support.

When it comes to assistance with their move, 34% of women say they didn't receive this but wanted it, compared to 27% of men feeling this way. For the lump-sum payment, an even larger share of women (44%) indicate they would have liked it, compared to 39% of their male counterparts.

As seen in this section, access to local networking and socializing opportunities are identified as some of the most desired types of support, and women indicate a stronger need for these. While there is no big difference in the percentages of those that received these types of support,

the biggest differences are that 64% of women would have liked access to networking (compared to 59% of men), and 62% would have liked access to socializing (compared to 57% of men).

These differences could be due to the fact that both the Foreign Assignees and International Hires have larger percentages of male representation (See Survey Demographics, p. 22). While employers may offer support equally to women and men, the actual issue could be that females are still underrepresented and in the minority in the international workplace. This could, furthermore, also be the reason why women indicate a bigger need for opportunities to engage with others, as this may be more challenging for them.

The type of relocation support with the most significant difference in the results is that of the additional spouse support. At 25%, a larger share of males received this, compared to 17% of females. Even though a lower percentage of women were offered this support for their partners, only 21% state they would have liked it, compared to 31% of men. This doesn't seem to be an important type of support for female Foreign Assignees or International

Hires, as 62% state they didn't receive it and didn't need it (compared to 43% of males). However, the significantly higher percentage could merely be due to the fact that a larger percentage of women moved abroad without a partner, and therefore didn't require spouse support, or they moved abroad with working partners that didn't need spouse support. This seems to be reinforced by the fact that a higher share of female working expats (56%) are single, and therefore do not need spouse support. Among male working expats, 70% are in a relationship, and only 30% are single (See Survey Demographics, p. 22).

Usefulness of Relocation Support Received



TOTAL RESPONDENTS

Rated most useful to least useful.

METHODOLOGY

Respondents that indicated they received relocation support were asked questions about the usefulness of this support. These respondents could rate the usefulness on a scale of one to five (1 = not useful at all; 2 = negative rating; 3 = neutral; 4 = positive rating; 5 = very useful). For the report, the negative ratings (1–2) and the positive ones (4–5) have been combined, while the neutral results remain the same. The ratings emphasize their satisfaction.



Lump-Sum Payment for Expatriation-Related Expenses

5% not useful 13% neutral 82% useful



Language Classes

14% not useful 29% neutral 56% useful



Information on Local Life

12% not useful 34% neutral 55% useful



Move Organized by Employer or Service

8% not useful 17% neutral 74% useful



Access to Local Socializing Opportunities

10% not useful 35% neutral 55% useful



Membership in an Expat Organization

13% not useful 35% neutral 52% useful



Additional Spouse Support

12% not useful 33% neutral 55% useful



Access to Local Networking Opportunities

9% not useful 37% neutral 53% useful



Intercultural Training

15% not useful 33% neutral 52% useful

Usefulness of Relocation Support Received



FOREIGN ASSIGNEES

Rated most useful to least useful.



Lump-Sum Payment for Expatriation-Related Expenses

3% not useful 11% neutral 85% useful



Membership in an Expat Organization

11% not useful 32% neutral 57% useful



Intercultural Training

14% not useful 32% neutral 54% useful



Move Organized by Employer or Service

7% not useful 16% neutral 78% useful



Additional Spouse Support

13% not useful 33% neutral 54% useful



Access to Local Socializing Opportunities

9% not useful 39% neutral 51% useful



Language Classes

13% not useful 29% neutral 58% useful



Access to Local Networking Opportunities

9% not useful 39% neutral 52% useful



Information on Local Life

13% not useful 32% neutral 54% useful

Usefulness of Relocation Support Received



INTERNATIONAL HIRES

Rated most useful to least useful.



Lump-Sum Payment for Expatriation-Related Expenses

7% not useful 14% neutral 79% useful



Information on Local Life

10% not useful 33% neutral 57% useful



Language Classes

15% not useful 32% neutral 53% useful



Move Organized by Employer or Service

9% not useful 20% neutral 71% useful



Access to Local Socializing Opportunities

9% not useful 34% neutral 57% useful



Membership in an Expat Organization

13% not useful 35% neutral 52% useful



Access to Local Networking Opportunities

8% not useful 36% neutral 56% useful



Additional Spouse Support

11% not useful 35% neutral 53% useful



Intercultural Training

15% not useful 32% neutral 53% useful

Usefulness of Relocation Support Received



RELOCATING SPOUSES

Rated most useful to least useful.



Lump-Sum Payment for Expatriation-Related Expenses

5% not useful 15% neutral 80% useful



Language Classes

16% not useful 23% neutral 61% useful



Membership in an Expat Organization

13% not useful 42% neutral 44% useful



Move Organized by Employer or Service

11% not useful 15% neutral 74% useful



Access to Local Socializing Opportunities

13% not useful 35% neutral 52% useful



Access to Local Networking Opportunities

15% not useful 37% neutral 48% useful



Additional Spouse Support

10% not useful 31% neutral 59% useful



Information on Local Life

13% not useful 37% neutral 50% useful



Intercultural Training

18% not useful 36% neutral 46% useful

Relocation Support Received Mainly Rated Positively

On average, the usefulness of the different types of relocation support is rated positively, with general ratings above three out of five. Respondents find the two most commonly offered types of support — having the move organized and receiving a lump-sum payment — most useful, and intercultural training least useful.

TOP FINDINGS

- **Receiving support with the move abroad and a lump-sum payment have the highest usefulness ratings.**
- **Of the most desired types of support, access to socializing opportunities has the highest share of positive ratings for usefulness.**
- **All expat types consider additional spouse support valuable.**
- **Language classes have higher satisfaction ratings than intercultural training.**
- **Despite a strong need for more support, Relocating Spouses perceive the value of some services provided as less useful than the other expat types.**

Highest Satisfaction Ratings for Move Organized and Lump-Sum Payment

Overall, of the respondents that received the various types of support, having their move organized and receiving a lump-sum payment stand out as having the highest satisfaction levels in terms of usefulness, with 74% and 82% positive ratings respectively. On average, Foreign Assignees have the highest percentage of respondents rating these types of support as useful, with 78% finding assistance with their move and 85% finding the financial support useful. The higher satisfaction with the lump-sum payment could be due to it being financial support, rather than a pure service as the other types of relocation support offered. With financial support, there is more freedom in terms of which services or items expats wish to spend the money on, and the satisfaction does not depend on the quality of the actual service received.

Desired Support Most Useful for International Hires and Foreign Assignees

As seen in this section, access to networking and socializing opportunities, as well as membership in an expat organization stand out as the most desired types of support, and more than half of all respondents that received these types of support say it was useful.

Of these, access to local socializing opportunities has the highest share of positive ratings for usefulness, with 55% of respondents stating this. On average, International Hires find it most useful, with 57% rating it positively. When it comes to the usefulness of access to local networking opportunities, 53% of respondents rate it positively, while International Hires is again the expat type that is on average most satisfied at 56%.

In total, 52% of respondents are satisfied that membership in an expat organization is helpful. Foreign Assignees is the expat type with the largest share of respondents finding it valuable at 57%.

Information on Local Life Gets Mixed Reviews

Of the nine types of relocation support received, information on local life is rated only seventh most useful on average. Respondents seem to be split on their view of the usefulness of this type of support, with 55% rating it positively, 34% rating it neutrally and 12% rating it negatively. This type of support seems to be most appreciated by International Hires, with the largest share of respondents (57%) indicating the information they received was helpful, rating it fourth most useful of all the types of support received.

All Expat Types See the Worth of Additional Spouse Support

In general, the majority of respondents (55%) find the additional spouse support useful. As Relocating Spouses generally indicate a need for support, 59% rate their satisfaction with the support they received positively.

Language Classes More Appreciated than Intercultural Training

While a larger percentage of respondents indicate a need for intercultural training, respondents who received language classes perceive these as more useful. Of those who had language classes, 56% found them useful, while only 52% of respondents with intercultural training say the same. On average, language classes are found more useful by Relocating Spouses (61%) and Foreign Assignees (58%).

Relocating Spouses Perceive Certain Support Types as Less Useful

It is clear from the survey results that the views of Relocating Spouses differ from Foreign Assignees and International Hires in terms of the usefulness of certain types of received support. Relocating Spouses also on average have the lowest percentage of respondents that find the following types of support useful (compared to the other expat types): intercultural training (46% compared to 54% of Foreign Assignees and 53% of International Hires), membership in an expat organization (44% compared to 57% of Foreign Assignees and 52% of International Hires), information on local life (50% compared to 54% of Foreign Assignees and 57% of International Hires), and access to local networking

opportunities (48% compared to 52% of Foreign Assignees and 56% of International Hires). For the latter, Relocating Spouses have a stronger negative perception by stating that it was not useful at all (15% compared to 9% of Foreign Assignees and 8% of International Hires).

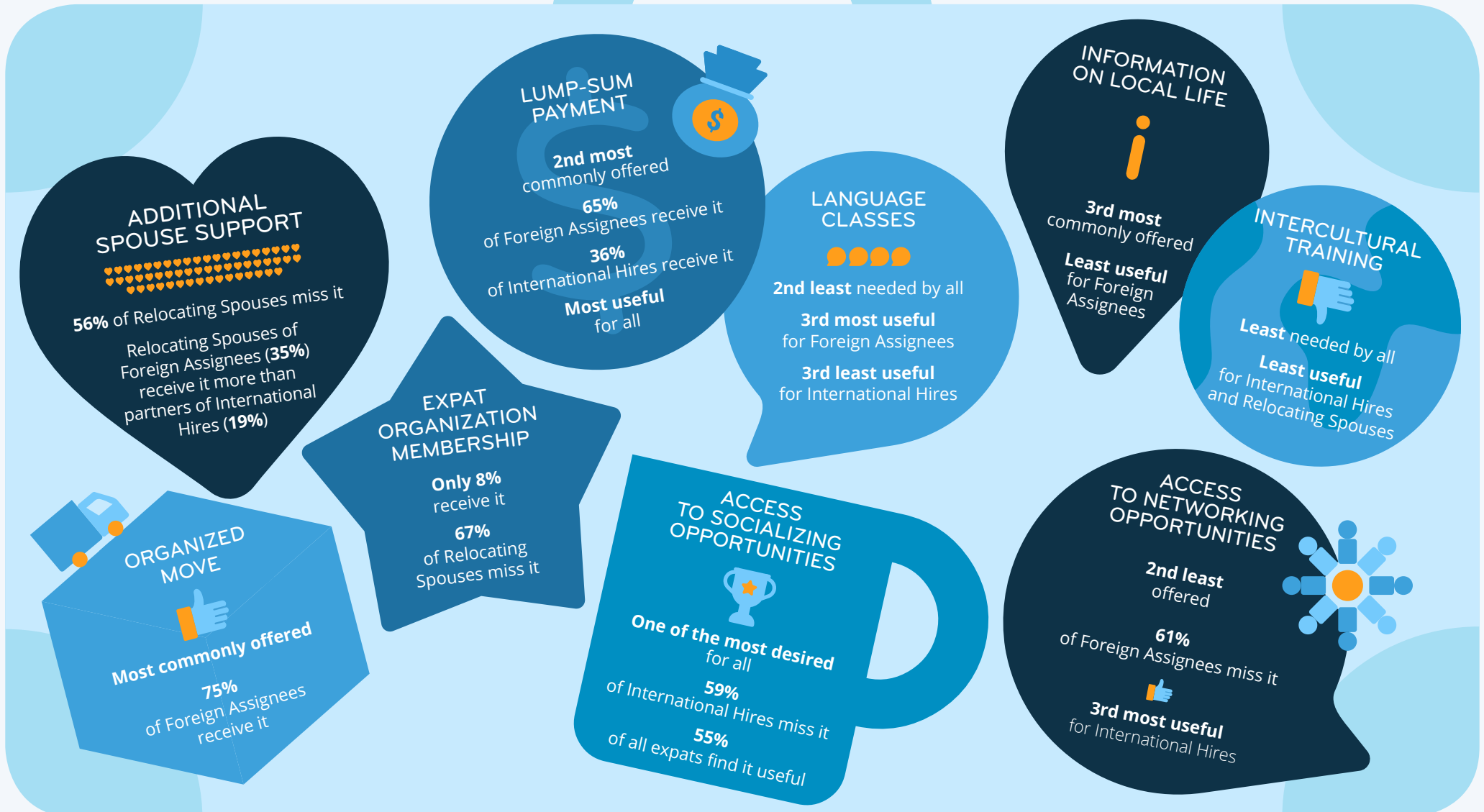
As Relocating Spouses is the expat type generally demonstrating a greater need for support, these different views on the support received could indicate that a one-size-fits-all approach may not work when offering relocation support, as general support or offer packages for Foreign Assignees and International Hires aren't necessarily that useful for Relocating Spouses. This could imply a need for service offers that are more strongly tailored to their profile and circumstances.

The Bottom Line?

These usefulness ratings could be interpreted in more than one way. In their ratings of how the support received helped them (or not), the expats may have considered factors such as whether their needs were met, whether the support spoke to their specific situation, and whether the quality of the support was what they expected.

In Focus: Relocation Support

9 types of relocation support offered by employers to Foreign Assignees, International Hires, and Relocating Spouses, and the perceived usefulness of this support



Ease of Settling In



- 46 Where Expats Feel most Settled (Country Rankings)
- 47 Factors Impacting Settling In
- 48 Settling In Over Time
- 51 Social Integration: Going Beyond Onboarding
- 55 In Focus: Expat Lifecycle (Infographic)

Where Expats Feel most Settled (Country Rankings)



As the ease of settling in is very much influenced by the country of residence and the

local perspective of the individual expat, a look at how the total survey respondents rate their ease of settling in in their various countries is important. The *Expat Insider* specifically focuses on this type of country ranking in its Ease of Settling In Index. A total of 68 countries met the minimum sample size requirement.

Not all of the sub-categories of the Ease of Settling In Index are reflected here. The results in this section only focus on the sub-categories: Feeling at Home and Finding Friends. For the full Ease of Settling In Index, and more country rankings, download the *Expat Insider* report [here](#).

EASE OF SETTLING IN

1	Bahrain	36	Myanmar
2	Mexico	37	Netherlands
3	Costa Rica	38	Morocco
4	Uganda	39	Brazil
5	Portugal	40	Luxembourg
6	Malaysia	41	Qatar
7	Spain	42	Egypt
8	Ecuador	43	Italy
9	Colombia	44	Kazakhstan
10	Philippines	45	Belgium
11	Kenya	46	Hong Kong
12	Cyprus	47	Turkey
13	Serbia	48	UK
14	Canada	49	India
15	Taiwan	50	France
16	Oman	51	Chile
17	Ireland	52	Norway
18	Singapore	53	Czechia
19	Australia	54	Estonia
20	Greece	55	Japan
21	Dominican Rep.	56	Finland
22	New Zealand	57	Poland
23	Argentina	58	Russia
24	Indonesia	59	South Korea
25	Malta	60	Hungary
26	UAE	61	Austria
27	Panama	62	China
28	Israel	63	Sweden
29	Thailand	64	Denmark
30	Romania	65	Switzerland
31	Vietnam	66	Germany
32	Bulgaria	67	Saudi Arabia
33	USA	68	Kuwait
34	South Africa		
35	Peru		

FEELING AT HOME

1	Bahrain	36	Netherlands
2	Mexico	37	Estonia
3	Portugal	38	Italy
4	Costa Rica	39	Israel
5	Spain	40	Peru
6	Ecuador	41	Brazil
7	Cyprus	42	Morocco
8	Colombia	43	Indonesia
9	Canada	44	Austria
10	Ireland	45	Chile
11	Australia	46	Hong Kong
12	New Zealand	47	Poland
13	Uganda	48	Finland
14	Taiwan	49	Belgium
15	Malaysia	50	Myanmar
16	Singapore	51	UK
17	Bulgaria	52	Hungary
18	Greece	53	Turkey
19	Malta	54	Qatar
20	Serbia	55	Russia
21	Thailand	56	Kazakhstan
22	Philippines	57	Norway
23	Oman	58	Japan
24	Kenya	59	Egypt
25	Argentina	60	South Korea
26	Panama	61	Switzerland
27	Dominican Rep.	62	Germany
28	Vietnam	63	Sweden
29	Romania	64	Denmark
30	Czechia	65	India
31	South Africa	66	China
32	UAE	67	Kuwait
33	USA	68	Saudi Arabia
34	Luxembourg		
35	France		

FINDING FRIENDS

1	Mexico	36	Myanmar
2	Bahrain	37	New Zealand
3	Serbia	38	Russia
4	Costa Rica	39	Turkey
5	Ecuador	40	Peru
6	Uganda	41	USA
7	Colombia	42	Czechia
8	Taiwan	43	Italy
9	Israel	44	Qatar
10	Portugal	45	India
11	Philippines	46	Poland
12	Vietnam	47	UAE
13	Greece	48	France
14	Malta	49	Hungary
15	Spain	50	China
16	Bulgaria	51	Hong Kong
17	Argentina	52	Luxembourg
18	Dominican Rep.	53	Chile
19	Malaysia	54	Japan
20	Cyprus	55	South Korea
21	Kenya	56	Netherlands
22	Oman	57	UK
23	Panama	58	Belgium
24	Thailand	59	Estonia
25	Indonesia	60	Austria
26	Ireland	61	Finland
27	South Africa	62	Norway
28	Brazil	63	Germany
29	Australia	64	Saudi Arabia
30	Romania	65	Switzerland
31	Kazakhstan	66	Denmark
32	Morocco	67	Sweden
33	Egypt	68	Kuwait
34	Singapore		
35	Canada		

Factors Impacting Settling In

METHODOLOGY

Respondents were given different statements related to their destination and asked to rate these factors on a scale of one to seven (1= don't agree at all / not satisfied at all; 2 and 3 = negative rating; 4 = neutral; 5 and 6 = positive rating; 7 = agree completely / completely satisfied). In the report, both the negative ratings (1–3) and the positive ones (5–7) have been combined, while the neutral results (4) stand on their own. The results focus on the ratings of the expat types, as well as their ratings during various time periods of their stay abroad.



TOTAL RESPONDENTS



FOREIGN ASSIGNEES



INTERNATIONAL HIRES



RELOCATING SPOUSES

	TOTAL RESPONDENTS			FOREIGN ASSIGNEES			INTERNATIONAL HIRES			RELOCATING SPOUSES		
It's easy to get used to the local culture	21%	17%	62%	23%	19%	58%	24%	20%	56%	26%	20%	53%
	disagree	neutral	agree	disagree	neutral	agree	disagree	neutral	agree	disagree	neutral	agree
It's easy to feel at home in the local culture	24%	16%	60%	27%	17%	57%	30%	18%	52%	33%	18%	50%
	dissatisfied	neutral	satisfied	dissatisfied	neutral	satisfied	dissatisfied	neutral	satisfied	dissatisfied	neutral	satisfied
It's easy to make new friends	25%	18%	57%	29%	18%	52%	30%	20%	50%	32%	18%	50%
	dissatisfied	neutral	satisfied	dissatisfied	neutral	satisfied	dissatisfied	neutral	satisfied	dissatisfied	neutral	satisfied
It's easy to make local friends	36%	19%	45%	41%	20%	40%	43%	21%	36%	48%	20%	31%
	disagree	neutral	agree	disagree	neutral	agree	disagree	neutral	agree	disagree	neutral	agree
It's easy to settle down	24%	17%	59%	25%	19%	57%	27%	18%	55%	29%	19%	52%
	disagree	neutral	agree	disagree	neutral	agree	disagree	neutral	agree	disagree	neutral	agree

Settling In Over Time



FOREIGN ASSIGNEES

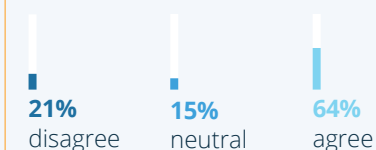
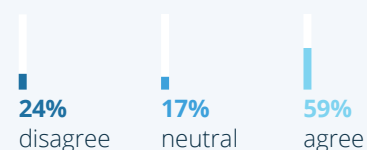
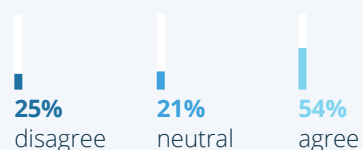
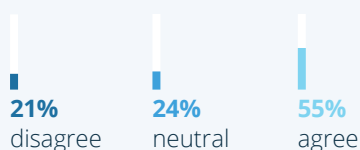
Less than 6 months

6 months to 2 years

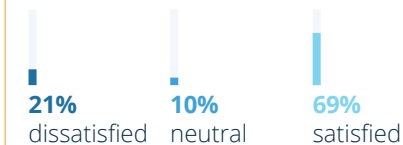
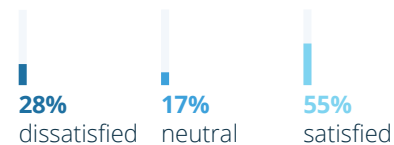
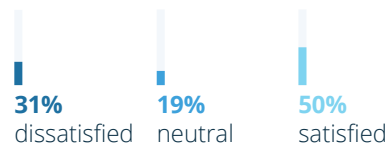
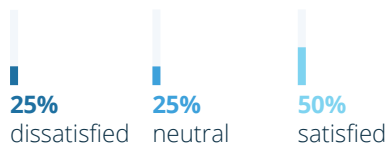
2 to 5 years

Longer than 5 years

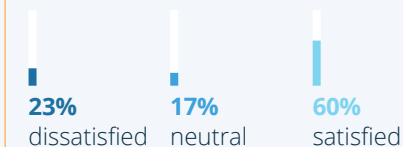
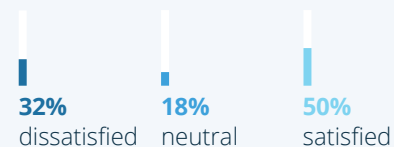
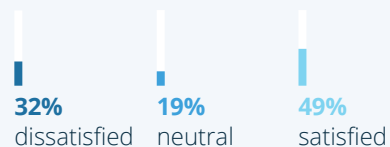
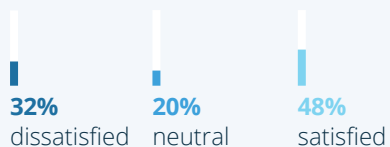
It's easy to get used to the local culture



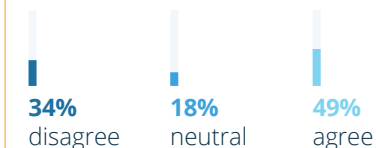
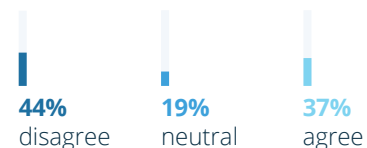
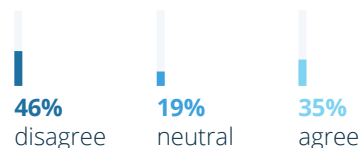
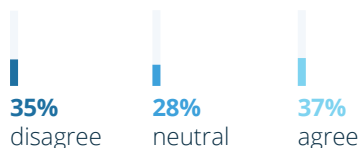
It's easy to feel at home in the local culture



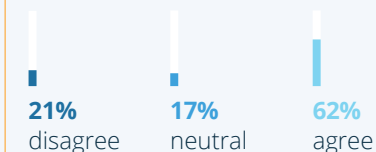
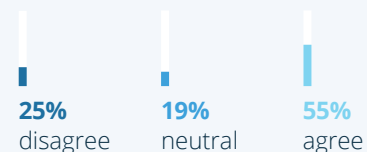
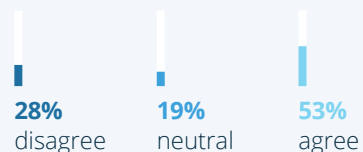
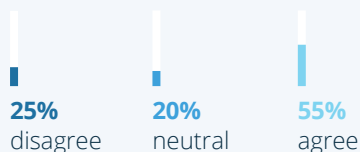
It's easy to make new friends



It's easy to make local friends



It's easy to settle down



Settling In Over Time



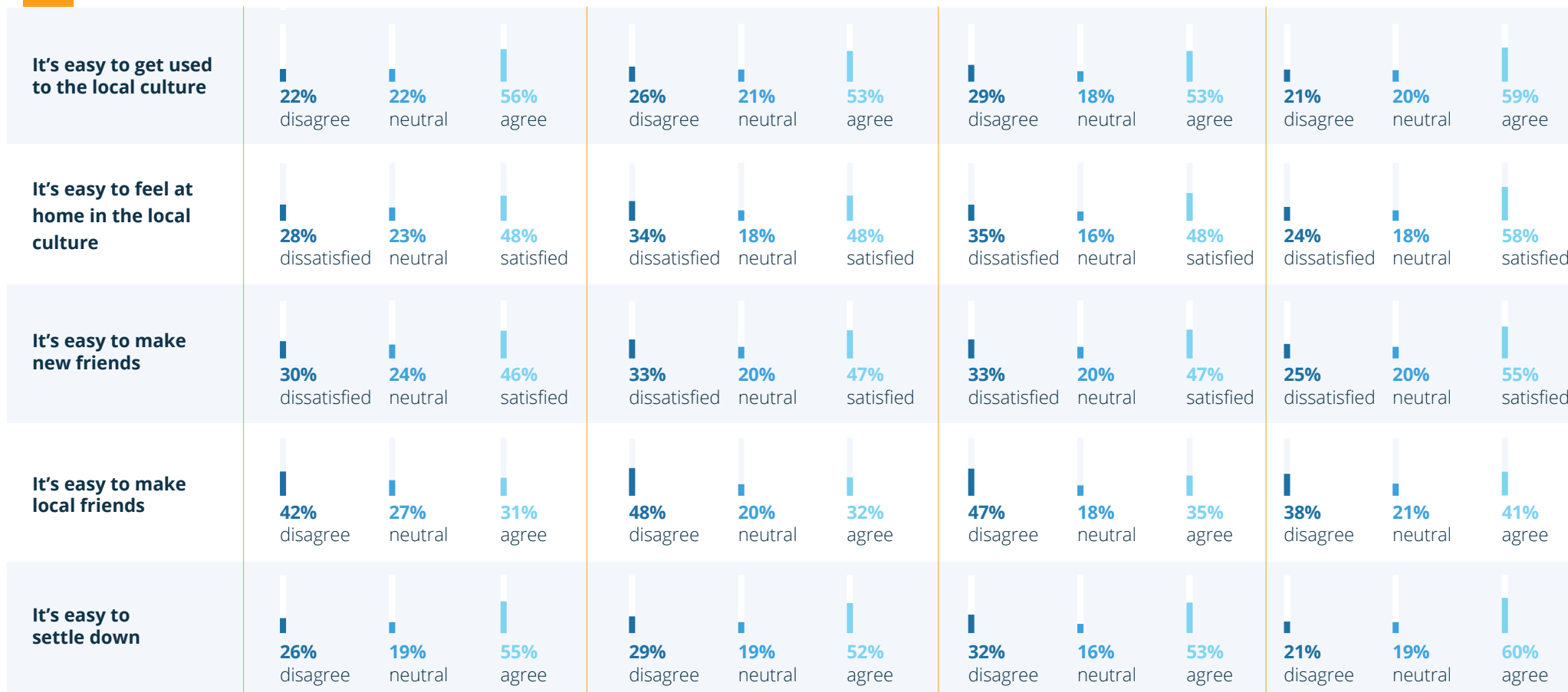
INTERNATIONAL HIRES

Less than 6 months

6 months to 2 years

2 to 5 years

Longer than 5 years



Settling In Over Time



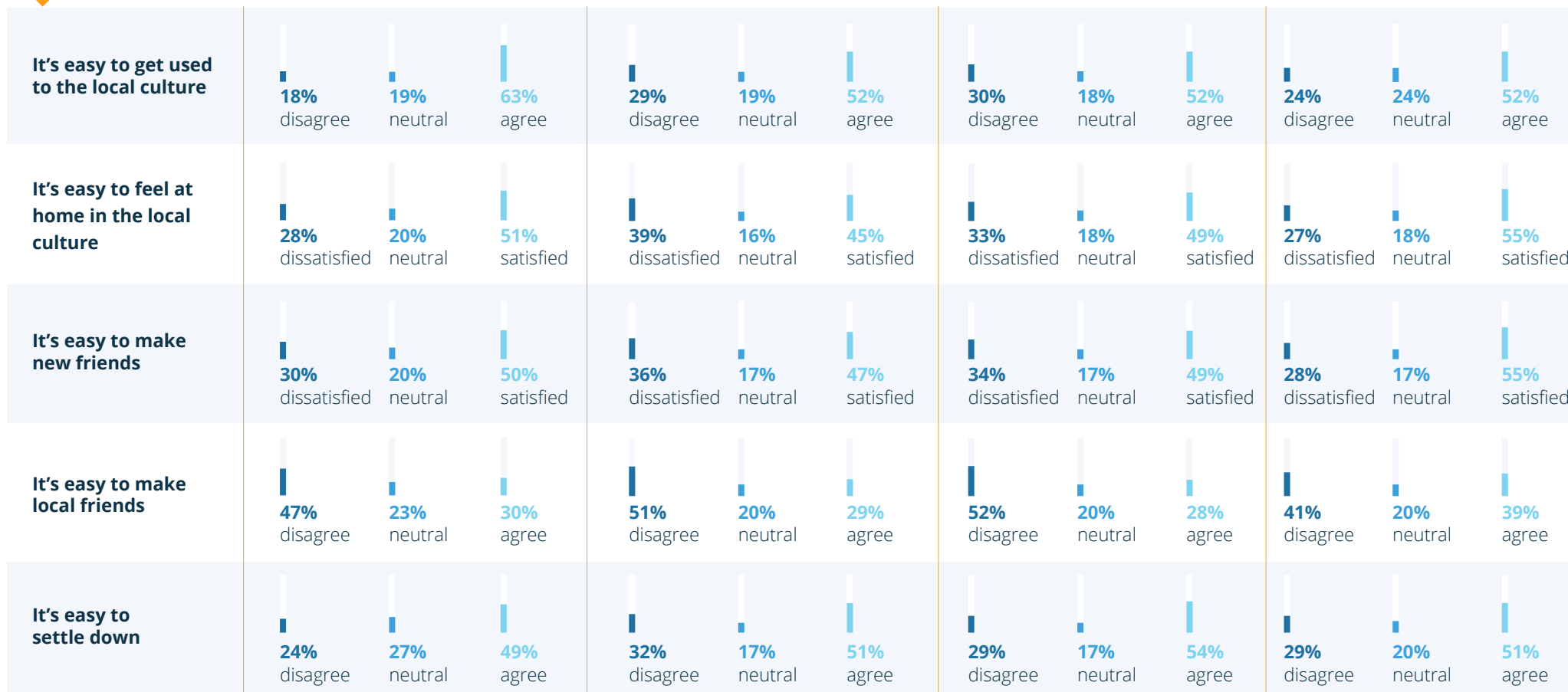
RELOCATING SPOUSES

Less than 6 months

6 months to 2 years

2 to 5 years

Longer than 5 years



Social Integration: Going Beyond Onboarding

All expat types find it easier to get used to the local culture than to feel at home in it. While making friends is generally a challenge, making local friends is one of the biggest problems. The results suggest that time does play a role when it comes to adapting to life abroad, and that settling in is an ongoing process that stretches beyond just the first months.

TOP FINDINGS

- **All expat types find it somewhat easier to get used to the local culture than to feel at home in it.**
- **Foreign Assignees are more satisfied in all phases of the expat lifecycle when it comes to adapting to local life, than International Hires and Relocating Spouses.**
- **Establishing friendships is a big challenge, and making local friends is especially difficult.**
- **The period 6 months – 2 years often has the lowest percentage of satisfied respondents, indicating a potentially difficult time in the expat lifecycle.**

Adapting to the Local Culture Takes Time

While 62% of the total survey respondents agree that it is easy to get used to the local culture, the satisfaction ratings of the three expat types are on average lower, with 58% of Foreign Assignees, 56% of International Hires, and 53% of Relocating Spouses agreeing that it's easy to get used to the local culture.

This is similar for feeling at home in the local culture, with 60% of total survey respondents stating satisfaction, and the three expat types again having a lower share of positive ratings (57% of Foreign Assignees, 52% of International Hires, and 50% of Relocating Spouses).

Foreign Assignees and International Hires both have the largest share of respondents agreeing it's easy to get used to the local culture after being in their new home country for longer than five years (64% and 59% respectively). The average satisfaction ratings for getting used to the local

culture are lowest for Foreign Assignees in the period between six months and two years (albeit only slightly), and for International Hires in the periods between six months and two years, and two to five years.

The results for feeling at home in the local culture are similar, with Foreign Assignees and International Hires again having the largest share of respondents agreeing it's easy to get used to the local culture after being in their host country for longer than five years (69% and 58% respectively). The average satisfaction ratings for feeling at home in the local culture are again lowest for Foreign Assignees in the period between six months and two years, and for International Hires in the periods between six months and two years, and two to five years. This might be an indication of onboarding challenges and difficulties with social integration during the first years abroad, especially for International Hires.

Some respondents reiterate this in their comments. One American male International Hire living in Bangladesh says it is "difficult to break into the local culture," while a British

female International Hire living in Denmark states: “There is a coldness of the local culture”.

Another respondent, a Turkish female International Hire living in Germany, says: “It is difficult to integrate into the local culture and there is sometimes hostility towards foreigners”. A Mexican male Foreign Assignee living in the Netherlands has a more positive response, even though he does acknowledge the difficulties: “Whilst the local culture is still a challenge, I have an extraordinary group of expats that have become family for me”.

For Relocating Spouses, the picture is different in terms of getting used to the local culture, with the largest share of respondents (63%) being pleased with this in the first six months. After this initial period, the positive ratings remain lower at 52% throughout the periods of six months to two years, two to five years, and longer than five years.

In terms of feeling at home in the local culture, Relocating Spouses have the largest share of respondents indicating satisfaction in the period of longer than five years (55%), closely followed by the first six months (51%) — compared to a lower share (45%) being satisfied between six months and two years. This is also the period with the lowest average satisfaction ratings for this expat type.

While Foreign Assignees on average have the highest satisfaction ratings in all phases of the expat lifecycle when it comes to adapting to local life, International Hires, and — to an even greater extent — Relocating Spouses, are

the expat types with consistently lower satisfaction ratings. This could be an indication that International Hires and Relocating Spouses may not be receiving all the integration support they need, and that these two expat types, and particularly the latter, may need more ongoing support and opportunities than Foreign Assignees to get used to and feel at home in the local culture.

“Whilst the local culture is still a challenge, I have an extraordinary group of expats that have become family for me.”



Mexican male Foreign Assignee
living in the Netherlands

This may relate back to the topic of relocation support (See Relocation Support, p. 32), where Relocating Spouses indicate a greater need for support, and they perceive the support received slightly differently than the other two expat types. Hence, employers should not only look at the types of spouse support differently, but also look at the longevity of support — not limiting this to the initial onboarding.

This need for longevity is supported by the fact that there is a decrease in the satisfaction percentages of all expat types after the honeymoon phase (the first six months where everything is still new and exciting). This further strengthens the argument that employer support should not be limited to just onboarding, and that social integration does take

time. As seen even with the more satisfied expat type, Foreign Assignees, the longer they are in their host country, the more satisfied they are.

Some respondents comment that both time and being open to the culture play a big role for them. As one Canadian female International Hire living in the Netherlands states: “Initially it is tough to integrate into Dutch society as a resident, but once you embrace it, it will embrace you, as is the case worldwide. You must embrace the local culture, or it will not work”. Another respondent, a French female International Hire living in Bahrain, says: “I like the local culture and living in a multicultural society, while being fully integrated with the local people. It’s very enriching after living here for ten years”.

Making Local Friends Is a Major Challenge for All Expat Types

Making new friends in general seems to be easier than making local friends, with higher overall satisfaction ratings. Of the total survey respondents, 57% are satisfied with the ease of making new friends. For Foreign Assignees (52%), International Hires (50%), and Relocating Spouses (50%), the results are, however, lower than the average.

On average, the satisfaction ratings for making new friends are highest when the expats have been in their host country for longer than five years, with the largest share of respondents being satisfied — 60% of Foreign Assignees, 55% of International Hires, and 55% of Relocating Spouses.

This could indicate that it does take quite some time to meet people, foster real friendships, expand social networks, and develop connections.

The challenges of making friends are described in the comments of some respondents. One American male Foreign Assignee living in Germany says it is “difficult to make meaningful friendships,” while a Lebanese female Relocating Spouse living in Kuwait agrees, saying: “I don’t like not having real close friends”. For an American female International Hire in Switzerland, not having friends contributes to her feeling homesick. She states: “It’s hard to make friends when working long hours. I miss my friends and don’t have anybody I’m close to here. It’s very lonely”.

In terms of making local friends the picture looks bleaker, with the largest share of respondents indicating it is difficult: 41% of Foreign Assignees struggle to make local friends, with 43% of International Hires and 48% of Relocating Spouses indicating the same feeling. The most negative satisfaction ratings are from respondents that have been in their host country in the periods of six months to two years, and two to five years.

Many respondents commented on this in the survey, making it stand out as a pain point for them. One Chinese female Foreign Assignee living in France says: “It’s not so easy to get into the local circle here”. An American female Relocating Spouse living in Guatemala says, “this has been the hardest part” of her expat journey and that “locals aren’t really looking for new friends”.

A Russian female Foreign Assignee living in the Netherlands shares this sentiment, saying: “Finding friends among locals is difficult within my age group, because most locals already have their circle of friends and family and are too busy with other things to make new friends. Finding local friends can be a challenge, unless you meet them through work”.

“I normally make friends easily and while I have made many international acquaintances, there is not a single local person that I can call a friend despite being here for over 14 months.”



American male International Hire
living in Denmark

A British male International Hire living in Switzerland says it’s not just difficult for adults to make local friends, but also for children. “It’s impossible to make local friends, and that goes for adults and children. I have three children in primary school. Their language skills are more than adequate to communicate, and they have made friends from various nationalities, but not a single local one.”

One of the respondents, an American male International Hire living in Denmark, highlights the importance of friendships with locals, saying: “I normally make friends easily and while I have made many international acquaintances, there is not a single local person that I can call a friend despite being here

for over 14 months. For me, if you cannot connect with the local people and make friends, there is very little meaning or purpose to your life abroad”.

From the survey results and respondents’ comments, it is evident that friendships play an important role in the lives of expats and that this is an aspect that takes time to develop. Furthermore, the lack of local friends, as mentioned before, could be a reason why respondents rate their satisfaction with feeling at home in the local culture so poorly in the first few years. This lack of having locals as friends could also be a reason for expats remaining within the expat bubble — staying exclusively within their expat community and not really understanding and immersing themselves in the local culture.

“It’s not so easy to get into the local circle here.”



Chinese female Foreign Assignee
living in France

Overall, the difficulty with making friends could also be why all expat types indicate a big need for access to socializing and networking opportunities, as well as membership in an expat organization (See Relocation Support, p. 33). These types of opportunities and networks could open the door to meeting new people, establishing meaningful friendships, and settling in more smoothly.

Settling Down Is a Bigger Struggle for Relocating Spouses

In total, 59% of the survey respondents state that it is easy to settle down in their host country, with 57% of Foreign Assignees, 55% of International Hires, and 52% of Relocating Spouses feeling this way.

The survey results of the Foreign Assignees and International Hires indicate a similar trend, with both expat types on average having higher positive responses in the first six months (55% each). As these expat types spend more time in their host country, the percentage of respondents agreeing that it's easy to settle down also increases. For Foreign Assignees, this increases to 62% for those being there longer than five years. For International Hires, the percentage increases to 60% for the same period. As there is a slight initial drop in the average satisfaction ratings after the first six months and a gradual increase in respondents feeling more settled as time passes, this could be an indication of the challenges of social integration, the time it takes to feel settled abroad, and the longevity that should come with relocation support.

In terms of the average satisfaction with settling down abroad, Relocating Spouses and International Hires again have lower ratings than Foreign Assignees. Their average satisfaction ratings are equally low during the first six months and the period between six months and two years. International Hires, similarly to Foreign Assignees, are however much more satisfied after the initial five years,

while Relocating Spouses still have much lower average satisfaction ratings during this time. Only 51% of Relocating Spouses in this timeframe agree that it's easy to settle down abroad. In fact, Relocating Spouses don't indicate a strong agreement that it is easy to settle down within any of the time periods.

One American female Relocating Spouse living in Switzerland says: "I don't like that it is difficult to feel part of the local culture and to be seen as a foreigner". Another Relocating Spouse, a German female living in Poland, says: "What bothers me most is that not speaking the native language well is a barrier for some activities".

"I don't like that it is difficult to feel part of the local culture and to be seen as a foreigner."



American female Relocating Spouse living in Switzerland

THE HONEYMOON PHASE

In the expat lifecycle, the honeymoon phase is often referred to as the first months just after relocation, when everything is still new and exciting — a lot like being on vacation. After the initial exhilaration and feeling of adventure, a daily routine kicks in and often changes the picture. This is where the honeymoon phase turns into a more critical phase in terms of feeling settled.

Expats usually have the highest satisfaction ratings in the period of longer than five years, indicating that it does take time for them to feel settled abroad. Next to this, in most instances the survey results indicate that respondents are on average slightly more satisfied in the first six months than in the periods between six months and two years, and two to five years. This supports the notion that there is some drop in satisfaction after the honeymoon phase, before increasing again as time progresses.

In Focus: Expatriate Lifecycle

Zooming in on the expat lifecycle of Foreign Assignees, International Hires, and Relocating Spouses and the factors impacting their time abroad.



| Happiness



- 57 Happiness with Life in General
- 59 Reasons for Happiness
- 60 Reasons for Unhappiness
- 61 Unhappiness Over Time
- 62 The Happiness Factor(s)
- 65 Does Relocation Support Increase Happiness?
- 68 Are Expats Happier Because of Relocation Support Received?
- 70 In Focus: (Un)Happiness (Infographic)

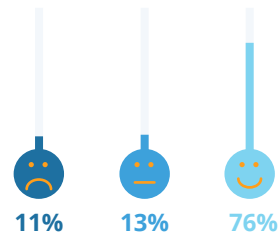
Happiness with Life in General

METHODOLOGY

Respondents were asked to rate their happiness with life in general on a scale of one to seven (1 = I'm not happy at all; 2 and 3 = negative rating; 4 = neutral; 5 and 6 = positive rating; 7 = I'm very happy). In this report, both the negative happiness ratings (1–3) and the positive ones (5–7) have been combined, while the neutral results (4) stand on their own. Depending on whether they rated their happiness positively or negatively, respondents were given a list of possible contributing factors and asked to choose up to three.



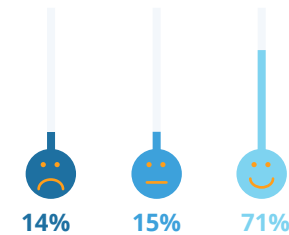
TOTAL RESPONDENTS



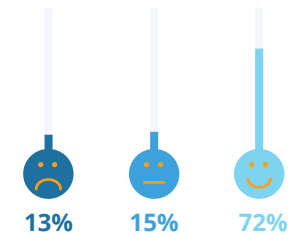
FOREIGN ASSIGNEES



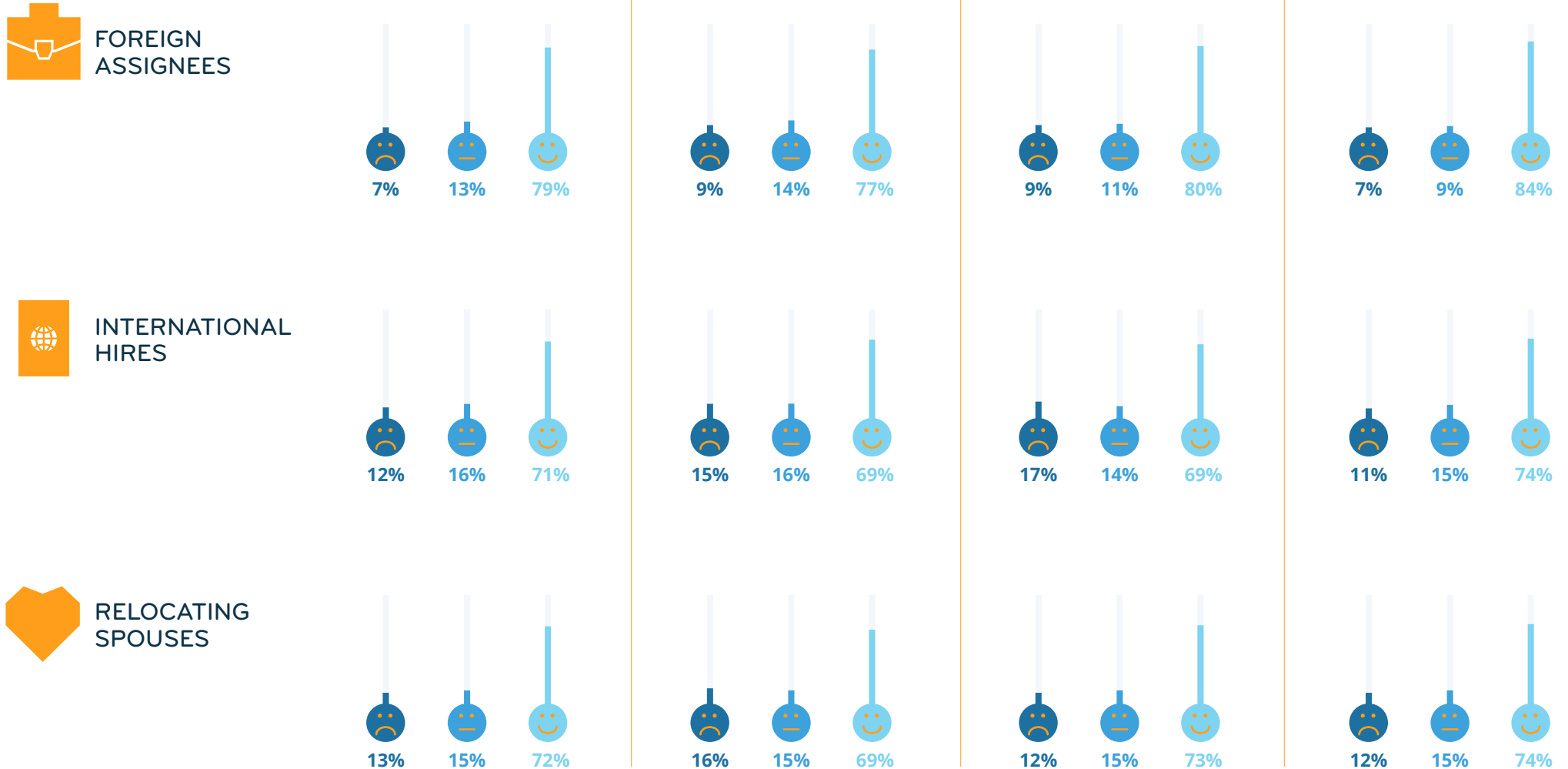
INTERNATIONAL HIRES



RELOCATING SPOUSES



Happiness with Life in General



Reasons for Happiness



HAPPINESS CONTRIBUTORS

Choice of up to three.



TOTAL RESPONDENTS



FOREIGN ASSIGNEES



INTERNATIONAL HIRES



RELOCATING SPOUSES

Happy partner and/or family	57%	53%	47%	83%
Plenty of socializing opportunities	35%	31%	31%	32%
Not experiencing any culture shock	38%	41%	42%	31%
Not struggling with the language	30%	30%	31%	27%
Having a personal support network	22%	19%	20%	15%
Easily dealing with the practical aspects of living abroad	50%	56%	55%	43%
None of the above	3%	4%	4%	2%

Reasons for Unhappiness



UNHAPPINESS CONTRIBUTORS

Choice of up to three.



TOTAL RESPONDENTS



FOREIGN ASSIGNEES



INTERNATIONAL HIRES



RELOCATING SPOUSES

Unhappy partner and/or family	19%	26%	20%	20%
Not enough socializing opportunities	52%	59%	59%	47%
Dealing with culture shock	20%	18%	19%	26%
Struggling with the language barrier	25%	22%	28%	29%
Lack of a personal support network	46%	45%	45%	51%
Struggling with the practical aspects of living abroad	20%	10%	19%	23%
None of the above	8%	8%	7%	6%

Unhappiness Ratings Over Time



FOREIGN ASSIGNEES

6 months
to 2 years2 to 5
yearsLonger
than 5 years

INTERNATIONAL HIRES

6 months
to 2 years2 to 5
yearsLonger
than 5 years

RELOCATING SPOUSES

6 months
to 2 years2 to 5
yearsLonger
than 5 years

Unhappy partner
and/or family

20% 31% 23%

Not enough socializing
opportunities

52% 69% 49%

Dealing with
culture shock

25% 17% 9%

Struggling with
the language barrier

34% 17% 3%

Lack of a personal
support network

43% 50% 40%

Struggling with the practical
aspects of living abroad

11% 14% 3%

None of
the above

13% 0% 14%

19% 20% 21%

62% 60% 57%

20% 19% 11%

32% 32% 17%

46% 43% 42%

21% 19% 16%

8% 5% 9%

19% 23% 18%

48% 56% 39%

31% 15% 29%

30% 40% 8%

45% 54% 53%

25% 15% 18%

3% 6% 12%

The Happiness Factor(s)

The expat types are quite happy with life abroad, with factors such as everyday practicalities and a happy family contributing to the positive ratings. On the other hand, a lack of socializing and personal support largely contributes to their unhappiness during various phases of their time abroad.

How Happy Are Expats Really?

On average, respondents are happy with their life in general, with 80% of Foreign Assignees, 71% of International Hires, and 72% of Relocating Spouses indicating contentment — compared to a total survey average of 76%.

Foreign Assignees are happiest and have consistently high percentages of respondents indicating this throughout the expat lifecycle. The happiness ratings of International Hires and Relocating Spouses are nearly ten percentage points lower than that of the Foreign Assignees, and their unhappiness is higher at 14% and 13% respectively, compared to 8% of Foreign Assignees. This expat type has the lowest unhappiness rating overall — even lower than the total respondents (11%). This further establishes that Foreign Assignees experience their expat life more positively. This might be related to the fact that Foreign Assignees receive more support when relocating (See Relocation Support, p. 32), compared to the others. On average, International Hires have the lowest happiness ratings.

What Are the Main Happiness and Unhappiness Reasons?

Of the multiple reasons that respondents could choose from, the ease of dealing with the practical aspects of living abroad, and a happy partner and family are the main contributors to their happiness.

Easily dealing with practicalities of life abroad contribute most to the happiness of Foreign Assignees (56%) and International Hires (55%). For them, the second most important aspect is that their partner and family are also happy (53% of Foreign Assignees and 47% of International Hires). Relocating Spouses, however, find the latter reason most important, with 83% indicating that a happy partner and family make them happy, followed by 43% stating that the ease of dealing with the practical aspects of living abroad adds to their contentment.

These results could be influenced by the fact that a larger share of Relocating Spouses (94%) are in a committed



TOP HAPPINESS CONTRIBUTORS

Foreign Assignees in a Committed Relationship



76% happy partner and/or family

54% easily dealing with practical aspects

International Hires in a Committed Relationship



71% happy partner and/or family

52% easily dealing with practical aspects

Relocating Spouses in a Committed Relationship



85% happy partner and/or family

43% easily dealing with practical aspects

relationship, compared to Foreign Assignees (63%) and International Hires (57%) (See Survey Demographics, p. 22). Looking only at respondents that indicated they are in a relationship, 85% of the Relocating Spouses say a happy partner and family make them happy. Of the Foreign Assignees in a relationship, 76% indicate that a happy partner and family contribute to their happiness, and 71% of International Hires state the same. Therefore, for all three expat types that are in a relationship, the happiness of their partner and family is in fact the most frequently cited reason for their own happiness.

"My husband is happy in his job, so our family stress is low."

 Canadian female Relocating Spouse living in Kazakhstan

Some respondents reiterate these results in their comments, with a Canadian female Relocating Spouse living in Kazakhstan saying her happy partner is important: "My husband is happy in his job, so our family stress is low". Another Relocating Spouse, a Venezuelan male living in Uruguay, says: "It's a great place to raise a family because many things are done around children". A French female International Hire living in the United States of America, states: "I like the practical aspects of things — it's easy to get info, services, and answers to questions. Stores are open every day and people are generally friendly".

Of the total survey respondents rating their happiness negatively, 52% attribute their unhappiness to a lack of socializing opportunities and 46% indicate that not having a personal support network makes them unhappy.

"I don't like the lack of a social life. I also hardly have any kind of support network."

 Turkish female International Hire living in Germany

Foreign Assignees and International Hires are no exception: 59% of both expat types cite the lack of socializing options as the reason for their unhappiness, and 45% blame the lack of a personal support network. In comparison, among Relocating Spouses the largest share of respondents (51%) say that not having a personal support network makes them unhappy, while 47% identify a lack of socializing opportunities as a contributor to their unhappiness.

Looking at how the unhappiness results are impacted by the relationship status of respondents, this time interestingly enough, Relocating Spouses are least likely to mention their partner's unhappiness as a reason for their own unhappiness (21%), compared to 44% of Foreign Assignees and 36% of International Hires. For them, not having a personal support network and no access to socializing opportunities are rated highest (50% and 49% respectively).

Of the unhappy Foreign Assignees and International Hires that are in a committed relationship, a lack of socializing opportunities is their top reason for unhappiness, at 54% and 55% respectively. Therefore, socializing stands out as an important contributing factor, regardless of whether the respondents are single or in a relationship.



TOP UNHAPPINESS CONTRIBUTORS

Foreign Assignees in a Committed Relationship



54% not enough socializing opportunities

44% unhappy partner and/or family

International Hires in a Committed Relationship



55% not enough socializing opportunities

40% lack of personal support

Relocating Spouses in a Committed Relationship



50% lack of personal support

49% not enough socializing opportunities

Foreign Assignees who have been living in their current country of residence between two and five years have the largest share of respondents (69%) stating the lack of socializing opportunities as a reason for their unhappiness. This percentage decreases to 49% for those that have been abroad for longer than five years, but it remains the most-cited reason for their unhappiness.

International Hires are most likely to choose a lack of socializing opportunities as a reason for their unhappiness if they have been abroad for six months to two years (62%), or for two to five years (60%). Of those that have been abroad for longer than five years, 57% are still experiencing unhappiness because of a lack of occasions for socializing. As with the Foreign Assignees, the need for socializing is prominent throughout, regardless of the stage of the expat lifecycle the respondents are in.

While for Relocating Spouses a lack of socializing opportunities and the absence of a personal support network have fairly similar results in the period between six months and two years (48% and 45% respectively), and two and five years (56% and 54% respectively), socializing does have slightly higher percentages. Of those that have been abroad for longer than five years, a smaller share of respondents (39%) state socializing as a reason for their unhappiness, while the majority (53%) still see the lack of a personal support network as a problem for them. While socializing remains a prominent factor for Relocating Spouses, the trend that they generally appear to need more support (See Relocation Support, p. 31) prevails in these results.

These primary reasons for unhappiness correspond to the need for support as indicated by all expat types, such as access to socializing and networking opportunities, and additional spouse support in the case of Relocating Spouses (See Relocation Support, p. 33).

As one Canadian female Foreign Assignee living in Tunisia says: “There is a lack of social groups that provide diversified activities and include a mix of locals and expats”. Another respondent, a Turkish female International Hire living in Germany, says: “I don’t like the lack of a social life. I also hardly have any kind of support network”.

How Do Cultural and Language Factors Impact Happiness?

Culture shock and the language barrier also contribute to the unhappiness of expats, albeit to a lesser extent than the aforementioned reasons. While there are higher percentages of unhappiness among the respondents in the first six months to two years abroad, there is a definite decline as time goes by. As the expat types are more settled abroad, these factors usually become less prominent in hampering their happiness.

The language barrier stands out as more of a consistent pain point for the International Hires, with 32% indicating this in the period between six months and two years, and two and five years. Within the same timeframes, 20% and 19% respectively indicate culture shock. Of those that have been abroad for longer than five years, 17% say the

language barrier and 11% say culture shock contributes to their unhappiness.

For Foreign Assignees, the language barrier is more prominent in the period between six months and two years, with 34% of respondents indicating this as a problem, compared to 25% stating culture shock. Both the language barrier and culture shock have 17% of respondents identifying these as a reason for unhappiness in the period between two and five years. Of those that have been abroad for longer than five years, only 3% state that the language barrier is a problem, while 9% state culture shock. Again, indicating a decline over time and becoming less prominent as reasons for unhappiness.

Of the respondents commenting on language and culture issues in the survey, a British male International Hire living in Switzerland says: “For me, the language is a barrier to everything”. Another British male International Hire living in Germany states that while culture shock is a problem, he gets some support: “Colleagues at work are aware of the culture shock and make an effort to help”.

“Colleagues at work are aware of the culture shock and make an effort to help.”

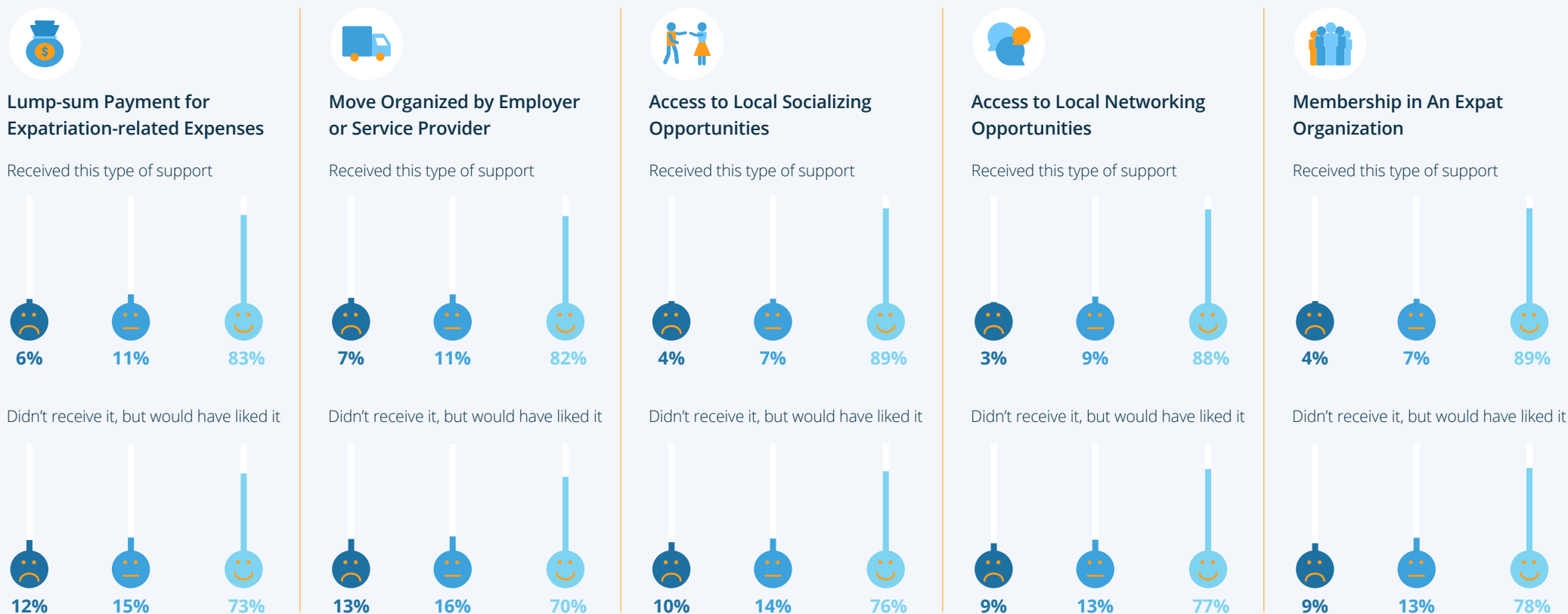


British male International Hire
living in Germany

Does Relocation Support Increase Happiness?



To get an idea of how expats that have received relocation support perceive their personal happiness, the most common types of support offered by employers and the most desired types of support indicated by the expat types (See Relocation Support, p. 27) are examined.



Does Relocation Support Increase Happiness?

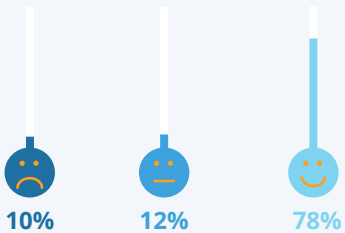


INTERNATIONAL HIRES

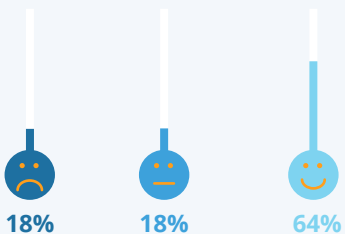


Lump-sum Payment for Expatriation-related Expenses

Received this type of support

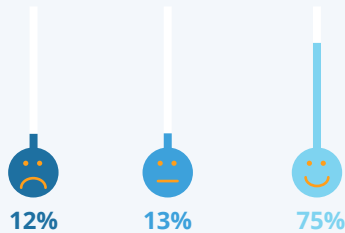


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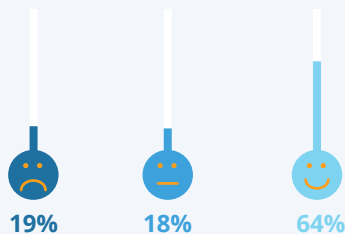


Move Organized by Employer or Service Provider

Received this type of support

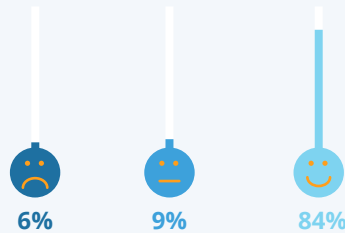


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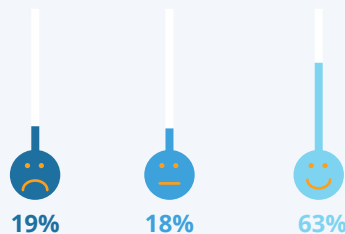


Access to Local Socializing Opportunities

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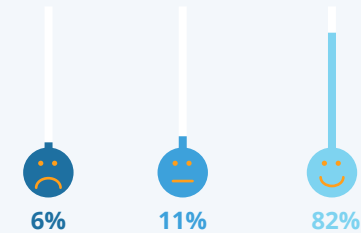


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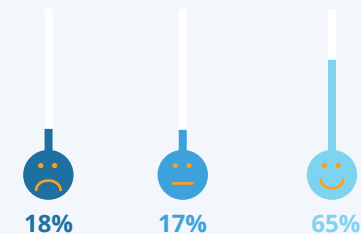


Access to Local Networking Opportunities

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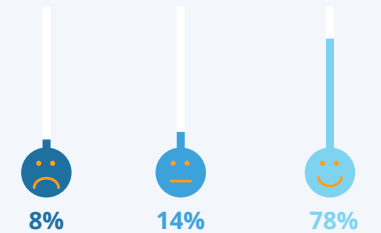


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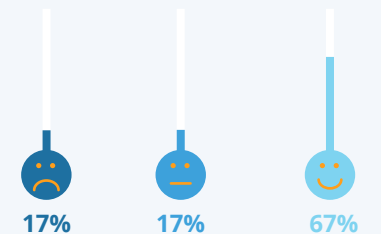


Membership in An Expat Organization

Received this type of support



Didn't receive it, but would have liked it



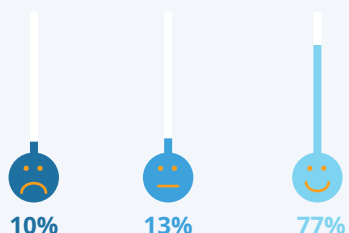
Does Relocation Support Increase Happiness?

RELOCATING SPOUSES

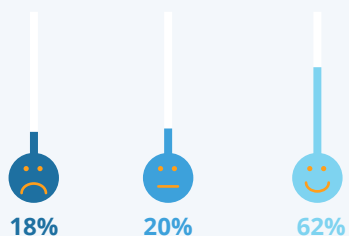


Lump-sum Payment for Expatriation-related Expenses

Received this type of support

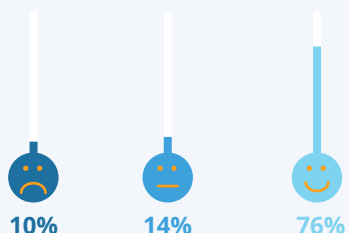


Didn't receive it, but would have liked it

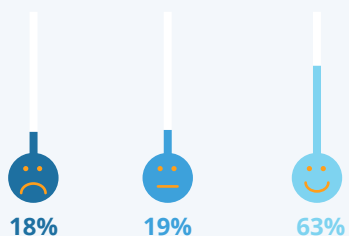


Move Organized by Employer or Service Provider

Received this type of support

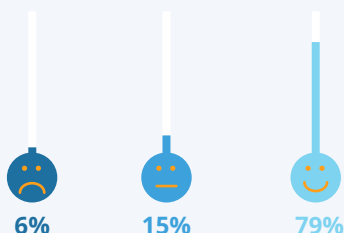


Didn't receive it, but would have liked it

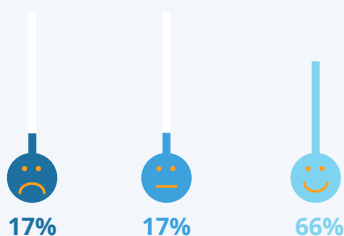


Access to Local Socializing Opportunities

Received this type of support

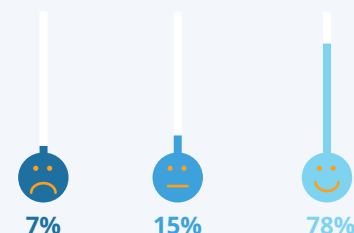


Didn't receive it, but would have liked it

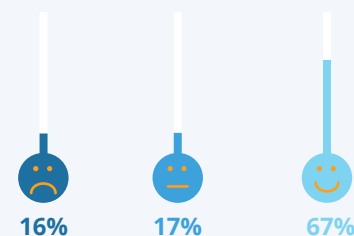


Access to Local Networking Opportunities

Received this type of support

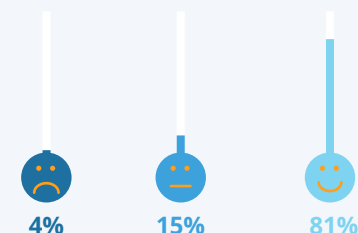


Didn't receive it, but would have liked it

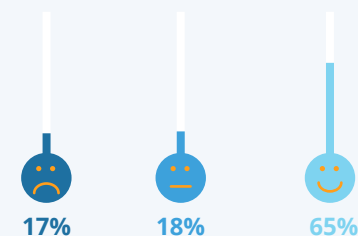


Membership in An Expat Organization

Received this type of support



Didn't receive it, but would have liked it



Are Expats Happier Because of Relocation Support Received?

Having their move organized by the employer or a service provider and receiving a lump-sum payment for expatriation-related costs are the two types of support most commonly offered by employers. Examining the happiness ratings of expats who have received such support, there is an indication that these types of support could have a positive impact on the happiness of the expat types.

Foreign Assignees have a noticeable difference in happiness between those that received the lump-sum payment (83%) and those that didn't but would have liked it (73%). The unhappiness of the Foreign Assignees that didn't receive this type of support is six percentage points more than those that received it (12% vs. 6%).

Somewhat smaller shares of International Hires and Relocating Spouses that received the lump-sum payment are happy (78% and 77% of positive ratings, respectively), compared to the Foreign Assignees. Of the International Hires that didn't receive this support but would have liked it, a considerably lower percentage are happy at 64%, and the picture for the Relocating Spouses is similar at 62%.

For both expat types, 18% of those that didn't receive this support indicate that they are unhappy.

Of the respondents that received the offer of having their move organized by their employer, Foreign Assignees are again on average the happiest with 82% positive responses. This is followed by Relocating Spouses (76%), and International Hires (75%). While only 7% of Foreign Assignees receiving this support are unhappy, this share is higher for International Hires (12%), and Relocating Spouses (10%). Respondents who didn't receive this support but indicated that they would have liked it are on average less happy than those who did.

These results demonstrate once again that Foreign Assignees are the most satisfied expat type. One possible reason for this could be that they generally receive more support and are better catered to by employers.

Not receiving these commonly offered types of support could be contributing factors to the unhappiness of International Hires and Relocating Spouses.

Is Social Interaction a Key Happiness Factor?

Access to networking and socializing opportunities, and membership in an expat organization are needs for all expat types. The lack of socializing, in any shape or form, is a big cause of unhappiness for all expat types throughout their expat lifecycle — as seen earlier in this section.

Of the expats that received access to socializing opportunities as a type of support by their (or their partner's) employer, 89% of Foreign Assignees, 84% of International Hires, and 79% of Relocating Spouses are happy. There is a noticeable difference in happiness between those that received this support and those that didn't but would have liked it, with ratings more than ten percentage points lower for each expat type: 76% of Foreign Assignees, 63% of International Hires, and 66% of Relocating Spouses indicate happiness.

International Hires have the largest difference (21 percentage points) in happiness between those that

received this support and those that didn't but wanted it. This is also the expat type that is on average somewhat less happy than the others, and that has the highest share of unhappy respondents (19%, compared to 10% of Foreign Assignees and 17% of Relocating Spouses).

Among those that received access to networking opportunities, 88% of Foreign Assignees, 82% of International Hires, and 78% of Relocating Spouses are happy. Foreign Assignees are again happiest, and even of those that stated they didn't receive this support but would have liked it, 77% say they are happy. For International Hires and Relocating Spouses the picture is different, with larger differences between the percentages of positive ratings between those who received this kind of support and those who didn't. Of the International Hires without access to networking opportunities, 65% are happy while 18% are unhappy, and of the Relocating Spouses 67% are happy while 16% are unhappy. International Hires is yet again the expat type with the lowest level of happiness in comparison to the other two.

Receiving membership in an expat network as a type of support may be seen to contribute to the happiness of the expat types, with 89% of Foreign Assignees, 78% of International Hires, and 81% of Relocating Spouses who received this support, saying they are happy. International Hires and Relocating Spouses are again the expat types with a larger share of respondents not receiving this support and stating that they would have liked it — 67% of International Hires and 65% of Relocating Spouses say they are happy, while 17% of both expat types say they are unhappy.

These results suggest that interacting with other people, whether it is through pure socializing, networking with other professionals, or meeting other expats through a network, could be an important factor to consider when it comes to the happiness of expats.

Another noticeable point is that Foreign Assignees are much happier than International Hires and Relocating Spouses, even in the instances where they didn't receive support. One potential explanation for this result could be that Foreign Assignees are more established in their workplace

and, therefore, have stronger professional networks and more opportunities for social interaction with others. For International Hires, the challenge could be starting a new job and not connecting with colleagues and people outside of work, while many Relocating Spouses may have the challenge of being at home and needing to build social interactions more remotely and with much more effort.

In Focus: (Un)Happiness

The factors that **impact** the happiness of Foreign Assignees, International Hires, and Relocating Spouses abroad.

Top 3

1. Deal easily with practicalities
2. Happy partner and family
3. No culture shock



HAPPINESS CONTRIBUTORS

Life in General

Expats are happy: Foreign Assignees are happiest (80%), followed by Relocating Spouses (72%), and International Hires (71%)



Happy Partner and Family

- **Most important** for all expats in a relationship
- Makes **83%** of Relocating Spouses happy
- **2nd biggest** factor for Foreign Assignees (**53%**) and International Hires (**47%**)



Having a Personal Support Network

- Makes more Foreign Assignees (**19%**) and International Hires (**20%**) happy than Relocating Spouses (**15%**)



Ease of Dealing with Practicalities

- **Top factor** for Foreign Assignees (**56%**) and International Hires (**55%**)
- **2nd biggest** factor for Relocating Spouses (**43%**)



No Language Barrier

- About **30%** of each type is happy because of this



Plenty of Socializing Opportunities

- **3rd biggest** factor for Relocating Spouses

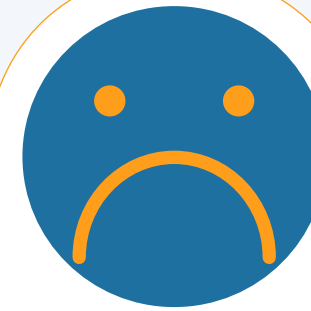


No Culture Shock

- **3rd biggest** factor for Foreign Assignees (**41%**) and International Hires (**42%**)

Top 3

1. Lack of socializing
2. Lack of personal support network
3. Struggling with the language barrier



UNHAPPINESS CONTRIBUTORS

Life in General

Unhappiness: International Hires (14%) and Relocating Spouses (13%) are unhappier than Foreign Assignees (8%)



Unhappy Partner and Family

- **2nd biggest** factor for Foreign Assignees (**44%**) in a relationship



Not Having a Personal Support Network

- **Big influencer** for all — even after years abroad
- **Top factor** for unhappy Relocating Spouses (**51%**)
- **2nd biggest** factor for Foreign Assignees and International Hires



Struggling with Practicalities

- Makes only **10%** of Foreign Assignees unhappy
- International Hires (**19%**) and Relocating Spouses (**23%**) more affected — throughout the expat lifecycle



Struggling with the Language Barrier

- **3rd biggest** factor overall
- Pain point throughout the expat lifecycle for International Hires



Not Enough Socializing Opportunities

- **Top reason** throughout the expat lifecycle
- **59%** of Foreign Assignees and International Hires are unhappy



Dealing with Culture Shock

- Only **9%** of Foreign Assignees and **11%** International Hires affected after 5 years — **29%** of Spouses still struggle

A Glance at Family Life



- 72 Family Statistics
- 73 Spotlight on Relocating Spouses and Expat Parents

Family Statistics

METHODOLOGY

Expats with dependent children abroad were given statements related to family life and asked to rate these: 1= not satisfied at all; 2 and 3 = negative rating; 4 = neutral; 5 and 6 = positive rating; 7 = completely satisfied. The negative ratings (1-3) and the positive ones (5-7) have been combined, while the neutral results (4) stand on their own (not included in the graphs).



Relationship Status



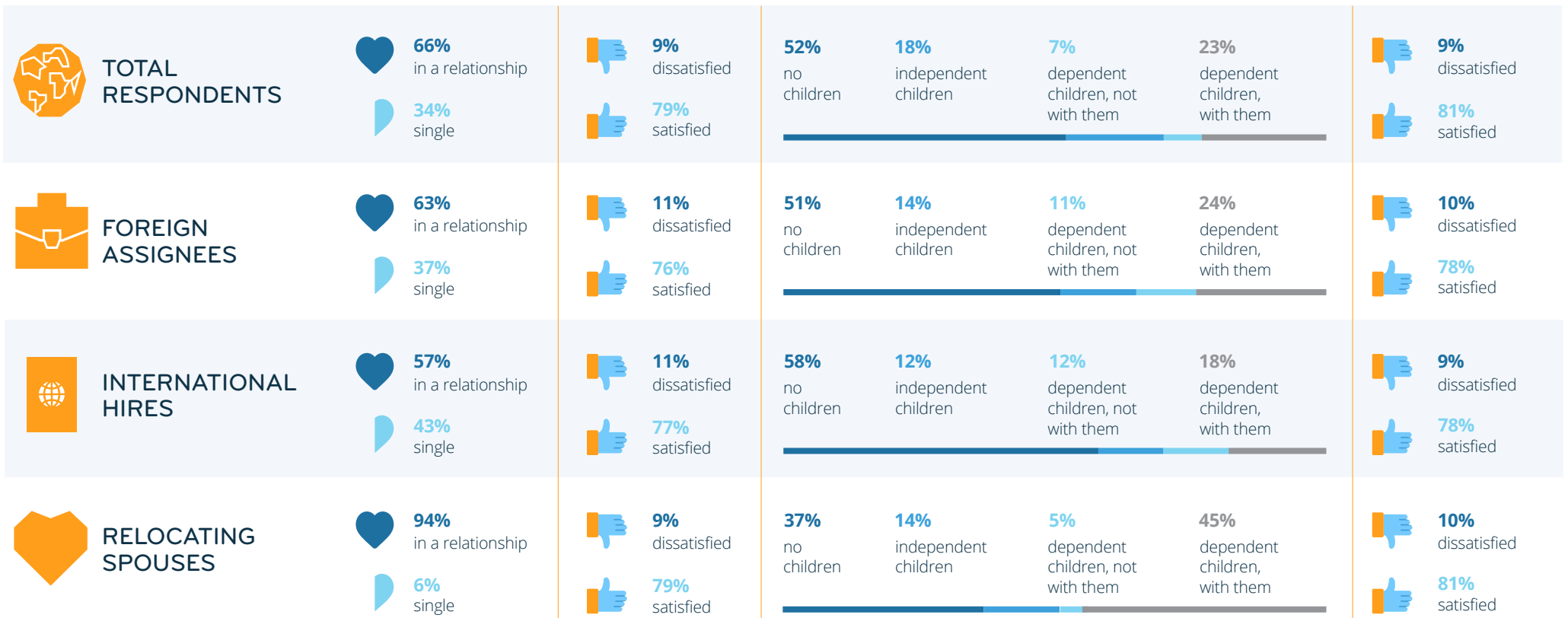
Family Life



Parental Status



Children's Well-Being



Spotlight on Relocating Spouses and Expat Parents

From the survey results, it's clear that all expat types are generally satisfied with their family life and children's well-being abroad. The satisfaction results are highest for Relocating Spouses, who are important as an expat type, as a larger share of these respondents are at home and taking care of their families.

TOP FINDINGS

- **The highest share of Relocating Spouses is at home — 27% are taking care of their households or children, and 17% are looking for work.**
- **Among all expat types, a big majority of respondents are satisfied with their family life and their children's well-being.**
- **Not only do a happy partner and family contribute most to the overall happiness of Relocating Spouses, but this expat type also has the highest satisfaction ratings for family life.**

Relocating Spouses: Family-focused, Highly Qualified, Home-based

Relocating Spouses is the expat type with the highest percentage of respondents in a committed relationship (94%), compared to 63% of Foreign Assignees and 57% of International Hires. This is also the expat type with the largest share of respondents indicating they have dependent children living abroad with them (45%), compared to 24% of Foreign Assignees and 18% of International Hires. Furthermore, 83% of Relocating Spouses indicate that a happy partner and family contribute to their happiness abroad, compared to 53% of Foreign Assignees and 47% of International Hires. Looking only at Relocating Spouses indicating they are in a relationship, as the largest share of this expat type is, 85% say a happy partner and family make them happy (see Happiness, p. 62). This expat type is, therefore, an important part of the expat family structure and an important figure for employers to consider when offering relocation support (See Relocation Support, p. 31).

The largest share of Relocating Spouses is female at 86% (See Survey Demographics, p. 22), and while there are working Relocating Spouses, the survey results indicate that this expat type is generally at home. In terms of their employment status, 27% of respondents indicate they are taking care of their households or children and 17% state they are looking for work. This means that a large share of Relocating Spouses (44%) are not fully employed. Over one third of this expat type devote most of their time and attention to their children and families. Furthermore, of the Relocating Spouses that do work, 41% work part-time and 59% work full-time. This differs significantly to Foreign Assignees (96% work full-time) and International Hires (95% work full-time). Nevertheless, Relocating Spouses are highly qualified, with 85% indicating having a university degree and 43% having a postgraduate degree, such as a master's qualification (See Survey Demographics, p. 23).

This could be a reason why Relocating Spouses consistently indicate a need for more support, such as additional spouse support, access to socializing and networking opportunities,

and membership in an expat organization (See Relocation Support, p. 33). Furthermore, this expat type also indicates that the lack of a personal support network is their biggest cause for unhappiness abroad (See Happiness, p. 60). As Relocating Spouses are mainly at home and taking care of their families, their social integration could take much longer or not happen fully, because they are not as exposed to work networks as their partners may be. Their social networks also potentially differ from the networks of their partners. These aspects could lead to more loneliness and general dissatisfaction with life abroad.

Some Relocating Spouses confirm this with their comments in the survey, with an Austrian female living in Switzerland saying it's "very hard to make local friends," and an American female living in Fiji saying she has been "unable to connect with people".

The unemployment problems are also reiterated in the comments of some Relocating Spouses, with a British female living in Bahrain saying it's "difficult for highly qualified expat wives to find work and contribute to the local economy". Another Relocating Spouse, an American female living in Germany, states: "I wish there was more help for professional Relocating Spouses with the integration".

Social and employment aspects are, therefore, important factors for employers to consider when offering spouse support.

Fulfilled Children, Fulfilled Families

Satisfaction with family life in general is rated positively, and the vast majority of respondents seem to be happy with this aspect of their life abroad. Of those that have dependent children living abroad with them, 79% of both the total respondents and of Relocating Spouses, 76% of Foreign Assignees, and 77% of International Hires show satisfaction.

"I wish there was more help for professional Relocating Spouses with the integration."



American female Relocating Spouse living in Germany

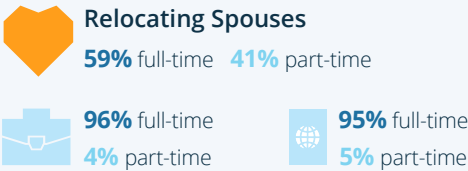
Respondents also rate their children's general well-being highly, with 81% of the total respondents and Relocating Spouses, and 78% of the Foreign Assignees and International Hires feeling content. Relocating Spouses, on average, again indicate the highest satisfaction among the expat types.

The main finding from these results is that Foreign Assignees, who are throughout the report generally most satisfied with expat life, on average seem to be slightly less satisfied with family life and their children's well-being, compared to the other expat types. On the other hand, Relocating Spouses, who are generally less satisfied than Foreign Assignees with aspects such as receiving relocation support and settling in abroad, are in this instance somewhat more satisfied. This

RELOCATING SPOUSES: EMPLOYMENT STATUS



FULL-TIME VS. PART-TIME WORK



could support the notion of a difference in priorities of the expat types, specifically Foreign Assignees and Relocating Spouses.

Even though there is minor dissatisfaction with family life, the overall tendency is that all expat types with dependent children are satisfied and this is also reflected in the comments of respondents. An Indian male International Hire living in Qatar says: “I like the safety aspects for my family and children, the good healthcare, and the friendly atmosphere”. Another Indian male respondent, a Foreign Assignee living in Denmark, says he likes that it is “a very good place for children to grow up”.

A British female Relocating Spouse living in Saudi Arabia says: “It’s a great place for a family with young children. Most of the locals either have children of their own or know what it’s like, so they are very tolerant of a screaming kid when in restaurants or coffee shops”. Another Relocating Spouse, a Greek female living in Germany, likes the “many options for child-friendly entrainment”, while schooling is an important contributor for a South African female Relocating Spouse living in Poland. She says: “Our children are in an incredible international school. Giving them this opportunity in life is valuable to me”.

For Relocating Spouses, other aspects such as the climate, culture, and safety are also mentioned as reasons for their satisfaction. A British female living in Portugal says: “The weather makes for a lovely family life with children,” and an American female living in China says: “I like this great cultural

opportunity for my children”. An Italian female in Hong Kong states: “I like the safety aspect for my children and the family life in general, as well as this international environment”.

Some respondents also shared the negative aspects impacting family life, with one Indian male International Hire living in Germany stating his dissatisfaction with “a severe lack of education options for children in English”. A Dutch female International Hire living in Canada says: “French is forced upon people here, especially on expat families, which causes a gap within the family as children must go to a French public school unless you pay a fortune for a private school”. Another Dutch International Hire, a male living in Taiwan, states: “I don’t like the lack of good daycares for small children — according to my Northern European standards”.

“ I like the safety aspects for my family and children, the good healthcare, and the friendly atmosphere. ”

 Indian male International Hire living in Qatar

FAMILY LIFE INDEX

As family life is influenced by the country of residence and local perspective of the expat types, a look at the top countries for families is significant. The *Expat Insider 2018* report specifically focuses on this type of country ranking in its Family Life Index. It includes 50 countries, each with a minimum sample size of 40 expats whose dependent children are living abroad with them. View the more detailed country rankings of the *Expat Insider 2018* report [here](#).

Top 10 (out of 50)



- | | |
|------------|-----------------|
| 1. Finland | 6. Israel |
| 2. Austria | 7. Bahrain |
| 3. Czechia | 8. Belgium |
| 4. Denmark | 9. Portugal |
| 5. Sweden | 10. New Zealand |

Bottom 10 (out of 50)

- | | |
|---------------|------------------|
| 41. Indonesia | 46. Peru |
| 42. Oman | 47. India |
| 43. Greece | 48. Kuwait |
| 44. Hong Kong | 49. Saudi Arabia |
| 45. Turkey | 50. Brazil |

**For all press inquiries,
please contact:**



Birte Kristina Pampel
Media Spokesperson
InterNations Business Solutions

Phone
+49 (0)89 461 3324-86
Email
birte.pampel@internations.org

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VAT-ID
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