MIGRATION AND STRESS

AMONG CORPORATE EMPLOYEES

by

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Abstract

Globalisation of business interests has resulted in new trends in international mobility of the highly skilled. Skilled flows can no longer be seen as the combined result of individual decision-making processes. Rather, the rise of the multinational since the Second World War has ensured that the majority of skilled worker mobility across borders is as the result of inter- and intra-organisational relocation, transfer and travel policies: company strategies applied to fulfil corporate aims. Skilled employees of such companies are participants in a mobility process closely related to paths of career development, in which mobility has a dramatic impact upon their relationship with their employer, with their family and upon their career.

This thesis argues that such mobility brings about changes in the relationship of the individual with their immediate environment (organisation, family and career) and alters the physical space within which these relationships take place. These changes are hypothesised to generate stress in line with established theories of stress generation through role strain and conflict. The study isolates a set of potentially stressful life events and records their occurrence, and the incidence of stress symptoms across a sample of skilled corporate employees undertaking international mobility.

Quantitative and qualitative methods are used to establish the relationship between mobility events and stress. New patterns of international mobility among the highly skilled are analysed before policies and trends at the level of individual companies are examined. Depth interviews are used to establish the meaning of frequent and peripatetic patterns of migration and travel to employees and their families. Diaries are used to quantify the occurrence of mobility events and short-term stress symptoms and determine the temporal relationship between them.

Survey evidence points to a complex relationship between mobility event experience and short-term stress symptoms. Stress outcome is dependent upon the types of mobility undertaken, but also prior experience of mobility, other person variables and the support offered by firms. The study questions the efficiency of corporate mobility policy which ignores its impact on the well-being of those employees on the front line of change. The need to look beyond the individual's role within the organisation and of the effect of culture change is shown. Mobility alters the temporal and spatial context within which the balancing of corporate and own career needs with family needs is undertaken. The study goes some way towards enabling these needs to be quantified and considered comprehensively in the mobility decision. In these ways the debate about the management and support of mobility in the short term, and the use of mobility in the long term is informed. A quantitative device is developed which has the ability to aid this decision-making process. The thesis thus highlights the need for, and feasibility of, policy mechanisms which address the effect of mobility upon all actors in the system and which manage geographical changes at the individual level to those which can be operationally justified and adequately supported.
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To Clare
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Abbreviations

The meaning of these terms is explained, where relevant, in the text and in Appendix I: Glossary.

ACTH - Adreno-cortico Trophic Hormone
BTR - Bureau of Tourism Research
CBI - Confederation of British Industry
CDI - Culture Distance Index
ELM - External Labour Market
ERC - Employee Relocation Council
GAS - General Adaptation Syndrome
GI - Gurin Index
ICT - Inter-company Transfers
ILM - Internal Labour Market
ILO - International Labour Office
IMS - Institute of Manpower Studies
IMSL - International Mobility of Skilled Labour
IPS - International Passenger Survey
LFS - Labour Force Survey
MEI - Mobility Events Inventory
MNC - Multinational Company
NA - Noradrenaline
NICs - Newly Industrialising Countries
SIM - Skilled International Migration
SRRS - Social Readjustment Rating Scale
STAs - Short-term Assignments
TCN - Third Country National
TWES - Training and Work Experience Scheme
VC - Video-conference

Transcript Coding

"Direct quotation" "Quotation by respondent" 

..... Short phrases such as ('you know') omitted for clarity, where omission does not interfere with passage meaning.

[ ] Truncation, and abbreviation used to protect anonymity.
Chapter 1: Introduction

1.1 Aims and objectives
The thesis is that the mobility policies of international companies create irreconcilable conflicts of interest for employees, that these conflicts act, along with aspects of the mobility process itself, to increase demands upon individuals and engender stress-related outcomes. This study aims to answer the question: 'How do mobility policies at work within international organisations produce stress for their employees?'

The principal focus will be on the individual working within the corporate mobility system. Whilst this means the system and actors within it will be viewed from the standpoint of the individual, aggregate and general conclusions will be drawn about the mechanisms which generate stress and the study will contribute to the debate on the efficiency of current practices of corporate manpower deployment.

Stress is defined here as the inappropriate application of the stress reaction - a complex set of physiological reactions engendered by the perception of threat by the individual. Threats are those changes in the individual’s environment perceived by him or her to exceed their accepted norms and thus create a need for readjustment. The stress reaction prepares the individual for action physically and mentally, through the hormonal and nervous activation of energy-yielding systems and the suppression of non-essential processes. This reaction is inappropriate whenever the threat is one which does not demand a physical response. Over-application of the stress reaction in these cases, and a failure to utilise the liberated metabolites, is implicated in a broad range of emotional and physical degenerative illness. Stress thus embraces an individual-environment interaction setting in motion a sequence of metabolic pathways which have the potential to engender illness outcomes in the short- and long-term.

The thesis is pursued through a set of three objectives. The first is to establish a means of measuring stress. The second is to identify the situations in international mobility in which stress arises. The third is to determine how stress arises in a mobile lifestyle. On the basis of these three an attempt is made to determine the research priorities consequent upon the findings and further applications of the approach that could be pursued, such as a longer-term study with medical linkage, since the latter cannot be pursued here.

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1 Difficulties are posed in the measurement of all three of these components and discussion is ongoing as to the role of other endogenous factors in stress (Pearlin, 1989). These components and the means of measuring them are reviewed in more detail in Chapter 3.
1.2 Context

Globalisation of business interests has resulted in new trends in international mobility of the highly skilled. Mobility flows can no longer be seen as the combined result of individual decision-making processes. Rather, the rise of multinational corporations (MNCs) since the Second World War has ensured that a high proportion of cross-border movement of skilled staff is a result of the recruitment, relocation and business travel policies of those companies. Companies send individuals overseas for purposes of contact, dissemination of knowledge, coordination and control. For each function there is a whole range of movement patterns, from trips of less than one day up to permanent relocation, or expatriation, overseas. However, the temporal and spatial characteristics of mobility are continually affected by changes in the corporate rationale behind travel and transfers, reorganization of functions and other, more external factors.

The geographical expansion of MNCs and the opening up of national frontiers have created the environment for a more mobile workforce. Faster transport services, improved frequency and route expansion have helped realize the potential. Easing of trade barriers (within Europe, between the Far East and the West, and through what was once the Iron Curtain) has encouraged companies to develop further afield commercially and industrially, to take advantage of localized resources and cheaper labour markets and to enable production closer to the marketplace. In contrast, the increasing cost of expatriation, improved skill availability overseas and national laws favouring home employment have encouraged a number of MNCs, in recent years, to reduce their use of long-term postings overseas (Brewster, 1988). Tightening of immigration laws in the West has sought to discourage flows of lower-skilled permanent international migrants. In the same way, developing countries favouring an indigenised workforce have developed immigration policies which restrict the long-term inward transfer of skilled staff from developed countries. Thus, restrictions on travel have declined, whilst those on residence have increased. In this way, the nature of the international labour market has changed: opportunities for international business travel and short-term movement have been created whilst alternative methods of developing overseas business have been restricted. For an organization that is international, the mobility of its employees is essential to the development and maintenance of its overseas business. Mobility is a prerequisite for transnational commercial and industrial activity. International trade is, therefore, dependent on the processes that generate and support international business travel and relocation.

Opinion twenty years ago was that as a method of communication and generally ‘conducting business’, physical mobility was outmoded and would soon be replaced by technological advances and the revolution in telecommunications (Martin, 1971). Product designs, complementary information and orders could be telexed or ‘faxed’. Conferences and meetings
would take place with participants from across the globe using video-conferencing facilities - a saving in time, money and effort for those involved. Writers speculated on the necessity for face-to-face encounters, and their possible decline (Törnqvist, 1970).

However, as far as existing data sources permit us to determine, throughout the seventies and eighties, the frequency of business travel has increased dramatically. Neither is there evidence of a decline in the relocation of skilled employees, to the limited extent to which such flows can be estimated. The continuing importance of physical mobility can be seen as a result of global interaction in the relationship between labour supply and demand.

1.2.1 International labour supply and demand

The mobility of labour, skilled or otherwise, must be seen in the context of supply and demand. In the international mobility of skilled labour (IMSL), labour demand can be interpreted as that required to satisfy the operational needs of companies. To the extent that companies can be said to be market-dependent and have little influence over their external environments, certain aspects of mobility are beyond corporate control. The distances involved, and whether labour mobility is of a regional or international nature, will be determined by the geographical locations of labour demand and labour supply. The economic characteristics of the region of labour demand will also determine the potential abilities of the local labour market and thus the particular skill requirements. However, organizations can influence the duration of placements and the environment of knowledge and support within which individuals move. These aspects of mobility, over which companies have control, are prone to greater variation as they yield to the implementation of plans linked to the achievement of corporate aims.

Any growth seen in IMSL is a reflection of the rise of new operations overseas - supervision of installations, joint ventures, new contracts and acquisitions - as well as increased mobility of employees within and between established operations. Within the field of international mobility as a whole, such a readily discernible manifestation of organizational interaction is a phenomenon of some importance and has both political and economic implications.

Politically, the international nature of trade necessitates the temporary movement of skilled labour, manifested as the mobility of the commercial representatives of individual countries. The magnitude of flows should thus reflect the state's involvement in international economic interaction. Economically, through its indication of the use of corporate resources, IMSL reflects the importance placed by MNCs on their overseas activities (or at least on those requiring physical travel). For such commercial interests representation and promotion of the company image abroad are vital components of functioning globally.
Business travel is at one end of the spectrum of IMSL, expatriation is at the other. The former category can include short trips associated with construction projects, sales and marketing, attending planning meetings and conferences, and excursions by specialists and trouble-shooting technical staff. Expatriates include those committed to lengthy project work, overseas headquarters personnel along with staff on the more extended management development sojourns, and senior management supervisory assignments.

Of the two groups, the shorter term visits are by far the more readily discernible phenomena, in terms of numbers of travellers, visits made and frequency of travel. However, it is important not to underestimate the economic significance of relocation. Each relocated individual is visible evidence of the permanent presence of an organization in a particular region and is a symbol of that company’s dedication to the region. The individual’s skills are deployed in the region, often in the form of training for the native workforce, thus adding to and improving the quality of the existing indigenous pool of expertise.

 Nonetheless, relocation is a very expensive use of manpower. Costs of £100,000 per relocatee per year are common, and legal, language and tax barriers often favour more short-term deployment of labour. Improved skill availability overseas and the development of more standardised professional, managerial and technical tasks have permitted local nationals to provide a more cost-effective way to fill full-time posts overseas. Temporary duties, short-term assignments and business visits can often provide the region with required specialist skill at the appropriate time at a fraction of the cost of permanent expatriation. In this way, ‘business travel’ may be being substituted for relocation, demonstrating a shift in corporate emphasis in reaction to changes in economic and legal restrictions at the national level. At the global level, any new trends in labour interaction between states reflect the combined outcome of numerous changes in individual companies’ strategies for conducting business overseas, and of the success of MNCs abroad in expansion, acquisitions, mergers and sales.

IMSL can be seen as an essential component of the interaction between organizations and the resultant trade between states. Aside from constraints on mobility, it is from a consideration of the state of the global economy that explanatory factors will be found. In studies of corporate practice and organizational behaviour, a thorough understanding of these movement patterns is essential to a comprehension of the mechanisms of business development employed by individual companies.

On the supply side, the forces behind international mobility cannot be seen in the context of corporate aims but in those of individual careers.
Individuals’ careers are developed by use of the corporate structure. Where that structure is international, a proportion of management development will be derived from international mobility. An internationally motivated mobile workforce will only be available to the company whose range of overseas activities offers opportunities for personal career gain. At the same time, organisations are able to use career advancement to encourage mobility of value to the company but perceived as being of minimal other benefit to the individual. In this way, an individual’s personal career gain may conflict with private or family wishes.

An international company requires a readily available mobile workforce willing to travel to some locations or at certain times that are unattractive, either to the individuals concerned, or to their families. A system which relies on companies being able readily to interrupt and change its employees’ lifestyles and environments is liable to create tensions periodically with the individual who does not want to move, whose family do not want to move or whose family do not want the individual to move. Three way conflicts between corporate aims, an individual’s career ambitions and their family obligations can thus develop. Such tensions and conflicts can bring about an environment conducive for stress to develop.

1.2.2 The stress of mobility

Relocation and business-trips are employer-determined movement processes undergone principally by higher skilled workers and executives. They comprise one of the major effects of corporate strategy on individuals, affecting both where they live and the way in which they live. Both relocation and business-trips bring about significant changes in living circumstances and specific problems for the mover and family can be anticipated. Where tensions or anxieties arise these may affect physical or mental well-being, motivation, daily job performance, marital or family life. Premature return or underperformance of individuals overseas can further increase corporate outlay. The company may suffer through reduced individual capability, cooperation or participation in work.

Employer-induced international mobility can bring about major changes regardless of duration. The essential difference between relocation and extended business trips, or temporary duties is that the former generally involves the ‘permanent’ movement of the entire household - worker, spouse and family - whilst the latter involves only the worker with occasional trips home or, very rarely, temporary accompaniment of the spouse. Also, whilst the former can last an indefinite period, from two to five years or more, the business trip or temporary duty rarely lasts longer than twelve months and is, in the majority of cases, much shorter.
How the company organizes its overseas labour force could produce or incorporate stress for the business traveller or relocatee in different ways. Many of the activities and situations associated with foreign postings have the potential to cause stress, including the travel process itself, an alien work environment, language/communication difficulties, culture shock, unfriendly accommodation, homesickness or missing loved ones. For relocatees or expatriates all these components will be of significance, whilst the travelling and working environment are likely to be of more importance to the short-stay visitor.

Mobility of a company's employees, however, means more than just the mobility of individual workers. Each individual will take with them to the foreign location their own set of circumstances, aspirations and abilities. Individuals will also be accompanied either by their families, comprising another set of individuals each with circumstances, aspirations and abilities of their own, or by the emotional baggage of a family left at home. Either situation engenders changes in the individual's environment and hence in requirements of their behaviour. Individuals have to reconcile two different sets of demands for which there is unlikely to be a common solution. Their subsequent readjustment is a potentially stressful process (Holmes and Rahe, 1967) and can not only reduce the time an individual has available to devote to a task but the success with which they are able to complete it. Companies can thus be dependent on the willingness of individuals to undertake duties which engender perceived threats to their current stability, and hence stress, and on the success of their readjustment to the new situations. There can thus be seen an inverse relationship between the efficiency with which corporate objectives are realised and the extent to which stress is engendered at the individual level by company policy.

1.2.3 Corporate efficiency

Efficiency, in its broadest sense, is the production of results with the least waste of effort. For an organisation operating in a capitalist economy, efficiency is the maximisation of yield for least capital input. Yield may be measured in direct profit, or in investment in fixed assets (plant, fixtures or goodwill) that will offer greater yields in the future. Through year on year accountability to shareholders, companies will seek to maintain high yield over time. The balance reached between the need for current profit versus sustained future profit will be a product of corporate ethos and the extent of competition from other companies. Such objectives define efficiency of commercial organisations in terms of profit-and-loss, year-end accounting. This definition does not encourage investment which shows a return only over the long term. This is because capitalism does not encourage companies to assess the effects of their policies on those beyond their own direct sphere of influence (comprising customers, competitors, shareholders and employees), nor in ways which cannot be measured in strictly financial terms. Outcomes of a policy which are less than tangible, such as stress, are thus left out of project decisions. Whilst
the principles of other approaches, such as cost-benefit analysis, permit high costs encountered early in the lifetime of a project to be borne against less tangible benefits which occur over a much longer period, companies with year-end accountability are left without a valid means of embracing such future benefits. Possible outcomes of stress, such as expatriate failure rate and absenteeism can be measured. However, companies have no means of assessing the extent to which these are consequences of their policies, nor can they assess the benefits of alternative policies which might reduce stress. There is thus a need to improve the association between aspects of mobility policy and stress outcome. This would enable a better assessment of the merits of different policies.

Companies will have different targets for yield and hence efficiency internationally. These will necessitate different policies and hence different mobility strategies with which to achieve those targets. Similarly, some companies with the same targets may perceive different ways of achieving them. A mobility strategy will take into account the use of host and third country nationals, the indigenisation of businesses overseas and the balance of different types of moves. Determining the efficiency of different mobility strategies, even in current financial terms, is thus a complex process. This has led to the development of a relocation industry dedicated to providing information and support which enable mobility strategies to proceed smoothly. The existence of relocation companies can be seen as evidence that the risk of failure or inefficiency in mobility is high enough to justify their cost. Such companies can only provide help within their remit, however, which means within the corporate plans. The objectives of companies, and hence their plans cannot, for reasons discussed above, always take into account the full long terms costs and benefits of moves. In addition, not all moves proceed according to plan, and this will be due at least partly to changes in decision-making by individuals as a result of stress. Whilst very little evidence of the success of corporate mobility strategies exists, a recent study found significant discrepancies between planned and actual mobility, in the context of succession planning, within the internal labour market of an international financial services company. Whilst 54% of vacancies occurred as planned, only 35% of vacancies were filled by the intended person, and in only 32% of cases did planned vacancies and fillings occur together (Salt, 1988). This highlights the unpredictability of the movement process as well as a certain amount of ad hoc decision making on the part of companies. This can do little to benefit the stability of employees, or enhance efficiency, as planned objectives give way to spontaneous decisions. Numerous studies have commented on the premature return and failure rate among expatriates (Brewster, 1988). Two of these found rates as high as 40% (Torbiörn, 1982; Tung, 1988).

Costs will be associated with stress resulting from the unplanned nature and unpredictability of moves as well as from the exogenous changes in environment associated with geographic
mobility. Thus scope exists for improving efficiency even within the existing framework of profit and loss. If aspects of mobility which generate stress could be identified in the corporate planning process, the reliability of the latter could be greatly improved.

Stress affects the efficiency of individuals and hence of the organisations to which they belong. The long-term costs of this are, however, hidden in part by the short-term profit and loss commercial approach to efficiency and also by the delayed onset of many stress-related illnesses. Employers invest in the skills of their employees. Underperformance, absenteeism, early retirement and departure of employees for other companies represent losses of investment by the company as real as the use of run-down plant, breakdown of machinery or the collapse of ventures. Efficiency is thus defined here in terms of fulfilment of employee potential: the quality and the quantity of work that could be performed by an individual for a company over their entire working career. This definition of efficiency is one with which stress and its manifestations are antagonistic. The greater the stress experienced by an individual, the less they will be able to fulfil that potential and the less efficient the company’s use of its assets will have been.

International companies respond to market opportunities on a global scale and choose to acquire and move their high and low skilled labour accordingly. This engenders a mobility on the part of employees likely to pose threats to the stability of aspects of their lives, notably family responsibilities, but pose opportunities for their career. It is thus likely that the company’s utilisation of its assets will create conflicts in the lives of its employees. These are manifested most notably through the implications of its policies for those it does not employ. Little is known about the mechanisms involved, or of the nature or extent of the stress engendered by different policies. It is not known whether, under the influence of possible differential effects on efficiency, the practice of transferring responsibilities onto business travellers and those on temporary duties is cost-effective in situations where the company has a choice as to its methods of controlling operations overseas. Short-term visits and assignments are increasing, yet little is known about the stresses they cause or their consequences. The effect on the lifestyles of individuals and their families is not fully understood. What can be hypothesised is that the current ways in which efficiency is pursued by international companies leads to irreconcilable conflicts in the lives of individuals. Where these conflicts cause stress, the effect on efficiency can be the reverse of that intended.

1.3 Outline and structure of the present study
A clear need has been established for research which will enable the effect of changes occurring at the individual level to inform company decisions about mobility and efficiency. The employee aspirations and responsibilities that are affected by moves need to be identified as do the
resultant conflicts between them. In addition, the potential for stress engendered by the operation of different policies needs to be understood. This should enable companies to make better informed decisions on the efficiency of their mobility policies. More sensitive policies and appropriately directed support should in turn reduce the exposure of individuals to mobility-induced strain or conflict-creating situations. This study aims to fulfil the needs for such research: to identify the nature of the employee-organisation-family system affected by mobility, and the relationship between the effects of corporate-engendered mobility and stress.

The thesis objectives, outlined at the start of this chapter, require a methodology capable of integrating the many highly variable processes operating in a complex system. The thesis structure thus has to incorporate the identification, classification and then appraisal of these variables. This is done via an essentially sociological approach. The first requirement is to establish the participants, or actors, in the system - the employee, family and organisation - and the relationships between them. Thus Chapter 2 identifies the interactions likely to encounter conflict and generate stress. The mechanisms of the stress reaction itself need to be established, based on the extent of current knowledge. A review of the literature on stress theory, of means of measuring stress and of previous studies of stress which encompass mobility thus comprises Chapter 3. The mechanisms and flows of international mobility also have to be established, especially the types of movement that affect the population of interest. Hence, a review of the literature on IMSL will follow in Chapter 4, including an analysis of the trends in, and the context and composition of, current flows. Once the variables in the study - the actors, stress and mobility - have been established individually, the empirical work to identify the relationship between them can begin.

A threefold methodological approach follows from the thesis objectives above. This involves the establishment of a scale which enables the potential for stress arising from different components of moves to be compared. The mobility strategies within international organisations as experienced by individuals can then be monitored and their potentially stressful components identified. Individually, and in combination, such components can be instituted as independent variables against which the dependent variable, stress, can be evaluated. Chapter 5 will present the methods and techniques to be adopted to carry out this work. The scaling device is developed in Chapter 6, whilst the results are presented in Chapters 7 to 10. Chapter 7 outlines the mobility strategies implemented by the international companies participating in the survey, and the emphasis placed on different components of remuneration and support packages. Chapter 8 examines, qualitatively, the effects of these strategies on the lifestyles, responsibilities and aspirations of the employees who undertake them. Interviews with trailing spouses or those geographically separated from their partners by mobility are analysed qualitatively in Chapter 9.
This chapter examines the effects of the moves on family members, who are not employed by the company, but whose lifestyles are affected as much if not more than those of employees. Chapter 10 presents the results of the evaluation of independent and dependent variables and the short-term outcome of moves. The discussion in Chapter 11 assesses the success of empirical work in achieving the thesis objectives and means by which the approach could be developed for use elsewhere. Policy implications are also considered and recommendations made where re-emphasis in, or alternative action to, current company policy may be appropriate under a cost-benefit approach. Finally, priorities for future research are proposed, which build upon the findings of the present study.
Chapter 2: The individual: career organisation and family

2.1 Introduction

This chapter aims to introduce the main actors in the international mobility system: the individual employee (hereafter referred to as the individual), the organisation and the family, and establish the nature of the relationship between them. The individual as employee acts as the mediator between the organisation and family and is the primary mover, without whom there would be no interaction between the other actors and no mobility. It is thus clear that it is the conflicts between relationships that affect the individual, and the stress they cause, that are of importance to a study such as this which seeks to determine the relationship between mobility and stress. Hence, as the individual is the principal actor and the unit of study, it is relationships that affect the individual that are to be assessed here.

The chapter begins with the development of a model of the interactions between individuals and the exogenous factors in their immediate environment. This is presented as a tripartite system of the aspirations and responsibilities individuals have: to themselves, to their organisation and to their family. These three relationships are then examined in greater detail to establish their nature; their role in the mobility process; and the implications of the relationships and the potential conflicts between them for stress production. The chapter concludes by describing how the tripartite model provides a framework for the study to proceed.

2.2 The individual

The principal unit of analysis for this study is the individual corporate employee. The sequence of spatial relocations and travel behaviour throughout life is determined initially by choices made by the individual, and subsequently by decisions made on his or her behalf to which he or she has given tacit acceptance at some level. These options are usually presented to the individual by employing organisations or family members. The offering of such options can stem directly from the individual's needs, characteristics or talents - their individuality - or it can follow on from relationships formed as a result of that individuality. The options themselves (in the case of this study, moves) if accepted create a need for readjustment. The extent of their readjustment to moves will also be a product of that individuality. Until readjustment has been successful, stress will be experienced. In this way, the main variables of the study - mobility and stress - are product and by-product of individual human agency, action and behaviour.

The discussion of the individual that follows seeks to establish the context in which mobility and stress occur. The conflicts between responsibilities and aspirations towards different aspects of the individual's immediate environment - career, organisation and family - and strain within roles
towards them, are discussed. The way in which decisions made in career and organisational roles can generate mobility which produce stress in all three roles is then assessed.

It has been impossible to discuss individual action without referring to the decision-making context in which that action takes place. Organisations and families are able to establish the criteria within which decision-making by the individual occurs. However, in using the term individual, one aims to identify the characteristics of a separate and single person distinct from those of the group. This distinction can exist within the 'sum of parts' definitions of the group. In biology, for example, the separate actions and potentials for action of the individuals that make up a colony constitute the behaviour and potential behaviour of that colony. Similarly, sociological definitions talk of 'organisation men' (Whyte, 1957) - the cogs and wheels that drive the whole who are in turn carried along by it themselves. Many individuals established together under a particular ethos form an organisation. However, this ethos is not defined as the sum of the individuals' beliefs. The ethos exists specifically because the organisation must maintain a separate identity from those of the individuals who make it up at any one time, in order to ensure its own continuity. This reduces all those individuals for whom the ethos does not coincide with personal beliefs to merely fulfilling the roles of human constituents of the organisation within which they exist as a physical unit of input and output. Individuals are, however, content to work within and provide their efforts to support an ethos which they may not personally uphold (Barnard, 1968). The reasons for this are complex and based on organisational employment being used to fulfil objectives on the individual's agenda of priorities, an agenda quite separate from that of the organisation. The other items that constitute an individual's agenda are discussed below.

The distinction here is between individuals, whose characteristics and organisational allegiances change through time, and constituents of organisations - the perpetually changing mass of human beings identified at any one time as cells within an organisation.

As far as this research is concerned, individuals represent a longitudinal data source - a wealth of past experience and future potential. Cross-sectional data from most statistical sources provide information of the constituents of the group at one particular moment. Many such records can be amalgamated to show trends but they cannot tell us anything of the progress of the individuals in the group at any one time - how they got there, where they will go next, and how they feel and react to the processes they are undertaking.

2.2.1 The individual as repository and decision-maker

The attitude of organisations towards individuals is often to regard them as repositories of 'files' which take on board various attributes over time (Harré, 1983, p.69). These attributes include
training, skills, and responsibility for other employees. By extending this analogy, the repository can also be seen finding ‘file’ space for home and family commitments. This would then coincide with a psycho-social model of the individual whose role responsibilities must compete for attention (Pearlin, 1983). The individual must achieve a balance between them if all responsibilities are to be fulfilled. In the model developed here, the repository walls are not infinite; if a concern already present grows too large, or there is an attempt to bring a new one on board, harmony may be disrupted and these or other elements wholly or partly lost. The sides of the repository are elastic and attributes taken on board can change its shape, making it more or less able to take on board new features.

This physical unit definition sees the individual as a product of their genetic potential modified by their education and health history. Through life, the physical unit, complemented by the education, training and skills acquired, creates the individual who has specific physical and mental capabilities which provide the context, the environment within which all decisions and actions are taken. The individual’s effectiveness at realising aspirations is determined by their level of capability. Awareness of their own capabilities can determine how individuals make decisions as well.

All individuals act as decision makers within a specific framework of responsibility and context. The responsibilities possessed by an individual provide their sphere of influence, the domain in which the decisions they make have an effect. As a result of past experience (knowledge acquired) all individuals have specific hopes, fears, expectations and aspirations with regard to their immediate environment. Decisions are made in an attempt to achieve individual aspirations towards their responsibilities within that environment. In the context of this study, the three most immediate responsibilities in the individual’s environment are:

1. The individual’s career (Responsibility towards oneself)
   Career represents the position of the individual on their progress through life and work. Career progression is determined by past and future decisions from a limited range of options. In an organisation, these are presented by those above the individual in the organisation’s decision-making hierarchy (Larson, 1977). Here, career moves are generally either promotions or lateral transfers, placing the individual on equivalent or higher decision-making planes within the hierarchy. The elevated position is usually equated with an aspiration for increased freedom to make decisions over a wider range of options. Enhancement of career prospects may also account for the decision to change organisation by entering the ELM.
2. As the incumbent of their current work position (Responsibility towards the organisation)

Decisions are made on a day to day basis by individuals about how best to perform their function within the organisation. These decisions can have a direct effect on the lives of their peers and subordinates within the organisation. Not only the individual's current activities, but also their ability to make decisions in the future, will be affected.

3. Their family (Responsibility towards emotional ties)

In the family, the hierarchy of decision making is less clear cut. For older individuals, the family can be seen both as a realisation of aspirations, an achieved goal, (albeit one that has to be maintained through adequate support and appropriate joint decision making) as well as a source of motivation, fuelling aspirations to achieve in career, organisational and future family roles. Younger individuals are likely to aspire to developing a nuclear family and thus generating new responsibilities.

Within each of the individuals' roles towards their immediate responsibilities, individuals will have aspirations. The greater the disparity between that desired and that achieved, the greater will be the role strain. The roles are also closely interlinked. Decisions made in the career role directly affect the nature of the current position, as well as the way decisions are made within it. Decisions made as the incumbent of the current employment position affect the family directly where the individual's time commitments or geographic location are altered, and indirectly where the amount of support that can be offered to the family is diminished by work obligations. One of the driving forces of the career person can be the motivation provided by the aspirations towards the family. These same lines of motivation can also be lines of role conflict, where aspirations towards one responsibility are not realised due to the need to fulfil obligations to another. Role strain and role conflict have been identified as sources of stress by many researchers (Cooper, 1981; Pearlin, 1983).

Thus a tripartite system of individual responsibilities and aspirations can be seen. The individual's immediate environment is represented in terms of career, organisation and family roles in Figure 2.1. The interlocking of these three aspects of individuals' environments has been identified by family therapists as key in the aetiology of stress (Wiseman, 1982; Ulrich and Dunne, 1986). This tripartite framework of aspirations and responsibilities rests wholly within the larger confines of the individual's physical and mental capabilities. All perception, decision-making and action are dependent on the individual's capabilities and hence all interactions have to take place through this outer shield where they may be enhanced, impeded or obstructed.
Fig. 2.1: Tripartite system of individual aspirations and responsibilities

- As Family member
- As Career Person
- As Incumbent of current position

Aspirations and responsibilities of individual
Interaction with environment
Lines of motivation and potential conflict
Figure 2.1 also shows the interaction of the individual beyond the immediate environment to the broader social and cultural milieu - the element of the environment that is geographically specific. It is this milieu into which the individual fits if interactions are appropriate. It is also the element usually subject to most immediate change upon relocation. Satisfaction with this interaction and the degree of fit in the new locale are similarly subject to the capabilities of the individual.

Capabilities are by no means fixed; they can be expanded through the acquisition of new skills and education but also reduced through mental or physical illness or stress. Stress can affect an individual's ability to perform both in the short term, through confusion, irritability and tiredness, and in the long term through stress-related degenerative illness. All the individual's areas of responsibility are potential sources of stress and thus are able to affect the individual's capabilities in the short or long term.

In Figure 2.1, a geographical relocation of the individual would be represented by the movement of the whole triangle away from the surrounding fixed environment. This implies leaving the local organisational structure, although there is likely to be a comparable structure in the foreign location. In the case of relocation, links with the home organisation become more distant, and career development can be strained by separation from systems of performance appraisal and from career options. Provided relocation is accompanied, family links should be maintained. Business travel strains links through separation, albeit temporary, within the individual's own framework of responsibility. This can strain family communication especially, but also affect relationships with junior or more senior staff. All types of mobility will engender separation from the broader social and cultural milieu with which the individual is familiar. The triangle in Figure 2.1 is, in effect, transferred from a setting into which it fits to another where it may or may not fit, or where an alteration of shape is required in order to fit. This implies a lengthy process of shedding old capabilities and acquiring new ones, the process of adaptation, such that the old 'peg' can fit into the new 'hole'.

Geographical separation from home, such as through business travel, acts as an extra constraint on the capabilities of the individual, impeding interaction with aspects of life towards which there are responsibilities and aspirations. The impediment can be direct and physical, caused by geographic distance, or emotional, caused by unfamiliarity with the new environment and culture. Inability to interact effectively with home and host can become a source of stress and further affect the individual's capabilities and performance.

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1 The issue of cultural distance is taken up in the following chapter.
A model has thus been established which places the aspirations and responsibilities of individuals at the centre of a system which embraces their relationships with their immediate environment: career, organisation and family. It shows how aspirations towards different responsibilities can interact to provide motivation and also how strain and conflict, and hence stress, can develop over aspirations requiring different courses of action. To understand the causes of conflicts and strains and the effect of mobility on such a system it is thus necessary to look at the relationships between the actors and the roles they play.

2.3 The career person

The term 'career' is used here to represent individuals' aspirations and responsibilities towards themselves - where they feel they ought to be socially, emotionally, economically and geographically in relation to where they are now (Krause, 1971). In the Western World, the process of realising such aspirations and fulfilling such objectives is dependent on interaction with organisations established either specifically for the purpose (educational institutes) or with whom such outcomes are a prominent by-product (employing organisations) (Larson, 1977). The starting point of individuals on their career path will be influenced by their parental background and their educational attainments in childhood and youth, over which they exert little choice. However, once they begin to make decisions to choose their career path, they will start to interact with the organisations they feel most able to help them realise their aspirations.

Career in an organisational context is defined by advancement, movement upwards in vertical organisational and professional hierarchies. Conversely, individual career success goes beyond such a rigid definition of progress through an organisation and needs to be balanced against ability of the individual to realise aspirations and fulfil potential. Fulfilment of potential is measured by success in the learning, adapting and development of skills relevant to the innate aptitude of the individual, through interaction with the organisations of which the individual is an active member at any one time. Such career success is, in many ways, less tangible than that measured on a company's vertical promotional scale.

Career responsibilities can be seen here as a long term commitment to a skill-appropriate activity, or occupation, which requires the individual to place and develop his or her economic and social life chances in, initially, educational establishments and, predominantly, employing organisations.

2.3.1 Individuals and careers: nature of relationship

Although the relationship of the individual with the organisation will be discussed in the next section, it is impossible to dissociate the concept of career as applied by the individual from the use of careers by the organisation. A due consideration of the latter will thus be made here.
Organisations requiring skills associated with particular occupations will need to employ individuals whose careers encompass such occupations and best offer such skills. In the same way, superficially, individuals are free to donate and develop their skills with any organisation in the labour market they feel is best able to satisfy their career aspirations. Where the organisations are small and skill requirement specialised, skills are invariably acquired through external labour markets.

Large organisations, however, require individuals able to offer more general management skills across many different divisions or locations. Often these skills are more specific to the organisation than they are to any one task or responsibility. To develop such individuals who 'know the company' or have a wider innovative capacity it is in the best economic interest of the organisation to recruit individuals when young and develop in them the skills relevant to the company. Individuals can find their skills applicable within the internal labour market (ILM) of their employing organisation, but relatively unsaleable outside. The fulfilment of the potential of an individual is thus constrained within the boundaries presented by the sphere of operations of the organisation (McKay and Whitelaw, 1977). Spheres of MNC operation are international, which means some 'career development' moves span national boundaries. Whilst writers have seen career development moves typified by flows from the core of the organisation's domain to peripheral developments (McKay and Whitelaw, ibid.), globalisation of labour markets has blurred these core-periphery distinctions. Career development moves may now occur from overseas subsidiaries into the home country headquarters, or between regional bases, bypassing the organisation's home country entirely. The presence of increasing constraints on career choices by individuals makes it essential that the firm offers enough inducements to prevent a perception by the individual that their ambitions will be restricted in any way by joining the company.

Companies are unwilling to lose skilled employees to the ELM since they have made a large investment in measures to recruit, train and keep the best human resources available. As far as the individuals are concerned, changing organisations is disruptive and carries great risk (such as the loss of pensions). If a single organisation appears able to satisfy career aspirations, then individuals are unlikely to be motivated to leave the organisation to seek another. Early experiences can alter aspirations and lead to changes of career direction and thus movement between organisations, but the organisation employee, once on an established career path, is likely to stay with the organisation that best enables him or her to follow it.

A process of adaptation by both parties has thus occurred. Organisations structure their opportunities for employment into a potentially satisfying career structure. Individuals modify their expectations to what is available. Ultimately, there may be little to distinguish between what the
individual is prepared to accept as a fulfilment of aspirations and what the organisation requires of individuals at various stages in their relationship with the organisation. Thus organisations can be seen to have appropriated the career paths of individuals into an employee development programme that best suits their mutual labour requirement needs.

Organisational careers can be seen as a structural aspect of an organisation: a pattern of hierarchically related and spatially distributed occupational positions or tasks that require successively more responsible performance of occupational skills. Through this pattern, individuals make an ordered sequence of moves in accordance with the career development system of the organisation and their own career aspirations. In this way the organisational career can be seen as a patterned sequence of positions through which there is an ordered progress of individuals along various vertical and horizontal lines which terminate at various levels of the hierarchy (Martin and Strauss, 1955).

In the tripartite system of the individual's responsibilities and aspirations (towards company, self and family) described earlier, it is assumed that career is a mechanism by which the aspirations of individuals towards themselves are fulfilled. Career opportunities are offered by the company, and can be accepted to satisfy individual aspirations subject to the constraints posed by family ties. There is thus a general assumption, and a specific organisational one, that the aspirations of individuals towards themselves can be fulfilled by career progression. The discussion above has illustrated how organisations base the operation of corporate manpower planning programmes and the enactment of mobility strategies within ILMs on the validity of this assumption. Individuals do have aspirations towards themselves in other areas of their lives beside organisation and family however: socially, politically, in sport or in hobbies. The question of how valuable career is to individuals and how its value changes over time then becomes a valid one.

There is only limited information on how individuals value careers (Guardian, 1982, 1988; Everett and Stening, 1989; Furnham, 1990a). However, the literature that does exist does not allow a conclusion that the aspirations of individuals towards themselves are fulfilled solely by extrinsic components of career progression. The implication is that some individuals are content to remain stationary in a career hierarchy and other incentives are necessary to encourage mobility. Even where career progression is not sought, any inherent favouring of current tasks by individuals can also be seen as a 'personal role' and, in the definitions of this study, a career commitment.

The reasons individuals choose to remain at certain levels in a career hierarchy are numerous. They can include a feeling that potential has been fulfilled, or that the effort required to proceed
further is not worthwhile. The latter will be the case where other self and family concerns carry greater importance for the individual.

2.3.2 The role of careers in mobility

If promotion requires mobility then it brings with it potential disruption of the work or private life of individuals. Individuals for whom career progression is not the top priority may choose to turn down such opportunities and become 'shelf sitters' (Jennings, 1967). Dilemmas may be posed where the 'cradle to grave' allegiance to an organisation and its career path is in question. The individual may fear losing the all-encompassing environment of the organisation if the proposed path is rejected. Such individuals may encounter stress if they reluctantly adopt the need to compete for promotion or mobility, merely to remain stable within the organisation.

Conversely, individuals who are motivated by career progression (or high-flyers) may find their paths blocked by the 'shelf sitters' referred to above. In these cases, organisations may still be able to compensate high-flyers with some of the advantages normally associated with career advancement, such as increased financial remuneration or improved working conditions. Organisations can assign such people to a 'fast track' career path which bypasses shelf-sitters through the use of upward or lateral transfer, making use of geographic mobility where necessary. Geographic mobility can thus become an important element in organisation policy for restructuring the career hierarchy. The way in which international organisations use geographic mobility within their ILM to act as a surrogate for promotion, and to 'create' required vacancies is outlined in the next section.

Jennings, in 'The Mobile Manager' (1967) observes the changes that have taken place in the structure of management within organisations since the Second World War. Economies of scale and technological innovation have made the hierarchical pyramid of management within organisations flatter and wider as lower-skilled layers are removed and some upper echelons of management as well.

Technological innovation has meant that the numbers of managers required in project teams or sited in each location have decreased, whilst the number of such teams has grown and they have expanded geographically. Middle management - and their direct superiors - managers of managers - have increased in number whilst the top tiers and director/president roles have expanded very little. In such a pyramid, the average employees' advancement must slow down over time (Rosenbaum, 1984). This may be exacerbated in a company which recruits the top tier of senior management from the ELM as well as the ILM. In this way competition for top management becomes very high. Thus middle management will contain many shelf sitters, not
only those who have reached their potential, but those who are unable to realise their full potential because of the limited number of top jobs available.

The post-war system means high fliers may become shelf sitters (stopped in their upward tracks) if they get caught below seniors who, for reasons of lack of aspiration, lack of potential or their own overhead blockage, are also stuck on their shelf. To continue upward movement individuals are dependent upon the promotion, transfer or retirement of their direct superiors. This does not bode well for the career aspirations of individuals or the employee development programmes of organisations.

Jennings proposes that this is why both organisations and individuals look to the benefits of the alternative to upward promotion - lateral transfer - as an overt or covert aspect of their career planning. Since lateral transfer will take the individual into a new location and will involve different work experiences, it can be presented as a career development move by the organisation. Increased use of lateral transfer as part of career development will mean managers at a particular layer of the organisational hierarchy can be moved around (or have their positions swapped) without any dependence on clearing the blockages to upward promotion in the organisation. Such moves often involve geographic transfer which thus becomes more frequent.

Relocations and international postings were seen by Jennings as associated with a change of environment and responsibilities along with increased remuneration. Individuals also had a chance of ending up below seniors who were more likely to move and hence to achieve upward mobility. The experience of international lateral transfer may not confer immediate escalation up the overall managerial hierarchy but the home management position can translate into a high level of local responsibility overseas. Thus many of the same attributes of career progression can be achieved by using mobility in its place. Since 1967 and 'The Mobile Manager' there has been an increase and broadening of opportunities within the new international spatial division of labour. This implies a reduction in the amount of change in the business environment engendered by mobility. Changes in levels of responsibility, salary and the external environment are still likely to apply, however.

Through lateral geographic transfer, therefore, organisations offer incentives to retain individuals and their skills whilst still enabling the organisation to achieve its goals. Under this system, recognition of the ability of an individual by the organisation is translated into lateral and geographic mobility as much as upward movement in a management hierarchy. In a system where mobility acts as a surrogate to upward promotion as a recognition of ability, Jennings argues, it will soon become a necessary component of a successful career. Thus 'mobicentric'
managers achieve by becoming and staying mobile. They are people for whom performance is a means not an end: "The new generation finds that mobility brings competency, whereas the pre-mobile generation believed that competency brought mobility" (1967, p.97) Jennings hypothesis is that the shelf sitters created by the effect of technology and automation on modern management structures are responsible for a new generation of mobicentric managers, both directed by mobility and enlightened towards it. Such a system for measuring success and developing careers existed for the 'IBMers' described by Nancy Foy (1973).

2.3.3 The role of careers in stress generation
The stress associated with readjustment to change has been referred to in Chapter 1, and is covered in greater detail in Chapter 3. All four aspects of life change described by Selye (1956) - loss of permanence, transience, novelty and diversity - are associated with the hierarchical system of career progression used by organisations. The very process of continual advancement thus carries a risk of inherent stress. In response to career aspirations, individuals will be encouraged to enter organisational career paths in MNCs which embrace international mobility, but this course of action may not coincide with the aspirations individuals have towards family considerations or even towards their roles within organisations. Where it does not, stress may occur. Conversely, stress can also be associated with the failure and isolation of being an unwilling shelf sitter. This ambiguity must call into question the value system that equates success with vertical progression through an organisational hierarchy.

Progress along the career path can also be affected by stress. Performance is monitored and analysed by those above the individual in the organisation. The performance of those over whom the individual exerts control may also be taken into account. As a result of superiors' analysis, and in accordance with any other pre-ordained organisational career structure, they may offer one or more opportunities for career change or promotion to the individual. Stress may reduce performance and thus diminish the prospects of promotion.

Thus, whilst career aspirations provide the motivating force behind entry into the MNC career system, this same system has the potential to generate significant conflicts in family and organisational relationships and the possibility of generating a career negative feedback loop as outlined above.

2.3.4 Careers in the tripartite system
In the modern international organisation, therefore, mobility is a response to the opportunities presented by an organisation in an overt or covert system of career development. The career paths of employees incorporate mobility opportunities where they represent a realisation of the
aspirations of individuals towards themselves. These aspirations, or this realisation of them, may be at odds with the family aims and responsibilities of individuals, or with their aspirations towards their current role within the organisation, or the role they would like to play. In addition, constraints on career decisions can be associated with stress engendered by the resulting mobility: an increase on current levels of responsibility, the disruption of the mobility process or the effect on family ties. The effect of mobility engendered changes on work and family roles are discussed in sections 2.4.2 and 2.5.2 below.

2.4 The individual as incumbent of position in organisation
An industrial organisation exists as an amalgamation of land, labour and capital united towards achieving a particular end. Success is measured by how well it achieves this end. To produce, market, sell and expand, organisations need a competent workforce willing to be trained in skills specific to the operations of the particular organisation: specific techniques to be used on specific projects in specific locations determined by opportunities presented by the market. The company will seek to retain the investment it has made in its workforce by maintaining employees within the company ILM. This requires loyalty on the part of individuals to the company and a strong relationship with employees is thus often fostered by the company.

2.4.1 Organisations and individuals: nature of relationship
Organisations may seek to pursue employee loyalty in many ways. Improved remuneration, company pension schemes, charitable donations and corporate social life are promoted for this purpose. The harnessing of career to achieve such ends has been discussed in the previous section. For a relationship to develop of which individuals will be proud, a strong corporate identity is sought. This identity is seen by employees as being beyond the mere geographic location and corporate system within which they are employed. The organisation thus takes on an identity of its own and represents a reality greater than the sum of its parts. This identity encourages employees to develop a relationship with the organisation rather than with the line management and staff who temporarily fulfil roles within it. Employees thus work for the benefit of the organisation rather than for any one individual. Perceiving an organisation in this way can be seen as an extension of legal definitions which authorize a group of people acting together in a corporation to behave as a single individual having its own powers, duties and liabilities.

These 'Organisation men' (Whyte, 1957) are individuals who contribute as member cells of a larger whole rather than thinking as individuals in their own right. Whyte saw this as a threat to the American ideal of individualism and by extension as inadvertently threatening to introduce to American society the collectivism it so despised elsewhere (p.10, ibid.). More modern definitions of 'organisation man' have seen Whyte's model expanded quite considerably to include any
individual working within an organisation for whom the organisation represents a structure and an ethos which transcends the individualities of those who make it up (Kantor, 1989).

The tripartite system in Fig. 2.1 shows individuals exercising choices over their aspirations towards different responsibilities and thus holding the balance between aspects of their lives. Individuals can seek to change their organisation, alter their career or change the nature of their relationship with their family. However, the balance of power at any one time will rest with the organisation since this provides the main mechanism by which individuals seek to develop career and realise aspirations towards their families. This power is further enhanced in geographic mobility where the organisation is the instigator, supporter and terminator of moves and becomes the principal source of permanence in the environment of the relocated individual.

As in all relationships where power is shared unequally, it is to the benefit of the subordinate partner to strengthen ties with the dominant partner. This reduces the risk of the relationship breaking down and encourages a reallocation of power to the benefit of the subordinate partner, manifested as promotion. Organisation men and women, therefore, may be seen as those whose personal and career aspirations demand an increasing share of attention be devoted to organisational responsibilities. This process, in turn, can result in the subordination of their personal life (Ulrich and Dunne, 1986 p.100).

Despite or perhaps partly because of Whyte's thesis, individualism is encouraged to a greater extent by organisations now than in the 1950s. This is a response partly to changing family and social circumstances and partly to the development of a greater competitive and adaptive philosophy on the part of organisations (Kantor, 1989). As dual-career couples increase, the reliance of organisations on an unpaid support service for their (predominantly male) employees has had to decline. As competition has grown, so has the need of organisations to release the untapped mental resources within the workforce and allow individuals greater freedom to express themselves. Nonetheless, the more modern definition is not necessarily in conflict with that of Whyte. The former fails to emphasise the collectivism/individualism dichotomy expressed by Whyte: modern organisation men can act independently of their peers. However, the identity of the organisation and the employee's allegiance to it is consonant with both, even if there has been a subtle change from doing things the company way to doing things one's own way for the company.

2.4.2 Organisations and mobility
The success of an organisation is measured by how well it achieves its aims. Corporate aims include not only maintaining the value of product output above the value of resources input, but
growth and expansion as well. As local markets become saturated or as competition intensifies, a company may seek to develop markets elsewhere, including overseas. Successful overseas trade may generate a need for company expansion into new sites of manufacture abroad (Dicken, 1992). As more outlets become required responsibility may have to be deputized geographically and across stages of the production process. In this way expansion of production in geographical space leads to greater organisational complexity across national boundaries. The stage is reached where a multi-plant MNC has responsibility for control functions divided between the parent plant or head office in the home country and many branches or sales outlets at home and overseas.

The staffing of MNC overseas locations will be from both outside and inside the organisation. Due to the decentralisation of operations, staff transfer or career mobility within an ILM will often necessitate geographic mobility which may be international.

As organisations expand, they require employees with technical and managerial skills to work away from home for varying periods to establish and maintain operations. They require a number of these people to be versed in the ways of the organisation and thus seek to recruit from their ILM as well as the ELM (Salt, 1988). In this way they extend the corporate identity.

An organisational identity can be seen as especially valuable to the corporate communicative role across locations. It encourages similar management structures, remuneration systems and work practices which have evolved as an efficient means of conducting affairs in each of many locations (Tung, 1988). The common identity allows for economies of scale in training and educating employees. Recruitment of managers and specialists can be undertaken across the entire organisation. Common identity favours uniformity of product, aids customer loyalty and eases transfer of technology. Communication and travel between the different locations is eased and made more efficient.

As far as mobile organisation men and women are concerned, it is the contribution of that identity to a sense of belonging that is most important. No matter how much the local environment varies between the different locations, within the organisation the environment will be familiar. This provides another encouragement for employees to strengthen the relationship between themselves and the organisation, since the stronger the relationship the less difficulty they will have adjusting to the new surroundings and the sooner they will be able to begin contributing effectively.

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Where the organisation is an MNC, similar factors will apply, though the value of common identity will diminish the more local conditions conflict with those of the parent country. Local labour regulations, tax laws, language barriers and culture may favour business practices in conflict with those of the organisation. Organisations must balance the value of a common international identity with the constraints of local conditions. It is to the benefit of expatriates and business travellers that, motivated by a desire for organisational integrity, organisations tend to favour upholding the former.

In order to exist, organisations need to maintain awareness of their image, aims and identity amongst all their staff. Training courses are often run with the sole purpose of 'indoctrinating' new employees, and those who arrive in the organisation as a result of mergers or acquisitions. Technological innovations, such as E-mail and video-conferencing, can be used to improve the efficiency of company communications. This has two effects: firstly, it reinforces and unifies common identity; secondly, it brings outlying organisation people together, improving their sense of belonging.

In sum, the relationship of the organisation with the individual is an essential component of the pursuance of regional and international objectives by the company. The organisation seeks to foster a sense of belonging amongst its employees through the establishment of a common identity, which eases external cultural transition and the transfer of skills and encourages the dissemination of the corporate ethos.

2.4.3 Organisations and stress
The performance of individuals in their current position represents the visible output from the individual to the organisation. Should a manager be responsible for more junior staff, his or her decisions towards those staff represent another output to the employer. Both these flows are of course dependent on the individual's capabilities as illustrated in Fig. 2.1 and are communicated through this mantle to the outside world. There is thus a possibility of the individual's performance being hampered by stress and the performance of others being handicapped by poor communication from the stressed individual. The organisational role of the individual can thus suffer through stress. This means that authorisation systems at work within organisations are significant in the efficiency-stress equation, and are examined in Chapter 7.

Other things being equal, organisations will seek to minimise visible stress as far as possible within the constraints posed by the economics and nature of their operation. It can be hypothesised that where stress is engendered by change in the environment of the individual, any facets of the organisation that foster stability will minimise change or ease adaptation to it, akin
to the 'stability zones' outlined by Toffler (1971). Whilst most aspects of operations: transfer, technological development, market expansion and career advancement, promote change, the most tangible example of a stabilising factor is the corporate identity (Tung, 1988). Outside the organisation, another might be the presence of family (see 2.5.2).

Stress is associated with the amount of readjustment that events require; the organisation man or woman requires less readjustment if he or she find themselves in familiar organisation surroundings. The common international identity of an organisation is thus a benefit, provided it does not conflict with local conditions to the extent of producing additional strains or tensions for local or visiting employees.

The strength of organisational allegiance can be seen when organisations merge or are taken over. A strong organisational relationship has been broken and another takes its place. This readjustment can cause stress, particularly where organisational identities conflict, and empathetic retraining is required.

Thus mobile organisation men and women, travelling and working within an international organisation with a strong common identity, may require less readjustment and encounter less stress than those whose commitment to other concerns in their lives may be greater. The changes created in the non-work responsibilities of the latter group by different forms of mobility, such as business travel, are likely to generate more stress, all other factors being equal, than for the organisation men and women.

2.4.4 Organisations in the tripartite system
Organisations, in a desire to retain their investment in a skilled workforce, whilst maintaining the flexibility of their ILM, seek to encourage individual loyalty and willingness to move. Corporate identity is a tool developed to achieve this. This creates a tangible entity for the organisation greater than the sum of the parts with which the individual can develop a relationship and, in order to procure benefits, is encouraged to do so. This identity proves of mutual benefit on relocation as it provides one of only a few potentially stabilising influences amongst otherwise dramatic changes. The other major source of stability through identity is that offered by the family.

2.5 The individual as family member
There are many ways in which the mobility of the individual has an impact on other family members: it can affect career and educational preferences and relationships with extended family, it can engender mobility on the part of family members, or a temporary separation of the household unit with a resultant effect on household contact and dynamics. Relocation,
secondment and business travel will all have their effects on this relationship. The relevance of different aspects of these mobility processes to the interaction of the individual with the family is discussed below. Thus, in the following section, family and household relations are being considered as they pertain to the internationally mobile individual.

Stress occurs in reaction to change. The changes brought about by mobility affect the way in which the family interacts with its environment in four main ways. The first is by disrupting the niche the household occupies in a particular neighbourhood. The second is by creating uncertainty or unknowns about the future. The third is through bringing about a change in the environment such that the frame of reference of family members becomes inappropriate. The fourth is the requirement mobility brings upon the family to readjust to its new circumstances. These four means of interaction are discussed in more detail in Chapter 9.

2.5.1 Nature of the family relationship

There are two possible definitions of family. The first is that of the primary social group consisting of generations of parents and their offspring, the extended family. The second is the immediate family of wife or husband and their children - the nuclear family. This study uses the terms 'extended family' and 'family' to describe these two groups. The first definition is appropriate to all individuals whereas the second will only apply where the individual is a partner in marriage or similar relationship. The term 'household' can be used to define people living together in one abode collectively. In most cases the household would comprise immediate family members and sometimes members of the extended family (often elderly relatives) who chose to live with the individual. Traditional migration studies have been based upon data sets (such as the U.K. Labour Force Survey) which refer to movements of the 'household' and occasionally defines the household by the occupation of the 'head of household'. This has led much research to be based around migration of the household as a whole (Johnson, Salt and Wood, 1974; Owen and Green, 1989). In this study, however, movement is examined which frequently occurs for the employed individual whilst the rest of the family remain stationary. The focus is thus upon the individual. The term 'household' is also used to define individual plus immediate family. This definition is anticipated to coincide with that of nuclear family for most of those under study.

It is expected that each working member of the household will provide financial, emotional and social support to other family members in the household. This is the collective living element of the household unit. Where an individual has children, these are an important part of the household group towards which adult members have significant responsibilities. Fulfilment of these responsibilities is necessary not only for the future success of the household group but also for the wider role the household has towards the reproduction of society. The children will
possess some responsibilities to the household of their own, but failure to meet these cannot be seen as a breakdown of the household function.

Nevertheless, children cannot be seen as an essential component of the household unit. Many multi-member households exist where children have not yet been born, have left the unit as adults or simply were never present. Under capitalism, obligations to society can be fulfilled by means other than having children (Caldwell, 1981). Even where children are present, since they are not yet adults, they are not in a position to contribute financially to the collective living element of the household group.

In most of these cases therefore, the immediate (nuclear) family fulfils the responsibilities of the household outlined above. Other cases exist where the single individual is the household unit and is part of an ‘extended family’ only.

The links between an individual and their immediate family or household are thus generally assumed to be stronger than those between the individual and other members of their wider or extended family. Thus a nuclear family is expected to place a greater importance upon keeping together than an extended family. Those who live alone might be expected to be at an advantage when international moves are contemplated, notwithstanding their lack of the source of stability represented by the family. Not only will their family responsibilities in Figure 2.1 be fewer, but the absence of the need to move other household members reduces the number of potential changes undergone and hence the stress experienced. The absence of responsibilities on the part of a single person should not, however, be confused with an absence of aspirations. The single individual may wish to form a nuclear family or may already be part of a relationship which is informal and thus not recognised by the organisation. The absence of a formal link may reduce the single individual’s access to support mechanisms made available to moving families. For a minority therefore, the inability to claim support for a move which affects an unmarried cohabitation or homosexual relationship could raise additional emotional strains. Nevertheless, it would be anticipated that single people with no such ties would suffer less as a result of such moves. The affect of moves on households comprising a nuclear family are discussed below.

2.5.2 The household and mobility
Relocation of the household encompasses the movement of the entire home base of an individual from one location to another. This often occurs when an individual is seconded overseas by an employer for six months or more.
The effect of geographic mobility for the majority of individuals for whom both definitions of family apply is to move the immediate family away from the rest of the extended family. Where only an extended family exists, the individual is moved away from the rest of their family. This move, away from parents and siblings can be a traumatic one, as it is in essence the splitting of one household to form two. This can occur as a result of a secondment initiated by the employer, but is normally associated with earlier mobility: the move to higher education or to the first job. Once the splitting away from the parental home has occurred, further moves are not generally associated with significant intra-family trauma. An exception can occur later in life where aged parents require more attention and geographic remoteness acts as a barrier. Industrial mobility has long been seen to interfere with traditional extended family networks (Parsons, 1951), leaving the nuclear family isolated as the principal source of support to individuals.

Therefore, the effect of work-related mobility on the household and the family can be summarized as:-

- Household is a single individual  ->  Household is moved
- Household is individual + immediate family  ->  Household is moved or Household is split.
- Household is individual + parental home  ->  Household is split.

Occasionally, upon relocation, relationships normally constrained to the extended family act as surrogates for absent immediate family relations. Examples occur of individuals who take their mother overseas on secondment for a representational role, or who have siblings maintain their household obligations in their absence.

The company generally undertakes to move the individual and does not bias its choice of potential candidates by family or household circumstances. Thus where there are two candidates for a particular overseas post, one of whom is single, the other married with children, the company will normally select on the merits for the post of the individuals alone\(^2\). In doing so they disregard the additional costs the latter individual will incur as part of their relocation package. Once the decision has been made, relevant terms and conditions are applied, usually via a formula which calculates a relocation package appropriate to the circumstances of each individual. This apparent benevolence towards the interests of the individual is an example of the

\(^2\) The information in these paragraphs is based upon responses from employers obtained in interview (Chapter 7).
price the company will pay to obtain sufficient flexibility to transfer skills within its ILM. Therefore, such measures are deemed necessary to ensure the portability of households. Two exceptions do operate: bachelor postings and married postings.

Bachelor postings occur where, for reasons of security, legal requirements or available living conditions, only single men, or men who are prepared to live and work away from their family are appropriate. There are also posts associated with apprenticeship training or development where it is unusual for the individual to have reached a stage in life where they will be married. The assignment is thus traditionally budgeted for unaccompanied individuals and funds may not be available for accompanied status.

Married postings occur where employers positively discriminate in favour of individuals who are married. This may occur where a managerial or representational role involves a substantial amount of out-of-hours entertaining, where the spouse is expected to contribute, despite not being on the company payroll. Companies may also discriminate in favour of married couples where conditions necessitate all staff live within a compound. The presence of spouses enables some level of social life to be maintained. Conversely, single individuals could suffer loneliness or create social tensions in an environment where all other inhabitants are married couples.

Dual-career couples, where both partners work for the same company, pose another mobility problem for employers (see Le Louarn and DeCotiis, 1983; Taylor and Lounsbury, 1988). The latter rarely have policies which embrace the employment of the spouse. The losses (of money, career or lifestyle) associated with movement of a family or household containing a dual-career couple, for example, have to be assessed by the individual and family alone. In this way, although the chances of an individual securing a particular post may not be prejudiced by their family circumstances, the same circumstances may prejudice the acceptance of the secondment by the individual.

When both partners work in prominent posts in the same organisation, moving one individual entails finding a suitable position for the other partner in the same location and funding a second, albeit reduced, relocation package. Where one partner is seen as having the dominant career, the company may decide to undertake only limited efforts towards finding and funding a post for the other. Companies may thus sacrifice one position provided the other partner will stay working for the firm. The situation then becomes similar to that of a dual-career couple where partners work for different organisations. The potential to move forces important mobility and career considerations up against the family responsibilities of each partner and can form a potential source of intra-household stress (Fogarty, Rapoport and Rapoport, 1971).
Children form an important component of the nuclear family. As they are still dependent on parental or surrogate parental support and guidance, mobility is likely to have a dramatic affect on their lives. Children have their own career and organisational commitments in the form of compulsory education and school attendance. Schools also form a primary source of social life for the child. Whilst appropriate education at all ages is important, continuity is generally seen as of prime importance in later stages. Once more specialist courses have been selected in the mid-teens, moving children can be seen as problematic. In addition, the older and more independent the child, the greater the importance of socialising through the formation of friendships, or 'cliques' within peer groups (Meltzer and Grandjean, 1989). Both these factors point to the need for children to remain in a familiar environment, or for moves to occur at accepted breakpoints in education (between 'stages' such as primary or secondary education). Education packages which include guidance and funding for continuance of boarding school education beyond the date of return are thus often offered by organisations.

The ability to adapt to new situations is often cited as being easier for younger rather than older children (Meltzer and Grandjean, ibid.), though little research has been conducted in relation to mobility (as highlighted by Furnham and Bochner, 1986). The importance to young children of keeping a familiar immediate environment (such as clothes and toys) throughout moves has been highlighted (Oakeshott, 1973). The same writer has also examined cases of separation where children are deprived of one or other parent (such as through business travel). Psychiatric problems were engendered by the role conflicts created in the familial and social world of children. Marshall and Cooper (1976) observed how current symptoms of insecurity and future communication problems were attributable to employment-related parental absence. The need to change friendships and school ties for the child moved overseas has been highlighted by Torbín (1982) as an adjustment for children which comes on top of pressures to conform to attitudes and norms of the host culture. Parents have responsibilities towards their children's emotional health and development. In turn children are dependent upon their parents for material as well as emotional support. These factors mean this particular aspect of the individual-family aspirations and responsibilities is a very significant one. The need for the relationship to be successful is vital for the success of the child and parent alike. Pressures on this relationship can thus be potent sources of stress.

MNCs pursuing courses of globalisation will have to consider the many aspects of household and family structure across the different cultures of the countries in which they operate. Definitions of family so far used have essentially been specific to the Western world. The nuclear family, where the immediate family and the household unit are one and the same is essentially a Western phenomenon. In many developing regions, the extended family comprises many married couples of different generations in the household unit. Even where the extended family is spread over two or more dwellings, it can still act as a single household unit, provided distances are not great. As companies internationalise and indigenise their

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not, they may not be able to compete effectively on the world labour market for their share of the future global skilled labour force.

2.5.3 The family and stress

The commitments of the individual to organisation and career rarely last longer than the duration of the individual's working life and can frequently change during that time. By contrast, their commitment to family is likely to be both the longest and most emotionally involved of their life, and one which requires a constant high level of responsibility. The success of the family depends upon the interconnection within the tripartite system of the aspirations and responsibilities of the many family members. Family members must be able to interact with their own immediate environments and mutually coexist through effective communication with each other for relationships to grow. Thus stability and the existence of 'quality time' when family members are free to devote time to each other are prerequisites for fruitful development of the family (Shaevitz and Shaevitz, 1980).

The organisation can make demands upon the professional individual which consume time normally devoted to the family, such as evenings or weekends. A conflict is thus created for the individual between competing demands for 'quality time' from work and home. Organisation-engendered short-term mobility, business travel in particular, can lead to absence of the individual from the home 'out of hours' and create stress through failure to maintain family commitments. This can lead to growing apart and a cleavage of responsibilities in the household, and differential growth on the part of spouses. The latter can create a vulnerability to crisis (Rice, 1979). The more individuals identify with corporate as against family identities and restructure priorities accordingly, the greater the threat of marital strain and eventual household break-up.

The effect of long-term geographic mobility on the tripartite system of individuals has been referred to in section 2.2.1. The system of aspirations and responsibilities is lifted out of the context into which it fits - its social and cultural milieu - and placed into another, where it may not. Such mobility also affects each of the family members as their tripartite systems are moved out of their context. In many ways the movement is more disruptive for family members as interactions with organisations (schools or the spouse's employers) and with careers (educational plans or spouse's career) are halted, suspended or transformed. The stress encountered by dual

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4 The family-organisation conflict created by business travel has been addressed specifically by Culbert and Renshaw (1972).
career couples in this context has been discussed above and elsewhere (Hall and Hall, 1980). Moves force family responsibilities to the fore, through the need to stay together, to the detriment of important organisation and career considerations. This can form a potent source of intra-household stress. Stress for the individual can result from the need for mobility - and thus the fulfilment of organisational and possible career aspirations - conflicting with perceived reneging on responsibilities to the family. For family members, stress can result from commitments to the employee - and thus the fulfilment of familial responsibilities and aspirations - conflicting with their own organisational, career and other family commitments.

The cost of moving the nuclear family is a price organisations are prepared to pay for geographic flexibility in their ILMs. Separating husband and wife places the family at a crisis point from which increasing emotional distance and strain have been observed as outcomes (Marshall and Cooper, 1976). The extent to which financial remuneration compensates for family disruption is not known, but as such funds cannot replace the organisation or career interaction of family members it is unlikely to relieve the stress of the transition.

Stress through relocation can affect relations between the family members. This can be direct, through stress- and travel-induced tiredness, irritability and confusion impairing interaction within the household. It can also be indirect as extra time spent at work by the individual to compensate for poor performance, or away on travel, can reduce the time available to spend with the family. A vicious circle of increasing stress and poor performance can thus develop for the individual, triggered by mobility.

The high level of responsibility and emotional attachment to family interactions increases the importance placed by the individual on the fulfilment of aspirations and responsibilities to the household. It is thus likely that lost time or the reduction in the quality of such time, due to career or organisational commitments and resultant mobility, will lead to stress.

2.5.4 The family in the tripartite system

The aspirations and responsibilities of the individual sit at the centre of the tripartite system of interaction with career, organisation and family given in Fig. 2.1. The individual is able to balance commitments to each aspect of the immediate environment through making choices about spatial and temporal commitments to each. As has been discussed, it is likely that a prime aspiration will be the devotion of quality time to family, and where this aspiration conflicts with others stress may result.
Although each member of the family will also have aspirations and responsibilities as part of their own tripartite system, the privilege of being able to balance their choices will not be available. Short-term travel impinges on the familial commitments of the individual, but usually allows scope for the fulfilment of desired career and organisational commitments by family members. The prospect of a long-term move for each family member, out of their environment, will mean forsaking organisation and career commitments in order to be able to maintain family commitments. It can thus be seen that although individuals may suffer stress through the conflict of their aspirations towards different aspects of their lives, they have at least had the privilege of choosing which aspirations to fulfil. Their responsibility to their family (and thus the potential stress that can result from failing to fulfil it) is made all the greater by the weight the other members of the family have been forced to place in their one remaining 'basket' - that of family commitments.

2.6 Conclusion

A model of individual-environment interaction has been developed based on aspirations and responsibilities within roles towards different aspects of life: career, organisation and family. The tripartite model illustrates how stress can impede interaction with these aspects of life and the possible negative outcomes of impaired performance, diminished promotion prospects, and reduced communication with family.

Individuals have been shown as constantly adapting their interactions with aspects of their lives to cope with changes in their relationships with the immediate environment. This adaptation can be a source of stress where a change in behaviour is required in a direction which produces conflicts with other aspirations or leads to a failure in the fulfilment of responsibilities to other aspects of the system.

Whilst the career provides motivation for performance within the organisation, the organisation can also alter circumstances. Depending on the direction of changes, the outcome can be to improve career prospects. Likewise, the outcome can be to frustrate - or provide less than attractive routes to - fulfilment of career aspirations. Similarly, aspirations towards ensuring the comfort and security of the family can provide a motivation for achievement in the career. The pursuit of the career, however, can necessitate neglect of family in the short term and changes in structure (such as spouse seeking to end work) in the long term. The organisation will provide much of the support and financial remuneration for the family, but it can also require the individual to undertake geographic mobility as part of work which has major effects on the structure of the family, the relationship of family members with their environment and relations within the family.
It has been shown that movement of the individual requires the moving of the tripartite system of aspirations and responsibilities out of a known context and places it in an unknown one. Even greater adaptation is thus required as the context into which individual interactions fit has changed, and with it the nature of the relationship between them.

The model developed and explained here has thus highlighted the areas of study required to determine the relationship between stress and international mobility. The mechanisms underlying the interactions of individuals with their immediate environment must be determined. This will require the identification of demands placed by components of the environment (including the family and organisation) on the individual to establish the nature of the role strains and conflicts of interests that occur and how they lead to stress. Initially, therefore, the study needs to isolate the mechanisms that cause such conflicts and strains to lead to stress and the means of measuring the outcome of such processes. In line with currently accepted theories of stress generation - that of individual-environment interaction (Luo and Cooper, 1990) - the interactive processes implicit in the mobility-stress relationship need to be identified. A framework based on the foci of concern of individuals within the attributes of their immediate environment - career, organisation and family - has been hypothesised. It is in the context of these foci that the aspects of interaction discussed here: attachment of the individual to the current niche (sense of belonging); the extent to which future changes are known (the extent of preparedness); the contrast between the individual’s understanding of the home and host environment (frame of reference); and the extent to which appropriate adaptation is possible; will need to be explored and developed (Chapters 8 and 9). The personal and specific nature of these aspects necessitates an interview survey to embrace a broad range of mobility experience. Organisational priorities should be addressed through interviews with employers. The relevance of family concerns to the mobility-stress relationship also necessitates the inclusion of spouses in the interview process. Methods of assessing the mobility experiences undergone and the stress outcome for individuals will also need to be established (Chapters 5 and 6). Before the methodology can be instituted, however, it is necessary to address the determinants of stress, its potential outcome and the means by which it can be measured. The forces that shape the current mobility patterns which affect individuals also need to be assessed. These issues are examined respectively in the two chapters that follow.
Chapter 3: Stress

3.1 Introduction
The previous chapter discussed the relationship between individuals and their immediate environment. The principal components of the environment were identified and the nature of the relationships established. Potential conflicts of interest between different aspects of the environment towards which the individual has responsibilities and aspirations were identified. These conflicts were presented as sources of stress. A model was generated in which such stress also acted to constrain the individuals' physical and mental capabilities, their ability to act, interact and communicate with the outside world. Stress was thus presented as both a product of the process of interaction with the outside world, and as a hindrance to it. Though its importance in the interactive process, and thus to this study, was identified, two questions remained unanswered, those of the specific nature of stress and how its effects could be measured. These will be addressed in this chapter.

The chapter begins with an examination of the nature of stress and the difficulty of defining a process so closely associated with life itself. The primary causes of stress and features of the stress reaction are discussed. The manifestations of stress and the short- and long-term effects are then examined. The next section discusses how stress and its effects can be measured and outlines the problems posed by variability in response. The role played by mobility in the generation of stress is discussed in the final section, with reference to the techniques used in previous research and the results obtained. The chapter concludes by stating the implications of past stress and mobility research for the way in which the current study should proceed.

3.2 Nature of stress
3.2.1 The definition of stress
"Stress is essentially the rate of all the wear and tear in the body [caused by life]"
Selye, 1956, p.3.

"The physiological, psychological and behavioural responses of an individual seeking to adapt and adjust to both internal and external pressures"

Hans Selye was the first researcher to identify stress as an all embracing phenomenon, an essential component of the individual's reactive and homeostatic mechanisms that in its over-application poses a threat to health. Stress is thus a part of life itself which in its prioritisation of short term survival increases long term wear and tear on the body.
Capel and Gurnsey, too, emphasised the homeostatic nature of the stress reaction. They highlighted the problems of assessing the level of responses against the magnitude of pressures when they referred to stress measurement as looking for "a formula which allows us to represent the action of the unquantifiable [life] on the infinitely variable [humans]" (1987, p.4). The problems of measurement are addressed in section 3.3.

In 'The Stress of Life' (1956), Selye established the link between what had previously been described vaguely as anxiety or distress, and subsequent medical conditions. In identifying stress as a life process, the non-specific reaction of the body to an external demand, Selye was careful to emphasize the positive as well as the negative effects, though others have since referred to it in the detrimental context alone (Cox, 1978). It cannot be overemphasised that without stress individuals would not respond appropriately to external stimuli and would lack motivation or energy to partake in, react to, or confront life events. In this regard, its importance to organisational efficiency has been identified (Benson and Allen, 1980). Selye defined stress as the state which manifested itself by the General Adaptation Syndrome (GAS) - the accommodating processes undertaken by the organism in reaction to external stimuli. The GAS had three stages after an organism-environment transaction: an alarm reaction (in crude terms, the instigation to flight or fight); a stage of resistance; and a stage of exhaustion.

There were disagreements over the definition: was stress an organism's response to an external threat, as Selye had defined it, or was it an outside force or pressure applied to the organism? The latter definition is derived from the analogy with engineering where stress is the continual cumulative application of an external force, the strain it produces being determined by the properties of the substance to which it is applied. Some researchers have maintained the engineering analogy (Singer, 1980). The analogy fails in that an engineer can calibrate the forces applied, and effects measured, without the effects being altered by the object's perceptions of the force.

Some (such as Levi, 1972) did not favour Selye's concept of stress or the GAS. The objection was based on the understanding that 'stress' was an abstraction, a hypothetical phenomenon possessing no real independent existence, not occurring in the pure state. This made it impossible to isolate for objective direct scientific observation and measurement of its effects. One cannot study stress, one can merely explore real and tangible things, a class of responses taken as evidence that the organism is adapting to a change in environment, such as the effect of exposure to cold. From a pathological perspective, Selye's definition leads to a classification of some situations as stressful that can be unhelpful, such as surprise, exercise or passion. Others pointed out the ambiguity of interpretations of response patterns: an increase in blood pressure
can be caused physiologically, through exercise, or psychologically, through fright (McGrath, 1970). Different responses are also possible from the same stimulus. Alternatively, if classes of situation are taken as having the properties of stimuli, not only will the classes be difficult to define, but there will be a tendency for separate stress theories to be developed for each situation. This complexity is inevitable where what is being classified is the effect of life itself.

The definition adopted here is based on Selye’s stress as response. Stress is assumed to be the inappropriate application of the GAS or stress reaction (described in 3.2.3). Inappropriateness can be where the body’s response is ill-fitted to the perceived threat, or where an event is incorrectly perceived as threatening. Such a definition is not outcome- or stimulus-dependent since there can be many different outcomes, determined by such factors as existing physical and mental state, environment, personality, diet and others. Interactive models of stimuli (such as Cox, 1978; Cooper, 1981) base stress on an imbalance in the transaction between environmental demand and individual (coping) ability. Taking inappropriateness as part of the definition means only the negative health outcomes of the reaction are taken into account. The positive outcomes arising from appropriate application are excluded by this definition. Thus attribution of positive or negative values to the reaction itself is avoided.

3.2.2 The causes of stress
The very broad definition of stress outlined by Selye implied that all things in life were stressful. It was the hypothesis that some were more so than others that permitted a pathology of stress to be established and led to a wealth of literature over the past thirty years which has attempted to establish the link between a multitude of events in life and increased levels of stress.

In essence, a stressful life event triggers a stress reaction of a greater or lesser magnitude or duration. The magnitude and duration are determined respectively by the individual’s perception of the magnitude (for example, encountering a spider versus encountering a tiger) and duration (for example, pulling back from a chained animal versus running, chased by a loose one) of the potential threat. The application of the stress reaction to potential threats which evidently require physical action is not of concern here. The ancient biological ‘fight or flight’ response is appropriate where causes are physically threatening. In modern employing organisations, however, the GAS or ‘stress reaction’ is inappropriate in many situations in which the individual feels threatened. The process which prepares the body for ‘fight or flight’ is not relevant when the individual spends most of the day behind a desk or sitting on an aeroplane. Whilst the modern environment may still feel threatening, and aggravate or alienate the person, remedy cannot be sought through physical action. Physical activity is a natural response to stress and
one which enables the body to return quickly to a steady state. Industrial society denies this and
the response becomes potentiated and destructive. In car-driving, for example, irritation turns
inward. It is here that the stress reaction is of little use, and its application becomes damaging
to the individual’s health and well-being. It is here too that most literature on stress causation and
management has been written. To understand the nature of inappropriate application on health
it is necessary to look at the reaction itself.

3.2.3 The stress reaction

The term stress has been used here to refer to the inappropriate application of the reaction to
a perceived threat. The term is also commonly used to describe bodily reactions which occur with
or without the real-time perception of the individual, such as the ‘stress’ of jet lag. Both reactions
are described here as both feed into the same pathway of physiological response (though at
different points of entry).

The physiological processes which enable external stimuli to disrupt sleep, digestion and immune
response, and eventually damage physical and mental health, are complex and involve numerous
neurological and hormonal pathways. An interpretation of the physiological pathways so far traced
is presented in Figure 3.1. Immediate responses, such as to work pressures, act via the centres
of higher thought; disruptive events, such as jet travel, act through disturbance of rhythmic
hormonal mechanisms (Conroy, 1983). These pathways are outlined, with reference to Fig. 3.1
in Appendix II.

All these mechanisms are manifestly concerned with preparation of the body for ‘fight or flight’
(Cox, 1978). Many are connected with energy production, stimulation of enzyme systems or
release of metabolites. Some increase blood flow to the heart and muscles and hence speed up
transit to the point of depletion. Others enhance the individual’s immune response, in preparation
for tissue damage. The autonomic nervous system response is immediate, whilst the hormonal
changes are gradual but more prolonged.

These processes are effective and necessary, should physical exertion actually form part of the
individual’s response. If the extra energy production is not required, however, excess circulating
metabolites can be detrimental (see 3.2.4). In either case, the reactions cannot continue
indefinitely. They are most effective in response to a short traumatic period. Should the stressful
**Fig 3.1 Physiological components of the stress reaction**

**PERCEIVED SOURCE**

**OF PHYSICAL OR**  
**EMOTIONAL THREAT**

**BRAIN (Amygdala)**

Mediation by Forebrain

**PITUITARY GLAND**  
Thyroid Stimulating Hormone

**HYPOTHALAMUS**

Corticotrophin Releasing Factor

**THYROID GLAND**

Thyroxine

**ADRENAL GLANDS**

Cortisol

Noradrenaline

**HEART**

Rate increased

**MUSCLE**

Suppressed

**GUT**

Glucose → Glycogen

Insulin production stopped

**LIVER**

Activates other energy producing systems

**FAT STORES**

Fatty Acids

Lipids

**KEY**

Suppressed  Stress Outcome  **HEART**  Target Organ

Hormonal Response  Nervous Response
situation not subside, regardless of the individual’s physical state, the stress reaction above will be disequilibrating (Capel and Gurnsey, 1987).

### 3.2.4 The manifestations of stress

Stress activates a large number of the hormonal, neurological and metabolic systems of the body. Where physical action is appropriate, this has the advantage of preparing the whole body for immediate activity. Where it is not, or where the reaction is prolonged, the disadvantage is the wide range of bodily processes and organs that are disrupted in the short- and potentially long-term.

**a) Short term**

On initiation of the stress reaction, the individual goes into oxygen debt, whereby harmful substances such as lactate are permitted to build up in the tissues, to be oxidised when in a less stressful state. As the toxicity increases, the stress reaction changes and the body adapts its metabolism to cope with the presence of stress for an indefinite period (Capel and Gurnsey, 1987). The change takes place as a result of ACTH action on the cortex of the adrenal glands. Corticosteroids including cortisol, the ‘long term stress’ hormone are produced. Cortisol stimulates glucose synthesis in the liver, muscles and adipose (fat) tissue; it prevents the leakage of fluid from the capillaries and stabilizes cell membranes and lysosomes. Normally, capillary leakage bathes the cells in plasma rich in nutrients, pathogen engulfing white cells and products of the immune response. Cell membranes are the location for many active and passive transport systems that permit the entry of nutrients and the exit of waste products. Inside the cell, lysosomes release enzymes essential for cell metabolism and destruction of foreign bodies and toxins. Cortisol thus has anti-inflammatory and anti-allergic responses which are counter to the initial effects of adrenalin (Hardy, 1981).

Neurotransmitter substances, essential for transmission of nerve impulses, are highly localised in specific centres and pathways. In association with hormonal activities it is their rise and decline which controls cyclical behaviour like waking, sleeping and eating. Disruptions here form the early manifestations of stress. ACTH, for example, is involved with the morning waking process, such that stress, by its stimulation of ACTH production, prevents sleep. Jet lag occurs where the essential balance between neurotransmitters, hormones and the time of day becomes disrupted and sleep patterns are interrupted (Conroy, 1983; McEwan et al. 1988). Close links exist between neurotransmitters and hormones; ACTH and the neuropeptide beta-endorphin which helps the body overcome pain in association with exertions (possibly due to stress) both originate from the same peptide-starting substance (or precursor).
The pineal body, a small gland on the lower side of the brain, is involved with the regulation of sleep. Under the influence of noradrenaline and gamma-aminobutyric acid (GABA) the brain's commonest inhibitory transmitter, it releases melatonin at night, which induces a relaxed attitude that makes sleep possible. During the day melatonin is converted into serotonin, and vice-versa at night. Stress disrupts the conversion process and the action of melatonin, this results in a loss of sleep and a reduced level of calm (Popova et al., 1985). Sleep is closely linked to diurnal or circadian (daily) hormone cycles (Krueger, 1989). Normally, individuals receive eight bursts of the 'waking' hormone ACTH in each 24-hour period. Stress, or working late, induces additional release of ACTH reducing the ability to obtain sufficient sleep. Emotional and physical recovery from illness is also linked to adequate sleep, one of the most common ways in which stress disrupts health, therefore, is through its interference with sleep patterns. Short-wave sleep is characterised by high levels of human growth hormone, responsible for protein synthesis (Takahashi, 1979). Hence, repairing of wear and tear, protein preservation, and regulation of energy substrates will be interrupted by stress-induced sleeplessness. An effect on the laying down of memory has also been proposed (Poulton, 1970, p.117). Excessive late working or international flights can thus be implicated in protein deficiency or mild amnesia.

When stress is first experienced the immune system is actually enhanced (as outlined above), but this state cannot be maintained indefinitely. If the reaction is sustained, both cell-mediated and circulating immune responses are suppressed. This presents an environment in which pathogens can thrive. Antibody production is impaired, B blood cell count is altered and activity is decreased. B blood cells (lymphocytes) have the ability to destroy bacteria; they respond to and retain a selective memory of different non-cell materials (antigens) (Kiecolt-Glaser and Glaser, 1988). Stressful activities are thus likely to precipitate infectious disease symptoms. Underperformance and absenteeism could thus be anticipated (as found by Jamal, 1984).

Observations of phenomena such as the secretion of hormones in anticipation of dental treatment and airline travel (Carruthers, 1980), have prompted thought that the reaction of the immune system to stress is related to attitude and perception of threat (Capel and Gurnsey, 1987). In the case of cancer, an illness with the potential to be extremely stressful, attitude to treatment can often be linked to survival (Stanway, 1986). Stress may render the individual less able to deal with the generation of malignant cells. Enzyme systems that break down carcinogens can be enhanced or conversely enzymes can act to aid the spread of carcinogens. Such effects, of course, also have long term implications.

Stress, and chemicals taken to relieve its effects, alcohol and aspirin, irritate and damage the lining of the gut leading to ulceration of the gastric mucosa, exacerbated by the depression of the
motility of the gut under stress. Several studies, reviewed by Cox (1978), have found the incidence of peptic ulcers greater amongst skilled occupations carrying heavy responsibility than amongst lower-skilled workers.

Stress can also be linked to impaired sexual behaviour. High cortisol levels are associated with a low sperm count. Erections are closely associated with the parasympathetic nervous system (whilst stress competitively stimulates the sympathetic). Prolactin, which is stimulated in the stress reaction in much the same way as cortisol, is responsible for the delaying of ovulation (Lamb et al., 1984). Although these problems may not be directly damaging to health, they can create anxiety and act as stressors, thus creating a vicious circle. The effect on nourishment can also be marked. Serotonin has been implicated in the choice of food, especially selection as related to nutritional content (Green, 1987). Stress, then, can result in an individual eating an unhealthy, unbalanced diet. Such a diet may also be associated with patterns of business travel.

These short term reactions can persist over long periods of recurring stress. The constant build-up of by-products of the reactions together with the action of long term hormones such as cortisol can result in long-term effects, described below.

b) Long term
Stress is implicated in a wide range of degenerative disorders. Through its consequent effects, it is a major cause of heart disease, much mental disorder, ulcers, headaches, hypertension, skin disorders and some cancers. It is also associated with worsening of conditions such as arthritis, asthma, migraine, diabetes and gastro-intestinal disorders which it does not initiate. One estimate has been made that some 60-70% of patients a G.P. sees will be suffering from stress-related conditions (Capel and Gurnsey, 1987). Some of the early signs, linked to short-term effects, include: irritability, apathy, lassitude, depression, headaches, backaches, insomnia and changes in eating and smoking patterns.

The long-term health risks most commonly associated with stress are cardiovascular ones: coronary heart disease, thrombosis, atherosclerosis (thickening of blood vessels) and hypertension. These are primarily linked to the energy production-enhancing aspects of the stress reaction. Raised adrenalin levels aid the conversion of glycogen to sugar in the liver and inhibit hormones which regulate the levels of sugars and fats in the blood such as insulin. They also enhance energy-producing enzyme systems: concentrations of sugars and free fatty acids thus increase. Free fatty acids combine to form complex lipids and glycerol. Under physical stress, these would be converted to carbon dioxide and water by the action of muscular tissue, but under non-physical stress, excess fats deposit as triglyceride on liver and arterial walls. The result is
fatty degeneration of the middle wall of arteries, rigidity, hardening and narrowing of the lumen. The hormone, adrenalin, is thus directly implicated in the creation of atheromatic plaques. Excess sugars create few problems in the short term, since they can be excreted, but there are indications that diabetes is a long-term implication (Cox, 1978). Adrenalin also binds to receptors on blood platelets such that they clump together and deposit on the artery wall as clots (thromboses).

Adrenalin induces an immediate, but not sustained, rise in blood pressure, through contraction of the peripheral blood vessels and accelerated heart output. It is estimated that only in some 20% of cases of high blood pressure is a pathological cause of hypertension identified (Walsh and Walsh, 1987). It is thought stress may trigger an already present genetic predisposition to hypertension (Capel and Gurnsey, 1987). After the initial stress response, concentrations of serum fibrinogen (a clotting agent) are high and dangerous, especially where lumens are already reduced by atheromatous tissue, and this can lead to thrombosis or a stroke.

A psychiatric condition may have its origins in some adverse experience in childhood, but its occurrence can be manifested by a disturbance in the metabolism maintaining the equilibrium of the brain neurochemicals. ACTH and noradrenaline are both closely associated with learning, alertness and concentration. Where the level or balance of these two is disrupted, behavioural change can be exaggerated.

Depression, for example, characterised by bouts of unrelieved gloom and despair, affects eight per cent of the female population and four per cent of the male. It is associated with imbalances in the limbic portion of the brain, high levels of cortisol and free fatty acids in the bloodstream (linked to ACTH).

Aggressive behaviour is linked to high levels of serotonin. As has been discussed, under stress serotonin levels rise. Severe emotional stress can disrupt the action of acetyl transferase which converts serotonin to melatonin enabling sleep. Melatonin also has a secondary tranquillisising effect crucial to a disturbed individual. Since serotonin stimulates release of ACTH (Keele et al., 1982), the individual can experience bouts of hyperactivity and inability to sleep.

Stress may also be implicated in the aggravation of schizophrenia. Brain noradrenaline (NA) levels increase under stress, before stores are depleted. High levels of NA have been linked to schizophrenia, both directly (Hornykiewicz, 1982) and indirectly, through NA control over other brain neurotransmitters, such as dopamine (Green, 1987). Schizophrenia has traditionally been
associated with hyperactivity in the dopamine system. It typically affects the left hand side of the brain where schizophrenics can have 70% more dopamine receptors than normal.

Whilst stress may not actually cause mental disturbance, it is certainly a contributory factor when levels rise over a particular threshold. The basic premise is that the greater a person's hereditary predisposition to psychiatric illness, the lower the stress level needed to precipitate problems. A vicious circle is enacted with emotional problems, such as nervous breakdowns, in that they are viewed with a much greater social stigma than are physical problems, such as coronary breakdowns. Relieving the pressures associated with emotional problems is difficult where the individual is reluctant to admit the problems exist, and this in turn increases stress on the individual and on family and friends.

In concluding this review of the effects of stress, it is impossible to isolate the problems of stress from the effects of substances taken by the stressed. Palliatives - alcohol, tobacco and other drugs - are used to provide temporary relief from stress (Cox, 1978), having either a tranquillising effect (nullifying the effects of stress or perceptions of stressors) or stimulating effect (diverting attention away from the stressful situation). They act as chemical props, but their use cannot be sustained without dependency or damage. In turn, therefore, stress has been linked to absenteeism (Manning and Osland, 1989) and underperformance (Cox, 1988).

Thus a majority of non-pathogenic illnesses, both short- and long-term can be seen to be linked to stress, occurring either because of it, due to a genetic predisposition triggered by it, or by substances taken to relieve it1. It follows that if a mobile executive is frequently exposed to stress-creating conditions he or she is more at risk of illness, than someone not so exposed. However, the various routes of the stress reaction and the many different ways in which stress can be manifested, pose problems for the assessment of the magnitude and frequency of occurrence of stressful states. Issues surrounding the measurement of stress are addressed in the following section.

3.3 The measurement of stress

Whilst all individuals can undergo the stress reaction, the perception of threat necessary to precipitate a reaction differs. Thus most researchers have sought to establish the presence of the stress reaction, or evidence of its prior occurrence. As the reaction occurs in vivo, the accuracy of tests varies with the degree of invasiveness. However, invasive tests can be a source of stress in themselves. The benefits and disadvantages of these tests are outlined in 3.3.1. Less invasive

1 This is not surprising if the stress reaction is understood as the body's reaction to life.
self-report and observation of the reaction suffers from a lack of objectivity in results. It can also necessitate separation of the individual from the real life situations in which stress occurs. Less invasive and more applied methods involve monitoring the outcome of the stress reaction with respect to its short- or long-term effects. In the short-term most methods depend on the accounts of individuals and suffer the same lack of objectivity of self-report of the stress reaction. Long-term effects can be traced through medical records, medical examination, self-report or trends in performance over time. As no symptoms are exclusive to stress, however, compounding factors are likely to intervene over time to reduce the specificity to stress of such investigations.

There has been a debate over many years in the psychological literature over the importance of objective stress measurement (see Frese and Zapf, 1988). Developments in cognitive research have suggested a reappraisal of the role of the environment in the light of new theories of individual coping strategies. It is not the intention of this chapter (or of this thesis) to contribute to this debate. Rather, this chapter seeks to determine the most reliable and effective methods appropriate to the present study with which to assess the stress associated with mobility. A model of stress has been adopted (section 3.3.3) which allows for stressor appraisal, in line with current cognitive/behavioural theory. Flexibility is required, however, for experimental practicality given the complex series of variables encountered in empirical studies.

3.3.1 Monitoring the stress reaction

The only way to be fully confident that an individual is under stress is to monitor the reaction as it occurs, or its by-products shortly afterwards. As the reaction follows a physiological pathway, biochemical assays and other invasive techniques are required. Increases in the levels of hormonal indices, such as adrenalin, give accurate indications of when the stress reaction is stimulated. Composite or time-average measurements can be obtained from blood or urine assays (Kopin et al., 1988). Aberrant levels of white blood cells, steroids, adrenaline products, adenosine tri-phosphate, sugar, carbon dioxide or free fatty acids can indicate the stress reaction when other potential factors are controlled for. Fluctuations in cardiovascular indices can also be used such as pulse rate, heart rate, vasoconstriction, systolic and diastolic blood pressure, respiration rate and blood volume, but these are secondary indices and can have other potential causes. Similarly, electrical conductivity of the skin varies under emotional stress and galvanic sweat response and digital sweat gland dilation can be measured (as for lie detectors). Two factors rule out the use of such techniques in most studies. The first is the invasive nature of testing, likely to be found a source of stress in itself. The second is the almost universal requirement for the presence of the investigator and expensive equipment. This by definition prevents the monitoring of the reaction in response to real life events and stressful circumstances have to be artificially created. Thus experimental conditions rule out the most accurate way of
measuring stress. The adoption of any other surrogate method will thus necessarily engender some margin of error.

3.3.2 Self report and observation
Non-invasive techniques of appraising the occurrence of stress are few. Visible tension, blushing and fear can be observed, but not in any quantifiable manner. Stress can be inferred from performance testing of speed, quality, accuracy and success (unrelated to the stressful event). These can be quantified, and behaviour in fixed settings can be observed, but both are depend on investigator and equipment presence. Self-report in questionnaires or interviews can measure the subject's confidence or perceptions of their interpersonal 'position'. Interpersonal relationships can be examined for amount of activity, communication and positive or negative behaviour. These techniques are subjective, either on the part of the observer (see Frese and Zapf, 1988), or on the part of the individual, since outward manifestations of the reaction are few and the ability to recognise behavioural changes variable. The means to quantify such observations or reports adequately and to deduce stress intensity from them is also lacking. Thus theoretical and experimental shortcomings prevent the measurement of the stress reaction real-time. The method adopted here will thus, by default, have to encompass measurement of stress in retrospect, through the monitoring of its outcome and effects.

3.3.3 Short-term effects
Even with valid monitoring of the stress reaction real-time, there would need to be a measure of the level of and variability in response to stress. Thus investigation of short-term effects and symptoms of stress outlined under 3.2.4a above is necessary. These effects and symptoms are often recorded using self-report measures which request an assessment of the frequency or intensity of common physical or emotional effects of stress, such as the Gurin Index (Gurin et al., 1960). These include measures of psychological disturbance (hallucinations, delusions, foggy vision), ratings of anxiety or related properties (fear or uneasiness) and shifts in attitudes, perception and self confidence. Though all tests are subject to reactivity effects where the 'testing' situation will alter behaviour, investigators can be absent and are at much greater freedom to alter the testing situation. The persistence of these indices can be credited to their ability to discriminate and their strong coefficient of internal consistency or reliability (Thoits, 1983). The two major problems with such tests are the subjectivity of responses - only partially overcome by careful and directed wording - and the scoring of results. The necessity to make assumptions about how the severity of stress is reflected in the frequency and intensity of symptoms, makes the scoring of questionnaires difficult. Pathological links between stress and its symptoms need to have been previously established, and controlling for other potential causative factors carried out (or careful wording used). Issues of individual variability are taken
up in 3.3.5. All tests have a qualitative as well as a quantitative value by highlighting the types of symptoms suffered. Some use this property to emphasise symptom clusters, rather than scores.

Evaluating the short-term effects of stress using self-report questionnaires is preferred despite these disadvantages because it is the only method which can be used in the real world, non-invasively and real-time. Symptom checklists indicate where a particular symptom has been experienced (such as 'shortness of breath', 'on verge of nervous breakdown') which have an immediate relevance to well-being and performance, notwithstanding association with the stress reaction. This is because any link that can be established between mobility and the occurrence of such symptoms has a consequence for performance and is of relevance.

Multiple response checklists are favoured to single scale questions such as ‘how stressed were you?’ (used by Munton, 1990) as lay interpretations of the term ‘stressed’ are many and often value-laden. Not only would such questions hinder comparisons of the outcome variable, but there is little scope for differences of interpretation to be ‘averaged out’ as over a checklist.

3.3.4 Long-term effects

Long-term effects are as significant as short term ones, if not more so, since they are by definition continuous and degenerative, having a persistent effect on performance and a potential to generate premature withdrawal from work. They are also of importance as an indication of persistent past short-term stress. Long-term symptoms of stress, such as ulcers, other alimentary disorders and cardiovascular problems, can be traced through medical reports (as carried out by Taylor, 1974; Young 1987). Archive studies of production or academic achievement could also be assessed. In practice, in both cases many factors other than stressors are implicated necessitating multiple records and controls (Morrison, 1972). There is a need for large sample sizes to balance out non-stress factors, or for longitudinal studies to link events and illness. Both have practical limitations, from obtaining accurate medical records through to the length of the study required.

Thus despite a wide range of measurement techniques being available, none are ideal for the purposes of this study. Practical implications necessitate the adoption of a measurement of the short-term effects of stress to generate the primary dependent variable in this study. The review of studies in 3.4.2 shows that, despite the shortcoming of self-report of short-term effects in the variability of response (discussed below) this has been the principal method chosen by other researchers in the field.
3.3.5 Variability of response

There are two components of intra-individual variations in response to stress. The first is over- or underestimation of the extent of occurrence of a stress outcome and hence over or under reporting of symptoms. The second is the inherent variability between individuals to respond to stress in different ways.

The first is difficult to compensate for but is usually overcome to some extent by the careful wording of questionnaires to embrace intended options whilst avoiding any discomfort or embarrassment in answering. Multi-option questionnaires often have absolute scaling where symptoms either do or do not occur (such as the Crown-Crisp Index, Crown and Crisp, 1966). This obviates over or under emphasis in response. Other scales incorporate a short range of frequency assessments of symptom occurrence such as 'A lot', 'Quite Often', 'Occasionally' and 'Never' (such as the General Health Questionnaire, Goldberg and The Institute of Psychiatry, 1978). Thus a flexibility in response is maintained whilst subjective variability is constrained.

The second component of variability, that inherent between individuals, can take many forms. The effect of personality type on stress response is a major topic and has been subject to much debate (Hamilton, 1979; Depue and Monroe, 1986; Payne, 1988). Full justice to the topic will not be possible here. The basic premise is that many of the people from unselected populations who indicate signs of stress symptoms do so not because they are suffering increases in their stress levels, but because of a disposition to experience the world as a threatening place. Attempts to prove this hypothesis have met with difficulty because of the lack of reliable measures of personality type (Payne, 1988). For a study of the scale of the present one, the means available to control for personality type were limited. This limitation, and two other factors specific to this study, led to the decision to exclude this aspect of variability in response. The first factor was the thesis itself, to see how mobility policies can create irreconcilable strains or conflicts which are stress-generating situations. The variation between individuals in their disposition to suffer (or indicate a suffering of) greater stress is not a necessary component of this question\(^2\). The second factor is that the population under study is not an unselected one but consists of successful business people who do travel. Determining whether or not the personality of such people creates a disposition to stress is not the purpose of the current inquiry. It is possible that personality will have an effect, though Pihl and Caron (1980) using a large sample and what they termed "reliable" instruments (p.193) found none. Even if such a finding were to be obtained it would say more about individuals than about the effect of mobility. The implication would be that additional

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\(^2\) Situations which have the potential to generate stress exist independently of the personal qualities of those who experience them. The amount of stress engendered by such situations will of course, vary. Thus, whilst the translation of event intensity to stress intensity can never be perfect, there is no necessity for the personality traits of current role incumbents to be rated for the potentially stressful components of the role to be identified.
screening should be undertaken to ensure the success of mobility policy, which does little to identify or reduce the aspects of mobility that create stress\(^3\). The practical issues this omission raises for survey methodology are tackled in Chapter 5.

It is believed that the main stress reaction of males is via the sympathetic nervous system (immediate reaction) whilst females respond via the pituitary-adrenal pathway (Cox, 1978). Other endogenous factors, besides gender, influence the response: age, natural enzyme levels and training or preconditioning. Personality will thus be one of several factors accounting for variability in the quantification of the mobility stress relationship (Chapter 10). Given the complexity of measurement problems, however, such variability is to be anticipated or even more 'desirable' (Frese and Zapf, 1988) than higher levels of association. Whilst these factors should have an influence on the symptoms recorded, they should not interfere with this study's exploration of the mobility-stress relationship. Exogenous factors such as the physical environment, use of drugs and nutritional status also have an effect. Whilst these are important in consideration of how the stress reaction works, they have less of an impact on the outcome measures outlined in 3.3.3 and 3.3.4. A stress reaction which is not manifested in long or short term effects has not perceptibly affected the individual and is of little consequence. Thus, the use of stress outcome measures to determine the dependent variable means many factors of individual variability can be circumvented.

Thus the factors which underlie the occurrence of the stress reaction and resultant disorders have been discussed and a means of measuring the outcome of stress suggested. The next section examines how these measurement techniques have been used to determine factors underlying the generation of stress through mobility and inform the understanding of the relationship between stress and mobility.

3.4 Stress and mobility

3.4.1 How mobility generates stress

Stress has been defined as the inappropriate application of the stress reaction, resulting from perceived threats in the environment of the individual. These threats arise through actual or potential changes in the environment. The threat may be removed by further changes, or it may remain ever present. In the latter case variations in the intensity of stress experienced will be

\[^3\] Many researchers have drawn attention to the susceptibility of persons with an overt behavioural syndrome typified by extremes of competitiveness, striving for achievement, aggressiveness, haste, impatience, restlessness, hyperalertness, explosiveness of speech, feelings of being under pressure of time and under the challenge of responsibility to coronary heart disease (Rosenman, Friedman and Strauss, 1964, 1966; Rosenman, Friedman and Jenkins, 1967; Cooper, 1981) and other disorders (Furnham, 1983). Such behaviour has been termed Type A and linked to a predisposition to encounter and suffer stress (Cox, 1978; Fletcher 1988). Managerial satisfaction and success has also been associated with classic Type A behaviour (Marshall and Cooper, 1976). Personality screening of managers for susceptibility to stress is thus likely to be counterproductive.
determined by changes in the individual's perception of the threat alone. Mobility requires, by
definition, a change in environment, and in a corporate context, mobility often engenders a
change to a new environment. Thus migration and travel have been posited as prime sources of
threat or stress for many years (Odegaard, 1932; Furnham and Bochner, 1986). Researchers
have looked at the relationship between mobility and stress using all four approaches to stress
measurement outlined above. Most have concentrated on long-term moves and migration,
because the most obvious long term changes occur in this way. Arguments are put forward in this
thesis (in Chapter 1) and evidence presented (in Chapters 8, 9 and 10) that corporate business
travel and secondments are as worthy of consideration in their requirement for persistent,
frequent changes as the all-embracing permanent change of migration.

3.4.2 Theories of mobility and stress
Pioneering work on the effect of migration on health was carried out by Odegaard (1932), who
found a higher rate of schizophrenia among Norwegians who had emigrated to the U.S. than
among those who stayed in Norway. There were two hypotheses: that those more prone to
mental illness were the ones liable to migrate (selection hypothesis) or that the increase in mental
illness followed the difficulties of migration (the 'stress' hypothesis). Odegaard favoured the
former as an explanation, though the latter has also been advocated for some time (Malzberg and
Lee, 1956). In individually-motivated migration, it is likely that those under some form of stress
are liable to move (Molho, 1986) and that both the selection and stress hypotheses will be
appropriate. The problems faced by those who neither instigate nor volunteer for moves, such
as people who are rehoused to facilitate construction projects, have been documented (Newman
and Owen, 1976). Moves within the ILM of international organisations, whilst voluntary, are
unlikely to be instigated by the individual. The relevance of the selection hypothesis is minimal
in this study, except where stress symptoms resulting from previous sedentary roles are falsely
ascribed to mobile roles. The effect of this occurrence is discussed in Chapter 10.

For the stress hypothesis to apply, changes perceived as threatening by the individual must take
place. Some of the changes hypothesised have been: loss of social milieu (Weiss, 1990), place
dependence (Stokols and Shumaker, 1982), preparation, encounter (or conflict in frame of
reference, Torbiörn, 1982) and adjustment (Mann, 1972). These last three aspects of change are
three parts of Nicholson's four-part transition theory (Nicholson, 1990). These changes fit within
a broad perspective of the interaction of individuals with their immediate environment, based on
sense of belonging, preparation, frame of reference and adaptation (Chapter 2). Determining to
what extent these changes are perceived as threatening are other variables pertaining to how the
individual interprets the situation. Ten intermediate variables were proposed by Morrison (1972).
The first five - personality, life experiences, cultural background, reasons for leaving old location,
reasons for moving to new location - are linked to the pre-migratory period. The sixth is the move itself. The last four variables - attitudes towards the migrant, homogeneity of migrants environment, fulfilment of expectation and personality - all relate to the period after the move. Overall, very few studies have been able to address the move and the pre-move period. The movement process has received limited empirical attention (see 3.4.3a) whilst the role of voluntariness and personality as they relate to the present study have already been addressed (above and in 3.3.5, see also Pihl and Caron, 1980). Post-move, the role of life experience has been addressed theoretically (Stokols and Shumaker, 1982) and empirically (Stokols et al., 1983) (see section 3.4.3e). Most other post-move variables have been interpreted as a product of cultural transition, although it is argued in Chapter 8 that career, organisation and family also determine the nature of changes in the post-move environment.

At the level of international migration the obvious change undergone by all individuals is a cultural one. A single cultural change will embrace many changes in the rules of business, conduct in social relationships and in the role of time (Furnham, 1990b). Where threatening change is a source of stress, cultural change can be anticipated to be a principal source of it. Many writers have looked at the effect of culture change on individuals. Berry et al. (1987) reviewed a series of recent studies which attempted to determine the changes experienced by individuals undergoing what they termed ‘acculturative stress’. They observed a reduction in health status of those undergoing culture change resulting from continuous, first hand contact between two distinct cultural groups (acculturation). The changes outlined were physical changes (finding a new place to live, different population densities, levels of pollution), biological changes (altered nutritional status, new diseases), cultural changes (political, economic, technical, religious) and psychological changes (new sets of social relationships, ways to behave). Reports of stress varied across acculturating groups, refugees and Native peoples suffering greater stress than sojourners, though this group showed a greater fluctuation in response. Sojourners in turn suffered more than immigrant and control groups. The level of stress found among sojourners is of particular interest here due to the temporary nature of the moves involved. This may affect the temporal relationship between cultural changes and stress.

The variation in stress experienced over time after a cultural transition has been described by many researchers (Lysgaard, 1955; Gullahorn and Gullahorn, 1963; Torbiörn, 1982). In a review of contemporary theories of the temporal relationship, Furnham and Bochner (1986) describe the ‘U’ shaped graphs these researchers obtained when ‘stress’ (as determined longitudinally by various indices) was plotted against time after move. The shape corresponded to initial elation, optimism and temporary adjustment on arrival, followed by a crisis period and then regained adjustment (‘Honeymoon’, ‘Crisis’ and ‘Recovery and Adjustment’ respectively). Though the ‘U’
shape itself is generally accepted, the time period over which the three processes occur, and in particular the duration between the peaks, is disputed. Gullahorn and Gullahorn (1963), for example, found that sojourners who return to their home country undergo a similar re-acculturation process, again in the shape of a ‘U’ producing a double ‘U’ or ‘W’ graph. Others (Torbiorn, 1982), have found the trough to be around 7-11 months with the final peak not reached until after 4-9 years. Although Torbiorn did include seconded employees amongst his sample, no study has systematically sought to determine the role of time in culture change-stress relationship for sojourners or temporary movers. The ‘U’ curve may not apply to sojourners as they are likely to reduce their chances of readjustment to their new environment by not establishing supportive networks in the host country (Berry et al., 1987). Even if the ‘U’ curve were to apply, individuals may well have moved on (and in to a new assignment) before the ‘recovery and adjustment’ stage of satisfaction is reached. The relevance of culture change to short-term business travellers has been referred to in recent theoretical literature (Furnham and Bochner, 1986; McIntosh, 1990) but empirical studies have yet to appear. The findings of Torbiorn and others have helped, however, to emphasize the time-specific nature of effects of movement on the individual which must be borne in mind, particularly in cross-sectional studies.

Any consideration of culture-change must take into account the importance of the extent to which there is a distinction between the host and home cultures. Researchers have developed the concept of ‘culture distance’ to explain this difference. Babiker et al. (1980) were the first to attempt to quantify culture distance. Important aspects of the physical and cultural environment in a number of locations, such as climate, clothes, language and family structure, were assessed by a sample of foreign students. The relative difference between them was compared, on a scale ranging from ‘totally familiar’ to ‘totally alien’. From this a numerical culture distance index (CDI) was created with low values for culturally similar regions to the U.K., such as Australia (10.0), and high values for more alien regions, such as Jordan (22.5). Such a scale is of relevance where the degree of change undergone by the mobile individual can be related to the culture distance between origin and destination. Furnham and Bochner (1982) used their own developed CDI to show that the more culturally distant students did indeed encounter greater difficulty in the host country (U.K.). They concluded that this was due to their lack of relevant social skills to deal with their new environment. Both the CDIs, of Babiker and of Furnham and Bochner, were based on the assessments of small samples of students. A comprehensive CDI has not yet been developed which could be used (like a matrix of geographic distance) to assess the objective culture distance between any two locations. A CDI was generated based on the responses of expatriates by Alway (1988). Whilst this was internally consistent, it was based on too small a sample (n=30) to be relevant here. These factors combined with the methodological problems thrown up by the
diversity of multiple destinations of business travellers and secondees to prevent the use of a CDI here.

The importance of the principal components of change, adjustment curves and culture distance will be encompassed by the current study in the analysis of the changes undergone by mobile employees whilst travelling. Many other changes occur as a result of mobility, besides those directly attributable to different cultures: separation from family, change in spouse's career, children's education and the dynamics of family relationships, moving house, unusual sleeping and eating habits and the journey itself. A number of empirical studies over the past thirty years have helped to identify the role of these variables.

3.4.3 Studies of mobility and stress: 'the effect on the infinitely variable'
Very little research on mobility, internal or international, and stress has been conducted (Luo and Cooper, 1990). Many writers in the management literature have speculated on the effect of relocation and expatriation (Howard, 1980; Fields and Shaw, 1985; Gaylord and Symons, 1986; Pinder, 1989), repatriation (Cagney, 1975; Gomez-Mejia and Balkin, 1987) and on the effect of travel (Rotenberg and Shrier, 1979), but few cogent empirical findings have resulted. Most studies have had small samples, below 160. The largest, by Fried (1963, N=566) occurred some time ago and looked at feelings of sadness and depression resulting from migration. Whilst providing a useful pointer for later research, Fried's leading questions meant his results contributed little to the understanding of the relationship between mobility and stress. Over the years since, numerous researchers, using a variety of the techniques outlined in section 3.3, have tested the relevance of particular variables in the stress-mobility relationship. Most have examined the post-move period, and some the travel experience itself. The problems of identifying movers prior to departure have all but ruled out examinations of stress in the pre-move period (Brett, 1980). Where moves occur during more general studies of life stress, their effect can be assessed (such as in life events work, section 3.4.4), but rarely can factors contributing to stress be established. Longitudinal studies have been advanced as a solution in recent years but their complexity, duration, and methodological issues regarding the assessment of stress outcomes over time, have restricted their implementation (Frese and Zapf, 1988). Few studies, either, have looked specifically at IMSL. A number of stress and mobility studies are of relevance to the present study, however, either because they employ potentially appropriate methodologies, such as diaries, or because they contribute to an understanding of the role of mobility in stress generation, through the effect of travel, social support or on family.
a) The travel process itself

There have been very few studies which have sought to examine the effect of travel on human health and performance. Speculative pieces and case studies have appeared in the medical press (Pollitt, 1986; Graham Lucas, 1987; Bonn, 1988; McIntosh, 1990). One more rigorous study, which used invasive and other techniques, attempted to measure the stress of commuter driving amongst 100 paid volunteers from two large industrial firms (Stokols and Novaco, 1981). Length of travel was associated with stress reactions (physiological arousal, negative mood and performance deficits, mediated by person variables). Satisfaction with residence also appeared to offset the negative aspects of commuting, emphasizing the existence of commuting as a compromise between conflicting residential and employment interests. Whilst Stokols and Novaco’s study was innovative and sophisticated, the invasive techniques used interfered with the daily life patterns of the subjects and may have altered how they drove. Many indices pointed to increased commuting distance and duration leading to stress reactions, but increased heart rate and high blood pressure could equally well be attributed to raised carbon monoxide levels after a journey through traffic-congested streets. The results show how studies of stress can be pursued through comparison of different mobility groups, in the absence of a control. The importance of avoiding atypical interference in subjects’ lives, and contributory factors must, however, be taken into account.

Two studies have looked specifically at business travel. The first, of 153 marketing executives, used a questionnaire survey to determine the frequency, duration and effect on family life of business travel (Rotenberg and Shrier, 1979). The survey found those surveyed spent an average of 30% of their working days away from home and office and that this was resented by three-quarters of families when family events were missed. No direct stress measure was incorporated and thus this was inferred from the family-work conflicts identified. These issues were taken up in more detail by a second study (Barnett et al., 1988) which included a telephone interview survey of frequent travellers - those who spent more than 15 nights away from home per year. Subjects (N=458) were asked directly about how stressful they found activities, and results were thus biased by differential perceptions of what constituted stress. Those who travelled most frequently (more than 30 times a year) or who had least experience (one to five years) of travel, were more likely to find travel stressful (50% and 53% respectively). Single people and those with young children were also more likely to find overnight travel stressful (54% and 58%). 66% thought travel put stress on their children. Career-family conflicts were experienced ‘somewhat often’ or ‘often’ by 36%, and ‘never’ by only 12%. Nearly three-quarters felt that more than five nights away from home interfered with their personal life. 64% felt they started to lose their effectiveness after this time. Despite the subjectivity of these findings, the results indicate a
number of concerns where a more rigorous study could yield results of greater value, both to an understanding of the mobility-stress relationship and to employers.

b) Social Support
The importance of support from institutions, friends and colleagues in enabling integration into a new culture, and thus avoiding stress has been the subject of several studies. The specific needs of the groups involved - primarily refugees and immigrants - have prevented the universal application of findings to the experiences of other groups, however, such as skilled migrants.

Evidence of idiopathic hypertension was sought by Walsh and Walsh (1987) in their study 137 recent immigrants to Ohio. Idiopathic hypertension refers to permanently elevated blood pressure levels (b.p.) in cases where there is no precisely defined organic cause for the observed syndrome. Protracted stress remains the most plausible etiological explanation and so high b.p. was taken as an indicator of protracted stress. Subjects were interviewed and b.p. readings were taken in their homes. The results were used to generate an index taking into account variables such as body bulk, cardiovascular problems, kidney trouble and drinking, smoking, exercise and dietary habits as well as age and sex. High stress levels were negatively correlated with church attendance, positive affect and marital status. The higher the occupational status and the higher the income, the lower the blood pressure. Level of education showed no relationship. Those who perceived positive social support from their environment and who regularly attended church were assumed to be more assimilated into U.S. culture. This group had lower biological effective blood pressure levels. No research was carried out into the conditions precipitating the move from the country of origin. Thus this study ignores earlier potential sources of stress. Walsh and Walsh also only looked for stress manifested in one particular way and may have ignored other significant causes of stress.

This study echoes other recent findings (such as from studies of Vietnamese refugees in the U.S., Van Tran, 1987) in illustrating the importance of social support for this particular group of permanent settlers. These refugee studies have also managed to discern trends within a mobile sample, obviating the need for controls. The prior experiences of immigrants have not been taken into account however, an omission that introduces compounding factors (as highlighted by Young et al, 1987, Young, 1987).

The link between homesickness and support was studied by Fisher et al. (1985) who looked at the move of 100 first year and 25 second and third year students to Dundee University. A questionnaire was used to investigate interpretations of homesickness and homesickness experiences, demographic and other details. No age or sex differences occurred in homesickness.
reporting. Scottish students had significantly low self-esteem scores. The 60% of first year students who defined themselves as homesick had moved significantly further away from home and showed less satisfaction with present relative to past friendships. Homesickness scores correlated negatively with satisfaction with academic work. Neither negative life events nor absence of a confiding friendship affected work, degree of concentration or reported cases of work being handed in late. 48% of the second and third year group currently defined themselves as being homesick but 72% said they had been so in the first term of the first year. Whilst this study points to a negative relationship between homesickness and time away from home, the results were subject to the judgement of individuals as to what constituted the principal dependent variable.

These studies suggest that stress is diminished in the post-move environment where adequate social support is available. How much these effects can be anticipated to apply to skilled international migrants moving within the environment of an organisation has not be ascertained, however. Gaylord and Symons (1986) identified the need for social support as a real one, and have described how employers aimed to meet those needs using increased financial support. That skilled movers are cushioned from threats posed by the environment to a greater extent by higher income levels has been postulated by Berger et al. (1988) but their survey of 160 mobile American families using a 14-item Perceived Stress Scale was inconclusive, finding high levels of stress in both top and bottom income bands. One issue to be examined in the present study, therefore, is the extent of the need for non-financial (what Payne (1980) terms psychosocial) support for mobile executives and their families and from what sources such support could be obtained (Chapter 7). Another source of support for the individual in an organisation, identified by Payne (1980) is the family. Under mobility however, relations within the family can be affected, as discussed in the following section, and the supportive role jeopardised. These concerns are addressed further in Chapter 9.

c) The effect on the family

The potential effect of mobility on the family has already been discussed (Chapter 2). The lack of control associated with being the passive rather than the active participant in moves has been hypothesised to result in mobility events being perceived as more threatening by the spouse than by the employee (Bayes, 1989, Vierhout and Erdman, 1989). Resultant stress and intra-household tension can often have dramatic effects on the family. The company medical department at one MNC published the results of examinations made on return of 354 members of expatriates' families (Hughes Hallett and Taylor, 1986). Of 180 employees, 27% reported minor ills, and 16% required specialist referral. Spouses, however, seemed much more prone to suffer, with nearly half failing to pass the examination as fit and one quarter requiring referral. Problems
occurring amongst spouses are unlikely to confine themselves there. Research amongst mobile and non-mobile employees has demonstrated the link between non-work life experiences on employee job satisfaction and stress (O'Driscoll and Thomas, 1987; Gutek et al., 1988). A recent questionnaire survey of 111 families relocated within the U.K. found 40% perceived their relocation as 'quite a bit stressful' or 'very stressful' (Munton, 1990). The same study also found stress associated with the lead time prior to moving and family separation. Two factors accounted for nearly half the variance in perceived stress scores - social support and property issues - spouse employment and children's education were highly correlated with both factors. Amongst a sample of 50 British expatriates who experienced emotional problems abroad, 13% saw their marriage end (Dally, 1985). Thus, whilst spouses seem more vulnerable to stress than employees, ramifications of stress experienced can have an effect on both partners, on the organisation and on children.

The stressful effect of moves on children has been studied for some time. The literature was recently reviewed by Haour-Knipe (1989) who observed an equally small number of studies finding mobility affecting children's mental health as not. Negative effects have principally been found in the short-term, whilst long-term studies report no negative effects. However, Haour-Knipe attributes this to an absence of rigorous, controlled studies rather than any conclusive evidence of no effect. Writers have speculated on the long-term improvement in family relations, but decline in peer ties and response to peer pressure amongst mobile children (Douvan and Adelson, 1966). One empirical study of the long-term effect on children of permanent moves over 50 miles in the U.S. made by 159 executives and their families (traced via a major moving company) was carried out by Barrett and Noble (1973). A checklist monitoring aggression, inhibition, learning and total disabilities of children was used. The older the children were, the more difficulty they experienced changing school and the harder it was for them to make friends. The tests for increased or decreased deviance in mobile children showed no significance. This work only assessed psychological outcomes, however, and did not address overall, or psychiatric well-being.

Another review of existing literature by Brett (1980) found studies supported hypotheses that older children were likely to have more difficulty moving and have poor peer relationships, but failed to support hypotheses that the mental health or parental relations of such children suffered. Brett found little evidence to support a detrimental effect on spouses, although evidence has been forthcoming more recently (Hughes Hallett and Taylor, 1986). Later empirical work by Brett on a sample of over 300 frequent corporate movers refuted every hypothesis supported by the literature review, except those concerning the difficulty of maintaining social contacts whilst on the move (Brett, 1982). In particular, mobile employees were found to be more satisfied with their family lives than the non-mobile. Whilst it is difficult to fault Brett's mobile sample and survey
techniques, the controls used were three separate groups of respondents to U.S. national surveys, whose characteristics could be anticipated to differ from those of corporate employees, particularly from those liable to transfer. This study highlights the difficulty of identifying a valid control where, by definition, the mobile are in possession of attributes that make them liable to transfer which are not possessed by other employees. As far as the present study is concerned, it is relevant that Brett examined moves taking place solely within the U.S.

d) Diary studies
Researchers have experimented with the development of non-invasive techniques for assessing the real-time occurrence of stress. Unfortunately, none which have taken place outside the laboratory have been able to measure stress directly. They must rely instead on the subjective interpretation of a stress reaction surrogate. Fisher et al. (1984) used the self report of the 'worry' involved in temporary separation from family and residence in a new location of 54 children aged 13-16: boarders in the first year of school. Diaries were used to record information about problems on a daily basis; life history events (noted as 'unpleasant' or 'pleasant' by year) and personal details were pre-recorded. Daily worries were recorded for a period of two weeks. The occurrence of 'worrying' was logged by a time scale for each day and 'worry units' were assigned by subjects to each problem. At least one school-orientated problem was reported by 94% of the children. More worry units were attached to home problems however suggesting physical distance made these problems less easy to solve. 16% reported homesickness without prompting.

Diaries have been used to record visits to physicians by Japanese residents in Boston, U.S. over a period of four weeks (Fukui, 1987). Highest levels of perceived stress and health problems were found among new arrivals. Murray (1985), too, has obtained limited success in the use of diaries to monitor variations in health and illness behaviour, though not in relation to mobility, and advocated symptom checklist insertion. Another study used small hand held recorders to maintain travel log diaries of a recent business trip undertaken by 20 frequent travellers (Barnett et al., 1988). Whilst this aided the understanding by researchers of the effect of real-time business travel events, diary accounts were not published.

These studies are interesting in that they use diaries for day to day assessment. There were problems, however, with temporal consistency - many more worries were reported for Fisher et al. in the first week than in the second - and the keeping itself contributed to the subject's problems (4 diaries were not returned). No study contained an independent test of how the magnitude of worry or stress varied between individuals or how reported stress corresponded to any known outcomes. The problem of using subjects as sole judges of their own experience has been criticised elsewhere (Dohrenwend, 1979; Thoits, 1983). Thus despite the practical value of
the diary technique, self report of the amount of stress experienced has little to offer comparative analysis of stress outcome in the field.

e) Other variables in the stress-mobility relationship.
A number of studies have sought to validate social and environmental factors in mobility which could precipitate stress. The value of prior experience of an event can be anticipated to reduce the amount of threat it poses for the individual, similarly an individual adjusted and orientated to a location could be anticipated to suffer less stress. 'Place dependence' or sense of belonging to a particular location has also been hypothesised to increase the perceived stress of the move (Stokols and Shumaker, 1982). The importance of such variables throughout an increasing number of residential moves was examined by Mann (1972). The sample consisted of 69 undergraduate students. Questionnaires were used, incorporating the Personality Inventory Form (assessing personality dimensions associated with effective functioning). Subjects were asked to give a self-assessment of anxiety and an account of their previous residences. The more mobile an individual had been, the less anxiety (s)he experienced in test and non-test situations. Residential mobility had less effect on females than on males, who put a greater emphasis on intellectual orientation and better adjustment. Mann's work thus tentatively suggested that where orientation and adjustment are important, such as in organisational roles, mobility has a disrupting effect. These variables, along with experience, can act as further independent variables in the stress-mobility relationship.

The association between personal mobility rate and health status in blue collar college employees was examined by Stokols et al. (1983). Phase one involved 142 unpaid volunteers, phase two, 120. Research consisted of a longitudinal study over three months, involving a survey of residential and work environments. Each subject's residential history was charted: where, when, how long, type of dwelling, owner/rental status and marital status, with an assessment of health and subjective assessment of attachment to places and people. Phase one looked at the place of residence and employment; phase two at the health status over the study period, using a symptom checklist. Highly mobile employees showed less sense of community and a greater number of illness symptoms. Residential desirability and job desirability both correlated positively with health status. Those who had little choice in moving were significantly less energetic and less healthy. Conversely, those showing low mobility and a low level of residential choice reported a greater number of occasions when they were bothered by health problems and a greater number of days on which they had such problems. The authors concluded that frequent residential change is a potentially stressful life pattern whose effects on health depend on the perceived quality of the individual's current situation at home and at work. Effects were most pronounced among persons whose lifestyle was least predictable. The relevance to the mobility-stress
relationship of the ability of individuals to compare past and present residential locations and to perceive more attractive, alternative options had already been highlighted by Stokols and Shumaker (1982). Thus the need to take into account life experiences and prior movement history in mobility studies had been anticipated. These results highlighted the importance of frequency of move, prior movement history and sense of belonging and thus supported the previous hypotheses. However, Stokols et al. looked only at the lower end of the employment scale in a college, amongst whom mobility would be a relatively rare event. The sample consisted overwhelmingly of females (n=95) likely to have less direct influence over their mobility.

Thus the success of using different methods to measure the stress associated with mobility points towards a favouring of real-time data (such as that obtained via a diary), symptom checklists and life history recording. The overwhelming number of studies of mobility and stress have used symptom checklists and all are open to some criticism due to the limitations outlined in 3.3.3. Nevertheless, the recurrence of themes which correspond to those elucidated using other - more objective - techniques, encourages the use in this study of an approach similar to those reviewed here. Tentative conclusions have been drawn about the temporal relationship between movement and stress and the role of the geography of moves in creating threatening change which leads to stress. The current study needs to be able to weight the variables identified - family concerns, experience, orientation, separation, the travel process itself and availability of support - which are part of the mobility-stress relationship. For these environmental and social factors to be taken into account in the relationship, their importance, or their magnitude, needs to be scaled in some way. Quantifying the extent to which these variables constitute threatening changes which trigger the stress reaction involves the methodological problems associated with rating the effect of life - a process Capel and Gumsey termed 'quantifying the unquantifiable' (1987, p.4). The methodological problems associated with the development of such a scale for the current study are addressed in Chapter 6. Some of the results of previous attempts to rate the effect of mobility are reviewed in the following section.

3.4.4 Life events: scaling the 'unquantifiable'

The diversity of previous studies, and the different methods used to tackle the problems of stress measurement, indicate that the relationship between stress and mobility is a complex one. Whilst the physiological and psychological pathways of the stress reaction become increasingly understood (summarised in Fig. 3.1), the means of measuring the occurrence of stress due to specific stimuli remains problematic. Researchers continue to disagree on how best to balance non-invasive but unreliable techniques with more reliable but invasive methods which are likely to act as stress stimuli in themselves. Research has also revealed little on the best means of alleviating stress. These factors have encouraged work which goes beyond measuring the stress
reaction and its effects to look more closely at the potential causes, the 'external changes' depicted in Fig. 3.1. Researchers have worked to establish scales which rate the potential of named life events to cause stress or ill-health. Pioneering work by Holmes and Rahe (1967) used the innate ability of individuals in rating their own experiences to establish a scale which they validated clinically amongst their own patients. The resulting Social Readjustment Rating Scale (SRRS) assigned values to events whose sum over a fixed period functions as a probability of future stress-related ill health. This scale is shown in Chapter 6, Table 6.1. More recent work has attempted to link types of event to types of illness (Brown, 1989). The use of such scales transfers the dependent variable of studies away from the intangible - individual perception of threat - to the tangible - visible occurrences in the external environment.

The scales developed to date have not been used to address migrants or travellers in particular. Paykel (1974) looked at the effect of migration between cities (as one of a number of life events) on 185 depressed patients in Newhaven, Connecticut. The control population was age, sex, marital status, race and social status matched. Subjects were questioned to ascertain the incidence of 61 possible life events in the six-month period prior to the onset of the depressive episode. Depressed patients recorded three times as many events for the 6-month period (1.69 versus 0.59). Eight specific life events had occurred significantly more frequently for depressed patients than for controls. The conclusion of the study was that events which involved 'entrance' into a new place or activity, or which encompassed an 'exit' from undesirable activities or place, were no more frequent in the run-up to a depressive episode than they were in everyday life. Undesired 'exit' events, however, were more frequent.

These results are valuable in assessing the quality as well as the quantity of changes that occur in mobility. Migration between cities was the second most common prior event for depressed patients, but because it had occurred frequently among controls too, its significance could not be assessed. Migration should not perhaps have been treated as a discrete event, the quality and components of moves being able to vary considerably.

Depression is only one potential outcome of exposure to stressful life changes. Other emotional disorders can result, such as schizophrenia. Brown (1974) looked at the occurrence of life events prior to onset of depressive or schizophrenic disease. He found schizophrenic patients were much more likely to have changed residence in the three months tested (prior to onset) than controls (11 out of 87 compared to 0 out of 313 for controls).

A very large number of studies have resulted from life events scaling (Rahe, 1969; Simonton, 1977; Holmes and David, 1984; Brown and Harris, 1989). Criticisms of the method have been
many, particularly from methodological (Thoits, 1983) and prognostic perspectives - the inability to determine what the outcome of a specific set of events will be (Brown, 1989). As a result, events research has become increasingly sample and disease specific (Brown, 1989). The SRRS persists, however, as the most tried and tested technique with which to assess the stressfulness of a person’s situation (Rahe, 1989). The principal inference from these critiques has been the necessity to develop scales appropriate to the population under study. There is as yet no life events scale specifically applicable to the mobile. The methodological concerns with the evolution of such a scale are addressed as they pertain to the present study in Chapter 5. The development of a scale - the Mobility Events Inventory - comprises Chapter 6.

Thus life events research has developed a useful biographic tool which allows significant occurrences in the recent life of an individual to be recorded. It also enables the association of combinations of events and illness episodes to be explored, and predictive models evolved. There are three difficulties with the development of the latter, however. First, variation between individuals in their perception of threat will affect the extent to which stress is caused by similar events. Second, combinations of events can act to compound or alleviate stress in a different manner from that indicated by a simple summation of points. Third, individuals may have a genetic or acquired disposition to certain types of illness which influences stress outcome. These factors mean the predictive value of events scales is limited at the individual level where it is better applied as a descriptive tool. At an aggregate or policy level, the sums of events scores may be of some value, but a more reliable outcome measure is desirable. In this study, these factors have had to be taken into account in the development of an events scale (Chapter 6), the predictive outcome values from which would be tested against short term stress symptom outcome from a scale of the type described in 3.3.3. Thus the use of both symptom and events monitoring is advocated for the survey as these are the most acceptable for the anticipated survey conditions and provide a means of internal verification.

3.5 Conclusion
Selye’s hypothesis that stress is the result of exposure to changes throughout life which the individual perceives as threatening can be seen to have held, albeit developed upon, over 35 years of research. Stress is linked to a number of short-term and long-term effects and implicated in the etiology of a number of degenerative diseases. Although its occurrence is recognised as the result of a physiological reaction, this reaction and the resulting symptom outcome have proved difficult to measure. More accurate invasive techniques produce interfering reactive effects. Intermediate variables on the route from stress input to symptom outcome reduce the reliability of less invasive techniques such as self report, archive studies and observation. The present study places importance upon the temporal connection between mobility and stress, and
the requirement for minimal interference in the daily lives of subjects in order to maximise cooperation. These criteria lead to the adoption of a self-report questionnaire which assesses only the short-term effects and symptoms of stress. This is to be used to examine the relationship between changes brought about by mobility and stress. A considerable number of life changes, both large and small, can be associated with mobility and the effect it has on the interaction of the individual with the immediate environment: family, career and organisation. A review of the current literature shows that different measurement techniques work with varying degrees of effectiveness in linking different types of movement with stress. No studies have specifically looked at the components of international skilled mobility for explanations of stress. Theories of interaction between individuals and changing cultural environments have been discussed and their relevance taken into account for the analysis of survey results in later chapters. Attempts at isolating aspects of the external environment - life events - and their effect on individuals have been reviewed, and the need for the development of devices more appropriate to mobile employees established.

It is not difficult to put the physiological and psychological observations of the effects of stress and of chemicals taken to alleviate its effects into the context of organisational mobility. In line with the long standing management slogan 'People are our only resource' (Drucker, 1982), organisations need a fit and able workforce, managers who are mentally alert and able to cope in an organisation with constantly changing internal and external environments.

It has been seen that change is a major cause of stress (see also Hinkle, 1974). Organisations, however, must seek change for their very existence. Their environment is uncertain and dynamic, if they do not respond to their altered surroundings, or keep up with trends they will suffer in much the same way as change perceived as threatening in humans brings on the stress reaction. The organisation imposes its own internal changes and, in the international context, it imposes additional external culture changes on individuals. To assess the effects of these policies, this study has to formulate a scale capable of rating the extent of these changes and observing the stress effects on the employees. The best methods available for this survey are events scaling, developed into a Mobility Events Inventory in Chapter 6, and self-report short-term effect monitoring, outlined in Chapter 5.

In examining stress linked to movement therefore it has been necessary to be very cautious, Singer (1980) begins Sarason and Spielberger's volume 'Stress and Anxiety' on the basis that there is no 'grand theory' of stress: simply not enough is known. One has to overcome the lack of systematic connection between the physiological and psychological traditions in stress research, locate the most appropriate indices, control for the numerous compounding factors,
select research techniques which will provide the most comprehensive results without bias and allow for the time specificity of the data. A review of work to date has indicated that the current study needs can be best served by a combination of measurement techniques which monitor the experience of short-term stress effects concurrently with potentially stressful life events engendered by mobility. These factors must be carried through to the establishment of the research methodology in Chapter 5. First however, it is necessary to examine the change-inducing process itself - mobility - and the ways this is manifested in the global corporate environment.
Chapter 4: Migration and business travel

4.1 Introduction

The previous chapter examined change as a source of stress and outlined how the extent of changes, and their resultant effect on the individual, could be measured. Chapter 2 illustrated how migration and business travel act as sources of change which could engender conflicts between the aspirations and responsibilities of individuals towards different aspects of their external environment: career, organisation, family and social and cultural milieux. Questions remain, however, about the sources of mobility: the nature of moves and the forces that shape them. It is necessary to examine the types of moves that make up the international mobility\(^1\) of skilled labour (IMSL) and the relationship between the different types before the mobility-change-stress chain reaction can be understood. Such a review will aid explanation in two ways. First, it will facilitate an appraisal of the types of change - long-term and short-term - that are experienced by individuals, and the implications of those changes for stress generation. Second, it will enable assessment of the consequences of current trends in IMSL for the balance between the different types of moves, how that balance changes and hence the future potential stress outcome for employees. Thus this chapter seeks to assess the nature of IMSL, current trends in the numbers of such moves and explanations of the forces that shape current mobility patterns. In doing so it should set the mobility context within which the changes induced by mobility, and their stress effects, take place and enable the influences of such effects in the future to be anticipated - issues taken up in the chapters that follow.

The chapter begins with an examination of the nature of IMSL in the broader context of recent developments in international movement. The extent to which patterns can be explained by conventional theoretical migration approaches is discussed. The chapter goes on to examine trends in skilled international migration (stays abroad of over one year in duration) and business travel, briefly reviewing the deficiencies of data sources for such information. Factors underlying trends and the extent to which future movement patterns can be anticipated are discussed. A critical review of current explanations of IMSL processes is presented against which the relevance of the current study is posited. A typology is constructed which highlights the inter-relation between the different types of IMSL. The chapter concludes with a review of the consequences of current mobility practice for individual employees and the implications for potential stress outcome.

\(^1\) The term international mobility is used here to describe all cross-border movements, and encompasses visits, secondments and migration (see Glossary, Appendix I).
4.2 Developments in international labour mobility

In order to understand the significance of growth in IMSL, it is necessary to review briefly trends in international mobility as a whole in the latter half of this century. During this period the principal IMSL flows have occurred under the influence of the global expansion of world trade, international expansion of companies or the auspices of recruitment agencies. This has meant its evolution has been dependent not, as with other forms of migration, on the aspirations of individuals to move, but on the development of the organisational infrastructure under which the moves take place. This process in turn is associated with regional economic development.

Up to, and for a period after, the Second World War, international labour migrants moved to maximise their opportunities mainly through permanent settlement. By the 1960s, however, political pressures meant temporary labour migration had become the intended norm for Western Europe (Salt, 1989). The temporary movement of gastarbeiter, mostly low-skilled, persisted until the early 1970s when economic factors, social pressures and a growing doubt of the intentions of migrants to return caused governments to tighten immigration controls. More recently, permanent settlement migration has diminished and attention has turned to flows of highly-skilled workers (Salt, ibid.). These latter flows have occurred within a global division of labour which has arisen as a result of developments in travel technology throughout the twentieth century. As the speed and reliability with which people and goods could be transported between regions has increased, so has the geographical distribution and complexity of industrial organisations able to exploit the newly accessible territories. Individual and corporate horizons have been broadened by simultaneous improvements in world media and telecommunications such that travel aspirations have grown. The realisation of opportunities presented by improvements in transportation technology has been manifested in increased mobility of people and goods (Dicken, 1992).

Thus two phenomena have combined to encourage new forms of mobility. Organisations have expanded internationally to develop labour markets which span many international boundaries, and developments in transport have acted to facilitate deployment of labour overseas. Organisations have sought to maximise the flexibility conferred upon their ILMs by improvements in transport and communications to develop international mobility amongst their workforce. These improvements have acted to remove time delays in mobility. The importance of international skilled moves outside the ILM of companies cannot be denied, and has grown with the expansion of recruitment agencies (Findlay and Stewart, 1986). International and inter-regional moves within the ILM are termed inter-company transfers (ICTs) by the U.K. government, although the term intra-company transfers could be considered more appropriate. International ICTs are the principal interest here.
The relative absence of constraints has meant moves within ILMs can be as short-term or as long-term as customer and labour needs dictate. Organisation needs have encouraged the development of short-term ICTs or secondments linked to project length or assignment needs. ICTs have thus come forward as a leading component of national and international migration systems in the developed world (Salt, 1990; Sell, 1990). The lack of a personal stake in the host country on the part of the individual has combined with organisational support for moves to mean that the majority of international secondments end with repatriation. The absence of a motive for the highly skilled to remain overseas has meant secondments succeed where plans for the voluntary repatriation of low-skilled *gastarbeiter* failed.

The interdependence of the global spatial division of labour and transport and communication can be seen in the location decisions of organisations (Dicken, 1992). This interdependence is based not only on the ability to base permanently skills on site in new developments but to provide the essential contact and support, prior to and during development. One of the first researchers to isolate flows of information as being vital to the development of societies with advanced division of labour and specialization as flows of goods and people was Törnqvist (1970). He reflects on the conclusions of Sahlberg (1969) and Hedburg (1969) that direct personal contacts are often more effective than other types of contacts in the exchange of information. This is because they are more flexible, offer a mutually compatible environment for communication and yield more opportunities for efficient data transfer. Törnqvist speculated on the extent to which advances in telecommunications would diminish the relative advantages of face to face contacts. The frequency of direct personal contacts could decline as the new generations, familiar with technology, entered employment. Alternatively, communications advances could work the other way, enlarging the potential information flows, increasing the need for planning and decision-making, complex processes that can only take place through face to face encounters. Törnqvist went on to examine the contact potentials of firms in different regions of rural and urban Sweden, and the importance of such potentials for regional development.

Erlandsson (1979) also examines the importance of regional interaction in the growth potential or development of different European regions. He points to the stage of 'advancement' of individual societies as an indicator of the extent to which emphasis is placed on communication possibilities. This applies not only in regard to the volume of interaction but also to the quality and duration of direct face-to-face contacts. The same argument of advancement dependent on communication has also been applied to organizations (Dicken, 1992). Visits are also used to maintain links with established sites and those regions where a permanent presence cannot be justified. Organisations thus seek to maximise the contact potential - based on the number and size of locations that can be reached within a specified period (Erlandsson, 1979) - between their
locations and customers, whilst minimising their labour costs. Whilst geographic expansion through relocation of labour and the need for contact will increase hand in hand, it is the latter which has seen the most dramatic growth (section 4.3). Business travel can be used for promotional and sales visits, trouble-shooting, servicing, attending conferences and meetings, for leave replacement, training, technical, supervisory and managerial functions. The flexibility it offers has encouraged its use, a point further discussed in Chapter 7. Erlandsson calculated that 80% of all trips by air in Sweden were made by employees with contact-intensive functions. He hypothesised that a similar proportion will apply elsewhere in Europe. Dicken too, has highlighted this importance of jet aircraft development in the global expansion of MNCs (Dicken, 1992). Thus growth in business travel combined with the use of new transport links by the leisure industry in recent decades has produced an increase in short-term moves, at a scale which dwarfs other population moves (Romero, 1991).

Such developments do not conform well with traditional theories of migration based on the optimality of individual human behaviour (human capital economic approaches, see Molho, 1986) and permanent settlement. This is because the ICT or business travel destination is not selected by the potential migrant. Similarly, those approaches which define push or pull factors associated with different regions as motivating forces (Taylor, 1969) are inappropriate. In ICT moves, it is the company, not the region, that artificially generates in-house pushes or pulls. Likewise, returning ICTs are hard to place in typologies of return migration (such as King, 1978) since the motive for the move (unless it is a return from a failed assignment), and even the timing and choice of return destination, are beyond the employee’s control. In essence, traditional geographical definitions of migration fail because the move is undertaken independently of its spatial context. The potential migrant decides only whether or not to move, not where, or how or when. To understand these moves it is necessary to look beyond the individual to the real decision-maker on temporal and spatial aspects of the move - the organisation.

The need to consider demand side variables in the explanation of international labour migration has been raised by Salt (1990). Variables which span the structure and operation of the organisation ILM, the use of relocation allowances and of relocation agencies are primary influences on the ICT movement process. Whilst the effect of internal labour markets on inter-regional moves has been considered by Johnson and Salt (1980), most studies have looked at skilled international migration in general (Gould, 1988; Salt and Findlay, 1989). The extent to which approaches to skilled international migration will apply to international ICTs is related to the ratio of such moves to those in the ELM. Gould (1988) was the first to develop a typology of skilled international migration (Table 4.1).
Gould distinguishes between migration (permanent settlement moves) and circulatory moves (temporary residential moves). As other writers embrace circulatory moves under the heading of skilled international mobility, circulation is not a phenomenon referred to further. However, the term secondment is used to refer to temporary residential transfers. MNC employees feature in only two of the eight cells of Gould's typology. As such moves typify circulating moves out from the developed world, this approach may underestimate their importance. ICTs will undoubtedly form a substantial proportion of skilled international migration, but the exact numbers are difficult to determine (see section 4.3).

One of the reasons for limited consideration of the distinctiveness of ICTs compared with other forms of IMSL is the lack of data to indicate the characteristics of such moves. Research has, to a large extent been data led (Findlay and Gould, 1989). Explanations have thus had to be based on the information available concerning the movement of skilled individuals, and the proportions moving within the ILM of their employer. Thus before the explanations for, and implications of, such moves can be examined, it is necessary to review the data available on patterns and trends in IMSL and ICTs.

4.3 Current patterns and trends in IMSL

Whilst the term international mobility of skilled labour encompasses highly skilled moves in both external and internal labour markets of MNCs and local companies, international transfers represent only those within the ILM of employers. Comprehensive data are not available for such flows in or out of the U.K. Similarly, business travel statistics are not available which distinguish between moves initiated within a company, and those undertaken by independent travellers. The sources that are available allow only a very tentative picture of the IMSL system centred on the U.K. to be developed.
4.3.1 The data sources

The only comprehensive source of U.K. migration and travel data from a geographical perspective is the International Passenger Survey (IPS) - a sample survey of those entering and leaving the U.K. via ports and airports. No distinction is made between respondents moving within or outside company ILMs. A migrant to the U.K. is identified as an individual who has resided abroad for a year or more who declares an intention to stay in the U.K. for a year or more. A migrant departing the U.K. is a person who has resided in the U.K. for a year or more and who declares an intention to reside abroad for a year or more. Business travellers are those whose stated purpose of travel is 'business' and who intend to reside abroad, or in the U.K. for less than a year. These definitions are problematic as far as IMSL is concerned, as there is no guarantee that individuals stay for the specified period. Empirical findings suggest that those relocated by their employers are often not in possession of sufficient information to anticipate their date of return (see Chapter 9). Project lengths are unpredictable and thus IPS figures may over- or under-estimate the numbers of skilled migrants. In addition, it is inappropriate for the purposes of this study to define an 11-month sojourn, likely to constitute a short-term residential assignment, as a business visit. There have also been reservations about the validity of such data in the context of migration studies more generally (Coleman, 1987). These reservations are based on the small sampling fraction - between 0.1 and 0.4 per cent of travellers - and the voluntary nature of response. In 1988, of some 174,000 interviews conducted for the IPS, the number of incoming migrants detected was 1299. The number leaving was 970. Estimates of immigrants and emigrants are obtained by grossing up interview responses by factors as high as 2500. This produces substantial anomalies in large- and small-scale flows alike (Coleman, ibid.). Likewise, the 15% refusal and non-response rate reduces the reliability of estimates.

The IPS is the only source of data for moves out of the U.K. and the only one that encompasses all origins of flows into the U.K. It is the only source to embrace non-settlement moves and thus includes data for business travel flows. Figures obtained for the latter are more reliable than for migration due to the larger flows involved.

Data from the U.K. Labour Force Survey (LFS) can be used to estimate international ICT moves into the U.K. over one year in duration. The small sample size - 60,000 of those resident in private households (not necessarily migrants) - prevents all but a rough estimate of regions of origin. Cell sizes below 10,000 are likely to be based on interviews with 40 or fewer people and are regarded as too prone to sampling error to be used. In addition immigration can be underestimated as data indicate only transition (absent one year, present the next) flows. A number of IMSL moves may be overlooked because entry and exit occur between surveys, and emigrants are not covered. In addition, hotel, hostel and other non-private household residents -
likely to encompass a number of IMSL movers - are not interviewed. Under enumeration is thus likely.

The value of Work Permit data for providing detailed and accurate information about labour immigrants, albeit a specific sub-sample which excludes EC nationals, has been highlighted (Salt and Kitching, 1990). Approximately 21,000 (53% of) labour immigrants picked up by the LFS arrive in the U.K. from countries for which work permits would be required (non-EC nationals). Department of Employment data on work permit issue are the only ones for which accurate trends in ICT flows into the U.K. can be seen, along with trends in awards to professional and managerial workers. Trends can be seen both absolutely and relative to other labour immigrant flows.

At an international level, information on worker numbers is available from the International Labour Office. Bailey and Parisotto (1991) have used such data to show the relatively small numbers of developing world nationals employed by MNCs. Of the 65 million people employed worldwide by MNCs in 1986, two-thirds (43 million) were employed in the respective home countries of the parent companies. Only 11% of all MNC employees (7 million) are based in developing countries. This means that whilst MNCs employ about 10% of the economically active population in the developed world, they employ less than 1% in the developing world. These proportions suggest ICT flows to be relatively insignificant, unless the highly skilled nature of such flows is taken into account. The omission of nationality by ILO figures prevents the ratio of home to host country nationals from being explored. Information on the global distribution of ICT transferees by nationality is not available from official sources.

Data from non-official sources can provide a valuable snapshot of patterns of IMSL or ICTs. The more comprehensive such as the International Experience Index produced from a survey of U.S. companies by the American Employee Relocation Council has been explored to show regional trends in expatriate use (Salt, 1988). Many aspects of secondment use and control have been surveyed by others (Brewster, 1988; Tung, 1988; CBI, 1990; Percom, 1990).

The data sources summarised above are used in the two sections that follow to establish a picture of the skilled international migration and international business travel systems centred on the U.K.
4.3.2 Skilled international migration: current patterns and trends

a) Flows
Due to variations in the accuracy of data sources outlined above, varying estimates can be made as to the number of skilled international migrants entering and leaving the U.K. Data on flows by occupation from the IPS indicate that some 71000 professional and managerial workers entered the U.K. in 1989, balanced by an outward flow of 76000. Examination of Figures 4.1a and 4.1b shows that flows in both directions have grown by around 20% over the past 10 years, and peaked in 1986. Professional and managerial inflows as a proportion of all inflows have increased 14% since 1979, to 31%. Professional and managerial outflows as a proportion of all outflows have declined 7.2% since 1979, to 29%. According to unpublished LFS data, some 87000 individuals in the professionals, managers and employers category found living in the U.K. during the period 1985-1988 had been resident abroad one year previously. Some 38% of these were foreign nationals. Thus the LFS estimate for the flow of professional and managerial immigrants to the U.K. over this period is less than one third of the 271400 indicated by the IPS. The discrepancy between sources can be ascribed to the different purposes for which the surveys are designed, their low sampling fractions and the different methods used. The low sample size also prevents too heavy reliance on internal consistency of the surveys to indicate year on year trends.

Fig 4.1a: Professional and Managerial Migrants leaving the U.K. 1979-1989

![Bar chart showing professional and managerial migrants leaving the U.K. 1979-1989](source: International Passenger Survey)
A more accurate source of information is work permit data from the U.K. Department of Employment. These provide information solely on inflows of non-EC nationals. Whilst professional and managerial workers accounted for 14.3% (1976) of all short-term and training and work experience (TWES) issues in 1989 (Salt and Kitching, 1990), the overwhelming proportion of long-term issues (83.0%) were to this group. 13156 long-term permits were issued to this group in 1989, a 92% increase since 1984. Despite this increase in magnitude, the proportion of professional and managerial to all work permits issued has changed little over the past five years. Of these non-EC origins, the U.S.A., Japan, Australia and Malaysia account for over half of all long-term, and by inference professional and managerial, work permit issues.

Thus sources indicate an increasing number of professional and managerial workers entering the U.K. Data from the IPS suggests that these flows are balanced by similar numbers of skilled emigrants leaving the U.K. The data so far reviewed, however, have said little about the organisational influence over such moves.

b) Inter-company transfers
Two official sources provide information on moves within organisations. Both provide information only about flows in to the U.K. Those resident overseas a year ago, living and working in the U.K.
for the same employer a year later, are estimated by the LFS to total 128000 for the period 1985-1989. 46% of these were foreign nationals, a quarter of these from the EC. The estimate of 46000 non-EC national ICTs to the U.K. over the period 1985-1989, tallies reasonably well with ICT work permit issues over the same period of 37863 for both main and training schemes. Thus, somewhere between a half (LFS) and two-thirds (work permit data) of those moving to the U.K. from overseas stay with the same employer (Salt, 1990; Salt and Kitching, 1990). Confidence in these statements about the involvement of organisations in international movement is encouraged by similar findings elsewhere. International ICTs in 1987 accounted for 51% of international moves to Australia (Appleyard, 1987).

An analysis of two overlapping samples from ICT work permit issues for 1988 revealed a considerable contrast between those issued work permits as ICTs and those obtained for non-ICT moves (Salt and Kitching, 1990). Transferees were, on the whole older, and substantially better paid than non-transferees (Tables 4.2 and 4.3). The mean duration of validity of their permits was also higher. Transferees were more likely to be male. Those of the sample in senior management and management support were mostly moved by their company whilst non-ICTs were mainly in professional and related activities. Of those issued a work permit for the training scheme, almost half were ICTs, this group receiving a mean salary almost 40% greater than non-transferred trainees. These data illustrate the high status and increasing dominance of ICTs in labour flows to the U.K. Moves within the ILM of companies form an increasingly important segment of skilled international moves, both quantitatively and qualitatively, at least as far as non-EC nationals are concerned.

Data on ICTs at the aggregate level expose something of the working of the global labour market but little about the decision-making within international firms that engender ICT moves. Other non-official sources such as the International Experience Index survey of U.S. companies by the American Employee Relocation Council have to be explored to discover regional trends in expatriate use (Salt, 1988). This source shows that for U.S. companies, the Middle East and Western Europe are dominant as destinations for U.S. expatriates and U.S. MNC-employed TCNs. The categorised nature of the data, however, prevent the size of flows or stocks from being identified. A similar survey by the U.K. Employee Relocation Council (CBI, 1990) of 21 U.K. MNCs showed stocks of expatriates in developing world regions declining whilst numbers in developed regions showed no obvious trend (Figure 4.2).
Table 4.2: Age of inter-company transferees

<table>
<thead>
<tr>
<th>Age Bands</th>
<th>Total (%)</th>
<th>ICTs (%)</th>
<th>Non-ICTs (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 30</td>
<td>21</td>
<td>17.8</td>
<td>33.3</td>
</tr>
<tr>
<td>30 to 39</td>
<td>53</td>
<td>52.1</td>
<td>55.6</td>
</tr>
<tr>
<td>40 to 49</td>
<td>22</td>
<td>26</td>
<td>7.4</td>
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<tr>
<td>50 years and over</td>
<td>3</td>
<td>4.1</td>
<td>0</td>
</tr>
<tr>
<td>No information</td>
<td>1</td>
<td>0</td>
<td>3.7</td>
</tr>
</tbody>
</table>

Source: Salt and Kitching (1990), sample of 100 work permit holders.

Table 4.3: Salary breakdown of inter-company transferees

<table>
<thead>
<tr>
<th>Salary</th>
<th>Numbers</th>
<th>Percent</th>
<th>ICT nos.</th>
<th>ICT (%)</th>
<th>Non-ICT nos.</th>
<th>Non-ICT (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;£15000</td>
<td>22</td>
<td>26.5</td>
<td>5</td>
<td>8.8</td>
<td>17</td>
<td>65.4</td>
</tr>
<tr>
<td>£15-29999</td>
<td>28</td>
<td>33.7</td>
<td>20</td>
<td>35.1</td>
<td>8</td>
<td>30.8</td>
</tr>
<tr>
<td>£30-39999</td>
<td>16</td>
<td>19.7</td>
<td>15</td>
<td>26.3</td>
<td>1</td>
<td>3.8</td>
</tr>
<tr>
<td>£40-49999</td>
<td>6</td>
<td>7.2</td>
<td>6</td>
<td>10.5</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>£50000+</td>
<td>11</td>
<td>13.3</td>
<td>11</td>
<td>19.3</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Source: Salt and Kitching (1990), sample of 83 work permit holders.
A survey of the balance of home, host and third country nationals in overseas operations by Tung (1988) showed a dominance in the use of host country nationals in management positions by U.S., European and Japanese MNCs for posts in the U.S., Canada and Western Europe. In the Middle East, South America, Africa and Eastern Europe, U.S. companies showed a preference for host country nationals whilst European and Japanese MNCs preferred parent country nationals. In the Far East, a split was seen in that MNCs used home country nationals for senior managerial posts, and locals for middle and lower management. Thus MNCs varied by country of origin in the emphasis placed upon ICTs over employment of host-country nationals. Tung found the percentage of TCNs in managerial posts universally low. A reduction in the use of expatriates by U.S. MNCs had already been observed, and the effect on overseas control reviewed, by Kobrin (1988). Kobrin saw reasons for the reduction as problems encountered in U.S. expatriate adaptation.

c) Duration of stay
No cross-sectional or longitudinal data to date have enabled length of stay of ICTs and business travel to be analysed. UK born migrants as a whole have been found to spend increasingly less time overseas, the average duration falling from 3.8 years in the late 1970s to 2.9 years in the early 1980s
(according to the IPS, Devis, 1985). Were this trend to hold across skilled international migration it would indicate a declining reliance on skilled international migration for long-term projects as observed by Findlay (1988). A survey by Percom Ltd. of 13 U.K. MNCs found short-term assignments becoming more widely used. One of the reasons given was to deliver a 'business objective flexibility' (Percom, 1990). The duration of ICTs and ratios of host country to home country nationals are discussed in relation to the present study in Chapter 7.

4.3.3 International business travel: current patterns and trends
The paucity of academic literature considering the geographic, economic, and social implications of business travel prompts a detailed overview here of the importance of such flows. The temporary movement of skilled labour on a global scale is large and, according to the sources reviewed here, expanding. It has been estimated to account for 15% of all world travel, but 42% of hotel composition - rising to 53% if conferences are included (Senior, 1982). It is thus important to balance the relative importance of the size of flows with length of stay, as the latter is hypothesised as of prime importance in the relationship between stress and mobility. An attempt to explain the magnitude of flows between states in terms of distance and GDP is also attempted.

a) Flows
Data on business travel flows centred on the U.K. are derived from the IPS. The 74,000 IPS interviews conducted in 1990 at the end of a visit were useable for length of stay data and formed the basis for estimates of 'business visits' to the U.K. by foreign residents listed by country of permanent residence and by U.K. residents visiting overseas, by country of destination.

An examination of absolute flows of business visits into the U.K. (Table 4.4) confirms the strong business links between the U.S.A., Western Europe and the U.K. As far as business travellers from the U.K. are concerned the positions are similar, though the numbers fluctuate somewhat (Table 4.5). Third in the league is the U.S.A. which receives only two-thirds of the number of visits

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2 For incoming U.K. resident travellers, country of longest stay since departure is recorded. Persons migrating (those entering or leaving after a stay away from home of over one year) are excluded from the figures as are those travelling to take up pre-arranged employment, military and diplomatic personnel, merchant seamen and airline staff. Passers through the U.K. who do not stay overnight are excluded. It should be borne in mind that the figures refer to number of visits, not number of visitors and the counts relate to those ending their visits, that is U.K. residents returning home, or overseas residents leaving the U.K. Countries of permanent residence are divided here into 31 categories with most major contributors of visitors given as separate states. Three groups of Western European states are combined: Belgium and Luxembourg; Gibraltar, Cyprus and Malta; and the 'Rest of Western Europe' (Turkey, Iceland and the Faroes). Eastern Europe encompasses Albania, Bulgaria, Czechoslovakia, Eastern Germany, Hungary, Poland, Romania and the former U.S.S.R. The only non-European states to appear individually are Canada, U.S.A., Japan, Australia, New Zealand and South Africa. 'North Africa' includes all Mediterranean bordering countries in Africa, along with Sudan. Countries south thereof (excluding South Africa) are included under 'Rest of Africa'. Mexico and all mainland countries south of it (bar Belize and Guyana) are classified as 'Latin America' along with Cuba and Haiti. The 'Commonwealth Caribbean' encompasses the rest of the Americas (bar Canada and the U.S.A.). The Arabian peninsula and countries westward to Israel, eastward to Iran and northward to Syria and Iraq are included under 'Middle East'. The majority of Asia is thus covered under 'Rest of World'.
its nationals make to the U.K. Comparison of Tables 4.4 and 4.5 reveals quite substantial
differences between number of visits to the U.K. from a particular state and number of visits made
there by U.K. business travellers. These differences, for 1990, are given as ratios of in- to outflow
in Table 4.6. In most cases the flows being dealt with are large and so fluctuations cannot be fully
accounted for by sampling error. Business travel flows between two regions will be balanced if
each exerts an equal attraction for the other's business communities. Apparent imbalance may
be due to the asymmetry in flows of commodities and services between the two countries. Raw
materials may flow in one direction whilst products flow in the other; each has distinctly different
demands for temporary skilled labour. The effect of distance or isolation from markets on travel
patterns or of the criteria used by the IPS to record country of stay may also influence the
asymmetry.

The distant developed nations show the greatest mobility. New Zealand sends four times as many
business travellers as it receives; Australia and Japan send three times the number they receive.
The U.K. has recently become a net recipient of business travellers. These patterns are difficult
to interpret. It would seem more logical, as an economy of scale, for visitors from developed
nations in relatively isolated locations (in terms of financial centres or potential markets) to make
multi-destination visits to close-knit areas such as Europe than for representatives from hubs of
activity to make lengthy single destination trips. The IPS lists only the country of longest stay for
outward visits. This will have the effect of understating the importance of certain destinations.
There appear to be indications of Commonwealth ties concentrating on the U.K. as three of the
top six in Table 4.6 are developed ex-colonies. There is evidence, too, of Britain's intermediate
economic position in Europe, and its geographic location on the fringe of the E.C. so that its
business community is actively seeking market interaction in Europe whilst being the subject of
similar interest from the yet more peripheral Scandinavian bloc.

An analysis of the variation in flows over the past decade reveals the regions where established
British business interests are expanding, where new ones are growing and the dynamics of
Britain's own pull on the World business community. Destinations and origins exhibiting growth
will, to a large extent, represent expanding economic powers whose status in the commercial or
industrial world has risen substantially over the decade.

b) Trends
There were 4,494,000 business visits to the U.K. by overseas residents in 1990 compared with
2,295,000 in 1978, a 96% increase (Table 4.7). Whereas business visits represented 18% of all
visits to the U.K. in 1978, by 1990 this share had increased to 25%. The greatest increase in
numbers of overseas visitors comes from the more distant parts of Europe: Portugal, Spain,
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(Source: IPS)
Table 4.5: Business visits by U.K. residents 1978-1990 by destination

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<td>1.38</td>
</tr>
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<td>82</td>
<td>1.17</td>
</tr>
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<td>16</td>
<td>14</td>
<td>1.14</td>
</tr>
<tr>
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<td>36</td>
<td>1.11</td>
</tr>
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<td>Denmark</td>
<td>82</td>
<td>77</td>
<td>1.06</td>
</tr>
<tr>
<td>Mid. East</td>
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</tr>
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<td>0.96</td>
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<td>0.94</td>
</tr>
<tr>
<td>Holland</td>
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<td>391</td>
<td>0.93</td>
</tr>
<tr>
<td>Latin Am.</td>
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<td>26</td>
<td>0.92</td>
</tr>
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<td>Italy</td>
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<td>232</td>
<td>0.91</td>
</tr>
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<td>Austria</td>
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<td>55</td>
<td>0.89</td>
</tr>
<tr>
<td>Switz.</td>
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<td>154</td>
<td>0.86</td>
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<tr>
<td>Eire</td>
<td>381</td>
<td>496</td>
<td>0.77</td>
</tr>
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<td>W.Germany</td>
<td>475</td>
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<td>0.72</td>
</tr>
<tr>
<td>France</td>
<td>620</td>
<td>900</td>
<td>0.69</td>
</tr>
<tr>
<td>Belg/Lux</td>
<td>224</td>
<td>356</td>
<td>0.63</td>
</tr>
<tr>
<td>Spain</td>
<td>128</td>
<td>228</td>
<td>0.56</td>
</tr>
<tr>
<td>Comm. Carib.</td>
<td>9</td>
<td>16</td>
<td>0.56</td>
</tr>
<tr>
<td>Portugal</td>
<td>27</td>
<td>50</td>
<td>0.54</td>
</tr>
<tr>
<td>Gib/Malt/Cyp</td>
<td>17</td>
<td>37</td>
<td>0.46</td>
</tr>
<tr>
<td>TOTAL</td>
<td>4494</td>
<td>4807</td>
<td>0.93</td>
</tr>
</tbody>
</table>

(Source: IPS)
Table 4.7: Trends in business visit flow to the U.K. 1978-1990

<table>
<thead>
<tr>
<th>No. of Business Visits (Thousands)</th>
</tr>
</thead>
<tbody>
<tr>
<td>INFLOW</td>
</tr>
<tr>
<td>E. Europe</td>
</tr>
<tr>
<td>Portugal</td>
</tr>
<tr>
<td>R.o.World</td>
</tr>
<tr>
<td>Finland</td>
</tr>
<tr>
<td>R.O.W.E.</td>
</tr>
<tr>
<td>Japan</td>
</tr>
<tr>
<td>Spain</td>
</tr>
<tr>
<td>Austria</td>
</tr>
<tr>
<td>France</td>
</tr>
<tr>
<td>Sweden</td>
</tr>
<tr>
<td>Australia</td>
</tr>
<tr>
<td>Italy</td>
</tr>
<tr>
<td>Gib/Malt/Cyp</td>
</tr>
<tr>
<td>Eire</td>
</tr>
<tr>
<td>W.Germany</td>
</tr>
<tr>
<td>U.S.A.</td>
</tr>
<tr>
<td>Denmark</td>
</tr>
<tr>
<td>Belg/Lux</td>
</tr>
<tr>
<td>Greece</td>
</tr>
<tr>
<td>Switz.</td>
</tr>
<tr>
<td>Canada</td>
</tr>
<tr>
<td>Yugoslavia</td>
</tr>
<tr>
<td>Holland</td>
</tr>
<tr>
<td>R.o.Africa</td>
</tr>
<tr>
<td>Norway</td>
</tr>
<tr>
<td>N.Z.</td>
</tr>
<tr>
<td>South Africa</td>
</tr>
<tr>
<td>North Africa</td>
</tr>
<tr>
<td>Comm. Carib.</td>
</tr>
<tr>
<td>Latin Am.</td>
</tr>
<tr>
<td>Mid. East</td>
</tr>
<tr>
<td>TOTAL</td>
</tr>
</tbody>
</table>

(Source: IPS)
Gibraltar, Finland and Eastern Europe. Increases from the first two may be linked to their recent enrolment to the E.C. and from the last group to the disintegration of the Iron Curtain. Flows from the Middle East, North Africa and Latin America declined.

The most prominent feature of flows from the U.K. is the increase in business travel to nearly all parts of the world between 1978 and 1990 (Table 4.8). 1990 saw twice as many business visits abroad by U.K. residents as 1978. The biggest increases are in flows to the perimeters of Western Europe (Portugal, Spain and the Rest of Western Europe) and distant developed countries such as Japan and the U.S.A. Flows have more than doubled to the Commonwealth Caribbean and the Rest of the World (evidence of where more detailed breakdown of flows would be useful). Flows to some developing regions, notably North Africa and the Middle East, are declining, but to others - the Rest of Africa and Latin America - flows are increasing, if slowly.

Most of the regions of major growth in business travel to and from the U.K. (more distant European states, South and South-east Asia) represent countries expanding their economic base, either as newly industrializing countries or as new partners in trade agreements. Visits by Britons to the U.S.A. and Japan have also risen sharply - increased mobility possibly generated by the expansion of multinational interests.

Examination of absolute flows, balance and trends reveals a business travel network centred on the U.K. which broadly reflects the economic status of participating regions in accordance with established and newly forming trade routes. In 1985, the latest year for which trade data are available, the correlation between gross business travel (to and from major world states and regions) and gross trade flows (in dollars) was 0.911. This relationship is plotted in Figure 4.3. To establish whether an explanation of business travel flows could be found in a consideration of the determinants of trade involved fitting of a gravity model.

c) Gravity model
The hypothesis under test was that business travel flows can be explained by two factors more generally applicable in explaining trade patterns between regions. The first was the strength of a region’s commercial and industrial base (‘business’). The second was the ease of mobility between the regions concerned, inversely related to their geographical separation (‘travel’). A gravity model was developed which explained more than 70% of the variance in the relationship between flows of business travellers and the two components, economic characteristics and spatial separation, using gross domestic product (GDP) and distance as variables. The equation and residuals are presented in Appendix III. In the case of flows from the U.K., the
Table 4.8: Trends in business visit flow: U.K. residents 1978-1990

No. of Business Visits (Thousands)

<table>
<thead>
<tr>
<th>OUTFLOW</th>
<th>1978</th>
<th>1990</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>5</td>
<td>41</td>
<td>720.0</td>
</tr>
<tr>
<td>Gib/Malt/Cyp</td>
<td>11</td>
<td>37</td>
<td>236.4</td>
</tr>
<tr>
<td>Portugal</td>
<td>15</td>
<td>50</td>
<td>233.3</td>
</tr>
<tr>
<td>Spain</td>
<td>70</td>
<td>228</td>
<td>225.7</td>
</tr>
<tr>
<td>Austria</td>
<td>20</td>
<td>55</td>
<td>175.0</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>151</td>
<td>439</td>
<td>190.7</td>
</tr>
<tr>
<td>Australia</td>
<td>8</td>
<td>21</td>
<td>162.5</td>
</tr>
<tr>
<td>R.O.W.E.</td>
<td>13</td>
<td>34</td>
<td>161.5</td>
</tr>
<tr>
<td>France</td>
<td>352</td>
<td>900</td>
<td>155.7</td>
</tr>
<tr>
<td>R.o.World</td>
<td>42</td>
<td>107</td>
<td>154.8</td>
</tr>
<tr>
<td>Belg/Lux</td>
<td>155</td>
<td>356</td>
<td>129.7</td>
</tr>
<tr>
<td>W.Germany</td>
<td>304</td>
<td>656</td>
<td>115.8</td>
</tr>
<tr>
<td>E. Europe</td>
<td>39</td>
<td>82</td>
<td>110.3</td>
</tr>
<tr>
<td>N.Z.</td>
<td>2</td>
<td>4</td>
<td>100.0</td>
</tr>
<tr>
<td>South Africa</td>
<td>9</td>
<td>18</td>
<td>100.0</td>
</tr>
<tr>
<td>Comm. Carib.</td>
<td>8</td>
<td>16</td>
<td>100.0</td>
</tr>
<tr>
<td>Italy</td>
<td>118</td>
<td>232</td>
<td>96.6</td>
</tr>
<tr>
<td>Eire</td>
<td>259</td>
<td>496</td>
<td>91.5</td>
</tr>
<tr>
<td>Holland</td>
<td>208</td>
<td>391</td>
<td>88.0</td>
</tr>
<tr>
<td>Sweden</td>
<td>44</td>
<td>82</td>
<td>86.4</td>
</tr>
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<td>154</td>
<td>81.2</td>
</tr>
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<td>18</td>
<td>32</td>
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</tr>
<tr>
<td>Denmark</td>
<td>44</td>
<td>77</td>
<td>75.0</td>
</tr>
<tr>
<td>Finland</td>
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<td>21</td>
<td>40.0</td>
</tr>
<tr>
<td>Yugoslavia</td>
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<td>14</td>
<td>40.0</td>
</tr>
<tr>
<td>Greece</td>
<td>26</td>
<td>36</td>
<td>38.5</td>
</tr>
<tr>
<td>R.o.Africa</td>
<td>40</td>
<td>55</td>
<td>37.5</td>
</tr>
<tr>
<td>Latin Am.</td>
<td>19</td>
<td>26</td>
<td>36.8</td>
</tr>
<tr>
<td>Norway</td>
<td>54</td>
<td>54</td>
<td>0.0</td>
</tr>
<tr>
<td>Mid. East</td>
<td>80</td>
<td>67</td>
<td>-16.3</td>
</tr>
<tr>
<td>North Africa</td>
<td>39</td>
<td>27</td>
<td>-30.8</td>
</tr>
<tr>
<td>TOTAL</td>
<td>2261</td>
<td>4807</td>
<td>112.6</td>
</tr>
</tbody>
</table>

(Source: IPS)
negative influence of distance on U.K. business travel was highlighted. The importance of GDP of country of origin as a determinant of flows into the U.K. demonstrates the 'rich world' selectivity of the business travel network focused on Britain. The model reveals the positive relationship between movement and prosperity expected if business travel constitutes an index as well as a component of the global economy. However, the sensitivity of the model to the spatial distribution and potential mobility of the labour market could be improved by the inclusion of such variables as employment rates, population size or transport accessibility as well as by applying more valid estimates of distance.

d) Length of stay
Of prime importance in determining the purpose of a business visit, its cost and its potential to disrupt the life of the person undertaking it, is the duration of stay in the overseas location. Short visits are likely to be associated with meetings, conferences and fact-finding, whilst longer visits are relevant to sales ventures, trouble-shooting and training programmes. Trips of over six weeks in duration are likely to be connected to technical assignments, short-term assignments, longer training courses and expatriate leave relief. Some 'visits' of just under one year in duration may represent secondments where projects have been completed ahead of schedule, or where premature return has occurred. It may be suggested that the longer an unaccompanied business
visit lasts, the more disruptive and potentially stressful it will be, an issue further explored in chapters 8 and 10.

Unpublished data on business visit length of stay are presented in Figures 4.4 and 4.5. These show the increasing importance of short-term business travel over the period 1979-1987, especially one to two day trips which account for between 40% and 45% of those made. Approximately half as many trips are made of three to four or five to ten day duration as one to two day visits. Half as many again 11 to 45 day trips are made. The number of trips of over 45 days in duration to the U.K. has remained small at below 40,000 per annum (just over 1% of all inbound trips). U.K. residents make a greater number of extended visits overseas, some 65,000 per annum (2% of outward trips). The importance of these longer trips should not be overlooked given that their number is of the same magnitude as IPS and LFS estimates of total skilled migration flows (section 4.3.2a). A six month visit may only show up as one trip in the IPS, but the overseas work completed and the economic and labour market impact of the move are likely to be greater than many shorter trips.

The duration of trips can be seen to be a product of distance - the need to maximise the potential value of a trip, the higher its cost - and the types of projects in which travellers are likely to be involved. Trips over 45 days accounted for fewer than 1% of visits to Western Germany in 1987,
but over 9% of trips to Japan and Australia. Overall flows to these distant regions were small, however, and it is thus likely that either major project work was involved, or a tour of distant regions. Because multi-destination trip lengths are attributed to the country of longest stay, the duration of a sales mission or managerial 'world tour' will be attributed to only one of the many destinations visited. This anomaly accounts for some of the disparity seen between trip lengths to and from the U.K. Over 60% of all visits centred on the U.K. can be accounted for by trips of 4 days in duration or less, and three-quarters last less than 10 days. Given that trip-lengths to some distant locations are likely to be over-estimated, a logical cut-off point for business trips can be seen at six weeks (Figs. 4.4 and 4.5). Visits to locations lasting longer than this can be termed short-term assignments. Both types of move will be of economic significance to the regions involved, and to the U.K. A conservative estimate of the amount of time spent out of the country on visits by British travellers is 17 million person days per annum. This travel load is unlikely to be evenly spread, and at the individual level many people will spend a substantial proportion of each year away from home. The implications for stress of frequent travel have been discussed in previous chapters. The affect at the individual level is analysed in Chapters 8 and 10.

e) Business travel data from other countries

In order to understand the global significance of business travel flows, and their effect on the people who undertake them, it is necessary to look beyond the U.K. sources already reviewed.
A number of other countries, both developed and developing, produce business travel data of varying reliability. An analysis of such data from 23 countries (across five continents) revealed both the large numbers involved and dramatic increases in flows through the late 1980s. Detailed breakdowns by destination have revealed the business-driven nature of moves; the spatial and temporal specificity of organisations’ needs to place expertise overseas.

Among developed countries, reliable time series data are available from a number of regions, all of which show growth. Canada, for example, has seen inward flows of business visits increase by 50% from 1979 to 1987, and business visits by Canadians increase by 25% (Statistics Canada, 1983-1988). Over 80% of these flows in each year are accounted for by crossings to and from the U.S. Data from Ireland and New Zealand also show increases in flows.

Australia produces business visit and migration statistics which are reviewed in more detail here because the nature of their source allows a breakdown of the characteristics of travellers, the types of trips undertaken and whether they are accompanied. The country’s remote location means patterns differ somewhat from the U.K. but this allows a consideration of the effect of greater distance from markets on the types of travel undertaken. Information is based on published and unpublished data derived from samples of completed Department of Immigration incoming and outgoing passenger cards. These are useful in that trips of short- and long-term duration (less than and greater than 12 months) are recorded, along with age of traveller.

Total flows for 1988 as estimated by the Bureau of Tourism Research are shown in Tables 4.9a and 4.9b. A separate column lists those accompanying the business traveller. Thus in 1988, 234000 short-term and 4800 long-term business visits were made to Australia. In the same year, 23000 people accompanied short-term travellers, but 4100 accompanied long-term visitors. These data show the importance of accompanied status for trips of over one year in duration. The importance of short-term visits for travel to conventions, or to take up employment overseas, can be seen, although the type of employment undertaken cannot be distinguished. Four countries dominate the employment and business travel destinations of Australians: U.K., U.S.A. Papua New Guinea and New Zealand. Around half of short- and long-term, business and employment visits are accounted for by these countries. In addition, Hong Kong and Singapore are important business, but not employment, destinations. Two-thirds of short-term business visits, and 71% of employment-related visits, to Australia are accounted for by just four countries: New Zealand, Japan, the U.K. and the U.S.A. The same countries are important in explaining long-term moves. Whilst British long-term arrivals were more likely to arrive for employment (1500 versus 400 arrivals), the reverse was the case for Japanese (1407 arrived on business, only 559 for employment). The British were also much more likely to be accompanied on longer business
Table 4.9a: Business visit flows to Australia 1988

**INFLOW - Short term**

<table>
<thead>
<tr>
<th>Origin</th>
<th>Employment</th>
<th>Convention</th>
<th>Business</th>
<th>Accompanying</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>90</td>
<td>1209</td>
<td>1527</td>
<td>285</td>
</tr>
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<td>1089</td>
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<td>823</td>
</tr>
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<td>3168</td>
<td>13445</td>
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<td>5948</td>
</tr>
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<td>1370</td>
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<td>204</td>
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<td>549</td>
<td>1290</td>
<td>184</td>
</tr>
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<td>South-Central Asia</td>
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<td>290</td>
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<tr>
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<td>7159</td>
<td>412</td>
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<td>3822</td>
<td>8330</td>
<td>895</td>
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<td>932</td>
<td>7590</td>
<td>535</td>
</tr>
<tr>
<td>Japan</td>
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<td>2925</td>
<td>26295</td>
<td>1965</td>
</tr>
<tr>
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<td>130</td>
<td>930</td>
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</tr>
<tr>
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<td>1750</td>
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</tr>
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<td>24351</td>
<td>2834</td>
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<tr>
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<td>1038</td>
<td>6809</td>
<td>601</td>
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<td>356</td>
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<tr>
<td>Other Oceania</td>
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<td>398</td>
</tr>
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<td><strong>TOTAL</strong></td>
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<td>22980</td>
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</table>

**INFLOW - Long term**

<table>
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<th>Employment</th>
<th>Convention</th>
<th>Business</th>
<th>Accompanying</th>
</tr>
</thead>
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<td>44</td>
</tr>
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<td>139</td>
<td>128</td>
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<td>0</td>
<td>1154</td>
<td>885</td>
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<td>Other Americas</td>
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<td>58</td>
<td>34</td>
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<td>South-West Asia</td>
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<td>32</td>
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<td>60</td>
</tr>
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<td>Singapore</td>
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<td>17</td>
<td>31</td>
</tr>
<tr>
<td>Other South-East Asia</td>
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<td>91</td>
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<td>Japan</td>
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<td>23</td>
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<td>57</td>
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<td>9</td>
<td>24</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>10816</td>
<td>70</td>
<td>4770</td>
<td>4087</td>
</tr>
</tbody>
</table>

---

3 Includes Cyprus, Israel, Lebanon, Saudi Arabia and Turkey.

4 Includes India, Maldives, Nepal, Pakistan and Sri Lanka.

5 Includes Brunei, Indonesia, Malaysia, Thailand and Vietnam.

6 Includes China and Taiwan.
<table>
<thead>
<tr>
<th>Destination</th>
<th>Employment</th>
<th>Convention</th>
<th>Business</th>
<th>Accompanying</th>
</tr>
</thead>
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<td>417</td>
<td>353</td>
<td>2201</td>
<td>294</td>
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<tr>
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<td>580</td>
<td>959</td>
<td>2959</td>
<td>397</td>
</tr>
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<td>USA</td>
<td>2071</td>
<td>8638</td>
<td>43061</td>
<td>4372</td>
</tr>
<tr>
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<td>364</td>
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<td>410</td>
</tr>
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<td>271</td>
<td>2929</td>
<td>139</td>
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<td>15527</td>
<td>1701</td>
</tr>
<tr>
<td>Other South-East Asia</td>
<td>4992</td>
<td>5185</td>
<td>27361</td>
<td>2849</td>
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<tr>
<td>Hong Kong</td>
<td>1265</td>
<td>1841</td>
<td>20916</td>
<td>2518</td>
</tr>
<tr>
<td>Japan</td>
<td>1141</td>
<td>671</td>
<td>12492</td>
<td>712</td>
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<td>South Korea</td>
<td>129</td>
<td>134</td>
<td>3135</td>
<td>183</td>
</tr>
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<td>Other East Asia</td>
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<td>661</td>
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<td>787</td>
</tr>
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<td>United Kingdom</td>
<td>2804</td>
<td>2243</td>
<td>24964</td>
<td>4227</td>
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<tr>
<td>West Germany</td>
<td>316</td>
<td>455</td>
<td>6449</td>
<td>732</td>
</tr>
<tr>
<td>Other Europe</td>
<td>969</td>
<td>3747</td>
<td>14680</td>
<td>2213</td>
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<tr>
<td>New Zealand</td>
<td>3810</td>
<td>4485</td>
<td>49971</td>
<td>3839</td>
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<tr>
<td>Papua New Guinea</td>
<td>5512</td>
<td>106</td>
<td>11532</td>
<td>1430</td>
</tr>
<tr>
<td>Other Oceania</td>
<td>1615</td>
<td>2010</td>
<td>11180</td>
<td>1506</td>
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<td>TOTAL</td>
<td>28425</td>
<td>37184</td>
<td>264361</td>
<td>28750</td>
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OUTFLOW - Long term

<table>
<thead>
<tr>
<th>Destination</th>
<th>Employment</th>
<th>Convention</th>
<th>Business</th>
<th>Accompanying</th>
</tr>
</thead>
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<td>88</td>
<td>181</td>
</tr>
<tr>
<td>Canada</td>
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<td>106</td>
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<td>USA</td>
<td>1157</td>
<td>7</td>
<td>660</td>
<td>1009</td>
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<td>Other Americas</td>
<td>142</td>
<td>0</td>
<td>54</td>
<td>72</td>
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<tr>
<td>South-West Asia</td>
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<td>0</td>
<td>121</td>
<td>194</td>
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<tr>
<td>South-Central Asia</td>
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<td>4</td>
<td>58</td>
<td>78</td>
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<tr>
<td>Singapore</td>
<td>303</td>
<td>0</td>
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<td>234</td>
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<tr>
<td>Other South-East Asia</td>
<td>810</td>
<td>0</td>
<td>356</td>
<td>585</td>
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<tr>
<td>Hong Kong</td>
<td>707</td>
<td>0</td>
<td>350</td>
<td>354</td>
</tr>
<tr>
<td>Japan</td>
<td>248</td>
<td>0</td>
<td>156</td>
<td>143</td>
</tr>
<tr>
<td>South Korea</td>
<td>29</td>
<td>0</td>
<td>18</td>
<td>41</td>
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<tr>
<td>Other East Asia</td>
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<td>0</td>
<td>41</td>
<td>59</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>2784</td>
<td>5</td>
<td>992</td>
<td>1015</td>
</tr>
<tr>
<td>West Germany</td>
<td>240</td>
<td>0</td>
<td>101</td>
<td>111</td>
</tr>
<tr>
<td>Other Europe</td>
<td>812</td>
<td>6</td>
<td>343</td>
<td>352</td>
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<tr>
<td>New Zealand</td>
<td>786</td>
<td>0</td>
<td>407</td>
<td>324</td>
</tr>
<tr>
<td>Papua New Guinea</td>
<td>2425</td>
<td>0</td>
<td>210</td>
<td>914</td>
</tr>
<tr>
<td>Other Oceania</td>
<td>683</td>
<td>0</td>
<td>157</td>
<td>339</td>
</tr>
<tr>
<td>TOTAL</td>
<td>12629</td>
<td>25</td>
<td>4410</td>
<td>6181</td>
</tr>
</tbody>
</table>

(Source: Bureau of Tourism Research, Australia. Column TOTALs include 'not stated' origins and destinations)
visits. Figures 4.6 and 4.7 indicate trends in visits to and from Australia over recent years. Substantial increases in short- and long-term flows can be seen. Short-term convention visitors to Australia and long-term employment moves by Australians have seen the most rapid growth, albeit from low initial bases.

Length of stay data for U.K. and Australian business travellers are presented for comparison as a cumulative graph in Figure 4.8. From the graph it can be seen that Australian business travellers make more extensive use of long trips overseas than their U.K. counterparts. This difference is to be expected as it reflects the relatively greater distance that has to be travelled to reach world markets, and the different ways in which Australian firms utilise international travel. The implication of these data is that Australians have to spend longer away from home when they travel and a greater strain due to separation might be anticipated.

The age breakdown of short-term business, convention and employment flows in Table 4.10 illustrates the dominance of those in mid-career (aged 30 to 49) undertaking business travel. Australians travelling to Europe tend to be older, on average, than those travelling to more proximate Oceania. This could indicate the importance of sending more experienced staff on longer trips, given the higher costs involved, and the importance of established markets in Europe. A similar explanation could be sought to explain the age balance of flows in the opposite direction. The young age profile of Asians visiting Australia (seen especially from Singapore, Malaysia and Hong Kong) can be attributed partially to demographic factors, but different
management structures associated with the rapidly expanding industrial base in such countries may also play a part. Evidence of this expansion can be seen in business travel data for such newly-industrialised regions.
Table 4.10: Age profile of business travellers to Australia

INFLOW (Employment, Convention and Business) - Short term

<table>
<thead>
<tr>
<th>Origin</th>
<th>15-19</th>
<th>20-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60+ Years</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>10</td>
<td>231</td>
<td>892</td>
<td>932</td>
<td>588</td>
<td>174</td>
<td>2826</td>
</tr>
<tr>
<td>Americas</td>
<td>585</td>
<td>7636</td>
<td>18478</td>
<td>22536</td>
<td>13447</td>
<td>6595</td>
<td>69276</td>
</tr>
<tr>
<td>Asia</td>
<td>305</td>
<td>10734</td>
<td>26394</td>
<td>23835</td>
<td>12468</td>
<td>3760</td>
<td>77495</td>
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<tr>
<td>Europe</td>
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<td>11442</td>
<td>18947</td>
<td>24746</td>
<td>14456</td>
<td>4312</td>
<td>74957</td>
</tr>
<tr>
<td>Oceania</td>
<td>2059</td>
<td>2059</td>
<td>18798</td>
<td>28799</td>
<td>27736</td>
<td>11515</td>
<td>92517</td>
</tr>
<tr>
<td>TOTAL</td>
<td>4052</td>
<td>49070</td>
<td>93669</td>
<td>99856</td>
<td>52547</td>
<td>18454</td>
<td>317648</td>
</tr>
</tbody>
</table>

OUTFLOW (Employment, Convention and Business) - Short term

<table>
<thead>
<tr>
<th>Destination</th>
<th>15-19</th>
<th>20-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60+ Years</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>12</td>
<td>149</td>
<td>876</td>
<td>1312</td>
<td>437</td>
<td>184</td>
<td>2971</td>
</tr>
<tr>
<td>Americas</td>
<td>258</td>
<td>8594</td>
<td>20822</td>
<td>22635</td>
<td>8467</td>
<td>2506</td>
<td>63262</td>
</tr>
<tr>
<td>Asia</td>
<td>737</td>
<td>15233</td>
<td>34335</td>
<td>41640</td>
<td>18880</td>
<td>4954</td>
<td>115779</td>
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<tr>
<td>Europe</td>
<td>407</td>
<td>6576</td>
<td>14858</td>
<td>21171</td>
<td>10257</td>
<td>3357</td>
<td>56627</td>
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<tr>
<td>Oceania</td>
<td>713</td>
<td>13099</td>
<td>29407</td>
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<td>14090</td>
<td>3699</td>
<td>90221</td>
</tr>
<tr>
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<td>100477</td>
<td>116515</td>
<td>52197</td>
<td>14773</td>
<td>329970</td>
</tr>
</tbody>
</table>

(Source: Bureau of Tourism Research, Australia. Row and column totals include not stated origins and destinations)

Business travel to Hong Kong increased 50% between 1981 and 1985 when 758000 visits were made (Economist Intelligence Unit, 1987). Other South-East Asian territories have seen more dramatic increases. Flows to South Korea rose 384% to 354000 between 1980 and 1988, 43% of trips being by Japanese visitors (Korea Ministry of Transportation, 1980-1988). Japan is also the destination for over half of the 226000 visits made by Koreans in 1988; flows from Korea having increased 37% in 1987-88 alone. Business flows to Singapore over the ten years 1979-1988 doubled to 532000, whilst ‘business and pleasure’ flows increased more slowly by 19% to 187000 (Singapore Tourist Promotion Board, 1980-1989). Over the period, 74-79% of these business and ‘business and pleasure’ visits to Singapore constituted repeat visits. Flows to developing countries such as Sri Lanka were more modest, but also exhibited growth. Some 13670 business visits were made to the country in 1988, an increase of 63% on 1978 (Ceylon Tourist Board, 1989). The importance of traditional colonial trading ties can be deduced from the consistently greater number of business visitors received annually in Sri Lanka from the U.K. rather than from neighbouring India.

This apparent diversion into patterns of travel from Australia and Asia is needed to show the scale of business travel flows worldwide. These examples show a universal increase in volume and a clear relationship with developing world patterns of business. Increase in international business travel is a reflection of both the rise of new operations overseas - supervision of
installations, joint ventures, new contracts and acquisitions - as well as increased mobility of expertise within and between established operations. Within IMSL, there are two reasons why such a readily discernible manifestation of organizational interaction is a phenomenon of some importance. Firstly, the international nature of trade necessitates the temporary movement of skilled labour, manifested as the mobility of the commercial representatives of individual countries. The magnitude of flows should thus reflect the state's involvement in international economic interaction. Secondly, through its indication of the use of corporate resources, business travel reflects the importance placed by MNCs on their overseas activities (or at least the activities requiring physical travel). For such commercial interests representation and promotion of the company image abroad is a vital component of functioning globally. The travel flows described above illustrate the dominance of rich countries in the global movement process. The duration of trips can be seen to be a product of distance and the types of projects in which travellers are likely to be involved. Dependent on countries' positions in the space economy, a logical cut-off point for business trips can be seen at six to eight weeks. Trips of a longer duration tend to comprise short-term assignments for which accompaniment can be anticipated to be more common (compare Tables 4.9a and 4.9b). The data available say little about the annual travel load of individuals and this is an issue to be addressed by the survey (Chapter 5). These factors must be taken into account in the construction of a typology of moves within organisations in section 4.4.1. Trends in moves likely to place individuals in potentially stressful situations must also be considered for the overall impact on organisations of stress through mobility to be addressed.

4.3.4 Overall trends
Tentative conclusions can thus be drawn that skilled international migration and business travel are on the increase, with the average duration of stay declining. The increasing use of short-term assignments and business travel, if borne out by survey findings of the current study, has implications for stress outcome. Employees can be anticipated to have less time to adjust during shorter secondments, and the opportunities for family accompaniment may become fewer. There also appears to a tentative trend away from ICT use, with home country nationals being favoured (albeit in declining numbers) only in developing world posts, where readjustment pressures are likely to be greater. The implications of such changes are taken up in Chapter 11.

4.4 Explanations of trends in IMSL
The data presented in section 4.3 are inconclusive, but they inform the view that types of IMSL, by definition of economic, political and social importance, are on the increase. Within IMSL there are trends towards increasing business travel with professional and managerial moves increasing at a slower rate. The proportion of moves which are ICTs appears to be declining, at least in the
These are trends in types of movement that theories of migration prevalent until the 1980s cannot explain.

The principal feature of skilled international moves is the presence of organisations which promote and support them: MNCs and international recruitment agencies. Hence the need to move the search for explanation in migration beyond data collection about individuals and into the institutional sphere (Keely, 1987).

The interplay of careers and ILMs has been proposed as the link between explanations of migration based on individual motivation and on the influence of organisations (Salt, 1988). Six types of rational career choices by the individual which can lead to international moves within the ILM of a MNC have been identified. Two out of the six can involve additional moves in the ELM. Salt illustrates how, by using international opportunities made available by their own employer, or another organisation, individuals are able to maintain and develop their own careers. As discussed in Chapter 2, organisations prevent leakage of employees to the ELM by offering attractive career opportunities to valued employees within the ILM. Organisations were seen to appropriate the career paths of individuals into an employee development programme that best suited their labour requirement needs. Individuals progressed through a patterned sequence of moves along various vertical and horizontal lines in the corporate hierarchy. This progress implies that whilst the geographical relevance of moves remains for the organisation, the individual moves and makes choices along career paths, the geographical component of which is pre-defined by the organisation. The size and direction of IMLS flows (and ICTs in particular) can thus be anticipated to be determined by the organisation.

Recent regional analyses of IMLS have linked the direction and course of flows to the spatial distribution of locations within organisations. A study of international personnel movement within commercial banks in South-East England found London headquarters to be the origin of all outward-bound, or the destination of all inward moves (Beaverstock, 1989). The study concluded that the determinant of migrant destinations were the historical links of the bank, its international structure and, in particular, its employment and business policies.

Such findings have lead Findlay and Garrick (1990) to develop a 'migration channels' approach to the study of skilled international migration. They broadened their focus to embrace international skill transfers undertaken by smaller firms to fulfil international contracts, and those facilitated by international recruitment agencies, in addition to ICTs. Moves instigated by such organisations were seen to have regional biases at points of entry and in the destination region. Skilled migrants thus proceed along pre-defined channels between particular points of origin and destination. A survey of the motives of skilled Scots and others in seeking to emigrate concluded

Although there may be technical coding reasons for this.
that migrants could not be seen as passive in the skilled international migration process. It was made clear however that motives were financially, rather than geographically, orientated. The survey sample was composed of those moved via international recruitment agencies. It is difficult to deduce the implications of this study for MNC moves. Individuals selected from outside the ILM of firms might be anticipated to have a greater element of choice, and hence those who move might be expected to be more motivated than equivalent MNC employees. In either case, however, individual motives will be economic or career orientated. Unlike other forms of voluntary migration, prior selection by the organisation renders the individual passive in the selection of location. It is thus at the organisational level that new patterns in mobility are determined.

Two reasons for the persistence of organisation-determined moves have been posited by Findlay (1991). Firstly, he cites the lack of technical skills in the developing world to install and service the capital goods, essential to development, which are purchased from the developed world. Secondly, he sees an increasing influence over the global economy being held by MNCs, which are, in turn, dependent on the use of ICTs. Whilst such mobility could be reduced by the increased diffusion of technical expertise to host employees (and resultant indigenisation of overseas operations), some have argued that MNCs do not see this skills transfer as in their own interests (Germidis, 1978; Frame, 1983). Findlay thus sees it as unlikely that MNC needs for ICTs will decline. This may be the case overall; however, individual companies can have skills transfer firmly on their agenda. Evidence from companies participating in the current study (presented in Chapter 7) suggests that those which pursue full internationalisation embrace indigenisation and reduce their dependence on ICTs. If the behaviour of the majority of organisations has been predicted correctly, and no decline is seen in ICTs, then the exposure of individuals and their families to new environments can be anticipated to continue, with implications for stress outcome.

A recent skilled international migration research agenda highlighted several aspects of the skilled international migration process about which little is known (Findlay and Gould, 1989). Some, including the extent of cultural integration, the social and psychological affects on split households, the degree of continuity in work environment for international moves, and the effect of skilled international migration on the two career household, are tackled by the current study (Chapters 8, 9 and 10). In addition, the agenda raised the need for an understanding of the relationship between international business travel and skilled international migration. This is another issue raised here (below and in Chapter 7).

4.4.1 Business travel and a typology of organisation-engendered moves

The skilled international migration agenda (Findlay and Gould, 1989) did not address the role of business travel in creating cultural, psychological or social problems. Whilst some studies of skilled international migration have referred to business travel in passing (such as Salt and Findlay, 1989), most actual analyses of the development and role of business travel, have been user- or trade-orientated, or anecdotal (Gray-Forton, 1981; Euromoney, 1984; Barrett, 1985). The
lack of attention paid to business travel in skilled international migration literature can be accounted for partly by the derivation of skilled international migration study from research in migration, and by the constraints placed on studies by existing categories of data (Section 4.3). Whether there are theoretical arguments for placing business travel outside the definition of IMSL is an issue not raised by the agenda but one that is questioned here. Data sources create a convenient cut-off point between visits and skilled international migration at 12 months. However, little evidence supports defining visits by such a cut-off point in practice. The disparity in definitions used by U.K.-based companies to describe international mobility is highlighted by data from a consultant's report (ECA, 1989), presented in Table 4.11.

Table 4.11: Organisation definitions of trip and secondment duration

<table>
<thead>
<tr>
<th>Duration</th>
<th>Visit length (max.)</th>
<th>STA length (min.)</th>
<th>STA length (max.)</th>
<th>Expatriate status (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 1 week</td>
<td>4</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 weeks</td>
<td>4</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>3 weeks</td>
<td>4</td>
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<tr>
<td>1 month</td>
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<td>29</td>
<td></td>
<td></td>
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<tr>
<td>6 weeks</td>
<td>6</td>
<td>5</td>
<td></td>
<td></td>
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<td>2 months</td>
<td>5</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Up to 3 months</td>
<td>25</td>
<td>27</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>4-5 months</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>6 months</td>
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<td>24</td>
</tr>
<tr>
<td>8-9 months</td>
<td>4</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 year</td>
<td>49</td>
<td>42</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 months</td>
<td>0</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Up to 2 years</td>
<td>9</td>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Source: ECA, 1989. Based on replies from 97 U.K. companies)

There is a clear need to develop a typology of IMSL within organisations which is not data-derived but based on the features of moves which affect mobile individuals. An attempt at such a typology is shown in Table 4.12. This divides ICTs into two categories based on their degree of permanence. Secondments, as utilised by international companies, are ICTs which conclude with a return to home. The Institute of Manpower Studies (1987) has identified a shift in organisational emphasis from permanent cadres of expatriates onto 'fast in - fast out' secondments. These have their parallels in the ELM with skilled workers who sell their skills overseas for short term contracts before returning to the same home base (Gould, 1989). Gould (ibid.) points out that such moves undermine the simple dichotomy in migration between mover and stayer. Whilst the place of work is to be found overseas, the place of permanent residence
remains unchanged. The other category of ICT, where place of residence changes for good, is permanent relocation, where no subsequent move is intended. A temporal definition of business travel is hard to produce. Gould, for example, disputes the use of the term for all work-related moves of under one year. This study adopts a temporal definition in Chapter 10 based on empirical findings. Aside from time, however, the most important distinction of business visits as far as stress is concerned, is their unaccompanied status. A typology of IMSL within organisations based on these criteria is presented in Table 4.12.

Table 4.12: Types of mobility within international organisations

<table>
<thead>
<tr>
<th>Mobility Type</th>
<th>Characteristics</th>
<th>Sub-Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relocation</td>
<td>Permanent</td>
<td>Group Moves</td>
</tr>
<tr>
<td></td>
<td>Accompanied</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Residential Move</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 months or more</td>
<td>Transfer</td>
</tr>
<tr>
<td>Secondment</td>
<td>Temporary</td>
<td>Fixed term</td>
</tr>
<tr>
<td></td>
<td>Accompanied</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Residential Move</td>
<td>Incumbency</td>
</tr>
<tr>
<td></td>
<td>6 months or more, typically 2-3 years</td>
<td>Project based</td>
</tr>
<tr>
<td>Business Travel</td>
<td>Temporary</td>
<td>'Round the World'</td>
</tr>
<tr>
<td></td>
<td>Unaccompanied</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hotel stay</td>
<td>Day trip</td>
</tr>
<tr>
<td></td>
<td>Visits: 1 day to 6 weeks</td>
<td>Brief, short haul</td>
</tr>
<tr>
<td></td>
<td>Short-term assignments, Tours of duty: 6 weeks to 6 months</td>
<td>Brief, long haul</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Extended, short haul</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Extended, long haul</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Short-term assignment</td>
</tr>
</tbody>
</table>

Thus organisations have been recognised as the prime forces behind patterns and trends in skilled international migration, ICTs and corporate business travel. They have made use of individual career motivation to encourage mobility policies and place individuals overseas for longer and shorter periods of time. Whilst some writers have addressed the potential decline in secondment length and noted the role of business travel, no detailed studies of short-term moves have been conducted. The importance of business travel to the development of MNCs has already been noted (section 4.2) as has its potential effect on the family (Chapter 2). In the absence of a logical temporal cut-off in the lengths of moves, this study has sought to incorporate business travel into a typology of IMSL on the basis of elements of permanence, and accompanied status, factors of greater significance in the study of the stress of such moves.

4.4 Conclusion

Explanations of global flows of skilled labour have shifted away from discussions of individual determinants of motivation towards a system of organisation-instigated channels of movement.
The destination, duration and purpose of such movements are organisationally determined. The limited data sources point to an increasing dominance of IMSL in world travel flows, both long- and short-term. A small, but involved literature has built up to explain long-term flows. This has seen the close interdependence of skilled international migration and individual career motives and has forecast the persistence of ICT use for the foreseeable future. Short-term flows have largely been ignored by the literature however, and this omission along with others highlighted by an agenda for skilled international migration research, are encompassed by this study.

This analysis of the nature and processes of skilled international migration, and international ICTs in particular, has shown that a highly sophisticated mobility system has built up within international organisations which is becoming increasingly dominant in flows centred on the U.K. and other developed world countries. Representation of the organization overseas requires placing individuals in what one writer has termed boundary roles (Miles, 1980): negotiating and transacting with other organisations and appraising new operating environments. These are situations with which individuals will, by definition, be unfamiliar. They will be subject to both internal and external pressures to which they will have to adapt and adjust. Continual change of environments, particularly to those that are perceived as unfamiliar or threatening, is recognized as a prime cause of stress and thus a source of diminished well-being and reduced performance. It is important in this shifting of the explanatory focus away from individuals onto the role of the organisation in the determination of such flows, not to ignore the subsequent effects of IMSL at the level of the individuals who participate in it. Business travel and ICT flows look set to continue, and so does the exposure of individuals to mobility events and changes in environment, already highlighted as potential and actual causes of stress. A survey methodology follows which sets out the way in which this study intends to understand this relationship.
Chapter 5: Methodology and nature of survey

5.1 Introduction
The previous two chapters discussed the causation, manifestation and measurement of stress and the different types of international mobility practised within the internal labour markets of MNCs. The aim of fieldwork was to determine the stress effect on employees of the ways in which companies make use of these different types of international mobility. The methodology thus has to attempt to operationalise the mobility-stress relationship: the translation of stress-creating situations (the practical realities of the mobility policies) into a measurable independent variable, and translation of the effect on mobile individuals into a measurable dependent variable. Chapter 3 highlighted the problems of identifying tangible evidence of stress. A combination of evidence from both qualitative and quantitative sources was thus sought to locate stress outcome. The experience of mobility is commonly the dependent variable in behavioural studies of migration. Classifying it as an independent variable requires the development of a device to scale the magnitude of the changes imposed by mobility. These processes require the adoption of survey methods derived from a number of branches of social science, especially geography and psychology.

This chapter sets out the criteria by which survey instruments were created, the structure of fieldwork, the analytical framework chosen and the response rates obtained. The advantages and disadvantages of the selected methods are debated with reference to the complexity of the two phenomena comprising the relationship under test: mobility and stress. Safeguards are developed to validate the adoption of these methods. Whilst, in the context of this study, mobility is the independent variable, it is itself dependent on many other factors, not least the feedback from stress and dissatisfaction with moves. Similarly, stress may be the dependent variable, but it is the outcome of many other processes apart from geographic mobility. Investigating the mobility-stress relationship thus necessitates a return to theory and ultimately to simplification, assumptions, generalisations and compromise. To ensure validity, therefore, the fieldwork had to include a system of internal checks.

5.2 The independent variable
5.2.1 The experience of mobility
Mobility is one of a number of life experiences with the potential to generate stress. To isolate accurately the importance of mobility over extraneous variables, the stress arising from other experiences would have to be identified. Mobility in itself is far from homogeneous and survey methods had to take into consideration the many processes, or events, which comprise a 'move'. At the same time a means of identifying the occurrence of those events had to be developed.
a) Previous attempts
Quantifying life experience usually requires the simplification of cumulative life processes and changes into a series of recognisable 'life events' (Chapter 3). Identification of life events, past and present, requires the construction of biographies which detail relevant events involving and affecting the individual throughout life. Such biographies, or 'career profiles', provide the temporal and spatial context into which the experiences of life, and resultant satisfaction and stress, can be situated.

A method of conceptualising such career profiles can be found in Hågerstrand's concept of a life path as developed in his web model from time-geography (Hågerstrand, 1978). This visualises, on a Lexis-Becker time-space diagram, space and time as resources drawn upon to realise projects geographically located in domains. The life path is represented as a line running through domains in three dimensional space. The advantage of this system is that changes in household composition, such as the birth of children and marriage, can be included. At an analytical level, however, it is difficult to develop empirical work beyond this illustrative or individual level. The mobility of one individual and his family, drawn from the present study, is plotted in Figure 5.1.

Time-geography sees mobility in the 'room' provided by time and space as limited by capability constraints on the individual, one of which could be stress, coupling constraints which define the length of projects and authority constraints which determine the mode of conduct within domains. Possibility boundaries are thus created which indicate potential paths through space and time, only one of which individuals can follow. Such theory is appropriate in considering the potential and actual secondment moves of the highly skilled, but definitions of duration of move and the effect of constraints on mobility are not adequately addressed. Business visits, for example, are difficult to plot. Hågerstrand's 'population archaeology' was criticised in its use of historic records to construct life paths, thus ignoring the element of human agency in moves (Gregory, 1985). Such paths explain little of the prior interaction of individuals, via business travel, cultural briefing or visits from others, with the area to be settled. They do not indicate cultural distance - how differentiated home and host society may be (Chapter 3).

b) Career profiles
The essential concepts of time-geography, that the paths of individuals through life are continuous, and that the path selected is only one of many potential routes, was assumed for this thesis. The concept of the career-organisation-family triad developed in Chapter 2, was itself based on a set of responsibilities and aspirations required to move between environments of
Fig. 5.1: Time-space representation of a career profile

KEY:
- Employee career path
- Spouse career path
- Children's career path
- Destinations

Destinations: AUSTRALIA
changing familiarity and meaning. Time-geography thus provides the theoretical basis for the use of the career profile as a framework for the analysis of mobility experience.

Career profiles were constructed for each individual. These comprised chronological and biographical accounts of moves from the start of their career to the present day, and included details of other important attendant life processes such as marriage, the components of spouses career, the birth of children and events in their schooling. A more recent three-month study period of mobility experience was subjected to life event and health symptom monitoring - real time in the case of business travellers and those seconded to the U.K., and retrospectively for those recently returned from abroad. For this latter group, the retrospectively 'monitored' period was the three months initially following arrival overseas. Methodological rationale is presented in Appendix IV.

5.2.2 Measurement problems: comparing migration and business travel
For geographers, data collection on migration requires that at least one boundary in a spatial network be crossed and a certain period of time be spent in the new location or area of residence. As the emphasis in this study is on the international mobility of skilled labour (IMSL), there is little difficulty in defining the spatial aspect of moves.

Corporate IMSL may be different from other kinds of mobility (Chapter 4) but it is far from homogeneous itself. The spatial and temporal characteristics of such moves, are diverse. Their durations can last from one day to several years, with corresponding variations in frequency. The direction of moves and the quality of destinations will vary dramatically. They can take place wholly within the developed world, within the developing world, or between the two. The experiences of individuals moving internationally within corporate ILMs, and thus their potential stressors, will be manifold and diverse. Whilst this study has set out to elucidate by comparison the effect of different types of moves, straightforward categories of moves as independent variable - such as business trip, relocation or secondment - will be unable to capture the quality of individual experience. A graded measure is required which can quantify the constituent events of mobility experience as they are encountered over time. This will enable the range of encounters of each individual to be rated against the different range of encounters of all others. A rating scale of the mobility experiences of individuals (or mobility events, such as ‘separation from family over one month’, or ‘return to home after stay abroad’) is developed for this purpose in Chapter 6. The use of the MEI to quantify the independent variable in this study required the equation of MEI to a normative measure of the potential stressfulness of those events. The value of the events approach as a measure of stress is discussed in 5.3.1 and 5.3.2.
The incorporation into the study of the concept of Hågerstrand's 'life paths' allowed career profiles to be created which could establish for each member of the sample their temporal and spatial relationship with their organisation, family and career. An advantage of the career profile's framework was that the reported outcome of any length of move, however short, could be registered in the same way as 'episodes' of a frequent repetitive activity, such as business travel. The limited comparability between profiles was augmented by the inclusion of real-time monitoring of recent mobility experience. The dual approach - career profile plus diary study - allowed the full sequence of moves in an individual's experience to be embraced, whilst a comparative framework was created for analysing the effect of mobility experiences themselves. Means of measuring stress needed to be devised therefore, which could be used to analyse moves once they had been isolated within this structure.

5.3 The dependent variable
5.3.1 Stress measurement
The pathological links between stress and inefficiency at work, and short- and long-term illness are well known, and discussed in Chapter 3. There has been a great deal of research interest shown in ways of identifying the activities or situations which cause stress and the resultant stress reaction in humans. Traditional behaviourist stimulus-response experimentation has been frustrated by the nature of stress as the body's non-specific reaction to an event perceived by the individual as threatening. Research has concentrated on one of two approaches: identification of the potential causes of stress (the 'life events' approach), or measuring the resultant stress outcome (the 'symptom' approach). According to physiological definitions (Selye, 1976), stress acts to accelerate the rate of wear and tear on the body caused by life. This requires the 'life events' approach to delineate artificial boundaries within the broad experience of life to isolate recognisable, potentially stressful 'events'. This leads to disputes over whether and where such boundaries should be drawn, what areas should be excluded and how to quantify the importance of those areas that are included. The non-specific definition of the 'wear and tear' produced complicates the isolation of stress-induced outcomes from others. This has direct effects on the symptom approach. The effect of stress may be immediate or delayed and manifested in long or short-term physical or emotional illness. In addition, very similar outcomes may have other primary causes. Recent sophisticated stress survey devices, such as the Occupational Stress Indicator (Cooper et al., 1988) have combined symptom and life events questions.

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2 Some researchers (Brown, 1974, 1989; Paykel, 1974) have sought to link particular life events with specific illness outcomes. The results from such research have proved valuable but far from conclusive. Thus, for example, no specific illness has been associated with mobility. In this study, therefore, an approach was adopted which embraced as wide a range of potential stress outcomes as feasible.
A vast range of mediating variables in the stress reaction have been proposed in the literature: personality types (Hamilton, 1979; Payne, 1988), behaviour types (Cooper, 1981), locus of control (Anderson, 1977; Furnham, 1983), coping strategy (Cooper, 1990), and social support (Payne, 1980). None contradict the stressor-strain relationship but attempt to explain some of the variance found within it, though clear roles have yet to be established. A study of this nature could not hope to include all such variables across a large enough sample to identify the role of each in a meaningful way. Many have ambiguous or overlapping definitions, or are redefinitions of elements of the stress reaction itself. No quantification of personality was undertaken by the survey, due to the increased invasiveness of personality tests, and theoretical reasons outlined in Chapter 3. Whilst accurate assessment of personality might aid interpretation of individuals' reactions to events, little faith could be placed in the location of an accurate measure of this kind, or of the proposed effect on stress outcome in a socially and economically demarcated group such as this one (Pearlin, 1989, p.250). Similarly, absence of suitable measures prevented analysis of the effect of coping strategies or social support on stressor input and stressor outcome. Coping comprises an individual's ability to 'dethreaten' potentially stressful situations (through cognitive restructuring) or to avoid them completely. Social support can act similarly, or to alleviate the long-term effects of stress symptoms experienced. Coping is thus inclusive within definitions of events as 'threatening' whilst short-term symptom outcome was chosen as the least likely to be alleviated by social support among this sample. Person variables of this kind are by no means ignored by the study. Interviews permitted individual perception and reaction to be studied in depth. The exploratory nature of the study's purposes would not be served by an overemphasis on quantifying person variables of inconclusive empirical value.

Surveys to assess the occurrence of stress over a period of an individual's life need to be acceptable and effective. Therefore, tests had to be intelligible to respondents, concise and not so intrusive as to be a source of stress in themselves. Nor should they be so time-consuming as to hinder response rates or, in this case, inhibit diary completion. These requirements necessitated a checklist format to be used for recent experience (a sample diary and checklist appear in Appendix V). As both life events and symptom approaches were to be utilised, compatible questionnaire formats of both had to be established. The decision was then one of whether to create schedules specifically appropriate to this study or to adopt existing ticksheet formats (section 5.3.2).

In interview discussions of the long-term effects of mobility on individual's lives, it was judged that symptom counts would have less salience. Retrospective reporting was likely to be highly variable and difficult to connect temporally with mobility events or isolate from other important life events. By the same token - subjective assessments of the value-laden concept of 'stress' were to be
avoided (see 3.3.2). Report rates and the quality of reported phenomena would be difficult to obtain and interpret. With no objective index of stress outcome available, emphasis was placed in questions on potential stressors. The intention was to focus on role strains, conflicts and events which occurred as a result of mobility. The loaded term 'stress' was avoided in questions and diaries. Questions were phrased in terms of 'problems', 'experiences', 'difficulties', 'benefits' and 'disadvantages'. To maximise time availability and cooperation, a conversational format was intended, yet with interviewer input to remain minimal and neutral. Interviews were designed to cover set ranges of topics - with events posited in neutral language ('were you able to obtain adjacent seating for the family'). Follow-up and prompting was avoided as individuals were anticipated to bring forward issues of concern where raised. In essence, questions were posed in a way that sought factual information about aspects of events in moves. The interviewer had an agenda, based on findings from pilot approaches. All relevant items on the agenda were to be covered in answers, either to direct questions, or to other questions where links were drawn by the correspondent. Diversions by the respondent into general, as against personal experience, or unrelated non-mobility experience were to be redirected. Discretion was to be used to ensure that generalisation was not curtailed if it represented a projection of the individual's own perceptions. Interviewing was thus a demanding exercise - balancing the advantages of insights gained through free-flowing discussion against the need to ensure all relevant agenda topics were covered. The success of this exercise is reviewed in Chapter 8.

5.4 Sample design
Contact with the potential sample had to accommodate to the spatial and temporal constraints imposed by the limited availability of those who were, by definition, mobile. Time and cost considerations also acted to limit fieldwork to U.K.-based interviews. Business travellers could be interviewed during their home-based time. U.K.-based secondees were only accessible on return from a posting overseas. Foreign nationals were only available whilst on secondment in the U.K. Whilst the returned secondees would have had the experience of the complete secondment process from inception to return, they were not currently experiencing secondment. This posed difficulties for the diary study. Conversely, the secondees posted to the U.K., who were available for a diary study, had yet to experience the full secondment and return process. The value to the survey of the experiences of both these groups acted against exclusion of either. Three groups were thus identified for analysis: secondees to the U.K. (group A), returned secondees (group B), and business travellers (group C) (Table 5.1). Methodological problems were nevertheless created for the comparison of data. Information was collected from group B over a different time-frame to that of groups A and C. A summary of the precautions taken to minimise post-facto rationalisation and incompatible responses is given in section 5.6.2. Every effort was made to ensure that questions regarding past mobility were asked in the same way and presented in the
same context to the returned secondee group B as to groups A and C. The problem posed by one-third of the sample being unavailable real-time was impossible to resolve and the circumstances of this group have to be borne in mind throughout the ensuing analysis and discussion.

The selection of individuals for the sample had to be at the discretion of individual company personnel departments. Secondees are easy to identify but business travel is a frequent undertaking by many skilled corporate employees. The identification of 'business travellers' as a distinct group thus required clarification. Since the aim of the survey was to examine the interrelationship between long-term and short-term travel, fieldwork needed to be centred on that business travel which was a means of achieving the company's international objectives. This implied a concentration on frequent travellers who perform a function in the overseas location, rather than less frequent conference-delegates or 'optional' travellers (where either party could meet the other). Individuals selected for the 'business travel' survey sample were thus required to be both frequent and regular travellers.

Table 5.1: Proposed sample breakdown by mobility group and by company

<table>
<thead>
<tr>
<th>Company</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overseas Secondees to the U.K. (group A)</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Secondees returned to the U.K. (group B)</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Business Travellers (group C)</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

Characteristics of companies are discussed in Chapter 7.
Response rates are discussed in section 5.7

5.5 Fieldwork
Career profiles were constructed through interview, detailing every move from first employment through to the present day. A non-schedule structured interview was developed to enable this process (Appendix VI). Life paths, and hence career profiles are too complex to be followed through a strict questionnaire interview. A free-flowing interview approach was also rejected since this might have jeopardised the degree to which all career profiles were comprehensive and thus comparable. There was also a need to keep individual commitment to a minimum. The need for the survey to be accepted by a majority of individuals, and not biased away from those who had greater pressures on their time, was essential to the study's integrity. In addition, as a real-time participation was involved the continuous commitment of sample members was not to be allowed to lapse due to time pressures. The semi-structured approach offered the best way to cover the relevant ground with the minimum time penalty. The fieldwork was thus designed accordingly.
A chronological approach to the interview schedule was necessary to keep the interviewer abreast of the context in which decisions were made and changes took place. Stress or failure in the overseas setting could often be the result of cumulative minor pressures. A sequential approach was the best way to address this. Each secondment of over six months or more in duration was discussed in detail. Visits of a shorter duration were generally discussed as 'episodes' of business travel or as short-term assignments. Details of individual trips were not entered on the career profile since they were too numerous, and recent trips were encompassed in detail in the real-time study. For each 'episode', characteristics of travel were recorded, such as destinations, average duration, longest and shortest trips and frequency of travel. Career profiles were thus divided into sections of different types of mobility, dated chronologically. For each six-month or business travel 'episode' details of family-organisation-career interactions were recorded, such as whether or not work required separation from family, whether promotion was involved, and the extent of company support for moves.

a) Recording of symptoms and events
Criteria for selection of measurement devices was established in Chapter 3. The devices selected are described in Appendix IV.

In order to generate comparable results, symptom and MEI checklists had to be completed by all mobile employees (groups A, B and C). This exercise had to be carried out after the three-month survey period. The simultaneous recording of both symptoms and the occurrence of potentially stressful (MEI) events allowed an association to be derived between mobility and short-term stress outcome. However, it was also possible to place checklists within diaries. Thus, in addition, individuals in groups A and C recorded symptoms and events on the pages of their diaries. The frequency of symptom onset and the temporal relationship between event occurrence and stress onset could be investigated. The real-time recording also allowed production of 'stress load' scores relevant to individual periods of mobility or immobility (Chapter 10). The noting of symptoms on diary pages also facilitated the recall by respondents of their frequency of occurrence on presentation of the symptom checklist (Gurin Index, Gurin et al., 1960; Cooper, 1981) at the end of the survey period. Table 5.2 provides an indication of the survey design and logistics of fieldwork.

Diary recording of mobility events and symptoms was by simple numerical or letter codes inserted on relevant dates of occurrence. This approach was adopted to minimise the time penalty of diary use, and also to avoid non-response through embarrassment attached to writing out certain events or symptoms in full. Fukui (1987) sought to elicit the recording in diaries of the emotional and psychological problems experienced by a sample of expatriate Japanese living in the U.S.
He obtained records of physical problems but no emotional ones. Fukui attributed the absence of emotional or mental symptoms to the conscious or unconscious resistance on the part of the Japanese to recognise such problems and the increased somatisation of psychiatric or emotional disorders. He also presented the SRRS after the diary survey period to locate the incidence of potentially stressful events prior to and during the survey period. The use of diaries in the present study, which contained their own checklists for use real-time, was intended to avoid some of this bias and encourage response. How well these methods worked is assessed in Chapter 10.

Table 5.2: Survey design and logistics

<table>
<thead>
<tr>
<th>GROUP A</th>
<th>GROUP B</th>
<th>GROUP C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overseas secondees to the U.K.</td>
<td>Secondees returned to the U.K.</td>
<td>Business travellers</td>
</tr>
<tr>
<td>COMPANY A</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>COMPANY B</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>COMPANY C</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>COMPANY D</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>COMPANY E</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>TOTAL</td>
<td>20</td>
<td>20</td>
</tr>
</tbody>
</table>

First Interview, May 1990-Aug 1990
- Yes
- Yes
- Yes

Second Interview, Aug 1990-Dec 1990
- Yes
- No
- Yes

Complete Diary
- Yes
- No
- Yes

MEI ticksheet
- In diary
- Yes
- In diary

Gurin Index ticksheet
- Yes
- Yes
- Yes

Intended figures. Response rates are presented in section 5.7

b) Logistics

Fieldwork strategy was devised with a view to maximisation of sample size within available resources, to maintain survey validity. To this end, 60 employees were to be approached for interview. These were to comprise 12 individuals from each of five MNCs. Each company sample was further subdivided into the three mobility groups A, B and C, according to current mobility category (Table 5.1). Given the exploratory nature of the survey, this was the minimum from which quantitative results could be subdivided with any meaning, whilst being close to the maximum upon which survey logistics and resources would permit an in-depth approach.
Where employees from each group were willing, their spouses were also interviewed, on a one-to-one basis. A similar interview schedule was used, but the symptom checklist and MEI were omitted\textsuperscript{2}. An account of the spouse sample and interview process is presented in Chapter 9. Survey methods were adopted and a fieldwork strategy and timetable devised which follow from the methodology derived from thesis objectives. A summary of the pilot and principal survey structure and timetable appears in Appendix VII. A key role in determining the use of diary, checklist and in-depth interview formats - and changes in data collection methods as a result of pilot work - was contributed by the available methods of analysis appropriate to the study. These are reviewed in the following section.

5.6 Methods of analysis

5.6.1 Analytical approach

Methods of analysis emulated the principles of the survey design. The first approach required a quantitative appreciation of the events profile over the three-month survey period. The events profile - the experience of a series of life and mobility events - was taken to be an independent variable, an outcome of the demands of career, family and organisation. Interaction was seen to produce a particular life and mobility event profile which 'acted' on the individual. The outcome - specifically the stress reaction - was the dependent variable. The quantitative expression of the events profile was an MEI score. This was generated by summing values corresponding to MEI events experienced, supplemented by scores for items in the SRRS (Chapter 6, Table 6.1, Holmes and Rahe, 1967)\textsuperscript{3}.

The stress outcome was measured using the psychosomatic symptom scoring appropriate to the Gurin Index, combined with qualitative appraisal of individuals' response to events. Open-ended interview questions and diary responses allowed consideration of the importance of recurring events and coping strategies, as well as specific events occurring during the three-month survey.

\textsuperscript{2} The MEI was developed to be applicable to the experiences of mobile employees. It was therefore inappropriate to issue the device to spouses.

\textsuperscript{3} The simplification necessary to adopt this approach was that the MEI score existed as an entity separate from the individual and could act upon another incumbent. Without this assumption of the 'interchangeability' of experience, the study could do little to address the basic question of the inherent stress associated with different mobility strategies as distinct from that associated with different individuals' temperaments and levels of experience. To do so would create a sample-sized number of case studies of little comparative value in the assessment of mobility. As organisational roles do have fixed job descriptions and fixed mobility demands, this was, in most cases, a justified simplification. An omission of this approach was that individuals can act to change their events profile as, by definition, they were interactive with its principal determinants. The problems created by such simplification were recognised. The qualitative appraisal of individuals' interactions was undertaken to compensate any arising over-generalisation. Experiential variables were also taken into account in analysis of the relationship between the dependent and independent variables. Action to change circumstances could arise as a result of stress outcome, creating negative feedback on the 'independent' variable. To maintain the independence of this variable, another assumption was necessary: that feedback was a prior given. Each individual's events profile was thus to be taken as an empirically-observed example of a mobile lifestyle producing a particular stress outcome.
period. This approach enabled the identification of areas of inter-individual variation and consensus, contemporaneously and over the duration of careers.

Symptom counts record one particular type of stress outcome active at one particular time. The manifestations of life events, conflicts and role strains are not expressed solely in short-term symptom outcomes, however. Individuals actively respond to changes to reduce their impact. These outcomes - the commonly conceived 'reactions to stress' (anger, distress, withdrawal) are much more likely to come forward in depth interviews.

Employees and spouses were encouraged in interviews to discuss their experiences beyond factual responses to questions. Lengthy transcripts were generated, within which were complex expressions of the meaning the experienced mobility events held for people. The emotional response to moves, whilst highly relevant to an understanding of threat and potential stress, could not be quantified or relatively scaled in any distinct way. The terms used by individuals were unlikely to correspond coherently with academically-established etiologies of stress. It was thus necessary to undertake qualitative analysis of interview transcripts. This was deemed the best means with which to identify the specific concerns, strains, conflicts and repercussions of different stages of the mobility experience. A description of how this was undertaken is presented in Chapter 8.

By nature of their skills and background, individuals interviewed would be verbally articulate. They were likely to draw on a whole host of experiences, images and analogies to illustrate perceptions of the secondment experience. This choice of vocabulary could be analysed for further understanding of how events were perceived. Comprehensive reference to individual interview transcripts is thus made in Chapters 8 and 9. It is important to emphasise the limitations of qualitative analysis. It has a clear role to play in outlining the mechanisms by which mobility events contribute to conflict. It can only identify cause and effect at the individual level, however. Evaluation to inform policy necessitates generalisation, albeit by category, and the most practical methods available for the purpose remain 'objective' event and health monitoring. Qualitative analysis was thus used in an indicative, not an explanatory role. In addition, the validity of its indicative role could not extend beyond the remit of the questions asked. Interviews were conducted to ascertain the affect of mobility on individuals. Therefore, the results were unlikely to reflect the influence of other activities on individuals. Any identified effect of changing career and of organisational interests on the household would nearly always be that manifested through mobility. There may have been other more direct routes of influence in the interaction of career, organisation and family, but these could be little more than inferred. The process of qualitative evaluation is outlined in Chapter 8.
5.6.2 Double checking and validity

The survey monitored the accumulation of events and symptoms. The nature of these variables dictated that no equivalent null measure (equal to no stress, or no events) could be interpreted or recorded, just variations in frequency. Respondents were asked in interview to assess their satisfaction with their mobility, and this is used as a control measure in chapter 10. A negative relationship between stress and satisfaction is anticipated. Whilst some studies have taken satisfaction to be the converse of stress (Torbjörn, 1982; Baglioni, 1989), there can be no opposite to the stress reaction, only its minimisation (Chapter 3). There was a danger that conscientiousness would create a situation whereby stress and events would exhibit association purely by virtue of willingness to participate. Every effort was thus made, through the use of cross-checking, to ensure that individuals believed their responses to be full and accurate, at the time of tick-sheet completion and during diary review in the second interview. During this interview, event verification was to depend on reliable recall of quite memorable 'objective' events, often recorded elsewhere (in personal or business diaries). Efforts were thus made to ensure accounts were consistent. In the main, analysis of results (Chapter 10) took symptom event scores as means, such that the effect of variations in conscientiousness was balanced out. In addition, although the recall of symptoms and all events was at risk of association by default, the study sought to establish the relationship between different types of mobility - rather than just mobility per se - and stress. The validity of the survey would thus not be affected by conscientiousness, provided this occurred randomly and consistently across both events and symptoms. Variation in stress and mobility experience between mobility groups A (foreign secondees) and C (business travellers) and group B (returned U.K. secondees) due to extraneous variables - such as recall ability - was a further concern. Whilst groups A and C would be made aware of symptoms through diary notation, group B would be presented with the symptom list 'blind' to refer to a period many months or even years before, albeit a memorable one (the first three months of their recent overseas assignment). A control was thus devised which would indicate whether recall and subsequent score were significantly affected by the passage of time, and whether this produced false indications of stress outcome. This used, as a measure of recall ability/conscientiousness, the number of events recorded (as against their score). For control tests, the association of MEI scores with i) symptom scores, and ii) satisfaction ratings, were compared with associations of event frequency with i) and ii). The second set of correlations were anticipated to be lower.

The analytical methods chosen thus directly follow from the survey. Events profiling and outcome monitoring should enable a temporal analysis of cause and effect in the relationship between mobility and stress. Methods of analysis have been devised within a comparative structure that should enable the benefits of alternative approaches to be identified. Such a system has its own
built-in cross-checks, but other means of ensuring survey validity have also been devised and incorporated.

5.7 Response and sample characteristics
The objectives for fieldwork (section 5.4) sought 20 individuals from each of the three mobility groups A, B and C. Company personnel departments identified some 52 individuals in total, a shortfall occurring due to the non-availability of recently returned secondees in two companies (C and E). All 52 participated in the initial interview. All requests to complete checklists made at this time (to group B) were successful. Three individuals were subsequently lost to the study through non-completion of diaries, two were seconded during the course of the survey and contact was lost. No data from these five individuals was used for analysis. Two who left the country during the course of the survey were contactable, diaries were returned and surrogates for final interviews conducted (one by telephone, the other by mail using a questionnaire based on the second interview schedule, with open-ended questions). Another two individuals’ diaries were lost in the post and one individual was unable to complete the diary - 'time pressures' being the reason given. The diaries of these three individuals had to be retrospectively reconstructed in the second interview. Thus 42 employees successfully completed all aspects of the survey required of them and are included in all relevant analysis. Data from the five 'diary failures' - but with whom contact was maintained - were included in some (non-diary) aspects of analysis. The 47 individuals whose experiences contributed to results are presented by mobility group in Table 5.3.

<table>
<thead>
<tr>
<th>COMPANY</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>a</td>
<td>b</td>
<td>c</td>
<td>a</td>
<td>b</td>
</tr>
<tr>
<td>Overseas Secondees to the U.K. (group A)</td>
<td>6</td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Secondees returned to the U.K. (group B)</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Business Travellers (group C)</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>2</td>
</tr>
</tbody>
</table>

The sample mobility groups in each cell (surrounded by a single line) are exclusive, but the number is presented in three ways: column a gives the number of employees originally approached, column b presents the number completing all aspects of the survey and column c, the number of 'usable' responses obtained for non-diary analyses.
5.7.1 Experience of secondments

A secondment was defined as a period of employment, of duration six months or more, based outside the employee's original country of employment. The sample as a whole was highly experienced in the secondment process. All but two members of the sample (N=47) had experienced at least one secondment; the maximum number was six, and the average 1.8. One sample member had spent over 13 years out of the country on secondment, five had spent over a quarter of their lives working overseas for their company. The mean total time spent out of the country was 4.3 years, though average secondment length was 2.4 years (range: six months to nine years).

Surprisingly, it was group C, the business travellers, who had had most experience of secondments, having been seconded overseas 2.3 times on average. British secondees (group B) had been overseas a mean of 1.7 times whilst for their overseas counterparts (group A), the mean was 1.4. The mean total length of time spent away from home was 5.0 years for British secondees (11.7% of their lives), similar to the 5.3 years for business travellers (12.6% of their lives). Overseas secondees had spent a mean of 3.4 years out of their home country (9.2% of their lives).

Twenty-seven employees (57% of the sample) had experienced at least one internal relocation, 5 (11%) had experienced five or more. Only one individual had experienced neither an international secondment nor an internal relocation.

The high level of experience amongst the sample was significant in two respects. Firstly, a high level of experience adds validity to the research findings. Not only is the sample population of secondees greater than might have been expected, but the population of secondments to analyse is greater too. Secondly, this abundant experience shows the high level of emphasis placed on secondments by companies. All but two of those selected for the sample had already been seconded overseas. These two were business travellers in group C. Groups A and B, by definition, comprised current or ex-secondees.

5.7.2 Experience of travel

International business travel is a less well-defined process than secondment. The secondment definition above puts an upper limit on business visit duration of six months. There can be no lower limit on duration, provided some employment-related function takes place overseas. The

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4 Six months is an arbitrary cut-off point for defining the length of secondments. It is based on the experiences of the present sample (none of whom had experienced visits between three and six months in the five years prior to interview). Trips of under six weeks in duration are termed 'business visits', and secondments are those of six months or more, based on the typology developed in Chapter 4.
shortest visit by a member of the sample, to a meeting in North West Europe and back, was six hours long from U.K. departure to return. The qualitative difference between a six hour and a six month trip is acknowledged, as is the inadequacy of grouping the two together in one category. This is offset only by the absence amongst the sample of visits of more than three weeks in duration, matching temporal patterns observed at a national level in Chapter 4. An additional problem is posed by the definition of a business traveller. The methodological challenge is one of reconciling frequency with duration of trip. The hypothetical 'six month business visitor' cannot make more than two trips per year, whilst an employee making two six hour visits to Europe per year would fail most definitions of business traveller. Thus in the analysis of stress associated with different components of business travel in Chapter 10 (section 10.4.2), definitions of travel intensity were derived from the diary records. Categorisations were based on the trips logged in diaries by all those issued with diaries (overseas secondees to the U.K. and business travellers). Five groups were derived from observed clusters on the travel intensity scattergram (Fig. 5.2). These respondents fell into five distinct groups: those who did not travel; those who were overseas for less than 5% of their time; those who were overseas for more than 25% of their time; those who made six to eight long trips (over 5 days) each year; and those who made between 24 and 40 shorter trips. There were seven non-travelling diary completers in the sample who were nonetheless undergoing a mobility experience - having relocated to a new location. This 'non-traveller' group also contained two managers chosen for the business travel (group C) sample who did not actually travel during the three-month period. International tension surrounding the invasion of Kuwait combined with the approach of a recession to reduce the travel opportunities of many who had been highly mobile prior to the study period.

Thus the sample more than matched requirements established above for an experienced group of frequent and regular travellers and secondees. Business travel was logged over the three-month study period by over half the sample and all but two had experienced secondments. The non-response rate must be regarded as tolerable for a study of this nature. 52 (87%) of the target sample of 60 were actually approached, and of these 47 supplied usable survey returns. Given the rigorous survey demands the 10% drop-out rate must be regarded as low. As the survey could only aspire to include those who participated and not encompass a representative sample, the effect on results of non-response must be regarded as limited and certainly minimal in comparison to prior filtering of respondents by personnel departments (Chapter 8). It must be recognised that this was an exploratory study which prioritised familiarisation with the experiences of mobile people over increased sample size. The small sample size and adaptation of survey techniques required for 'diary failures' must thus be appreciated in the results and analysis presented in Chapter 10.
5.8 Conclusion

Much scepticism has surrounded measurement of both stress and mobility in previous research. Techniques for the development of empirical study are not readily available since both are usually treated as dependent variables. The approach adopted here was thus cautious, drawing on established geographic and psychological theory where appropriate. A need was identified for a broad-based approach incorporating psychometric, quantitative and qualitative techniques. Simplifications necessary for quantitative analysis have been compensated for by qualitative analysis of the life experiences of sample members. Cross-checks have been incorporated into the survey design. The comparative nature of this survey has required the development of new survey instruments such as diaries and the MEI. The latter is developed in the following chapter. The results from qualitative evaluation of interviews with employees are presented in Chapter 8, and with spouses in Chapter 9. The results from quantitative evaluation of the diary study, mobility events and stress are presented in Chapter 10.
Chapter 6: Mobility events inventory

6.1 Introduction
Discussion in previous chapters has pointed to the need to establish a device whereby the stressful events associated with mobility could be identified and their intensity scaled. Chapter 2 established that a number of events occur as part of a mobile lifestyle where the aspirations and responsibilities individuals have towards different aspects of their lives (family, career and organisation) conflict. Chapter 3 recognised these conflicts as changes and potential threats to the stability of individuals' lives and therefore encompassed within a pathology of stress where readjustment to changes in life engenders a stress reaction. Exploration of this relationship by previous researchers revealed much anecdotal and restricted evidence as to the levels of stress generated by different mobility events. There has, however, been no systematic way of comparing the experience of different mobility events with regard to their ability to generate stress. Chapter 5 outlined a survey methodology which encompassed 'events profiling' as a means of establishing the independent variable in the mobility-stress equation. The establishment of a list of objective mobility events - which could be recognised and recorded by participants and observers and scaled according to their potential ability to generate stress - was thus essential for the study to proceed. Such a scale would also have a role beyond the present study where it enabled organisations to prioritise mobility problems that occur and select appropriate preventative and remedy measures accordingly.

In order to provide a quantitative scale for potentially stressful events constituted in a mobile lifestyle, a Mobility Events Inventory (MEI) was created. The inventory contains a list of the discrete and independent events that represent the changes in lifestyle encountered due to mobility in the daily life of international business travellers and secondees. The MEI enables a ranking of events occurring across different mobility lifestyles. More importantly, it produces a measure of the intensity of events through a stress or readjustment rating scale. The end result is a scale which can be used both as a descriptive and as a predictive device.

This chapter briefly reviews the history of life events research and the previous use of events inventories in stress research. The needs of the present study are addressed alongside lessons learnt from previous work and a methodology for a survey to enable the creation of a MEI established. The success of the survey and the validity of the resulting inventory are then assessed prior to a preview of applications of the MEI, both for the purposes of the present study and potentially to those beyond.
6.2 Life events research

Events inventories have been created before (Holmes and Rahe, 1967; Brown, 1974; Paykel 1974), but not specifically to analyse the events connected with geographic mobility. Their creation is a result of the association of two lines of research in psychology: psychopathology and psychometrics. Their use both as descriptive devices, monitoring the cumulative stress effect of different events on an individual or population, and as predictive devices, to forecast the future incidence of stress-related disorders, encompasses the concepts of Pavlov, Freud, Cannon, Meyer and Skinner. Specifically, the concepts are embraced in two theories, that of Selye's General Adaptation Syndrome (GAS) and Steven's Psychophysics.

As discussed in Chapter 3, stress results from the over-application or the misapplication of Selye's G.A.S (1976, 1956). The body prepares itself for potentially threatening events and subsequent action by hormonal stimulation of energy metabolite release ready for immediate respiratory uptake. When the event does not require a physical response, these metabolites are in excess and deposit in blood vessels and tissues where they can be responsible for later degenerative diseases (Chapter 3). The hormone imbalance can also precipitate mental health problems.

There has been much recent speculation (Brown, 1989) on the role of the type of event on the illness outcome (whether physical or emotional) of the stress reaction. The preceding stress reaction however, whichever outcome it precipitates, is generally sensitive to the magnitude, or significance, of the event. Magnitude, or significance, is not easily defined but is determined by the extent of the threat. In this way events can be seen to produce stress to a greater or lesser extent dependent on the gravity or duration of the event (Chapter 3).

What causes a threat to bring on the GAS is the need to adapt and adjust to changing circumstances. Thus it is the potential requirement for readjustment associated with an event that determines its stress load on an individual. The greater the need to readjust, the greater the stress. Inherent in this definition of stress is the fact that the desirability of the event is a factor only where it determines the extent of perceived threat\(^1\). In principle positive events posing a threat to, and requiring a change in, current behaviour, such as marriage or promotion, will cause stress in the same way as undesirable ones, such as bereavement or demotion. Magnitude is determined by the scale of readjustment required for each individual.

\(^1\) Some researchers have doubted Selye's thesis and ventured that it is only readjustment to negative life events that causes stress typified by mental illness outcomes. 'Undesirable' life event scales have thus been developed. While the value of these scales is not doubted, determining the specific ill-health outcome was not a goal of this study. It was assumed that readjustment to undesired events is of a greater magnitude or duration and the qualities attributed to negative life events arise from this rather than strictly defined desirability (which requires a normative assumption of what is desirable, or rating only at the individual level).
Steven's work established psychophysics - the study of individual's psychological perception of the quality, quantity, magnitude and intensity of physical phenomena (Stevens, and Galanter, 1957). Holmes and Rahe assumed that the innate ability of humans to rate physical experiences could be applied to rating their own social experiences and the experiences of those around them. Their later work involved the production of an inventory, termed the Social Readjustment Rating Scale (SRRS) which justified this assumption (Holmes and Rahe, 1967).

a) Development of the Social Readjustment Rating Scale
The production of the SRRS by Holmes and Rahe was dependent on harnessing the innate rating ability of individuals to quantify life events according to the amount of readjustment they require. Respondents were given a randomly assorted list of life events which they were required to rate against each other. One event, 'marriage', was to be used as the reference item, having been assigned an arbitrary value of 500. Arithmetic means of their responses were presented in a scale of the type seen in Table 6.1 (for convenience, the final scores were the means divided by ten).

The SRRS has an immediate descriptive value. It says that, on average, marriage is twice as stressful as a major change in living conditions, but only half as stressful as the death of one's spouse. Holmes and Rahe went further by collecting records of the quality and quantity of life events observed to cluster prior to disease onset for 5000 individuals. They were then able to observe how the scores assigned to life events in the inventory rating exercise corresponded to the probability of disease onset. Thus the inventory adopted a predictive value. Scores for events monitored over a period of twelve months could be cumulated to provide a prognosis for stress-induced health breakdown. A score of 150 to 300 points implies about a 50 per cent chance of a major health breakdown in the next two years. A score above 300 raises the odds to about 80 per cent.

b) Use of the SRRS
The device has since found its way into many studies of stress (reviewed by Holmes and David, 1984) where its strengths and weaknesses have been confirmed. It is crude when used for prediction at an individual level. Major health breakdown is never clearly defined, and interpreting whether or not certain events have occurred is often difficult. At a sample population level, however, it has proved a useful descriptive tool. Different groups such as Japanese and American have been compared for the frequency and quality of stressful events they encounter (Masuda and Holmes, 1967). Historical work is also possible since wherever a good biographic record of an individual's life exists (as in a diary) events and illness can be identified, such as in a study of the lives of classical composers (Simonton, 1977).
Table 6.1: The Social Readjustment Rating Scale (SRRS)

Instructions: Check off each of the events that has happened to you during the previous year. Total the associated points. A score of 150 or less means a relatively low amount of life change and a low susceptibility to stress-induced health breakdown. A score of 150 to 300 points implies about a 50% chance of a major health breakdown in the next two years. A score above 300 raises the odds to about 80%, according to the Holmes-Rahe statistical prediction model. (Source: Holmes and Rahe, 1967).

<table>
<thead>
<tr>
<th>LIFE EVENT</th>
<th>MEAN VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Death of spouse</td>
<td>100</td>
</tr>
<tr>
<td>2. Divorce</td>
<td>73</td>
</tr>
<tr>
<td>3. Marital separation from mate</td>
<td>65</td>
</tr>
<tr>
<td>4. Detention in jail or other institution</td>
<td>63</td>
</tr>
<tr>
<td>5. Death of a close family member</td>
<td>63</td>
</tr>
<tr>
<td>6. Major personal injury or illness</td>
<td>53</td>
</tr>
<tr>
<td>7. Marriage</td>
<td>50</td>
</tr>
<tr>
<td>8. Being fired at work</td>
<td>47</td>
</tr>
<tr>
<td>9. Marital reconciliation with mate</td>
<td>45</td>
</tr>
<tr>
<td>10. Retirement from work</td>
<td>45</td>
</tr>
<tr>
<td>11. Major change in the health or behaviour of a family member</td>
<td>44</td>
</tr>
<tr>
<td>12. Pregnancy</td>
<td>40</td>
</tr>
<tr>
<td>13. Sexual difficulties</td>
<td>39</td>
</tr>
<tr>
<td>14. Gaining a new family member (e.g., through birth, adoption, older child moving in, etc.)</td>
<td>39</td>
</tr>
<tr>
<td>15. Major business readjustment (e.g., merger, reorganisation, bankruptcy, etc.)</td>
<td>39</td>
</tr>
<tr>
<td>16. Major change in financial state (e.g., a lot worse off or a lot better off than usual)</td>
<td>38</td>
</tr>
<tr>
<td>17. Death of a close friend</td>
<td>37</td>
</tr>
<tr>
<td>18. Changing to a different line of work</td>
<td>36</td>
</tr>
<tr>
<td>19. Major change in the number of arguments with spouse (e.g., either a lot more or a lot less than usual regarding child-rearing, personal habits, etc.)</td>
<td>35</td>
</tr>
<tr>
<td>20. Taking on a mortgage greater than £10,000 (e.g., purchasing a home, business, etc.)</td>
<td>31</td>
</tr>
<tr>
<td>21. Foreclosure on a mortgage or loan</td>
<td>30</td>
</tr>
<tr>
<td>22. Major change in responsibilities at work (e.g., promotion, demotion, lateral transfer)</td>
<td>29</td>
</tr>
<tr>
<td>23. Son or daughter leaving home (e.g., marriage, attending college, etc.)</td>
<td>29</td>
</tr>
<tr>
<td>24. In-law troubles</td>
<td>29</td>
</tr>
<tr>
<td>25. Outstanding personal achievement</td>
<td>28</td>
</tr>
<tr>
<td>26. Wife beginning or ceasing work outside the home</td>
<td>26</td>
</tr>
<tr>
<td>27. Beginning or ceasing formal schooling</td>
<td>26</td>
</tr>
<tr>
<td>28. Major change in living conditions (e.g., building a new home, remodelling, deterioration of home or neighbourhood)</td>
<td>25</td>
</tr>
<tr>
<td>29. Revision of personal habits (dress, manners, associations, etc.)</td>
<td>24</td>
</tr>
<tr>
<td>30. Troubles with the boss</td>
<td>23</td>
</tr>
<tr>
<td>31. Major change in working hours or conditions</td>
<td>20</td>
</tr>
<tr>
<td>32. Change in residence</td>
<td>20</td>
</tr>
<tr>
<td>33. Changing to a new school</td>
<td>20</td>
</tr>
<tr>
<td>34. Major change in the usual type and/or amount of recreation</td>
<td>19</td>
</tr>
<tr>
<td>35. Major change in church activities (e.g., a lot more or less than usual)</td>
<td>19</td>
</tr>
<tr>
<td>36. Major change in social activities (e.g., clubs, dancing, movies, visiting, etc.)</td>
<td>18</td>
</tr>
<tr>
<td>37. Taking on a mortgage or loan less than £10,000 (e.g., purchasing a car, TV, freezer, etc.)</td>
<td>17</td>
</tr>
<tr>
<td>38. Major change in sleeping habits (a lot more or a lot less sleep, or change in part of day when asleep)</td>
<td>16</td>
</tr>
<tr>
<td>39. Major change in number of family get-togethers (e.g., a lot more or a lot less than usual)</td>
<td>15</td>
</tr>
<tr>
<td>40. Major change in eating habits (a lot more or a lot less food intake, or very different meal hours or surroundings)</td>
<td>15</td>
</tr>
<tr>
<td>41. Vacation</td>
<td>13</td>
</tr>
<tr>
<td>42. Christmas</td>
<td>12</td>
</tr>
<tr>
<td>43. Minor violations of the law (e.g., traffic tickets, jaywalking, disturbing the peace, etc.)</td>
<td>11</td>
</tr>
</tbody>
</table>
There are two major problems with using the SRRS to examine specific populations. The first is that to keep the inventory length manageable, Holmes and Rahe assigned event categories that were broad, encompassing a well recognized sequence of events, such as ‘change in residence’ or ‘pregnancy’, or lacked temporal specificity, such as ‘troubles with the boss’ and ‘sexual difficulties’. In addition, many minor events were omitted, of little consequence in themselves but which, where frequent, could cumulate to significance. The second problem is its universality. The SRRS rating sample was effectively a random one representative of the U.S. population in the mid-1960s. The significance attached to many of the events, and hence the readjustment they precipitate, may vary with different groups or at different times.

Cosmetic alterations to the SRRS, such as to the relevant amount/currency of mortgage debt in items 20 and 37 (Table 6.1), have been made over time. However, varying levels of experience of events and of their requirement for change in lifestyle are acknowledged. Differences of ethnicity, gender, income, religion and age contributed to discrepancies in scoring for Holmes and Rahe. Mexicans rated ‘marriage’ as the most stressful life event; taking on a high value mortgage required as much readjustment as ‘death of spouse’. Black Americans rated ‘death of spouse’ and of family members first and second, placing mortgage acquisition in third place.

With the GAS as defined above, frequent and prior experience will minimize the application of the stress reaction. It is thus clear that specific groups who experience a set of events frequently will rate their requirement for readjustment at a very different level to that of a random sample of the general population. Further criticism has since been made of the life events technique and the ability of the rating sample to predict adequately and quantify human experience (Brown, 1989). Concerns have centred on whether an inexperienced sample has the ability to rate the experiences of others and on the inferred predictive value of their ratings for stress outcome in others. Holmes and Rahe (1967) were indeed testing such hypotheses in their pioneering life events work. Whilst they found their assumptions to be empirically valid, such criticisms need to be taken on board before similar techniques can be used for the present study.

It is argued here that lack of experience does not invalidate perception of a threat. The study brief was to examine the effect of changes on individuals at the aggregate or policy level. It was not appropriate to eliminate respondents, who may in future be affected by such policies, on grounds of existing experience. This was not to overlook the high levels of appropriate

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2 The event category ‘sexual difficulties’ can also be criticised for its ambiguous nature as both a potential cause and a potential outcome of stress, similar criticisms can be made of ‘divorce’, ‘change in residence’ or ‘major illness’.

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personal experience found across the survey sample used. It is recognised, however, that the life events approach cannot be used to indicate the actual stress on individuals caused by events, but rather, the change represented by those events and hence potential to generate stress across the population of mobile employees.

6.3 MEI methodology
This thesis seeks to compare the effect of two different mobility regimes (business travel and relocation, Chapter 5). It was therefore desirable, in monitoring potentially stressful mobility events, to obtain a similar descriptive value to the SRRS without losing the general level predictive relevance of the inventory. Applying the SRRS directly might not only overestimate readjustment levels for the experienced mover, but also omit many of the stressful but minor events that occur in a mobile lifestyle. A new inventory was therefore necessary.

The study needed to be able to assess and compare quantitatively the stress generated by the conflicts hypothesised in Chapter 2. The rationale behind developing a Mobility Events Inventory (MEI) was to be able to introduce a new series of events specifically encountered by mobile people (with clear time specificity where required). Empirical validation of the outcome of MEI scores (possible for Holmes and Rahe with their SRRS) was beyond the scope of the present study. There was thus a need to maintain comparability with SRRS outcome scores. Therefore the MEI needed to be scored in much the same way as the SRRS, but by the specific population group to whom the scale applied. It was essential that the scoring was carried out by a sample of people who had regular experience of events associated with mobility and would score them accordingly. The MEI would thus have an enlarged descriptive and comparative value for these groups albeit at the loss of universal applicability.

In order for some predictive value to be maintained in the MEI, but without access to detailed medical records, it was necessary to adopt parallel scaling to the SRRS. For this purpose, a list of new mobility events to be scored was interspersed with seven of the original Holmes-Rahe events. One of these - 'major change in responsibilities at work' - was used as the principal reference item against which other items were scored.

The scores assigned by the mobile sample to the six original items, other than 'change in responsibilities at work' helped formulate the MEI in two ways. Firstly, the scores indicated how disparate this group was from a general population sample, as used by Holmes and Rahe. Secondly, dependent on satisfactory concordance, as used by Holmes and Rahe. Secondly, dependent on satisfactory concordance, they acted as additional reference items, allowing MEI scores to be inserted into appropriate positions on the SRRS. New MEI items were developed according to original Holmes-Rahe criteria for their rating scale. Items
had to be unique, that is, mutually exclusive and independent, and lie in one of the two original categories for items, either indicative of the 'life style of the individual' or of 'occurrences involving the individual'. Events were devised by the researcher following discussions with three sources: i) personnel managers at eight international companies, ii) a pilot survey of a sample of convenience (staff at the Department of Geography, UCL), and iii) seven pilot interviews with mobile employees of an international MNC. Events were modified and amended further after discussions with academic and industry experts in the field.

The MEI items chosen represent the events occurring in the lives of the mobile that could create conflicts in their responsibilities and aspirations towards different aspects of their lives. The term 'event' is used throughout although it is recognised that a number of items imply chronic or role strain (such as separation and working in a different culture), rather than discrete occurrences. Nonetheless, strains require readjustment. A number of events were minor (such as air journeys) or likely to be minor but persistent stressors (such as working where alcohol is forbidden). Encouragement for the inclusion of such items was taken from Chamberlain and Zika’s recent work on minor events (Chamberlain and Zika, 1990). Table 6.2 lists the items selected for the MEI along with relevant SRRS items under the headings of family-organisation, career-organisation and career-family conflict. The position of items in the table does not imply that they will always create conflicts in that area of an individual’s life but that they have the potential to do so. In effect, some items have the potential to cause conflict in more than one area of an individual’s life and the occurrence of these items under more than one heading reflects this. The term ‘career’ is used here in its more broad sense, that of individuals’ perceived responsibilities and aspirations towards themselves and their own personal development, rather than in its more strict definition of organisational advancement.

6.4 MEI survey

The survey to rate mobility events was carried out in association with the Employee Relocation Council (ERC) at the Confederation of British Industry. A sample of mobile managers from over fifty different international companies (members of the ERC) was contacted. The questionnaire and covering letter appear in Appendix VIII. 209 replies were received, 206 of which were used to scale the inventory. This was 57 more than the minimum sample requirement based on the variance in pilot work. The questionnaire logistics and

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3 Careful consideration was given to whether events and SRRS reference items should be rotated using a split-half method to minimise direct or indirect response bias in questionnaires. Three factors acted to discourage rotation: i) the timetable and logistics of questionnaire production, ii) the nature of a rating questionnaire whereby each item is checked back against a principal reference item rather than its neighbour, and iii) the ultimate survey need to have an MEI scale that was at least internally consistent for purposes of analysis, even if SRRS comparison was lost. The high level of correspondence between MEI survey results and SRRS values allayed fears of resultant bias.
methodology of analysis are presented in Appendix IX. The MEI items with the arithmetic and geometric means of the responses are given in Table 6.3. The geometric mean is included due to the skewed (logarithmic) distribution of the non-interval data collected.

Table 6.2: Mobility events by area of potential conflict

<table>
<thead>
<tr>
<th>ORGANISATION - FAMILY CONFLICT</th>
<th>ORGANISATION - CAREER CONFLICT</th>
<th>CAREER-FAMILY CONFLICT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobility Events Inventory</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Living or working where hostile or threatening.</td>
<td>Living and working out of hotels.</td>
<td>Spouse no longer able to pursue career.</td>
</tr>
<tr>
<td>Living or working where appearance distinguishes you from natives.</td>
<td>Work in culture where climate is different.</td>
<td>Separation from spouse.</td>
</tr>
<tr>
<td>Separation from spouse.</td>
<td>Work in culture where customs are unfamiliar.</td>
<td>Separation from children.</td>
</tr>
<tr>
<td>Separation from children.</td>
<td>Work in culture where language is unfamiliar.</td>
<td>Finding new education.</td>
</tr>
<tr>
<td>Finding new education.</td>
<td>Work in country where alcohol is forbidden.</td>
<td>Spouse unable to work.</td>
</tr>
<tr>
<td>Spouse unable to work.</td>
<td>Work in country where transport inefficient.</td>
<td>Return to home.</td>
</tr>
<tr>
<td>Return to home.</td>
<td>Loss of communication with HQ/colleagues.</td>
<td></td>
</tr>
<tr>
<td>Holmes-Rahe Social Readjustment Rating Scale</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Major changes in work hours.</td>
<td>Major business readjustment.</td>
<td>Retirement from work.</td>
</tr>
<tr>
<td>Change in residence.</td>
<td>Major change in financial state.</td>
<td>Major change in number of arguments with spouse.</td>
</tr>
<tr>
<td></td>
<td>Changing to a different line of work.</td>
<td>Change in residence.</td>
</tr>
<tr>
<td></td>
<td>Major change in responsibilities at work.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Troubles with the boss.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Being fired.</td>
<td></td>
</tr>
</tbody>
</table>

The scaling exercise was generally successful, high levels of correlation were obtained between sub-groups of the sample (such as single versus married, older versus younger). This implies variation between sub-groups of the sample to be low. Pearson's coefficient of correlation between discrete segments of the sample is shown in Table 6.4. All are above 0.94 with exception of that between males and females which was 0.85.
Table 6.3: Mobility Events Inventory

Arithmetic/geometric means (with standard errors) of response scores

<table>
<thead>
<tr>
<th>SRRS Equivalent Mean Scores (with standard error and 95% confidence limits)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mobility Event</strong></td>
</tr>
<tr>
<td>Living or working where hostile or threatening</td>
</tr>
<tr>
<td>Geographical separation from spouse over 1 month</td>
</tr>
<tr>
<td>Geographical separation from children over 1 month</td>
</tr>
<tr>
<td>Major change in responsibilities at work</td>
</tr>
<tr>
<td>Spouse/partner no longer able to pursue career</td>
</tr>
<tr>
<td>Change in residence - finding accommodation</td>
</tr>
<tr>
<td>Working in culture where language is unfamiliar</td>
</tr>
<tr>
<td>Change in residence - moving self and belongings</td>
</tr>
<tr>
<td>Identifying/arranging suitable education</td>
</tr>
<tr>
<td>Return to home after stay abroad</td>
</tr>
<tr>
<td>Change in residence - disposing of housing in old area</td>
</tr>
<tr>
<td>Spouse/partner unable to work</td>
</tr>
<tr>
<td>Working in culture where customs unfamiliar</td>
</tr>
<tr>
<td>Working in country where transport systems are inefficient</td>
</tr>
<tr>
<td>Working in country where telecommunications are inefficient</td>
</tr>
<tr>
<td>Loss of communication with colleagues/heads office</td>
</tr>
<tr>
<td>Geographical separation from spouse 11 days-1 month</td>
</tr>
<tr>
<td>Geographical separation from children 11 days-1 month</td>
</tr>
<tr>
<td>Living and working out of hotels</td>
</tr>
<tr>
<td>Major change in sleeping habits</td>
</tr>
<tr>
<td>Major change in type/amount of recreation</td>
</tr>
<tr>
<td>Living or working when appearance distinguishes you</td>
</tr>
<tr>
<td>Major change in eating habits</td>
</tr>
<tr>
<td>Working in country where climate is different</td>
</tr>
<tr>
<td>Major change in social activities</td>
</tr>
<tr>
<td>Major change in no. of family get-togethers</td>
</tr>
<tr>
<td>Geographical separation from own culture over 1 month</td>
</tr>
<tr>
<td>Working in culture where alcohol is forbidden</td>
</tr>
<tr>
<td>International air journey long haul</td>
</tr>
<tr>
<td>Geographical separation from children 2-10 days</td>
</tr>
<tr>
<td>Geographical separation from spouse 2-10 days</td>
</tr>
<tr>
<td>Geographical separation from own culture 11 days-1 month</td>
</tr>
<tr>
<td>International air journey short haul</td>
</tr>
</tbody>
</table>
Standard errors of arithmetic means, scaled to Social Readjustment Rating Scale (SRRS) equivalence, ranged from 0.6 to 3.9. The comparable standard errors for Holmes and Rahe were larger, 0.7 to 8.3. These gave 95% confidence limits for the true population means ranging from ±7.8 ('living or working in a hostile environment') to ±1.2 ('separation from own culture for 11-30 days'). Geometric means exhibited more consistent standard errors and, hence, more consistent confidence limits, and were better suited to the logarithmic nature of psychophysical evaluations. Geometric means were thus more reliable at greater levels of magnitude, whilst arithmetic means were more reliable over the lower levels.

Arithmetic means were chosen for use in the MEI rating scale in preference to geometric means, for two reasons. Firstly, the majority of events, having registered at the lower level, present smaller standard errors of the arithmetic mean than of the geometric mean. Secondly, arithmetic means were those adopted by Holmes and Rahe for their SRRS and to be comparable, the MEI had to do the same. Holmes and Rahe had found geometric means unable to improve on the association and prediction of illness onset provided by the arithmetic mean scores.

<table>
<thead>
<tr>
<th>MEI SUB-GROUP</th>
<th>n</th>
<th>MEI SUB-GROUP</th>
<th>n</th>
<th>Pearson’s r</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>184</td>
<td>Female</td>
<td>21</td>
<td>0.845</td>
</tr>
<tr>
<td>Single</td>
<td>52</td>
<td>Married</td>
<td>151</td>
<td>0.955</td>
</tr>
<tr>
<td>Age 39 and under</td>
<td>91</td>
<td>Age 40 and over</td>
<td>115</td>
<td>0.946</td>
</tr>
<tr>
<td>≤1 secondment</td>
<td>118</td>
<td>≥2 secondments</td>
<td>88</td>
<td>0.952</td>
</tr>
<tr>
<td>≤9 years experience</td>
<td>83</td>
<td>≥10 years experience</td>
<td>123</td>
<td>0.957</td>
</tr>
</tbody>
</table>

Scores for the reference items in the MEI are shown in Table 6.5 alongside original SRRS scores, at the SRRS scaling level. Concordance between Holmes and Rahe's general sample scores and MEI respondents scores was good. The scores for 'change in number of family get togethers', 'change in eating habits', 'change in social activities', 'change in recreation', 'change in sleeping habits' correspond between the two samples to within two standard errors of the mean.

A prominent concern is that the MEI total score for the 'change in residence' process is so high. A score of 84.3 would place it second only in importance to 'death of spouse' in the SRRS. However, other rating measures have indicated that moving house is more stressful than the SRRS implies (Brown, 1974). 'Change in residence' is subdivided into three distinct processes
for the purposes of the MEI survey, and is the only reference item that does not correspond well. The subdivision may account for the anomaly. This could indicate that when presented with assessing the moving process in greater detail, 'change in residence' scores more highly. If this is the case, then the event is either overrated when presented as three separate processes in the MEI (total score 84.3) or it is underrated by the general population in the SRRS (score 20.1), who may move less frequently. The discrepancy may be accounted for partly by the number of residence moves that do not involve all three MEI subdivisions. Examples include moving into or out of rented accommodation; moving into ready furnished property; and moves where preparation or costs may be borne by someone other than the respondent. It may have been the case, however, that 'change in residence' was an event where sub-division was inappropriate. The sample may not have been able to adequately consider each of the three event categories in isolation. Readjustment ratings may thus have been high because these categories were treated as surrogates for other, unlisted, changes, or those embraced by other events elsewhere in the list. None of the above would discount the conceivable interpretation that mobile managers, on average, find residential moves more demanding of readjustment than do the general population. Nevertheless, at the risk of erring on the side of caution, in survey analysis the original SRRS value for 'change in residence' was used in Chapter 10.

Table 6.5: Reference item values
MEI Mean Scores for Reference Items (scaled to SRRS values)
SRRS scores for same items

<table>
<thead>
<tr>
<th>MOBILITY EVENT</th>
<th>MEI Mean</th>
<th>St.Error</th>
<th>SRRS Mean</th>
<th>St.Error</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major change in responsibilities at work</td>
<td>(29)</td>
<td></td>
<td>(29)</td>
<td></td>
</tr>
<tr>
<td>Change in residence - finding accommodation</td>
<td>28.6</td>
<td>2.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in residence - moving self and belongings</td>
<td>28.1</td>
<td>1.7</td>
<td>20.1</td>
<td>0.8</td>
</tr>
<tr>
<td>Change in residence - disposing of housing in old</td>
<td>27.6</td>
<td>1.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Major change in sleeping habits</td>
<td>17.6</td>
<td>0.9</td>
<td>15.6</td>
<td>0.7</td>
</tr>
<tr>
<td>Major change in type/amount of recreation</td>
<td>17.0</td>
<td>1.1</td>
<td>18.9</td>
<td>2.6</td>
</tr>
<tr>
<td>Major change in eating habits</td>
<td>15.2</td>
<td>0.7</td>
<td>14.7</td>
<td>0.6</td>
</tr>
<tr>
<td>Major change in social activities</td>
<td>15.1</td>
<td>1.0</td>
<td>17.7</td>
<td>0.7</td>
</tr>
<tr>
<td>Major change in no. of family get-togethers</td>
<td>15.0</td>
<td>0.8</td>
<td>15.1</td>
<td>0.7</td>
</tr>
</tbody>
</table>

By most standard test criteria, the creation of the MEI can be regarded as successful. The scoring of the mobile sample was no less reliable than that obtained by Holmes and Rahe. There was significant agreement between reference item scores from the SRRS and scores obtained for the MEI. Correlation between subgroups of the mobile sample was high. Use of the MEI arithmetic mean scores from the mobile sample of 206 as a measure to rate stressful events occurring to the 47 interviewed mobile individuals involved in the study would seem to be validated.

6.5 Applications
a) The present study
The MEI presented here can be used as a score chart for assessing the mobility strategies.
companies employ. It will be used as such in Chapter 10 to assess the event load (with regard to potential to engender change) of the mobility experiences of the interviewed employee sample. To do this, it was necessary to utilize the statistical prediction model for health breakdown within the general population, created by Holmes and Rahe. Producing a statistical prediction model of proven validity to the mobile population requires calculating the probability of stress related breakdown for individuals whose life and mobility events (taken from the SRRS and MEI) have been recorded and scored over the preceding years. In practice, this would mean the application of the MEI and SRRS against a sample of employees’ health records. As such an exercise was beyond the scope of the present study, only the predictive model by Holmes and Rahe, developed through the monitoring of over 5000 patients, was available.

According to the Holmes-Rahe prediction model, if the total number of points scored by a series of events from the SRRS (Table 6.1) exceed 150 a year, there is a 50% chance of a major health breakdown in the next two years. A score above 300 implies an 80% chance. Points accruing to events contained in both the SRRS and MEI will be applied in tandem in analysis - items such as divorce and bereavement are assumed to add to life stress associated with mobility. Each event can apply more than once: a business travel commitment to nine, unaccompanied, three week duration, long haul trips a year, staying in a hotel, would score more than 300 points and indicate an 80% chance of stress related breakdown within two years.

It must be emphasised that these probabilities are hypothetical. They have not yet been empirically tested. At the individual level, the extent to which events lead to ill health depends on how important the event is at the personal level and whether personal coping strategies have been developed. If, as seems likely, the use of the Holmes-Rahe statistical predictive model results in over-prediction of health breakdown for an experienced mobile sample, this does not invalidate the comparative value of the MEI to assess one mobility strategy against another as it used in Chapter 10.

MEI scores - summed MEI and SRRS values - were calculated for mobility events experienced over a fixed period by the employee sample. These scores are taken as indicative of the intensity of events constituting each sample member’s life style over the period and are tested against perceived stress symptom outcome in Chapter 10. This process should enable a greater

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4 An example would be experiencing the following life events over a 12 month period: divorce, death of a close friend, being fired from work and Christmas. This combination of life events scores 169 and implies a 50% chance of a health breakdown within the next 24 months. A similar score and probability for a mobility strategy can be obtained by applying the prediction model to the MEI. For example, mobility which encompasses working in a hostile or threatening country, where the language is unfamiliar and alcohol is forbidden, a long haul flight away, separating the employee from spouse and children for long periods, implies a similar result.
understanding of the individual components of the mobility-stress relationship. It should also furnish evidence of the empirical validity of the MEI where high correlations between events and symptoms are obtained.

It is a four step process to translate scores from the MEI and SRRS into company costs. The first step is to translate daily experiences into life events series which can be analysed and scored. The second is to use the score to infer a probability of stress related ill health. The third is to translate that ill health into absenteeism, unwillingness to cooperate with the company, lost productivity and reduction in productive working lifespan. The fourth step is to translate those losses into tangible financial losses to the company. Each translation involves some assumptions and loss of accuracy.

The MEI presented here attempts to enhance the primary translation process. However, it is not yet fully reliable as a predictive device. It would have to be applied over many years against health records of employees for a fully valid predictive model to be developed. Nevertheless, it is most reliable as an indicator of where employees are likely to have to readjust to events, that is, those events that present the greatest threat to their well being and ability to work efficiently. In this capacity it will be of use in assessing the potential event load of mobile lifestyles in Chapter 10.

b) Other applications

A device which enables the impact of work environment upon employees to be measured, however crudely, has applications in personnel management. If the presence or absence of certain company supports can increase or decrease the stress load on employees and thus have an effect on productivity or efficiency, their cost can be assessed.

The MEI has quantified, at an aggregate or company policy level, the potential to cause stress of different aspects of moving, working and travelling overseas. These aspects can be overt and recognised facets of a company's mobility policy or the results of unintended omissions. A mobility events inventory can assist in assessing the worth of changes in policy. It can aid decision-making as to whether the adoption of new or different mobility strategies will reduce stress for employees, or whether the improvement of support mechanisms will reduce stress associated with different aspects of the process. This can be done by determining whether the score obtained for a fixed period's worth of MEI events resulting from a particular strategy is greater than that from another. Those responsible for the well being of employees travelling and working overseas should aim to keep scores as low as possible or practical. This could be done either through changing the use of a mobility strategy or through improving employee support.
Changing mobility strategy is the more radical solution to relieving the stress associated with mobility. International policy encompasses demands on employees to experience a diverse and potentially stressful series of mobility events. The accumulated MEI scores from these may be termed the 'event load' of the policy. Adjustments and changes to policy may thus be able to increase, or preferably, decrease, that event load. This could be done by increasing the number of employees eligible to be mobile, disseminating the event load to below individual threshold levels. Alternatively, the ratio of use of different mobility strategies (business visits, short term assignments and secondments) could be altered.

Changes in strategy have ramifications beyond those concerning employee welfare. The full economic and commercial implications of any changes must be considered. Conversely, many changes, beneficial from the point of view of stress reduction, may occur as a result of other considerations. For example, a policy of indigenisation or increasing employment of local nationals in positions of responsibility overseas - traditionally associated with economic and political constraints - also reduces the total employee event load accruing to international policy. The overall event load may also be reduced by posting individuals permanently to the foreign location rather than sending them there on frequent extended business trips.

The more traditional means of reducing the event load of the mobility policy is to improve employee support. A mobility events inventory is of benefit here in that it can assign scores to experienced events. Support that relieves employees of the experience of particular events can be evaluated against the scores in the Inventory. The benefits in terms of stress reduction, of cultural counselling, using relocation agencies or education consultants, or reducing the number of business visits can be quantified. For example, a policy which enables the employee to be familiar with the language overseas will, according to the MEI and prediction model presented here, relieve more stress than one which improves the availability of alcohol.

Different levels of support carry a greater or lesser financial burden. As with the changes in mobility strategy outlined above, the wider implications of changes must also be considered. In evaluating the advantages of employee support, however, a mobility events inventory might allow stress to be quantified and included in the cost-benefit equation. This application is discussed further in Chapter 11.

6.6 Conclusion
The establishment of a scale to measure the intensity of the independent variable in this study - mobility - has required the utilisation of a method originally pioneered some 25 years ago by Holmes and Rahe - life events research. The MEI was developed from a large survey of mobile
employees carried out in association with the CBI Employee Relocation Council. The exercise has proved worthwhile such that a device capable of indicating where employees are most likely to have to adjust to events has been created. It will be used in this capacity for survey analysis in Chapter 10.

The MEI developed also has a value as a prognostic device in its own right. It suggests that international company policy, when it requires individuals to work in a hostile environment or separated from their families for long periods, could cost the company a great deal in human and financial terms. Company policy and existing support measures are considered in the following chapter. The MEI cannot be used on its own to predict accurately the savings in company costs (either in human or financial terms) which will result from various degrees of change to specific policies. Much research work must follow. It is successful, however, in that it highlights the concordance of opinion amongst the mobile as to the events they experience which demand the greatest readjustment. It will also help to establish the components of the mobility process most in need of support and attention.

The extent to which potential stress as indicated extends to long-term considerations of company loyalty and the length of time employees will contribute their skills in conditions perceived as stressful is not known. It has also not been possible to develop an MEI appropriate to individuals such as other family members. In Chapters 8 and 9, therefore, a qualitative evaluation of employee and spouse experience of the effects of mobility is undertaken. This places in context the stressful characteristics of the MEI events introduced here and their meaning for the individuals involved.
Chapter 7: The international division of labour within organisations: the demand for mobility

7.1 Introduction

Actors in the international mobility system have been identified as the individual, organisation and family (Chapter 2). The tripartite group of interacting responsibilities and aspirations of these actors has been seen to provide both the motivations for moves and the conflicts that generate stress. This chapter and the two that follow will consider these responsibilities and aspirations in turn, with respect to the forces that shape interaction. The way in which mobility affects this system and creates a potential for stress will thus be identified. This chapter assesses the international requirements of employers for skills and their ability to move their employees to meet those needs. Chapter 8 goes on to consider the commitments of employees to themselves and their career, while Chapter 9 examines the interaction of the family with the corporate mobility system. In order to place the accounts of individuals in context, however, it is necessary first to examine the characteristics of, and motives behind the mobility policies of organisations. It is these that provide the motivating force behind, initiation of and vehicle for corporate moves. This chapter will consider the organisation - the raison d'être for mobility.

Chapter 2 found that organisations wished to retain their investment in a skilled workforce, whilst maintaining the flexibility of their ILM. Thus companies seek both to maintain corporate loyalty and to encourage willingness to move. Chapter 4, too, concluded that individual motivation played a very small role - compared with organisational policy - in determining the destination, duration and purpose of corporate mobility. Thus, in line with trends in IMSL identified in the same chapter, individuals and their families were increasingly likely to be exposed to demands for mobility, and hence potentially stressful situations.

This chapter starts by briefly considering the potential value to organisations of different types of mobility, based on information provided by the sample of MNC employers. It then goes on to discuss the international policies of organisations that might require different types of move. A model of the international orientation of companies and the indigenisation of their internal labour markets (ILMs) is developed. The way in which internationalisation and other forces - corporate aims, market opportunities, economic and legal constraints - act on an organisation to necessitate the use of different types of mobility is then discussed. From this evaluation of the use of mobility by organisations, the criteria for company selection are derived. The chapter goes on to discuss the policies of the selected organisations towards the role played by international mobility within their ILMs. The authorisation of mobility by these companies and the support packages offered are discussed, together with the implications of different policy approaches for potential stress generation among employees.
7.1.1 Types of mobility

Mobility is one of the major components of the process of bringing together in the right place the skills and information necessary for the performance of a task. The typology of international mobility in Chapter 4 established the three main methods available to companies to move their employees and their skills: relocation, secondment and business travel. The modern economic climate requires that international organisations are able to adapt quickly to changes in the commercial and political environment. Companies thus require a flexibility in their ILM and this determines their use of different mobility types. Each type has advantages and disadvantages and is better suited to some purposes than others.

Relocation is used by companies wishing to move a particular set of operations in their entirety from one location to another and for transferring skills. It is initially a very expensive process and a highly disruptive one, both for the individual and the organisation. In contrast, the circulation of skilled labour, through the use of secondments, tends to be much more flexible. Secondments can be used for many purposes, from management development and training purposes (transfer of trainer or trainee), to regional control, market development or project management. Secondees can be used on a regular basis, to fill regional managerial roles over a fixed period. They can also be used in a temporary vacancy that cannot be filled immediately by locals, or to provide technical assistance for an unspecified duration of a project. The flexibility offered by secondments is tempered only by the inflexibility of the ILM, the legal constraints of the host country and their cost. Within the ILM of MNCs, therefore, permanent moves (relocations) have become much less common than circulatory moves (secondments) (Findlay, 1991). The temporary/permanent distinction between relocation and secondment can, in any case, become blurred. Situations can arise where a secondment of unspecified length becomes extended through lack of a potential new incumbent or lack of a suitable onward vacancy for the current incumbent. Incidence of the latter can engender relocation of the former secondee to a new host destination. Sequential or training secondments can hence be used to replace transfer-type relocations.

Business travel similarly has many purposes from conference and meeting attendance to promotional, sales, trouble-shooting or servicing trips. Longer trips can also be used to provide leave replacement and training. A regular system of visits can exist to permit a technical, supervisory or even managerial function to be spread across many centres. Since business travel requires no permanent overseas base for the traveller, and the employee is the only one who moves, it offers the most flexible means of skills transfer for the company. Travel and accommodation costs mean it, too, is expensive.
Companies also make use of short-term assignments which offer a relatively less expensive way of transferring skills for periods of time under a year. These are generally used for technical or supervisory roles. They encompass the changes in job incumbency and residence of the individual associated with secondment, and the family separation elements of business travel.

It can be generally assumed that companies will adopt the mobility practice most appropriate to a particular task. Where choices exist, and as can be seen, there is some considerable overlap in the roles performed using different types of mobility, the most viable will be chosen. The determining factors as to the viability of the types of mobility chosen are the relevance to the tasks to be performed, host country (legal) constraints, labour market flexibility and financial cost. These factors, in turn, will be determined by how the organisation structures its ILM overseas.

7.2 Models of corporate internationalisation: global orientation and indigenisation
Organisations succeed and survive through growth, which may be organic - the development of new business in new markets - or through mergers and ventures. The need for efficiency may mean that growth causes decentralization of operations to a greater or lesser extent, with consequences for staffing strategies and mobility.

An organisation may decentralize along product lines or along geographic lines (Handy, 1984). The product-based organization will have divisions, each with their own management: personnel, R&D, manufacturing and sales staff responsible for producing the same products in one or (as in the case of MNCs) many locations. The geographically-orientated organisation will have regional bases each with their own R&D and personnel departments, as before, but concentrating on the manufacture or sale of a range of the company's goods or services. The structure will have been determined partly historically and partly through economic choice, balancing transport costs against economies of scale in production.

Companies which concentrate on universally required goods or services are more likely to favour a regional structure; those which are dependent on a particular region for raw materials or skilled labour may favour the product division (Dicken and Lloyd, 1981). Some companies may fall into both camps and a complex hybrid structure will result with extensive sales networks and localized manufacturing centres, overseen by a combination of headquarters and local management.

International expansion is essentially a continuation of the same decentralization process, over national boundaries. By crossing boundaries, differences in labour law, taxation, immigration restrictions, and market configuration apply. In addition, the company's role in economic development of the regions it occupies will have political implications. These issues will affect the
speed with which the international decentralization, or *internationalisation* process can take place, but will have little influence on the company's structure, which is still more likely to be determined by such factors as the availability of raw materials and labour and the responsiveness of the local market.

The process of internationalization can be seen as a continuum, with home based firms producing for home based markets using local labour and local materials at one end and international companies with regional bases producing for host country markets using indigenous labour and local materials at the other. Typical stages in the transition process have been discussed elsewhere (Dicken and Lloyd, 1981; Dicken, 1992) and are presented here in a diagrammatic form in Figure 7.1. A company at stage A initially expresses increasing interest in foreign markets and this leads to the use of sales agencies overseas (B). Further development encompasses the appointment of a local sales office staffed by relocated home country employees (C). The establishment of a manufacturing base requires more relocation of home country employees but with the employment of host country nationals in addition (D). Greater autonomy is given to regional headquarters and transfers become more common between regions, by-passing the home country (E). Full internationalisation (F) follows indigenisation, a gradual drop in the number of secondees and the placing of host country nationals in positions of increasing responsibility in their own country. Figure 7.1 presents a model of this internationalisation process with reference to these different stages (A to F).

International companies are at different stages along the sequence. Some will fully complete the process. Others will, for economic, political or logistical reasons, choose to *remain* at a certain stage. Host governments may choose to influence the process by passing laws favouring indigenisation. Completion of the final stage will depend on the availability of adequate skilled labour in the host country location and the ability of host nationals to travel to home country headquarters for training and management development. By stage F, the terms 'home' and 'host' country have little meaning as the increasing geographical spread of company expertise and experience dictates the transfer of skills in the short term from any one location to another, neither of which may be the organisation's country of origin. The ownership of a company may become international, or the country of ownership may become nominal. Headquarters may be based elsewhere, or pared down dramatically with decentralization of corporate functions. The term 'transnational' (as against 'multinational') is sometimes used to describe such companies. The sequence in Figure 7.1 is not, however, foreordained. Some companies may omit stages along the sequence through the use of mergers and acquisitions, whilst large companies may consist of separate businesses which chose to remain at different stages. Others may choose to re-centralise and move in the opposite direction to the arrows in Figure 7.1.
Fig 7.1: Sequence of corporate internationalisation

Type A
Home based
Home Market

Trans-national
owning locally based
companies with local
HQ, serving local
markets.

BUSINESS TRAVEL

Home and Regional
HQ and subsidiaries

SECONDMENTS
(Home out and
inter-regional)

D
Home HQ
Overseas Production
and Sales

BUSINESS TRAVEL
SECONDMENTS
(Out from home)

B
Home based
International Market

Use of agencies
and travelling
sales staff

BUSINESS TRAVEL

C
Home Based
International Market

Establishment of
Overseas Sales
Offices

BUSINESS TRAVEL
SECONDMENTS
(Out from home)
It is evident from the model that the way in which companies choose to operate overseas will determine the way in which they deploy skilled labour. Thus the use of mobility can be seen to be a direct consequence of the internationalisation process.

7.3 The use of mobility in organisation ILMs
The decision by a company to internationalise, and how far it chooses to proceed along the sequence shown in Figure 7.1, will be determined by corporate philosophy, structure, type of product and available markets. Within the framework provided by corporate internationalisation, the extent to which different types of mobility are used will be affected by four principal constraints. These are relevance to task, immigration control and legal restraints, internal and external labour market flexibility and financial cost (in all its manifestations). These are discussed, in turn, below.

a) Relevance to task
At any stage of internationalisation the tasks to be performed will require different skills and different levels of skill for different durations. Thus, the level of use of secondments and business travel, the balance between home, host and regional origins and the diversity of destinations will change. The nature of the changes is outlined in Figure 7.1.

Initially, business travel is used to establish contact between the company and its future markets and agencies overseas. As markets develop, permanent posts in sales offices are created, to be staffed by relocation or secondment. The extraction of resources or the establishment of manufacturing based on a local labour force, will require supervisors and managers, posts originally established from home. As overseas businesses develop, the decentralisation of control will require skilled local and regional management. This may be acquired through managerial secondments from home, or the training of locals - the initiation of indigenisation - using secondments or more short term visits of trainees to the home country, or of trainers from it. Throughout the overseas development and globalisation of the organisation's operations, business travel will continue to play an important role. Business visits are used throughout stages C, D and E of internationalisation, shown in Figure 7.1, for the dissemination of information, training, technical and managerial trouble-shooting as well as for more traditional market development and maintenance of sales networks. The long- and short-term movement of skilled home country and locals up to stage D is primarily that to and from the home country - often termed 'hub and spoke' moves. From stage D onwards movement between overseas outposts develops. Thus third country nationals developed within the company ILM begin to play a role, in addition to those recruited from the external labour market (ELM) who can enter at any stage. If indigenisation proceeds through to stage F, the demand for secondments is minimised as
managerial and technical positions become filled increasingly by skilled locals. Nevertheless, corporate accounting and control functions are still likely to necessitate business visit interaction between regional businesses or subsidiaries and their headquarters.

As far as the ILM of the organisation is concerned a process of substitution is occurring through the sequence. Frequent secondment opportunities may be the norm for employees at stages C, D or E. By stage F, home country nationals may still make visits overseas for purposes of support, supervision or technical trouble-shooting, but primary responsibility for overseas operations is being passed from home to host country nationals. Home country nationals, who at earlier stages in the process would have experienced secondment, will now experience increasing business travel as their role shifts to one of support or supervision. This may be one reason for the increase in business travel seen in Chapter 4.

b) Legal restraints
Moves will also be subject to legal restraints. MNCs may operate and plan at the level of the global economy, but they are still limited to working within the confines of the national laws of the countries in which they operate. Systems of immigration control in the developed world generally sanction the temporary movement of the highly skilled. However, there can be difficulties with work permit issue to dependents and the movement of developing world nationals to the developed world (Tung, 1988). Meleka (1985) and others (Mehren and Gold, 1976; Shankar, 1981) have also highlighted the legal obstacles introduced by developing nations to regulate the use of foreign labour by foreign-owned companies operating within their borders. These countries can issue licences which stipulate the employment of a certain percentage of local manpower, and an element of skills transfer. Such operation may place additional costs upon international companies, or run counter to their international aims, as highlighted by Germidis (1978). Thus political, legal and economic constraints can act to vary the extent to which companies make use of different types of mobility.

c) Labour market flexibility
In order to be able to exploit opportunities and react quickly to economic and political changes at whatever stage of internationalisation, organisations require flexibility in their labour market. This means the ability to transfer efficiently the skills developed in their ILM and take advantage of the availability of skills in the relevant local and international external labour markets, for example, via international recruitment agencies. Whilst such methods offer a great deal of flexibility in recruitment, there is likely to be a substantial time delay to the employer compared to internal recruitment. Other advantages to the employer of recruiting from within the ILM have been discussed in Chapter 2 and elsewhere (Findlay, 1991). These centre on the individual's
existing experience of the company, obviating the need for training, and prior knowledge of his or her track record. The primary constraint on flexibility in the ILM will be stress, as this affects employee willingness to move. This may result from direct previous experience or derive from the negative recollections of others. Corporate approaches to overriding such constraints - increasing remuneration and briefing - will be expensive. The value of such approaches as against a review of mobility strategy has been called into question in consideration of the MEI in Chapter 6. Individual company approaches are addressed in section 7.4. Flexibility in the company labour supply is desirable, but it is not one that can be sought at all costs. Training and time constraints are unavoidable with use of the ELM, whilst stress will act to constrain flexibility in the ILM.

d) Financial cost
As discussed in section 7.1.1, all mobility is expensive to the organisation. In general, the greater the flexibility, the greater the daily cost. The movement of individuals engenders transport and accommodation costs. Their absence from home base necessitates deputation and possible new recruitment. Incentives may need to be paid and double taxation accounted for. There are in addition, many marginal costs that have to be taken into account such as the provision of international briefings, and interpreters. Such costs have declined over time with advances in transport and communications and increased demand, but mobility remains expensive.

In the long term, nearly all other constraints such as labour market inflexibility and legal restraints culminate as financial costs to the company.

7.3.1 Implications of constraints for policy
Companies will seek to use international mobility in a way that best suits their overseas internationalisation aims or relevance to task. The actual ability to use mobility will be determined by economic factors, legal restraints, labour market flexibility and, ultimately, financial cost. The realisation of this disparity between what is desirable and what is possible can act in turn to shape mobility strategy, to increase its relevance and efficiency. There is thus a circular feedback system of decision making leading to a mobility strategy which encounters mobility constraints which subsequently influence decision-making, as shown in Figure 7.2. It is within such a circular feedback system that the effect of international mobility strategies on individuals, such as through stress, will act to provide constraints upon the effective use of the different types of mobility. Thus, the extent to which the constraints imposed by stress are realised and incorporated in the mobility strategy will have an important effect upon corporate efficiency.
Fig. 7.2: Corporate decision-making and mobility constraints

CONSTRAINTS:
Legal, financial, Labour market flexibility, stress?

Chosen policy of Internationalisation

Affect Mobility choices

Affects potential ability to internationalise

Corporate ethos Product profile Company structure
To address the corporate policy elements of the feedback loop in Figure 7.2, it was necessary to examine the mobility strategies of companies and the constraints to be overcome. This could only be assessed in light of the sectoral and product constraints upon firms. It is this that ultimately determines the extent of the company's internationalisation and hence its need for different types of mobility and the cost equations it balances to determine that use. This variability in the approach of firms may engender a variability in the stress outcome for employees. To examine the link between the product and structural constraints of different companies, their mobility choices and resultant stress outcome, it is necessary to examine policies at the corporate level: what mobility is used, how it is authorised and subsequently supported. For the survey to encompass the potential variability between companies, the sample base had to be diverse, embracing companies at different stages in the internationalisation process outlined in Figure 7.1. This required the development of specific selection criteria.

7.4 The organisation survey
7.4.1 Selection of companies
To ensure that the predominant methods of mobility in use were covered by the survey, and to avoid bias towards the practices of any one company or industrial sector, a broad-based sample was envisaged. Companies were sought from different sectors of the economy (heavy engineering and extraction through to business services) which were likely to be at different stages of internationalisation. A hierarchy of suitable companies to approach for the survey was created using the following selection criteria:

1 - The companies had to be international, with overseas operations or subsidiaries, but sufficiently established in the U.K. for sample requirements in Chapter 5 to be met.

2 - The companies had to be large enough to be able to furnish the required sample sizes. This favoured companies which had developed beyond stages A, B or C in Figure 7.1.

3 - The companies had to be diverse, spanning different industrial sectors, without ownership or other direct connections between them.

The hierarchy ranked companies from each of five sectors: pharmaceutical (company A), oil (company B), construction/civil engineering (company C), heavy/mechanical engineering (company D) and computer/business services (company E), by size and geographical distribution. A range of sectors was desirable so that a wide range of business conditions in organisations could be encompassed. If the first company from a sector was not available, the second was approached, until consent was obtained. Twelve companies were thus contacted, of whom five
agreed to participate in the survey. At least two interviews were conducted with each employer, usually with personnel managers, concerning the extent of the company's international involvement and mobility policies. The results of these interviews are outlined in the following section.

7.4.2 Company profiles

The aim of the interviews was to secure a general overview of any overt or covert mobility policy operating within the company. The interview schedule appears in Appendix X. Any collated information available which might indicate trends in long or short duration trips was requested along with the interviewees' interpretations of current movement patterns. This information is presented in Appendix XI. In addition, the criteria used by line managers in authorising mobility was addressed, along with overall travel budgets and their fluctuations. Employers were asked whether any policy or practice of substitution existed within the company. International secondment policy documents were obtained wherever possible. Where they were not, details were obtained in interview.

The approach of different companies to mobility policy, the perceived need for monitoring of employee movements and the confidentiality surrounding such data varied across the sample. Directly comparable information was not always available for each topic, from each company. The approach was thus to address systematically the general themes which arise in considering the aims and responsibilities of organisations: the extent of company internationalisation and hence need for mobility; how the companies use and authorise mobility; and their responsibilities to employees. Company responses are analysed below.

7.4.3 The extent of internationalization: corporate need for mobility

All the organisations selected for consideration here are public companies which operate internationally, deploying capital and employing labour in many countries. Of the five organisations involved in this study, four operate internationally in both the developed and developing world, only one (company E, the youngest) operates solely in the developed world. The five companies involved in this study can be seen to be at different stages in the internationalisation process described in Figure 7.1.

COMPANY A - Chemical company - Type E

A large transnational company with businesses established in the U.K., U.S.A. and Pacific rim, manufacturing and selling petrochemical and pharmaceutical products. The U.K. headquarters is small (around 500 staff). The company manufactures universally required goods from a wide range of multi-origin raw materials, some already part processed. This enables it to have regional
manufacturing bases more closely associated with sales networks. The company is undergoing a process of decentralization and prefers to be seen as an international company rather than a British one, communication between regional centres, bypassing the U.K., is commonplace.

COMPANY B - Oil company - Type D
A complex multinational with raw materials produced in numerous, yet specific global locations (North Sea, Middle East), it sells a range of universally required energy-yielding products and by-products. This requires a global sales network. As far as decision-making is concerned, internationalization has not got beyond a U.K. to region axis. Nearly all international communication is to, from or via its U.K. headquarters.

COMPANY C - Construction company - Type F
The construction and civil engineering firm has a small U.K. headquarters, but has additional world regional headquarters and associated national companies which undertake contracts using skilled labour and materials local to their area. It is thus an association of virtually autonomous units, almost fully internationalized.

COMPANY D - Mechanical/Electrical engineering company - Type D
The mechanical engineering firm undertakes energy and transport projects often associated with regional economic development. Occasionally contracts come from developed nations updating or expanding existing systems, but more often they are won from NICs and developing regions. The nature of projects dictates that skilled labour must be imported into the regions concerned to complement that available locally. A loose regional sales network is maintained to win contracts when and where they occur. As future contract locations are unknown, regional manufacturing is an impossibility. Precision components are manufactured in the U.K. and other developed countries for export to sites. Location of headquarters for such an organization is to a certain extent arbitrary and for historical reasons is in the U.K. - a necessarily centralized MNC.

COMPANY E - Computer/IT specialists - Type D
The youngest firm, a computer systems adviser and hardware/software installer, services corporate or institutional customers who either possess or require an integrated computing system. Such customers are only now beginning to emerge outside the developed West, and this has shaped the company's potential for international growth. The company is wholly owned by a foreign manufacturing MNC, the servicing of whose regional bases formed the basis for entry into new regions. Once operations were established in each new location, the company was able to broaden its horizons and find additional clients. Hence it has not established itself far beyond those locations where the parent MNC operates. It is the only foreign-owned company in the
survey. The U.K. was the site for its first European regional headquarters. Physical components are purchased locally or imported as required, but the company is dependent on the presence of its own skilled labour in each location. Initial staffing therefore tends to originate from its home country before local recruitment can begin.

Thus the five companies selected for the survey can be seen to be at different stages of internationalisation shown in Figure 7.1. The primary determining factors in labour mobility can be seen to be resource availability, manufacturing and marketing base, globalisation strategy and company age. With this sample therefore, the extent of internationalisation can be seen to be delineated by industrial sector and vice versa. A larger sample of companies would be required to discriminate trends within and between sectors.

7.4.4. Company use of mobility
In order to pursue their international aims, companies choose to vary the spatial and temporal location of the skills invested in their employees. The stage of internationalisation reached by each of the five companies selected for the survey and the subsequent constraints upon them differed. Thus, though they all made use of the range of mobility available, from secondments and short-term assignments (STAs) to business travel, the degree of emphasis differed significantly by type. The greater the degree of internationalisation, the less use was made of secondments.

a) Use of secondments
The companies still making substantial use of expatriation are those that are actively expanding in new geographic regions. Company E is undergoing organic growth and as its business expands globally, so does expatriation. Companies A and B, though established with stable staff numbers in many regions, are expanding in North America and the Far East and it is here that expatriate numbers are rising. Increasingly for these two companies, though, it is not British expatriate numbers which are rising, but those from other regions whose moves bypass headquarters (company A) or who visit the U.K. for management development (company B). Company D is consolidating numbers after a major merger with a foreign company and no immediate trend is visible - apart from increases in senior managerial moves between the two headquarters. Company C is the only one to experience decline, as it indigenised the skilled workforce in its foreign subsidiaries. Company C has thus reduced ILM expatriate numbers, and recruits as required from the ELM for major projects.

All five companies make some use of expatriation for skill transfer (filling local skill gaps) and technical roles, in addition to managerial postings. Companies A and B make use of expatriation for career development purposes. Duration of secondment varies from 12-month contracts, or
multiples of the same, in company D to two to four year management development posts in companies A and B. Company E is flexible about secondment length since repatriation is dependent on the successful location of local skills.

b) Use of short term assignments (STAs)
Companies vary in their definitions of STAs. For company B, they encompass any trip of over one month, but less than twelve. For company D, STAs last from 30 days to three months, but with the possibility of subsequent, contiguous three month 'parcels'. For company E, the maximum length of an STA is six months. Companies A, D and E perceive a future increase in their use, though for different reasons, whilst company B predicts little change. With the need for the long-term international transfer of skills diminished, company C makes little use of STAs, relying on extended business visits where skills are needed short-term.

The greater return-to-home frequency of STAs is perceived by company A as less disruptive. The budgetary need to rationalise the use of secondments in companies A and E has lead them to favour STAs for training assignments, transferral of technical expertise and, in the case of company E, management development. Company B uses STAs for technical skill transfer and educational purposes, and is alone in condoning family accompaniment. STAs are the largest single area of manpower deployment for company D, as the need for field service engineers to make on-site inspection, and maintain an ageing population of installations, grows.

c) Use of business travel
All companies associate business travel increase with the start of new projects - initial exploration, marketing, joint ventures and the laying down of assets - and thus to the extent of globalisation. In addition, for company C, short term skill transfers, such as the deployment of quantity surveyors, are part of this process. A further 'background' level of business travel maintains communication between businesses: the audit and control functions, and to customers, through sales and servicing. Company D has seen an increase in the use of business travel as visits to its merger partner increase, along with shorter machinery servicing trips. Business travel increase for all companies is thus tied to geographic expansion and increasing business volume, but also to structural change.

d) Substitution of mobility type
An underlying assumption in this chapter has been that organisations are free to choose different types of mobility to match changes in corporate mobility strategy. This implies that changes in emphasis towards different types of mobility will occur. Where one type of mobility is increasing and another declining, this can be linked to one of two processes. The first is changing corporate
objectives, and thus a shift in ethos, product base or structure which necessitates new types of mobility (a change in box A in Figure 7.2). The second is maintenance of the same objectives whilst other constraints - legal, financial or labour market - favour new types of mobility (a change in box B, Fig. 7.2). These processes can be termed substitution, and their occurrence is of relevance since such changes may alter the frequency of potentially stressful events embraced by the mobility strategy.

For no company in the survey was substitution a stated policy; however, all five could recognise some changes that altered the balance of different kinds of moves within the company. For companies A and B the creation of international businesses with headquarters outside the U.K. has increased levels of travel. Rationalisation has also lead to geographic expansion of regions of responsibility. Travel load within the company is also being spread, but not as the result of any deliberate policy. Company B see indigenisation concurrent with corporate expansion leading to stabilisation of secondment numbers while business travel increases. Company C has indigenised and supports its overseas companies with business trips by marketing managers. Hence it has already undergone substitution. In company D, as types of work change, so does the mobility that supports them. Rationalisation has resulted in some regional sales managers and senior project managers working from home rather than from regional bases, for example. Company E see STAs substituting for secondments in most situations other than the initial phases of business expansion. Therefore, although policy aims do not overtly embrace substitution in the five companies, it does occur as a result of the coincidence of two or more other concurrent manpower policies. In consequence, the balance of different types of mobility is continually shifting, with an overall tendency, from this sample, towards a reduction in moves of longer duration.

e) Use of local and third country nationals (TCNs)

The indigenisation process is dependent upon the employment of local skilled nationals to oversee local operations. Policies towards indigenisation can thus indicate the emphasis placed by companies on the maximisation of local labour markets to fulfil international objectives as against the use of mobility of existing employees. Third country nationals (TCNs) can be deployed at any time from the ELM. Where they arise within the ILM, they are indicative of an advanced stage of internationalisation beyond ‘hub and spoke’ stage of moves centred on a headquarters in the home country. The use of TCNs indicates investment in local skill development has reached the stage where local nationals are offered career development through international experience. It suggests use of local national skills as a corporate global resource through mobility within the ILM rather than an indigenisation of skilled labour per se. Thus although both local national and TCN numbers are indicative of the stage of internationalisation reached, the number

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of seconded TCNs might be expected to decline (along with all expatriate numbers) approaching stage F on Fig. 7.1.

Almost 50% of company A expatriates are TCNs, who move primarily as part of the process of developing local management. Company B trains many such people in situ, or uses career development moves. In addition, company B is witnessing local managers outgrow the career hierarchies of their national companies and thus require almost permanent posting away from home. The desire to retain such skills can be one of the reasons for a company choosing to remain at a specific stage of internationalisation (Fig. 7.1), as further indigenisation would lead to the loss of skilled labour and wasted training. In company C, nearly all employees are local or TCNs, as a result of indigenisation and a company policy which favours projects in regions where skills are already available or can be readily developed. Only in company D are local managers not increasing in number. Locals, such as sales agents, are employed for economic, or political reasons. It recruits skilled local nationals from the ELM on temporary contracts and trains them on site with expatriates. Company E sees local national development as an essential component of its internationalisation process; expatriates and TCNs are used in the initial stages of business expansion in each region.

Thus the use of different types of mobility within organisations is a reflection of the extent of internationalisation of the company. Secondments, STAs, business trips and TCNs fulfil specific roles which vary between companies and over time, as substitution of one type of mobility for another occurs.

7.4.5 Authorization of moves
It was shown in section 7.1.1 that mobility costs to companies are high and that the factors favouring different strategies are complex. A high level of responsibility for efficiency in mobility is thus placed upon the company decision-making structure. Where information is incomplete, or specific tasks are dependent on a certain type of mobility, it can be difficult for decision-makers to perceive any alternative to current practice. Changing mobility strategy requires complex changes in the way the company organises its business internationally. The inertia of the current system can thus prevent alternatives being investigated. In addition, as outlined in Chapter 1, organisational reliance on profit-and-loss accounting can deny the effect of long-term costs, such as that engendered by stress. It is thus important to consider the systems of authorisation in use for different types of mobility and how individuals are selected for moves, as unnecessary or inappropriate moves could engender unnecessary stress.
a) Secondments

In companies B and D, line management devise and authorise moves within each business or department. Company E encourages short term transfer of skills through the use of STAs which do not require senior approval, but for which the seconding manager is accountable. Senior vice-presidential approval is required for expatriation. In companies B, D and E, financial accountability is thus the primary consideration. In company A it is usually the business or project head who makes the decision to second, but the personnel department also have an input to ensure suitable local nationals have been considered first, and that the secondee will have an appropriate post to return to. In company C decision making is project based and often uses the ELM for project manager recruitment, though it is unusual for local management to be unavailable from within the company.

Company A screens for willingness to move at the recruitment stage, whilst the host country assesses the suitability of potential secondees. Company B chooses for secondment those it regards to be of a suitable disposition although this tends to be more by trial and error, as a predictive selection system has not been formalised. Company C keeps a register of potentially mobile people based on annual appraisal. There is no specific screening. Company D similarly has no formalised process but expects employees who work in international businesses to be willing to move. Company E assigns individuals overseas as part of its graduate training programme and often subsequently. It believes these moves prepare employees for future mobility. A skills inventory is maintained internationally to enable the matching of people and posts. Companies C and E make use of skills registers for selection purposes which seem likely to enhance the efficiency of the selection process. Such registers are indicative of an intra-ILM mobility system which has moved beyond 'hub and spoke' moves.

Thus while most companies have a well recognised system for authorising moves and selecting individuals, the criteria that are taken into account vary. Most companies hold decision makers accountable financially for establishing a need to second and for selecting an appropriate employee. Whilst budgetary accountability might enhance local efficiency, it could discourage consideration of broader criteria in a corporate context. Inadequacies in the conception of necessary roles overseas could lead to poorly conceived or instituted moves and, hence, stress. As 'failed' moves become a budgetary loss, stress can be seen to have financial implications at the level of decision-making. At the same time 'benefit' is measured as project success, fulfilment of contract and the gain in international experience of employees. Company A encourages other constraints to enter into the decision-making process, such as indigenisation and allowances for repatriation. As several factors relevant in appraisal of international moves are not financially
tangible, a decision-making process based on budgetary considerations cannot be consistent or fully reliable - this issue is discussed further in Chapter 11.

b) Business travel
Companies tended to view authorisation for business travel as secondary to authorisation for secondments. Decision makers are usually departmental managers, accountable to department and individual project budgets, who authorise travel in advance. The exceptions are companies B and E which employ a system of ‘travel now, account for it later’ - placing the decision-making burden on the employee. Whilst superficially, such a system reduces the amount of unnecessary travel, it does place a heavier emphasis on the task allocation system within the organisation and the individual's perception of what his or her role should be. The decrease in the stress of travel has to be balanced against the increase in the stress of greater accountability. Nevertheless, no travel policy takes into account factors other than immediate cost. To quote one personnel manager, it is 'a tool to be used where justified'.

Concerns for security preceding the 1991 Gulf War affected the willingness to fly of some employees. The security risk, combined with the recession in the early 1990s, led to austerity measures within companies such that they actively sought to reduce ‘unnecessary’ visits overseas. This was sometimes extended to outright bans on certain airlines or airports. These measures are the nearest many companies have approached to a formal regulation of business travel based on factors other than cost. The clamp-down raises the question of what, in an efficiently-run business, previously constituted an ‘unnecessary’ visit. The definition was often left up to the line manager or individual concerned. Where tasks continue to be performed but with a reduced or zero requirement for travel, alternative methods of communication - delegation, video-conferencing, computer links - are necessary. The extent to which these are normally available is discussed in the next section.

c) Alternatives to travel
Reference was made in Chapter 1 to the failure of ambitious, early 1970s theories which foresaw physical mobility being replaced by advances in telecommunications. In contrast, the past twenty years have seen short-term mobility increase alongside innovations in telecommunications. There has thus been a significant expansion in the contact potential within and between developed countries for face-to-face and electronic communication (Erlandsson, 1979). Reasons for such trends have been discussed in Chapter 4. Whether communication devices and delegation of duties acts as a substitute for travel or as a prelude to it is difficult to estimate. In either case, where the outcome of the use of alternatives is a more rational, discriminating use of travel, there is likely to be a reduction in the stress of individuals by reducing their travel load.
The ability to use alternatives is linked to the authorisation structure outlined above, and especially the extent to which decision-makers are aware of and have access to alternatives. In cases where the decision to travel is made by the individual or line management, this process will be unable to examine all the options available. A question was asked of diary respondents as to whether there was any alternative to their current mobility. 29% said that at least some of the time spent overseas was unnecessary, and another 19% said telecommunication devices offered an alternative to their travel. 14% felt there could be greater delegation of travel responsibility. Only 37% thought no alternative to their current mobility was possible.

All company A, B and E executives have use of electronic messaging and video-conferencing. In company A, face-to-face contact is actively encouraged to reduce inhibitions whilst video-conferencing is encouraged where issues are organisational, logistical or technical. Business visits are still favoured for negotiation. Company B has no policy towards video-conference (VC) use, though in practice VCs replace interim meetings. Only company E claims VCs reduce travel load. There is thus a discrepancy between employees’ perceptions of the possibility of using alternatives, the availability of such alternatives and the effect on travel load which is thought to be minimal. As the implementation of communication devices has, as yet, had little impact on travel policy, any potential effect on levels of stress has still to be seen.

7.4.6 The responsibilities of companies to employees

The recognition by organisations of their responsibility towards the welfare of their employees has been discussed in Chapter 2. The labour market attractiveness of individuals was seen to be the prime motive for companies to offer incentives for maintaining their employment. Companies have to be just and considerate to those they employ to set an example in order to recruit and maintain skills. The extent to which mobility is supported can thus be linked to the need to retain the individual, their skill and performance, and the need to persuade others to accept international opportunities. A by-product, and increasingly an aim of such policy, must be to minimise the stress load engendered by corporate policy. The way in which this responsibility is manifested is essential to the fulfilment of such aims. Traditionally, organisations have offered a financial payment for contractual obligation and a recognition of disruption through incentives. Money is not fully convertible into successful cultural adaptation, however, so the ability to adjust funds to match individuals’ requirements is important. Characteristics of the remuneration and support systems offered to mobile employees, and their negotiability, thus need to be assessed in order to determine their role in the relationship between organisational mobility and stress.
a) Remuneration
There is usually a level of formal input by the employing organisation wherever movement, other than daily commuting, is required as part of a work routine. Basic costs of transport and accommodation are normally provided for all short-duration trips. The longer the length of stay, the more interference the company has in the lifestyles of its employees, and so, generally, the more it compensates. Monetary payments are made to cover both the financial costs of secondment - new home and relocation expenses - and the emotional costs: incentive or hardship payments. In addition, longer moves are acknowledged to have effects on the family, and so relocation costs, transport, host accommodation and education assistance for family members also tend to be provided.

Companies A, B and D operate standardised expatriate remuneration packages which comprise an expatriate salary, an international location incentive payment, housing, transport home and the education costs of children. The education component is fixed in companies A and D and may not cover all costs, in company B it is comprehensive with home country boarding school fees being maintained on return until a suitable breakpoint in education. Home and host salary levels are taken into account, along with cost of living indicators and guards against currency fluctuation. The incentive payment (of up to 40% home salary) is the element that officially recognises lifestyle readjustment and thus compensates for stress. The STA package is a 15-20% addition to salary plus expenses in A and B. In company D, short-term assignees receive a fixed daily allowance identical to business travel. Company C is more flexible. Whilst leave, housing, food and car costs are standardised, salaries vary. The small core of career expatriates simply receive a percentage addition on salary. Company E has a standard package for secondments and STAs with a fixed 10% foreign service premium. Housing, education (but not boarding school) and transport assistance is provided, but not for the family on STAs. Budgets for the latter may not even stretch to the cost of a family visit.

Few employees in the survey complained about the level of monetary remuneration, as packages covered most costs. An issue of greater concern was how the sums were arrived at and hence the amount of negotiation possible.

i) Negotiability of package
The extent to which companies are flexible with regard to remuneration can be linked to their size or extent of indigenisation, as is the case with company C above. A small company will be able to discuss each case on its merits and come to a mutually acceptable compromise. Indigenised companies, with few secondees will be able to act similarly. Large companies with many secondees moving simultaneously will favour a uniform system that cannot be seen to
discriminate between employees. Whilst individuals will recognise the need for a standard package, the ability to negotiate can be seen as a benefit, especially over non-salary elements, as individual circumstances are not standardised.

Company A sees negotiation as negative. However, both it, and companies B and D adjust elements to suit circumstances at the individual level. Company E has a non-negotiable expatriate package, whilst STA remuneration is negotiable within budgetary constraints. Company C varies remuneration according to host and home business requirements, but within uplift guidelines. Such flexibility has been anticipated from an indigenised company, but other companies are seeking to customise elements of their packages with changing circumstances. The advent of freedom of movement of labour within the EC, for example, has encouraged companies to distinguish intra-EC moves from other international moves.

ii) ‘Europat’ package

Companies B, D and E are currently developing ‘Europat’ packages for Intra-EC moves. Company B wishes to eliminate the difference in salary levels between expatriates from different home countries, based in the same EC host. The package is likely to require matching the highest common denominator and so will be expensive. Company D favours a standard package for two years, after which it applies an efficient purchaser index which reduces the cost of living and discretionary portions of overseas salary by up to 50%. Whilst initially protection against double taxation, education and housing costs continues, a gradual phasing in of host country terms and conditions is favoured. Company E’s ‘Europat’ package involves the payment of a transfer allowance and school fees, but no bonuses. Increments are made for accompanied status, and to ease accommodation differentials. The ‘Europat’ is expected to pay the taxes of the host country. Company C has no such scheme, whilst company A is considering changing to a cost of living index for intra-European or U.S.-Canada moves.

The ‘Europat’ packages outlined above illustrate the dilemmas faced by organisations attempting to be fair whilst minimising costs. The need for such packages stems from two factors. The first is recognition that uniform packages based on cost of living indices overcompensate moves between culturally similar states. The second is that uniform formulae applied universally across non-uniform sending countries produce anomalies in remuneration whereby expatriates working side by side can be salaried in inverse relation to their seniority. Companies are thus tending to favour non-uniform scales to overcome this. The implications for stress of such policies are those associated with the unknown. Employees are more likely to encounter unknowns in the secondment process such as: how much they will receive, whether the funds will be sufficient, what the local rate of taxation is, how easy it will be to find property and how to go about it. To
eliminate such questions sufficient accurate information about the future destination will be required. This is the role of the non-financial elements of company support.

b) Employee support: preparation and orientation
Non-financial support fulfils two roles. First, it enables employees to inform their behaviour prior to departure and thus adapt and perform more efficiently on arrival in the host location. Second, since it helps overcome a disparity between expectations, or frame of reference, and reality, and hence eases the severity of the change undergone by individuals, it can help to minimise stress. The key role played by information systems, frame of reference and behavioural adaptation in the interaction of individuals with their immediate environment, and hence the generation or alleviation of stress is addressed in the following chapter. Whilst briefing the employee alone may inform such interaction, it is likely that briefing of the family as a whole is necessary to minimise the stress of family members and, in consequence, ease stress on the individual. Support can take the form of formal cultural or language training sessions at outside agencies, briefing packs and pre-secondment visits. As repatriation engenders a need for change and adaptation, preparatory briefings can be similarly valid for return moves.

i) Cultural orientation
Company A uses an outside agency to provide cultural briefing and (a target of 200 hours) language training for all Asia Pacific moves and many others, to both staff and spouses. Another agency provides information for visitors to the U.K. In company B, pre-secondment visits are mandatory for employee and spouse, as is cultural briefing for all moves beyond Europe or North America but language is only taught where necessary for business. Companies C, D and E do not use outside agencies, but C and D do provide language training, whilst D and E provide information packs. Company D provides pre-secondment visits, but not for spouses. Company E generally reimburses pre-secondment visits. Stress in the initial stages of secondment would thus be anticipated to be less in companies offering greater support, such as A and B. Stress outcome across companies is analysed in Chapter 10.

ii) Spouse involvement
Company A and B spouses are generally met by line management, and briefed, since spouse opposition to a move can sway decision making. Company B is considering attitude testing for spouses. Company D meets spouses for all non-European moves. It considers spouses' careers an important issue. Where possible it will look internally to find employment in the overseas setting and is contemplating use of an external advisory service. Company E prefers single people for financial and practical reasons, as it perceives couples' thinking to be more 'immobile'. Whilst spouses are often met prior to departure, the policy is not formalised. The number of
couples which are dual career within the company are both a blessing, as a move is double the
investment, and a bind, as dual vacancies must be found and subsequent moves for one but not
the other can be a problem (see examples in Chapter 9). The value of company support for the
family, especially where the move interrupts a partner's career, is further assessed in Chapter 9.

iii) Preparation for return
Preparation for return in company A relies on annual meetings between the expatriate and home
management, and written briefings. Contact with home is also maintained by the despatch of
videos of home country news, current affairs and entertainment. A position is guaranteed on
return. Company B provides re-entry briefings but recognises these are imperfect. Where there
is no job to return to, out-placement systems (set up with external contractors) come into effect.
This is not seen as a solution, and the company is working on this issue. Neither company C nor
D provide any formal preparation for or help with readjustment, though a position will be found
on return. Company E has provided pre-departure conferences in the past, and videos of the
most recent are still issued to returnees. The company provides a re-entry handbook, a company
recruitment centre that matches returnees to vacancies and pre-return trips home, often
accompanied, for interviews.

Support for returning expatriates becomes increasingly important as temporary recruitment within
the ELM gives way to frequent mobility within the ILM and the need to retain the skills and
experience of those who are seconded. Whilst return preparation does not contribute to the
success of the secondment per se, it does influence future mobility choices by the returning
secondee and others. In addition, the existence of an effective return package should reduce
undue attention and anxiety towards the return process on the part of individuals still on
secondment.

iv) Success of secondments
It can be seen that companies are willing to spend greater or lesser amounts supporting
employees through the mobility process. It can be assumed that, subject to the relevance of the
programmes devised, the more that is spent, the easier will be the readjustment process on the
part of the individual and the less will be the stress of the move. Companies will seek to reap the
rewards of such expenditure in better performance and a reduction in the number of premature
returns. Companies were thus asked to assess the success of recent secondments.

Company A claims to have seen performance improvements since the introduction of its more
supportive package, though only anecdotal evidence is available in support. In the light of this,
cost penalties are perceived as modest. Company B notes a 'halo' affect that prevents host
companies prematurely returning headquarters staff. Overseas subsidiaries prefer not to be seen to doubt HQ decisions by returning secondees prematurely and reassign tasks instead. Questionnaire surveys are conducted by both companies A and B to determine levels of satisfaction with personnel support. Both companies claim premature return as running at less than 5%. Company C has recorded no premature return for emotional reasons whilst company D does not record such figures centrally. One division within company D reported only one such case in the past twenty years. Company E’s U.K. headquarters similarly only know of one failure - a return after 3 months, due to spouse dissatisfaction.

Low rates of early repatriation reflect many factors besides the success of support packages. The ‘halo’ effect, forward transfer to new duties, absence of records, and difficulty defining ‘premature’ all contribute to under-recording of failure. Some of the figures above were disputed by others in the same company. It was not in the interests of personnel departments to reveal figures which reflect poorly on the way in which they carry out their role. Return rates do not embrace underperformance or stress that fails to achieve the high threshold necessary to engender early return. Such effects will be further assessed in the following three chapters.

c) Business travel support
A very high proportion of the cost of business travel is transport and accommodation, and companies seek to negotiate bulk deals with agencies, carriers and hoteliers to ease these costs. The efficiency and flexibility of such agencies will have an effect on the stress of those who use them. Flexibility has a cost however, in the higher premium paid for travel at short notice. As business visit skill transfer is not permanent, there is rarely any meaningful delegation of home duties to others. This factor, combined with incremental accommodation costs encourages briskness of visits. Time is at a premium in the overseas location and work can begin soon after touch-down. To compensate for the tiring nature of air travel, senior managers and those on long-haul flights are often offered a superior class of accommodation, further increasing costs. Extended separations from spouse and family can engender stress as can homesickness and the need to readjust to a different home life on return. Telecommunications which supplant travel, are a potential solution to some problems (section 7.4.5c). Spouse accompaniment of employees is also a partial solution to such problems, as is delegation of travel duties to others and faster transit times through the use of corporate, as against public, transport. The extent to which individuals require cultural briefing and language training, akin to that for secondments, can also have a bearing on stress outcome. The approaches of sample companies to such issues are assessed below.
i) Use of travel agents
To keep flexibility up, and stress down, whilst minimizing costs requires an efficient system of monitoring the contracted agencies. Often agencies are implanted, and work from within corporate offices to ease monitoring and service delivery. Monitoring often works via a tendering system, as used by Company A for its two implanted travel agents and by company B which monitors its implanted agent by user surveys. However, as there are only four travel agents in the U.K. that are able to work on a global basis, international companies find competition not that efficient a regulator. Company D's implanted agents are not monitored, though their accounts are checked to ensure the rates that they secure are competitive. The implant is well established and felt to be part of the company rather than a remote supplier. The agents look after travel. Company C and E outward travel is arranged centrally, within the company before being purchased from outside. Those on company C projects cover travel out of their budgets and purchase it locally. Employees of company E can book through an external travel agent but the cost must not exceed their allowance. The cost of booking outside will also show up on their own personal (taxable) income.

ii) Internal transport
Company A has a corporate jet, reserved for directors and senior executives, those in the top 200 of the company. Company B has purchased three corporate jets for the use of the chairman, and other directors he designates. Two jets have trans-Atlantic capability whilst one is a local European-based aircraft. There are an additional six corporate jets in the U.S.A. The company also employs ten pilots. Company E has a corporate jet, based close to headquarters. The ability to fly without lengthy check-in procedures or delays, and to travel direct will no doubt reduce the stress of business visits for those who use corporate jets. The limited availability of such aircraft, however, means there is unlikely to be any significant impact on corporate stress levels. Neither company C nor company D have their own air transportation systems.

iii) Class of travel
There is a strict company A class of travel policy: business class for long haul and all people over a certain level. The board travel first class. For journeys over 12 hours, the top 700 will also travel first class. The requirement to have class of travel authorized, however, varies between departments. There is a strict company B policy that necessitates travel on a full economy ticket short haul, and business class long haul. This means travellers will usually be upgraded to a higher class by airlines. In addition, some businesses will use limited tickets for short-haul or internal U.K. flights. Grades at or above general manager of a department are entitled to first class for long-haul and business class for short haul. Company C policy is similar in that long haul flights are entitled to a standard business class ticket which can be upgraded within the same
price bracket. In company D the policy is economy class for everyone, anywhere in Europe, including the management board. For those people travelling outside Europe as expatriates, then it is business or club class. Field service engineers normally travel economy except where poor airline standards necessitate upgrading. In company E, it is managers' own discretion and budget that determines the class of travel.

The importance of travel class to the business visitor is not just on-board comfort and service. Class of travel determines priority for alternative routing or accommodation should flights be cancelled, and often later check-ins which minimise waiting time and apprehension about seat availability. It represents a straight trade off between the minimisation of stress-generating situations and the minimisation of cost.

iv) Post-travel rest
Despite acknowledging the stress of travel in ticket class policies, no company A, C, D or E policy considers work after travel moratoria. In all cases employees decide as individuals how much freedom of choice they have. In company B the decision is up to both the business and the local manager concerned. The ultimate responsibility is left to the individual. The need to rest after travel can be linked to a requirement for recovery from jet lag, tiredness and to catch up on home events. A lack of recognition of this need may lead to stress.

v) Spouse accompaniment
Only company B allows the use of airline 'freebies' or 'two for one' tickets for spouse accompaniment, and this only when no other employee can make use of the ticket. Company D will allow spouses to be present at their own expense. Occasionally cases arise where it is necessary or desirable for spouse accompaniment at the company's expense, but this is restricted. In company A, authorization has to be signed by a director. Senior executives and heads of businesses, do frequently or periodically, take their spouses with them, because it is necessary for reasons of entertaining or some other judged rationale. Companies C and E do not support spouse accompaniment, however. These policies indicate that, beyond spouse ticket cost, there is a perception that the presence of spouses hinders the progress of business visits. This once again calls into question the extent to which the company has purchased the individual's 'quality' or family time (Chapter 2) in their work contract. Only companies C and D pay daily travel allowances to compensate for such losses.

vi) Travel briefing and orientation
Company A places a strong emphasis on maintaining employees' health whilst abroad. Appropriate medical packs are issued to company A business travellers along with a multilingual
card which declares the company’s willingness to pay medical costs of the bearer. Health and vaccination requirements of new regions are investigated in detail. Companies B, C and D provide a medical screening for risk areas. Company B issues travel guidelines and hotel/airport information, whilst company E offers minimal additional support since travel is managers’ own responsibility and budget. Where such policies present individuals travelling with a fear of the unknown or a sense of threat, stress can be avoided.

7.5 Implications of policies for stress generation

It can be seen from this analysis and précis that company mobility policies are driven primarily by economic motives. Some companies (notably A and B, but also D) have expressed an awareness of the problems mobility creates for their employees and the necessity for practical support in addition to funding, to ease transition and enhance overseas performance. Whilst the stress outcome of different mobility strategies cannot yet be established, it is possible to speculate on the outcome of divergences found in policy towards secondments and business travel, the two extremes of which are found in companies C and E.

Policy priorities could be biased by systems of accounting and definitions of efficiency. However, they do permit the use of secondments to be seen as part of a logical progression towards the realisation of a corporate objective. With business travel, however, a line management decision-making and authorization process is used to ensure that all visits are justified and approved by a direct senior. The criteria against which senior managers make decisions are complex, and generally confidential, as they are tied in to budget allocation and the sensitivity of projects to travel costs or time constraints. These criteria are unlikely to be influenced to any great extent by concern for company mobility levels as a whole, or to travel policy beyond the immediate project in hand. A collection of independent decisions by individual departments about travel cannot be seen as a universal mobility policy. The conclusion must be reached that fluctuations in short-term mobility are not the result of any policy concerned with mobility per se but with the criteria driving travel decision-making such as cost, project requirements, security and time constraints. Business travel could thus be seen as less a part of corporate strategy than secondments with much less corporate machinery engaged in its planning and support. The chances for misuse, oversight, under support and hence, stress would thus be greater.

Within company policies there are also some divergences that may have an impact on stress outcome. Company C stands apart as an organisation with a different approach to the use of secondments. Through full internationalisation, it has managed to reduce dramatically the amount of mobility within the global organisation. This has cut costs and avoided the need for the expensive support of mobility the other companies have been seen to be providing. At the
corporate level, stress through mobility would be anticipated to diminish through this lowering of the mobility load. Stress might be increased at the individual level however, due to the minimal support offered to the few who do travel or take up assignments.

Company E is at a stage of internationalisation very similar to companies B or D and has similar expatriation policies, yet is a very much younger organisation. One manifestation of this may be its very different approach to short-term mobility. By making employees accountable for their own short-term mobility, it has relieved itself of much of the responsibility for providing support. This keeps costs within project budgets, and encourages a minimal use of travel. However, as individuals are always responsible for overspend it could be that they economise on comfort or welfare, with implications for stress outcome. Placing greater onus for the timing of travel on the individual may also increase role strain.

An important factor in companies’ own accounts of policy outcome has been the extent to which individuals were prepared for mobility as part of their work experience. Company D, in particular, but also companies B and C, claim ‘career’ or permanent expatriates to be an integral part of their workforce. One might expect greater stress therefore amongst company E employees and least amongst companies A or D, depending on the relative importance of support and experience factors. The monitored stress outcome of employees in each company will be discussed in Chapter 10.

7.6 Conclusion
This chapter has discussed the aims and responsibilities of organisations as embodied in their corporate mobility policies. The use and support of geographic mobility of employees has been seen to be directly linked to the economic rationales of companies, which differ according to industrial sector, product, the sophistication of markets and corporate ethos.

The fundamental determinant of the emphasis placed on different types of mobility used has been the extent of corporate internationalisation. This is a product of company growth and expansion, determined by market and labour factors, but also corporate aims and responsibilities to the people it works with and the locations it works within. How the different types of mobility are used, and the amount of employee support offered is, in turn, affected by the requirement for corporate efficiency. Current accounting procedures, outlined in Chapter 1, favour the minimisation of year on year costs, and this has provided the financial justification for policies, and the definition of efficiency. Human factors are only addressed to the extent to which the integrity of company ILMs is maintained, and hence recruitment and training costs minimised. This means companies have been required to respond to overcome the constraints to mobility encountered by their workforce
as a result of their international policies. However, this leads to a high expenditure in order to maintain the attractiveness of overseas work to employees, and a tendency to be reactive rather than proactive in determining employee needs. Hence, some organisations were encountering problems with dual career couples and repatriation.

Money is used to outweigh disadvantages which occur during travel or secondment. Often, this is to compensate for placing the individual in situations where lifestyle, social and cultural environment are manifestly different from home. Practical help or other support could well be of more use in such situations. Whilst financial inducements are, of course, unlikely to be unpopular, required readjustment and stress is more likely to be reduced through adequate preparation, contact with home or language training.

Thus corporate mobility strategy tends not to question the need for mobility per se. The factors that determine strategy tend to be the skill requirements in the overseas location, the management development needs of the company and the relevant economic costs and benefits attributed to the move. Efficiency in policy decisions can be ultimately left to home or line management, whose ability to take into account fully the other relevant factors has been called into question (Heller, 1980).

The ways in which companies with different mobility strategies tackle similar problems leads to the conclusion that some - the more proactive and supportive - will be more effective at preventing stress-causing factors than others. These factors are investigated in the following chapters.
8.1 Introduction

It has been hypothesised in Chapter 1 that the different aspects of life towards which mobile individuals have aspirations or responsibilities will place irreconcilable temporal and spatial demands upon them. This implies a potential source of stress wherever career aspirations, the aims of the organisation or the needs of the family conflict. Conflicts can be created where those needs undergo transition such that they have to be met in a new environment or have to adapt to what a new environment can offer. This will involve the household in organisation-family and career-family conflicts, and the individual in all cases.

This chapter aims to use qualitative analysis of interview transcripts to assess not only the ways in which career-organisation-family conflicts create stress but also the mechanisms of individuals' interactions with their environment, the failure of which is manifested in conflicts. The underlying mechanisms have been identified as sense of belonging, preparation, frame of reference and adaptation. As these mechanisms apply across relocation, secondments and business travel, all three are analysed here. Although differences in task, duration and family separation will occur between such moves, there is no single criterion by which the different forms of mobility can be distinguished (Chapter 4). There is also evidence of the substitution of one means of mobility by another (Chapter 7). Thus the effect on the employee is assessed in relation to all three forms of mobility.

Whilst mobility can create conflicts between all three factors - career, organisation and family - the most common scenario from the empirical findings here involved career aspirations initially conflicting with household wishes over the need for mobility. Where the demand for mobility was advanced by the company, there may also have been some organisation-career and organisation-household conflict. Once overcome and some form of mobility undertaken, organisational rather than career factors tended to be assumed responsible for success. Hence, during the mobility process itself, open conflicts were more likely to be of the organisation-household type.

8.2 The survey

Changes produce stress because they threaten the life stability of the individual or family. Often stability is manifested as a sense of belonging in a particular environment, or topophilia (Tuan, 1974). Frequent and dynamic changes, particularly those engendered by mobility, can disrupt the sense of belonging and result in feelings of rootlessness, typified by the lifestyle of the 'executive gypsy' (Cooper, 1979). Dramatic reorganizations may be anticipated which threaten established norms, introduce known dislikes or represent the unknown. Potential changes also constrain
certainty. This jeopardizes permanence by inhibiting personal planning and the ability to maximise opportunities. At all times individuals need to be prepared for the future. Adequate information on potential future changes needs to be available to diminish speculation by establishing knowledge and readiness.

Each individual and household member will have a frame of reference through which they understand the external world and how it relates to them. The frame of reference will have developed to be appropriate to their own circumstances: their interactions with other family members, their employer and the world around them. The integrity of an individual's behaviour is determined by their frame of reference (Figure 8.1). An individual who has a frame of reference which corresponds to their environment is said to have internal balance (Torbiörn, 1982). An individual whose behaviour is appropriate to their environment is said to have external balance. Changes in the external environment, such as those engendered by a geographic move, or career change, disrupt the clarity of the frame of reference and require appropriate changes in the frame of reference and behaviour, or adaptation, to maintain external balance. Where this balance is lost, individuals find their behaviour lacking applicability to their surroundings. Stress results from each situation where mismatches between frame of reference, behaviour and the environment create 'unknowns', perceived as threatening. In the readjustment process, one's initial helplessness and inability to act, as behaviour based on the current frame of reference is found inadequate or lacking in applicability in the new surroundings, is another threat and source of stress. Once an appropriate behaviour pattern has been adopted and proven successful this will reinforce the developing frame of reference. 'Unknowns' and hence stress should diminish. The magnitude of stress will be greater if many changes occur at once, requiring dramatic shifts in frame of reference and behaviour to become established in the new environment. The extent of such shifts during long and short term company-sponsored moves will be examined here.

Transcripts were analysed for the manifestation of each phenomenon in turn and evidence of resultant stress. This analysis did not ignore the connections between and the interdependence of the different ways in which individuals interact with their environment. Frame of reference is the individual's view of the way the world should be, shaped by the information received about that environment, against which the individual measures their own behaviour. Behaviour will vary in its appropriateness to the environment: the more appropriate the better adapted the individual. In turn, a sense of belonging will only exist in an environment to which the individual is well adapted. The adaptation process depends on the correct translation of the behaviour of others, and is thus reliant on an adequate information system and clarity of interpretation, aided by appropriate language skills. The antitheses of sense of belonging, adequate information, frame of reference and adaptation: rootlessness, ignorance, disorientation and maladaptation render the
Fig 8.1: Frame of reference and subjective adjustment

Aspirations regarding clarity of frame of reference

Frame of reference

Perceived clarity of frame of reference

Aspirations regarding applicability of behaviour

Environment

Perceived applicability of behaviour

(Source: Torbiörn, 1982, p.59)
individual incapable of adequately communicating with their environment and with others. This chapter will examine how these deficiencies in communication lead to failure in coping with the processes of change that disrupt pre-existing commitments and objectives in the triad.

8.2.1 Method of analysis
52 individuals were selected for interview by their company personnel departments. This selection was likely to be biased in a number of ways. It was unlikely that a large number of failed or prematurely returned secondees would crop up in the sample, or those who would be unwilling to talk about their experiences. In addition, five of the 52 employees did not complete the survey sufficiently for their views to be incorporated here. In this way the views of many who encounter real difficulties with the secondment or business travel process cannot be represented here. 95% of the secondment experiences of the sample were those deemed successful by organisational criteria. Only three premature returns were recorded amongst employees\(^1\). As it is impossible to generalise findings about the causation of stress from such a low failure rate, examples of stress generating situations are drawn here solely from ‘successful’ secondments. After careful review and analysis of transcripts, 14 (one third) were selected to represent a cross-section of the views obtained from the 47. This was to minimise the bias possible in the presentation of a composite of selected excerpts and to enable a more representative impression of the actual experiences of the 14. It was thought that this would engender an understanding of the processes that generate stress during short- and long-term moves that was less prejudiced than selecting single issues of specific concern from a greater number. Two means were used to ensure that general and salient points arising from each interview were embraced by analysis. The first was the general overview gained by the researcher due to familiarity with interviews and transcripts. Each interview was conducted, tape-recorded, transcribed, read and re-read by the researcher. This allowed themes of interaction which run through the issues raised to be identified, and comments allocated accordingly. The second was the creation of a spreadsheet summary of factual information and opinions expressed in each interview (ordered chronologically by past and present move). Transcripts were thus selected which either best articulated points made generally about the mobility process, or which exposed specific issues of relevance to a significant minority of cases. Wherever possible the proportion of all cases reporting a particular phenomenon was calculated from the spreadsheet. As a result, the secondment and business travel processes chosen and followed here were not those that would generally be perceived as traumatic. There were no language barriers or significant cultural barriers in the transitions to distort perceptions of the move. Within the transcripts, there were examples of moves that had failed, of mismanagement and of the sheer danger associated with hostile environments. These cases did

\(^1\) See section 8.4.
not conform to any standard pattern, nor could they be considered the norm. Therefore, whilst such cases are not ignored here, they have not been used in evaluating the stages of the secondment and business travel process. Where exceptional experiences do provide an insight into the effects of unresolved conflicts in the move, illustrative material from relevant transcripts has been included. There are examples of where problems over the use of language and culture barriers arose for English speakers visiting an English speaking country. The implication is clear that similar problems arising in a non-English speaking or developing country would be much more demanding.

Four aspects of the way in which individuals interacted with their immediate environment - organisation, career, household and social and cultural milieu (Chapter 2) - emerged from analysis as of importance in the mobility-stress relationship. These were thus adopted as the sectional headings: preparation, sense of belonging, frame of reference and adaptation. As well as imposing a structure on the analytical approach, they also form relevant headings for constructive review of current mobility policies. Stress or failure in the overseas setting was often the result of cumulative minor pressures. Thus the chronological approach utilised for interviews was maintained under each heading to provide the context in which decisions were made and changes took place. The different conflicts created by moves of a more short term nature, such as business travel, are referred to towards the end of each section. There is no logical temporal cut-off point for this group of moves (see Chapter 4), and so examples are chosen here which are representative of the geographical separation of households typified by shorter moves.

8.3 The employee and mobility
8.3.1 The role of preparation and the information system
Where stress results from the threat of the unknown, information individuals can glean from their environment is of value as the provider of knowns. The 'information system' available to an individual can be seen as a supply of facts with which to prepare for events about which the individual was previously ignorant. These facts may be sufficient or insufficient for the purpose. Information enables the individual to anticipate the changes in behaviour that are necessary to minimise the risk of threatening situations. Predictions must encompass the probability of changes not occurring as well as their timing. This role is complicated by the existence of influential factors as to whether or not a move takes place, external to the career-organisation-family triad. The information system can thus fail in two ways, firstly, in its predictive role, and secondly, in its delivery of those predictions. Failures in both roles are analysed below.

Many factors contribute to preparing an individual for an overseas sojourn. Initially, one of the factors is the intention of employees to pursue a mobile career. Sample responses to a direct
question on this issue implied that a substantial proportion of employees (44%) were prepared for mobility even prior to taking up their position, but that an even larger proportion (53%) were not. Once established in a potentially mobile position, prediction of moves and their likely duration as well as changes in the employee’s finances and social and cultural environment usually emanates directly from the employing organisation. Information may also be available through formal and informal contacts within the organisation and through the employment of an outside training organisation. Other information may be gleaned from the individual’s own research or from friends and relatives. Information can also be available through prior experience. Its availability could be anticipated to be a function of the career stage reached, particularly in terms of the number of secondments and business visits undertaken, and also relocations within the home country. Relocations provide experience of the movement process and adaptation to new environments, which the individual can draw upon to inform later moves.

Forty per cent of secondees in the sample had experienced additional work-related internal (within the home country) relocation (Chapter 10). Initial experience of internal relocation provided substantial experience of the movement process. Where career, household and organisational conflicts were slight because moves were seen to be of positive benefit to career development, and to involve a household which did not yet contain children, they were rarely regarded as problematic, though spouses could face their own career conflicts (Chapter 9). The life stage reached was important, since the more established an individual had become, through family and social ties, the more a move would engender major changes in their lives. This accounted for the more ‘care free’ attitude of younger employees, whose lifestyle was more portable, to internal relocations.

Mr. Oxford: "[The personnel function gave me a] one hour briefing on where to live, and then go out and find a house. ‘Here’s a hire car. Go and find a house.’ ‘It didn’t bother me that the company didn’t have some houses all lined up for us. It turned out to be fairly simple to find a house there. There wasn’t much choice in locations and therefore you could quickly decide. You found a house in the area that you wanted and off you went. That worked out very well."^2

Generally, the later that moves occurred in the career, the greater the length of premeditation before the international secondment decision. Individuals who sought to gain experience and further career development through international assignments could actively encourage or apply for positions. Negotiating a release from the home company could be difficult, and this caused the downfall of an earlier attempt to move by at least one individual. The transfer process required the simultaneous completion or near completion of many processes. The host company

^2 Mr Oxford, 46, is a senior technical manager for a large international company. He joined the company 17 years ago. He was relocated twice within the U.K. and took up a two year unaccompanied secondment to an English speaking developed country. He has just returned. He married 23 years ago and has two children, aged 16 and 19 at time of interview. Transcript coding is explained under abbreviations (p.13).
had to find a suitable vacancy at the same time as the home company found a suitable replacement, the individual and family had to cancel, postpone or transfer commitments in the home country and assume them overseas. Houses and other possessions had to be relinquished and acquired. Synchronisation of complex processes was rarely perfect and so delays and premature transfers occurred. All of these processes are dependent upon accurate advance information to facilitate decision-making. In some cases this was not available. Departures with little warning did not give adequate time to prepare or plan. Home renovation was often required before sale or lease of the existing home was possible. Major activities precipitated by the knowledge of departure took time and money which could have been devoted more directly to the move. In such cases, household circumstances affected the organisation by reducing the individual’s ability to prepare adequately for a move. Overlong lead times also caused frustration. For one individual, a lead time of nine months interfered with both household and career objectives. The frustration almost led to his resignation.

Mr. Stockwell: "I had too much lead time because, from when I was originally approached on the idea, and when I actually left, a period of about nine months had transpired...Out of that nine months probably there were six months of uncertainty...I really got pissed off about that. I mean just the issue of buying a house or making career plans and so forth, I almost left the company on account of that."³

In these cases it was less the length of the lead time itself but the element of uncertainty that created frustration, as all other life planning was disabled until certainty about the secondment had been reached. Stress here resulted from a combination of the ‘unknown’ and prolonged anticipation of potentially threatening change.

It was here that the distinction between an information system's predictive ability and delivery was important. A personnel department may not be able to predict exactly when the complex mass of factors influencing a secondment decision will combine to produce a departure date. However, the company will at least be more aware than the individual of what those factors are. Where personnel departments were in possession of more information than individuals making the move, a ‘gap’ existed in how the move was comprehended.

Many seemed to experience this comprehension gap between their own knowledge of the secondment process and that of their personnel department. Despite the existence of sufficient information and advice within the organisation, potential movers were not able to access it. Inexperience of the process prevented first time movers from being able to ask the correct

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³ Mr. Stockwell, 39, was seconded to the U.K. headquarters of a large transnational from an English-speaking, developed overseas country. He had worked as part of the export sales team of a large company in his home country for eleven years before it became part of the U.K. transnational. He had been married eleven years prior to the secondment, and had two children, aged seven and five at the time of interview.
Mr. Park refers to ‘stumbling’ along the way to his secondment, trying not to step in the ‘potholes’.

The role of personnel departments in providing information was one of delicate balance. Whilst many felt they did not provide sufficient guidelines to living in a region, they also had to strive not to insult the intelligence of visiting managers, especially since many would be senior. Mr. Park pointed out that he did not want to be ‘spoon-fed’ information. Spoon-feeding might dampen down or deny inquisitiveness on the part of the individual and remove a necessary part of adaptation to a new environment. There could also have been the fear that personnel primers would be ignored, however well researched or presented, if they were seen by employees as over-long or patronising. Those charged with preparing and receiving secondees need to balance these concerns with those of reducing the potential stress of the unfamiliar events likely to be encountered. Stress theory states that the potential of a situation to cause stress is proportional to the magnitude of its perceived threat. Therefore, an effective warning which lessens the threat an event poses for an individual will reduce the situation’s potential to cause stress.

The information system for any one individual may contain many different sources, both formal and informal. Nevertheless, the principal role in the provision of information was undertaken by

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4 Mr. Park, 43, was seconded to the U.K. headquarters of a large transnational from an English-speaking, developed overseas country. He had worked for one other organisation for four years before joining his current company. He worked as a senior programmer and manager for fourteen years in his home country, being relocated twice. At the time of secondment, he held substantial responsibility managing the supply of information technology to the company’s regional headquarters. His thirty month secondment to the U.K. was to fulfil a similar corporate management role at two large regional complexes. Mr. Park is married with two children, aged seven and twelve at the time of interview. When Mrs. Park married, she had a career in nursing.
the home and host personnel departments. In many cases the former provided information regarding the mechanics of the move whilst the latter provided cultural and language training. This split recognized the relevant abilities possessed by both departments but ignored hazards surrounding the extent of responsibility. Some aspects of briefing may be omitted by both departments in the mistaken belief that they had been provided by the other or that the individual would voluntarily raise the issue. It has already been shown that the seconded individual is not always in a sufficiently knowledgable position to be able to ask the right questions. In addition, this approach ignores the important sequential aspect of learning. Prior awareness of a culture could also improve the efficiency of the preparation phase.

Most company policies outlined in Chapter 7 stated that a visit prior to departure on secondment for purposes of familiarisation and house-finding was a vital component of the preparation process, yet this was not offered to most of the secondees interviewed. In many cases, past business visits were assumed to suffice. Such an arrangement proved of little benefit to spouses, or to the employee.

Mr. Park: "The travelling that I had done was always: over for a week at a time, chauffeur driven car, staying in a hotel, so you don't really get to see how normal people live, and you don't get to understand what it means to live here."

The above accounts illustrate how existing information systems fail to prepare individuals adequately for moves. This can be through the failure to provide sufficient information, at the right time and in the right place. A formalization of procedure such that basic conventions are adhered to, would minimize much of the uncertainty surrounding moves. One measure that would reduce the threat of the unknown would be guidelines to ensure individuals are informed of secondment dates in advance of established minimum lead time. This lead time should be sufficiently long to allow for formal briefing and a pre-secondment visit. Other guidelines should aim to minimize the haphazard nature of briefing, the roles of the different elements within the information system should be formalized, to ensure all relevant information has been imparted at the correct time. Pre-secondment visits are discussed in greater detail, particularly as they pertain to families, in Chapter 9.

Information systems also play a crucial role in successful readjustment on return from abroad. This will be analysed in the following sections.

8.3.2 The role of a sense of belonging
Throughout life individuals establish a relationship with their surroundings based on responsibilities, aspirations and receiving positive feedback or satisfaction (Chapter 2). The mechanism of positive feedback establishes a sense of belonging in a particular milieu.
Satisfaction is gained through interaction with family, social contacts and the organisation. The balance of satisfaction gained from these three sources through life will change with circumstances. Closer contact with the organisation may lead to positive feedback in the form of career progression. Closer contact with family may lead to emotional satisfaction there. Whatever the balance of responsibility, however, the individual will gain from close contact with an environment which is found enjoyable and stimulating, over which they have some 'control' (Fisher 1990) - an environment in which they belong.

Sense of belonging has been identified as a phenomenon by many writers. The maintenance of close local social relationships has been linked to sense of well-being for some time (Weiss, 1969). More recent work by the same author has tied the breaking of relationships of community, which provide a sense of place, to loss and grief (Weiss, 1990). Packard drew on Weiss' earlier work in his commentary on the increased mobility of American society (Packard, 1972). In it he linked mobility to a decline in sense of belonging and 'rootedness'. Stokols and Shumaker (1982) have referred to place dependence - the individual's perception of being strongly attached to the locations of their activities (analogous to sense of belonging) - as the prime mediator in the relationship between mobility and health. They used empirical evidence to relate people's place dependence to the congruence of their goals and activities with prevailing environmental conditions. Sense of belonging - or 'at homeness' - the situation of being comfortable and familiar with the world in which one lives one's day to day life has been tied to feelings of control over the environment by Seamon (1979). He found the five positive attributes of sense of belonging to be: rootedness (power to organise one's lived space), appropriation (possession of space), regeneration (the restorative powers of home), at easeness (freedom to be) and warmth (the availability of friendliness and support).

The sense of belonging can be reduced by mobility, since rewarding aspects of contact with organisation, family or locale may be lost. Frequent mobility early in the career can serve to disrupt the formation of close ties with home environment. The lack of such ties may act with experience to minimize the disruption of moves later in the career. The international management maxim 'move early, move often' is based on this premise. The relationship is not straightforward however. Contacts with family or organisation may be strengthened by moves, and so the initial balance of responsibilities, aspirations and positive feedback is important. Those who could move without forfeiting their ties or sense of belonging might be regarded as having a portable lifestyle.

Where strong ties form with the host locale in each new location, a new sense of belonging can develop. It would be anticipated that frequent moves would engender a feeling of rootlessness, by successively segregating individuals from environments in which they feel they belong.
Individuals undergoing such moves include third country nationals (TCNs), those with specialist skills in frequent demand internationally, and those whose career advancement has outgrown their local organisation. Such individuals have been termed 'company gypsies' (Packard, 1972) or 'executive gypsies' (Cooper, 1979).

The life stage reached was important, since the more established an individual had become, the greater the sense of belonging, the more each move would mean major changes in their lives. The more 'care free' attitude of younger employees has already been discussed. As family responsibilities grew however, so did ties to a particular locale. One such tie would be that associated with being part of a dual career couple. Spouses have their own aspirations and responsibilities to career, organisation and family. In many cases, spouses have to moderate their own career aspirations and responsibilities to suit the relocation process.

Mr. Park: "[My wife's career] was actually the hardest part. We were five years married and she was an assistant head nurse at a hospital in [major home city]...it meant that for the first time in her career she was off shifts and working a normal five day week. She had to give that up but she ended up going from that to occupational health nursing for [chemical company]. So it was painful at the time but it worked out well."

On occasion, relocation may not be personally planned from a career perspective. Company circumstances may force a move. For example, as a result of political problems, Mr. Park's company had to relocate out of his home region and undergo a major reorganisation. Here the organisation needs dictated that the individual, career and household had to move. This created a potential, though in his case, unrealised, conflict at home.

Mr. Park: "[Mrs. Park] ended up back working for [chemical company] in another city, it worked out fairly well, but at that point we didn't have any children so it wasn't a big deal."

Eight of the 14 wives known to have pursued careers were to be found either in education or nursing. Two were secretaries, and three worked in administrative or managerial roles in the same company as their husbands. This may reflect the higher proportion of women in the nursing and educational professions. Of significance, however, was the portable nature of their careers. For a career to survive relocation or transfer in support of a partner's job opportunities, it had to involve readily saleable skills that were universally required. This necessitated the pursuance of one of only a handful of career paths able to be taken up in the urban labour markets overseas to which relocations were likely. The career paths of this type most readily open to women were nursing and education.

Personal problems also existed which tied people to a region. Individuals had elderly or ill relatives it was difficult to leave.

Mr. Pimlico: "My mother had recently been widowed, my mother-in-law had been widowed some time. My mother in law had...had a heart attack...we were concerned about the distance and so, because they're both old, I asked for a return ticket for both once a year and this was refused on the grounds that it was a
dangerous precedent...I felt pretty negative about it and I still do."5

When away from home, a sense of belonging to a particular milieu was often preserved through the retaining of valued personal belongings, and family mementos such as photographs, to remind the individual of home. The loss of such objects may represent the loss of the link with a remembered home and generate or exacerbate feelings of rootlessness. Of the 48 interviewed employees with experience of secondments, two (four per cent) had lost belongings in a move, one through theft and another through carrier malpractice. In the latter case, the grief at the loss was compounded by a dispute over insurance.

Ms. Victoria: "[I brought] the things that if I were never to return, I would want to have with me. And unfortunately that shipment was mostly destroyed. It was left out in the rain for five days uncovered...It just seeped all the way through, it's horrible, horrible, horrible, horrible." "All the photographs and things from childhood, all of that was absolutely soaked. Most of the photographs were ruined and then to make matters worse, I had this big battle with the insurance company."6

The most obvious example of rootlessness is conjured up in the image of the third country national (TCN). For such individuals, the readjustment difficulties associated with leaving familiar surroundings would be expected to be exacerbated where the return was to a different home country location to that which was left, or to another foreign location. Such employees were no longer part of a secondment process, but were being relocated from place to place. Individuals who followed this more traditional migration, as against secondment, pattern - Ravenstein's (1885) 'step by step' principle - could find themselves like Packard's company gypsies unsure of where to call 'home'. The ability of the global organisation to regard every nationality as a potential part of its labour force, combined with ongoing internationalisation of company ownership, blurred the distinction between the executive on a second foreign posting without a break and third country nationals. The nature of the sample prevented a large number of such onward relocatees being present. There were some, however, who did not know where to call home. Perhaps as a product of this uncertainty, or of the mobility that caused one employee expressed doubt as to the future of his marriage.

Mr. Finsbury "My wife feels the U.K. is a foreign posting, and almost, in a way so do I. I don't really view the U.K. as my home any more and of course, assuming that we're still married, when I retire it'll be moving back to [foreign location], because there's no doubt about it, my wife is, is not that happy in the U.K. and the same

5 Mr. Pimlico, 42, is a regional business manager for a large transnational. He joined the company sixteen years ago. He has spent two years on secondment in a developing country and fifteen months in a developed one. English was one of the languages spoken in each location. Both between and since the secondments he has undertaken extensive business travel. He married fifteen years ago.

6 Ms. Victoria, 36, is an accounting and finance manager and management training instructor for the regional headquarters of an overseas transnational. She had worked for two previous employers, in accounting and communications, before joining her current employer. She was seconded to the U.K. two years ago, having been involved in several prior temporary assignments establishing regional businesses. She is currently based in the U.K., travelling frequently overseas. She is single.
with me. 7

Many organisations guaranteed a position on return. Nevertheless, a reorganisation of internal labour market or job structure during the average length of a secondment is quite likely. Individuals overseas were also subject to assessment and liable for promotion over the period. It was thus rare for a specific post to be offered in advance of an impending return. This created uncertainty on the part of the individual and preoccupation with return during the later stages of the secondment. Many interviewees did not know what they would be doing on return, even up until the day of departure. Without confidence in the future, potential returners may assume any outcome is possible. They may seek out options, however slim, to stay on, or to move to another region, or even to another organisation.

Mr Park's uncertainty was of this type. His home organisation had undergone a very large reorganisation leaving it a fifth of its former size. Whilst he was guaranteed a job, it was to be one in an organisation very much smaller than the one he left. Mr. Park felt that as he was a senior manager used to coordinating the actions of a large number of people, a job corresponding to his skills did not actually exist in his former organisation, and he would find a position artificially manufactured for his return. Alternatively, a job might be found in a new centralised complex, 350 miles from the offices he left, in another country.

Mr. Park: "What normally, I suspect, happens is there is alternate employment somewhere. In this case, it's probably [town 350 miles away]. Well, gee, all of a sudden, I'm facing another secondment, because more and more [the home region]'s becoming as one. That introduces a whole new thing again, and the attraction of going [there] is very different from moving [here]...That move really turns me into a mobile manager."

A few had experienced the demoralisation of an unexpected return and others occupied temporary posts for many months until a suitable position was found. Uncertainty could be added for employees, like Mr. Hale, who experienced a move late in their career.

Mr. Hale: "Coming back here was extremely difficult. They had gone some way into a major reorganisation...and the appointments had been made here...No consideration had been given to the fact that my return was imminent and I had a lengthy spell of extreme uncertainty waiting for something to develop. I guess it is a traumatic experience to come back and find a 'We didn't think about slotting you in anywhere and we haven't got anything left to give you. Can you hang about a bit until something crops up?'...there was a distinct tailing off in management interest in what I'd been doing."

Such individuals found that having returned home, where they had felt they belonged, they had

7 Mr. Finsbury, 41, is a regional support manager of a large U.K. transnational for an overseas developing region. He was first seconded eighteen years ago, to a developing region. He undertook six projects overseas in five different countries before returning to the U.K. eleven years later. He had recently returned from another two and a half year assignment in a different developing region at the time of the interview. He has since departed for an indefinite period to another. He married ten years ago and has one child, aged seven.

8 Mr. Hale, 62, is a finance manager for a large transnational. He has worked for the company for 36 years. He married 34 years ago and has three grown up children. He undertook several short and longer term assignments to establish a regional business in a developing region. This involved two secondments accompanied by his youngest child on the first occasion, and his wife on both.
lost their workplace niche. Thus a sense of belonging denied to them by geographic separation was transformed on return into rootlessness through feeling superfluous.

The return process thus saw career priorities conflicting with the organisation's needs. Once individuals felt rootless, there was little to encourage them to return to the sending country. Where family had become well settled in the host location, they could be indifferent to the prospect of return. The uncertainty created stress in that no course of action could satisfy both career and household priorities. Leasing of home property had the potential to fall through due to time period uncertainties. Employees found themselves premature in having to consider their return before their tasks in the host country had been completed. This could affect efficiency at work. Employees also considered staying on in the host country. The career and household decision making process was thus considerably influenced by changes in the organisation. Poor decisions can cause sending locations, if not organisations, to lose permanently those they second.

Mr. Park: "A friend...said: 'Why don't you just give it all up and move here permanently?'; 'Well, it's a big step.' Now, I'm not sure if it is. So, the question comes. So we extend a year. This time next year, we'll be sitting around saying 'Well, do you want to go back, or shall we stay another year?'"

It was also quite possible for individuals to become career-trapped in the mobile manager role. For, as long as individuals stayed with the same company, increasing seniority meant there were fewer and fewer regions where a suitable post was available. Promotion necessitated relocation. High fliers in the overseas businesses of multinationals found they 'outgrew' their home country career structure, corporate restructuring could also radically alter career opportunities and thus requirement to move. This link between the use of career structure by individuals and by organisations has been addressed in Chapter 2. Staying with the same company, whilst being unwilling to move, left individuals vulnerable to replacement by managerial succession, particularly if they were older. Mobile executives could find career prospects threatened by this 'mobility trap'.

Mr. Park: "People who don't move around tend to slow down in their career development at certain levels, and yet if I chose not to move again, then it's probably terminal. The [350 mile move at home] would, in fact, not be a secondment. It's effectively a transfer....Should I be able to grow beyond that job, the next move is right back here. This is the centre of the universe. So it's an interesting prospect...You also get to the age where you really can't afford to turn it down either, and that nasty age trap is probably 48 to 52."

Whilst Mr. Park saw himself being forced into future moves, there was evidence of occupational selection in the amount of geographic mobility required by the organisation. Employees on career development assignments, or those who entered high up in the host organisational hierarchy, tended to find they had a low business travel load whilst overseas, with few international visits. Auditors, sales or regional managers, however, when seconded to a large international region found their travel load was high. Occupational or functional role within the organisation was thus mobility related and this partly predetermined mobility patterns.
Thus sense of belonging was distorted by secondments in a way that could be detrimental to both the individual and company. Short term moves or business travel could also deny bonds being developed with an environment in a similar way. This could happen if travel was concurrent with longer term sojourns overseas. There was also evidence to suggest that travel reduced the individual's sense of belonging to their home and social environment even when ostensibly based at home.

Business travel had two roles in the career-organisation-family triad of conflicting priorities. It could act as an irritant and enhancer of feelings of rootlessness associated with secondments and also as a significant generator of dissociation in itself, both during and outside secondments. The need for business visits and their subsequent length was often unpredictable. Often they were perceived by the individual as an extra burden on top of their existing workload, rather than as an essential component of it. The duration of separation due to the visit was often augmented by time required for preparation prior to departure, and subsequent work arising from the visit. Yet more time away from the family was occasionally necessary due to the backlog of home country work generated during the visit. Business visits intruded on quality family time by segregating the family unit in the evenings and at weekends.

Mr. Tottenham: "It's after the initial 'missing you' type phase, it's then getting down to daily life [that] is difficult. There's quite a bit of friction until things settle down again. And you'll start learning to live with each other again, putting up with each other's little ways." 9

Intense business travel thus denied some of the essential contact between individual and spouse, children and social contacts necessary for a strong sense of belonging to develop.

The above examples have shown that lack of association with any form of home base leads to feelings of rootlessness and potential stress. It was an inherent problem that such individuals were rarely fully content with their prevailing circumstances. There was room for organisations to play a more active role in maintaining secondees' links with home organisation and family members in enabling their reintegration on return.

8.3.3 The role of frame of reference

To maintain internal balance and minimise stress, an individual's frame of reference must maintain its clarity. That is, an individual's reactions to, and behaviour within surroundings should match as closely as possible their internal perception of how the world should be. Where surroundings change dramatically as a result of secondments, there is a necessity for frame of

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9 Mr. Tottenham, 30, is an area sales manager for a large transnational. He had worked in the U.K. and on temporary assignments overseas for one other company prior to joining his present employer. He has had one two-year secondment in the Far East, and is now a frequent business traveller to the region. He married four years ago, and has a child, aged 15 months at the time of interview.
reference to change accordingly to match the new environment. Until it has changed there will be a mismatch between the individual's behaviour and what is deemed appropriate for that environment.

The frame of reference cannot start to change until after the characteristics of the new location have begun to be realised. Thus, whilst acknowledging the necessity of a prompt recasting of the frame of reference to suit the new surroundings, there is a need to balance this against the vulnerability caused by people's current frame of reference and behaviour being inappropriate to their new surroundings. The vulnerability of the post-arrival period has already been discussed with regard to the requirement for an efficient information system at that time. To increase the probability of success, there is a need to ease individuals into their new setting, be it a residence in a host locality or living on site, rather than depositing them at the deep end. Clarity of the frame of reference should be maintained initially by reducing contact with the alien system and encouraging the familiar. Usual corporate practice in this regard is to meet new arrivals at the airport and provide initial accommodation in a hotel. Whilst this eases the transition, it is not a replacement for it. The frame of reference will remain inappropriate to the future living environment as long as individuals are isolated from it. If the secondment is to require integration with the local environment, exposure should begin within a few days so that the frame of reference can start to change.

Most secondees were met on arrival by a driver or a company representative. The Parks were not met at the airport, and had to find their own way to the hotel. They stayed there only one day before moving in to the new house and reclaiming their belongings from the customs dock. The process was complicated because they had moved on the New Year holiday weekend and had to negotiate a Saturday delivery, whilst purchasing uniforms to prepare their children for school. This contradicted their frame of reference for a country to have holiday opening, wide open roads and driving on the right hand side.

Mr. Park: “£500 later we had them fitted out, and I must confess this, we were tired from Christmas, we were tired from travel and driving on the wrong side of the road and all of the rest in congested [host town], some of the narrowest roads I’ve ever seen....Didn’t have a telephone either, that was one thing Personnel screwed up, of all the other things they screwed up.”

What appeared to have been small organisational oversights conflicted with household needs at a very demanding time. A culmination of minor errors and lack of awareness almost led to Mr. Park abandoning his assignment at that point. A person inexperienced to a culture will be vulnerable to taking on board every event as typical occurrences of that location. Arrival in a new home and work location can be expected to be a complicated process in any circumstances. This means that the probability of the new arrivals gaining an unfavourable impression in the initial weeks is higher than at any later time, when positive and negative events have had a chance to
balance out. New arrivals may project their first experiences as their vision of the future. This illustrates the balance required between damaging secondees’ perceptions by leaving them overburdened on arrival and the need for them to undertake activities in the local environment as an aid to assimilation. The Parks had such problems with both the major concerns for a family arriving somewhere new: finding a suitable school and somewhere to live.

Mr. Park: “Now, [the company] has an educational consultant who lives somewhere in the bowels of [a city 200 miles from host location] who is very good at sending us fifteen, twenty, thirty page documents on lists of schools but it doesn’t really help. We finally found one, but it was on our own initiative, not a lot of help. The education system is totally different. There’s different words to describe different things, there’s different schemes, things happen at ages, which is a totally foreign concept. The various kinds of schools is a mystery: state schools, grammar schools, public schools, private schools, boarding schools...[The company] would say, I think, that they did everything that we asked and they sent us lots of information and lots of data on the schools but it wasn’t really in a frame of reference that you could do anything with.”

The frame of reference of new arrivals will be appropriate to the previous (home) system and it will take them some time to adjust to the host country conventions (Torbiörn, 1982). It is thus very difficult for a recent secondee or traveller to take on board any information unless it is equated to the home system or explained from basics. The failure of Mr. Park’s personnel department to realise this and their general indifference almost lost the company the assignment.

Mr. Park: “Now, we got not a lot of help in finding accommodation...the department found us a relocation woman. Her interest was I think solely because she had a house to rent and there was a potential tenant here, she was interested. Now as it turns out she was a very nice woman and was a relocation counsellor of some description...she was not in the employ of [the company]. It was a very, very frustrating piece of work. She helped us as best she could. She didn’t know the area that we ended up settling in. I couldn’t convince [the company] to hire her, and when I finally convinced [them] to hire her, they didn’t or they failed to for whatever reason, until I finally blew my stack one night and hired her myself on behalf of [the company]...The other problem is that there was no restriction on rental so...I had no frame of reference that £500 a month is not bad, £1500 a month is expensive...we’d got to noon on Friday, we had no place to live. No one in personnel seemed to, could help or wanted to help. I said ‘well, we’ll go look, if we don’t find anything, we’ll get back on an airplane and go [home] and stuff the job.’ Very, very frustrating at that point...but we found something at the eleventh hour...Very unpleasant time and nearly caused the end of the assignment because I was to the point where it didn’t really matter enough for this crap. I had a sense of there was going to be a lot more of this behaviour.”

Individuals asked themselves questions, based on their home frame of reference, about the differences they found in their new environment. Culture shock, in some form, was common. It persisted as long as behaviour patterns failed to match the local environment. It declined as soon as the stage of acceptance was reached, when behaviour started to conform to host norms and frame of reference began to shift. This is the stage of adaptation referred to later.

Mr. Park: “I used to think [the system of shop opening hours] was stupid, to be quite frank. It’s not, it’s just a different way of living. You go through emotional phases when you move into a foreign culture. You start in what I call the ‘why’ phase: ‘Why do these people do this?’ or ‘Why do these people put up with this?’ To the next phase, the ‘how’ phase and that’s ‘Well, I don’t really care why, just tell me how I can get this done’; and then you get into the phase of just acceptance, and ‘This is the way things happen’ and you put up with it...sounds trivial, but when you spend your entire life developing these things.”

These phases can be seen to correspond to the early stages of personal adjustment described
by Torbiorn (1982) as one's frame of reference and behaviour patterns adapt to the new environment. Torbiorn found that appropriate frame of reference and behaviour coincided between six and nine months of arrival. He found satisfaction with the assignment ('feeling on top of things') would begin to increase at this stage. This corresponds with Mr. Park's assessment of his own satisfaction.

Mr. Park: "I think it was somewhere around the ninth or the tenth month where things were back to normal and by back to normal, it was: you get up in the morning, you go to work, children go to school, you come home it's business as usual, and you don't particularly think about it."

Thus frame of reference and behaviour had become appropriate to the new environment, clarity had been restored and the potential for stress reduced. This was one of two possible outcomes, the other being denial of the foreign culture in order to maximise the benefit gained from the maintenance as much of the familiar (home) frame of reference as possible.

In certain circumstances the frame of reference of individuals did not shift towards the local culture to maintain clarity but adopted an 'us and them' outlook. This was done by isolating the frame of reference as much as possible from influences contrary to those on which it was already based. This occurred where needs, of the individual, family, organisation, were best met through maintaining the distinctions between home and host cultures rather than integrating the two. Such practice was an example of segregation as against assimilation in the host country, part of the wider multiculturalism versus assimilation debate in the literature (Clarke, Ley and Peach 1984). Isolation from locals in a formal or informal enclave such as a compound or 'expatriate community' are examples of such behaviour. Such isolation would not necessarily result in greater stress since in some cases it may preserve greater clarity of frame of reference than integration.

Mr. Hale: "We decided that the ideal situation is to try to live in a house in a compound. It's like a small development with a wall round it...A French family moved in to a house almost opposite...the wives and the two boys used to go to the swimming pool during the day and things worked out fairly well. There is a tendency to feel a little isolated because there is no European community as such in [overseas location]...you don't bother about other people."

Mr. Oxford: "You don't actually mix so much socially with the locals as with the other expats. 'Cos you've more in common with other British people living out there on contracts."

A variation in the maintenance of home frame of reference was the adoption of a combative or ambassadorial outlook. Employees sometimes used military metaphors to describe their interactions with the local organisation and culture. Such language is normally associated with conflicts of a different kind and carries connotations of enforced mobility, authoritarian management and even a 'siege' mentality. One traveller referred to business trips as "sorties" whilst another used the term "R. and R." to describe days off whilst overseas.

Mr. Highbury: "They had me for seven years, I didn't get fired, I did the job, I didn't complain. I'm a good soldier. I get on with the job and I don't tend to moan about things. You don't moan about them because they
won't listen for a start."10

Secondments allowed sufficient time for options such as whether to shift the frame of reference to maintain its clarity or to isolate it from contrary perspectives. Business visits however, unless taken regularly to a well-known destination, were too short to allow an alternative. These represented quick shifts between two different environments which required rough and ready accommodation to local conditions in which to do business. After a few years of frequent trips of this type, stress due to frame of reference-environment mismatch might be anticipated to be greater than for a secondment of similar length. There was some evidence to suggest frame of reference did change over even a short period, into a 'business travel' mode which required time-consuming reversion on return. For example, many interviewees reported becoming 'out of touch' with their spouses' and children's behaviour, losing 'quality time' (Shaevitz and Shaevitz, 1979; Chapter 2) in the act of getting to know each other again.

Mr. Tottenham: "The last time I went away, the child was crawling, I came back and she was walking. Now that's grieved me to the point of I thought well, is this really worth it?...When I come back, [my wife is] out and she's doing her own thing, I'm back and I've been doing my little routine. When I come back it takes probably a good week, week and a half to start getting on together. That is common to at least myself and a couple of other colleagues."

Thus shifts in behaviour and frame of reference occurred even during short stays away. Both partners adapted to new ways of living whilst apart and found their behaviour inappropriate on return. This necessitated the readjustment process on return that Mr. Tottenham referred to.

Travel itself was a source of stress for many. Some had qualms about flying. Others found communication difficult, due to language and cultural barriers between themselves and locals. Few enjoyed living out of a suitcase with poor communication to home.

Mr. Brixton: "Dealing with new administrations in foreign languages, and not quite understanding what you have to do, getting it right the fourth time. All those things are hugely frustrating."11

On accompanied secondments, the family unit could become much more isolated due to many fewer kinship or friendship ties to the immediate community. At the same time, there was likely to be an enhanced need for contact and support from within the family. Frequent travel away from the home base, whilst abroad, could create difficulties by separating the family when it was

10 Mr. Highbury, 42, was relocated to an English-speaking, developed overseas country for seven years. He had worked for the company's U.K. subsidiary for three years, and for two years on secondment in the Far East. He held financial planning roles in all locations. After seven years, he left the company and joined another as finance director. This company relocated him back to the U.K. Mr. Highbury has been married throughout his working life, and has two children who were aged four to eight at the time of the relocation referred to here.

11 Mr. Brixton, 39, is a general manager of one of the regional businesses of a large U.K. transnational. As such he is a frequent international business traveller. He had worked for two years in an accounting firm prior to joining his current company. He has experienced two secondments, in non-English speaking developed countries, one with each of his employers. At the time of interview he had been married sixteen years and had three children, aged six, ten and twelve.
vulnerable. The increase in responsibility associated with secondments could burden the secondee with greater obligations to the office, and less predictable time with the family.

Mr. Brixton: "Strain developed which was heightened at the end of it...In August we booked a holiday for two weeks, and I spent two days with the family...I was travelling backwards and forwards...I would stop trying to persuade [my wife] it was only temporary. She coped with it by bitching at me when I got home".

Many resented the 'macho' culture within organisations that meant disruptions caused to family life or one's biological clock by frequent business travel could not be compensated for.

Mr. Oxford: "The corporate culture is such that even if you've spent the night on a plane, you're in here, for at least some of the day, and...even if I've spent the previous night on a plane, I will be in this office for four or five hours the next day...you don't feel too shattered, though you probably are more. The danger is that you don't realize that you're being bloody awkward."

Mr. Warren: "I...fly out on Tuesday, fly back overnight Thursday and be in the office for Friday and that started to be a macho culture within [the company], which became widely adopted...at the same time, taking weekends was anathema, particularly in my bit of [the company] so that you would be going out on a Sunday, or, if necessary a Saturday because it was a long haul and you'd return back on the Friday, so you'd lose both of your weekends and the company would get the benefit of the full week, and we all regarded ourselves as being quite heroic for doing that...So you then got yourself into this ridiculous nonsense of doing everything in a couple of days, two or three days, flying around and coming back to work again."

Thus both frequent short term, and long term, changes engender a change in frame of reference. The organisation however is dependent upon the clarity of the frame of reference so that individuals can operate effectively both overseas and at home. To ensure success, the company must create a delicate balance between minimising stress through the mismatch of person and environment, and encouraging interaction of the two. Interaction should encourage the development of more appropriate behaviour which in turn reinforces the newly developing frame of reference. This is the process of adaptation.

8.3.4 The role of adaptation

The host location imposes many demands for readjustment upon new arrivals and also upon the host country nationals. Adaptation is required in the relationship individuals have with their family and organisation. There is thus a source of possible conflicts in the career-organisation-family triad. As stress is a product of the readjustment process (Selye, 1976), it is important that any adaptation is relevant and effective. Organisations need employees who adopt the correct behaviour to respond to business deals, manage effectively and live competently. Often, the secondee would be the only foreigner in a particular location, making correct interaction all the more essential for business, and social, survival. Such secondees sometimes encountered resentment or alienation, requiring additional readjustment.

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12 Mr. Warren, 58, is a commercial manager for a large transnational. He has had one 12 month secondment to a part-English-speaking developing country, 35 years ago. Since then he has been an extensive business traveller to most world regions. He is single.
Mr. Highbury: "I had been promoted to a fairly senior management position [in] the head office and I was coming from abroad. I was virtually unknown and I was managing a large group of [local] people, many of whom were more qualified than I was to do the job, but [who] didn't have a proven track record of success...I was something new to that organisation in terms of all of the managers had previously been [local]...there was a lot of suspicion that I had to prove myself with that group." "That set the scene for the whole period of time. It took a long time to adjust [there]."

Mr. Stockwell: "There's a certain aspect of being a lame duck. Things are really different when they know that you're here for longer haul as opposed to being here temporarily, I think you're seen in a different light...You're still 'one of them' as opposed to 'one of us'."

Transferring between two parts of an organisation of unequal size always meant slotting in at a different level of the hierarchy overseas. For most British expatriates this was a process of leaving the headquarters to run a part or the whole of a small overseas subsidiary. Individuals thus had a greater sense of responsibility when working overseas. The loss of communication with immediate superiors heightened this awareness.

Mr. Walthamstow: "The biggest adjustment really is...you make the decisions. If you work in somewhere like [host country] where, in the North, even though you could telephone home better...I seem to remember there was a time when I couldn't get through on the phone for three weeks. You make your own decisions and you stand by them. You come back here and there is more red tape, there is more people to talk with, so adjusting to that."

On return such British expatriates, and those coming from an overseas subsidiary to work at headquarters, have to adjust to a position relatively lower within the organisational hierarchy. The readjustment process for overseas nationals returning home to an overseas subsidiary involved adaptation to being higher up in the hierarchy. Reduced work efficiency on return from overseas (both as assessed by the returnee and by colleagues) has been demonstrated by Adler (1981). Returnees were not seen to return to levels of effectiveness perceived by colleagues prior to departure until the third month back in the home country. Conflicts on return were between career aspirations and organisational structure.

Mr. Park: "[At home] I had an awful lot of delegated authority...Got here, and I'm somewhat further down the overall management chain, less power in a very decentralized organisation. I've got staff [in eight different locations across two regions]. All of a sudden I'm faced with a geographic problem and an organisational difference that I just didn't have the skill to deal with. So that took a long time to get used to and I suspect I still am, because it is so different."

Wives had to give up their work, and often their careers to accompany their husbands overseas. Many resigned themselves to the fact that legal or cultural barriers would prevent immigrant spouses finding employment. No spouses were able to take up employment with the employee's organisation unless they had worked for it prior to departure, though some organisations are

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13 Mr. Walthamstow, 47, is a project manager for a large international company. He joined the company twenty three years ago. He returned from a five year secondment overseas to a developing region five years ago and has since been managing international contracts from the U.K. This has involved substantial international business travel. He had been married eleven years prior to the secondment, and had three children, aged six months, three and six, at the time of the secondment.
contemplating this as a future option (Chapter 7). No work sometimes posed a threat to the spouse (Chapter 9). It could also affect the dynamics within the household and affect the employee. Attempting to find work in countries such as the U.K., where a work permit could only be issued on the request of a potential employer, could be a formidable task. Where employee remuneration was adequate and career interest was less such that the spouse did not wish to continue a career abroad, the stay could be viewed as a vacation opportunity where the lack of employment posed less of a threat.

All interviewees were asked whether they felt they were homesick. The responses could be divided into two general groups. The first group comprised those who remained fairly independent, and socialised only with their family, neighbours and locals, who recorded little homesickness. The second group, those who socialised only with people from the office and other expatriates, tended to report greater homesickness. One secondee to the U.K. who found it very difficult to make friends reported periodic feelings of homesickness. Mr. Euston: "I'm not a very social being...I can probably safely say I don't think I've made any friends outside of work at all...I go through waves of emotion, I think, times when I feel homesick generally."14

This would correspond to the frame of reference shift. Those who adapted well, shifted their frame of reference quickly to that of the new location. Conversely, those who chose to keep their home frame of reference, found their own behaviour inappropriate to the world around them and had greater need of a familiar environment. Where the cultural difference experienced was greater than that found for a move between two English-speaking countries, such as for those from the West visiting the developing world, an element of homesickness was almost inevitable. Only in cases of an exceptional inclination to adapt, or of substantial shielding from the local culture, such as through living in a compound, could such an outcome be avoided.

By the end of the first year, most secondees had adapted sufficiently to be able to enjoy their assignment. Except in extreme cases where individuals completely failed to come to terms with their surroundings, all reached Torbörn's stage of satisfaction or feeling 'at home' in the host location15. This is where the individual's frame of reference had caught up with behavioural adaptation and accommodated to the less frequent changes in the environment encountered in 'everyday' overseas life. Many found they then had time to take advantage of the benefits their secondment package offered.

14 Mr. Euston, 33, is an applications engineer for a large transnational. He worked for six years as a purchasing manager for a transport operator in his home country (English-speaking developed region) before joining his current employer in the U.K. In both jobs he has undertaken frequent business travel to the Far East and Europe. He is single.

15 The length of time it takes to reach this stage, and the relative stress experienced, in different locations are discussed in Chapters 7 and 10 respectively.
The element of secondment packages most employers strive to perfect is financial remuneration for overseas service (Chapter 7). An indication of the success of such efforts is that, after initial misunderstandings had been resolved, remuneration for the majority (79%) of secondments undertaken was found adequate or better\textsuperscript{16}. By the later stages some even regarded it as 'generous'. After the initial adaptation, therefore, expatriation was a slightly artificial existence. Responsibilities in the host country were fewer than at home and the availability of funds to cover them was automatic.

\textit{Mr. Park:} "[Not having] a house...gives you an awful lot more free time. Here, I don't have to pay for anything...outside of what, food, telephone and whatever I spend on myself. So I've got a lot of disposable income...My house [at home] is leased and the rent covers it's carrying costs so in fact it's a positive gain...You also spend an awful lot of money because you don't have a great deal to do that keeps you away from spending the money."

Any problems with remuneration nearly always stemmed from a fluctuating exchange rate. Few had to adapt to living on a lower income. Nevertheless, one individual felt deceived when a proposed 66% increase failed to materialise.

\textit{Mr. King:} "Remuneration was pathetic...It transpired that when I got there I found that I was the lowest paid person there. The fact that we were working [longer hours] meant that I was actually paid less per hour overseas, but had the benefit of the non-tax situation. I was very vocal in my opinion about it and over the next few years progressed financially quite rapidly but as I say the company took advantage of me with the understatement."\textsuperscript{17}

\textit{Mr. Brixton:} "We were paid local, slightly more, salaries plus a rent allowance and that was fine when we went but [the local currency was] 60 to the pound when I went. When I left it was 130. So any hope of saving was squashed."

Organisation-family and organisation-career conflicts are also created by the return move and require shifts in frame of reference and adaptation. This is often regarded as negligible by companies who hold the view that families are returning 'home' and will need little help. For younger members of the family, however, the return often equated to leaving 'home' since they had spent a significant portion of their lives abroad. For all members of the family, many aspects of the transition were the same as for their original departure. Children lost the continuity of education; friendships were lost; the spouse’s career was forced to undergo another change. In many cases, the home country or neighbourhood had undergone political or social change. Regardless of the positive or negative attributes of the change, it still required readjustment. Adaptation to an assignment, viewed as temporary, in a new and exciting environment was for

\textsuperscript{16} On 15% of these secondments initial exchange rate fluctuations caused a problem for employees. An additional 18% of employment undertaken overseas (grouped here as secondments) was under local pay and conditions, and did not involve a specific remuneration package.

\textsuperscript{17} Mr. King, 34, is a senior technical manager for a large international company. He joined the company fifteen years ago and took up a five year secondment to a developing region six years later. Since then he has been closely involved with establishing new project sites through the use of business visits. He married seven years ago and had a child, aged ten months, at the time of interview.
many people an easier process than readaptation in a fondly remembered environment which failed to live up to their recollections. The financial cushion and personnel support available whilst resident overseas was not available to smooth the transition on return. Mr. Park was contemplating such issues about his impending return home in the light of a recent visit there.

Mr. Park: "Through this [early] period, you...compare everything back against [home]. Interestingly I found that [after last visit], I was comparing everything against host...Home was always correct. That was always the centre, the way the place should be. Well, my frame of reference changed to [host] and I'm not so sure of what I saw [at home] was the best imaginable....we found a lot of change. We found it crowded. We also found [n]in my neighbourhood, there is mile after mile of strip plaza...Huge amount of choice, but who the [...] needs it? So there's a whole lot of change. There's change in your friends as well because the world has moved on, and the interesting thing about the effect of time here, is your recollection of [home] hasn't moved on, so the frame of reference gets somewhat distorted."18

Nearly all secondees and travellers will return to their home country at some point. Whilst the literature recognises the effect of reverse culture shock, this is based on how much the home location will have changed in the individual's absence, that is, representing 'home' as the unfamiliar. Torbiörn (1982) went further, and attempted to explain the decline in satisfaction seen in recently returned expatriates on the basis of changes in the individual's frame of reference and behaviour. Observations here would bear out his theory that the more an individual's frame of reference becomes adapted to their new location, the more difficult it will be for them to re-adapt to their home country.

Mr. Park: "I have a very faint worry which, not quite a worry, it's just something I keep parked at the back of my mind that the longer you stay outside of your normal environment, the harder it's going to be to go back."

This presents the conundrum that those who have adapted well to their secondment will experience the biggest upheaval on return as they have to relearn the behaviour patterns appropriate to their home country. Conversely, those who make little attempt to adjust may well find repatriation easier. It may be that former familiarity accelerates the relearning process, and that those who adapted well are those who also have the ability to adapt more quickly. If this is the case, whilst the upheaval of readopting an appropriate frame of reference and readjusting behaviour may be greater, such people may be those better able to cope and adjust anyway. In addition, when the home country has undergone political, social or other changes in their absence, those people better able to adapt will be at an advantage. The need for employees, especially, to communicate and interact with the host business and social environment tends to favour adaptation over non-adaptation even if only to local site conditions - where work does not require interaction with the culture and society at large.

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18 During the second interview, Mr. Park made reference here to a time-space diagram he had drawn, thus the words 'here' or 'there' have been replaced in the text by [host] or [home] as appropriate.
Thus adaptation occurred in response to change, regardless of the direction of change. Failure to adapt created tensions in the career-organisation-family triad, and the potential for stress. It was not just cultural factors that prompted a need for readjustment. Changes in the structure of the organisation and the position of the individual within it, in the dynamics of the family, in income and of social contacts also generated a requirement for adaptation. There was a great deal of variation between individuals in their ability to adapt, such that some were better able to overcome major transitions than others. Whether organisations choose to select future secondees on these points is a controversial issue, since capability to adapt may be related to experience or training as much as any innate ability\textsuperscript{19}. What would benefit all secondees, however, is a clearer understanding of where readjustment is required, especially as regards the return to home, and adequate preparation for the forthcoming changes, to accelerate the readjustment process.

\textbf{8.4 Conclusion}

The employees whose accounts are presented here were not unhappy with their situations. Their organisations benefitted through the transferral of management skills developed in one country to improve management centres elsewhere and through the procurement of new business. Many employees also learnt at first hand the nature of operations at headquarters. Their families benefitted as spouses and children gained valuable life experiences. Their careers benefitted as new skills were acquired and their global experience broadened. Thus companies, families and individuals regarded their secondments as successful. Nonetheless, complex processes of adaptation to different cultures and ways of conducting business, had been required, both within and outside the organisation. Lack of experience and company oversights almost ended two of the secondments discussed here in their vulnerable early stages\textsuperscript{20}. Company reorganisations and uncertainties posed threats to households and careers towards the end of the secondments. Mobility worked to confer upon individuals responsibility for major changes in every aspect of their lives and their families' lives. Nevertheless, at many stages in the move out and the move back they were hindered by insufficient knowledge of the options available within the organisation, and

\textsuperscript{19} Not one of the five who felt they had adapted poorly on secondment had received any language training or cultural briefing, but neither had those employees on the 88\% of secondments where they felt had adapted well. The general dearth of language and cultural briefing prevents firm conclusions about their role in adaptation being established.

\textsuperscript{20} Three premature returns were recorded amongst the employee sample, one due to domestic pressures and two due to failure on the part of the employee to adapt to life overseas. With such a low rate of premature return, it is impossible to generalise from these cases and thus this chapter has sought to establish the potential sources of threat prevalent across a much broader cross-section of the sample. Tung (1988) found rates of return in British MNCs of between 'less than one' and six per cent (some of the lowest in her international survey - U.S. MNCs experienced premature return of up to 40\%). In addition, Tung found transnationals reported assignments were a failure from their point of view when the individual gained little from the experience or underperformed (about 10\% of cases, p.157). Brewster (1988) found 72\% of European MNCs to have failure rates of less than 5\%, and criticised previous research (such as Torbiörn, 1982) which found rates as high as 40\%. The rate amongst the present sample (5\%) corresponds with the findings of Tung and Brewster. The many reasons why premature return will be underestimated in the present study are discussed in section 8.2.1.
often little experience of their own upon which to base decisions.

Individuals seek to fulfil what they see as priorities in their home and work lives. They assume responsibility not only for fulfilling their own career aims, but also the aspirations of their family and, to a certain extent, the aims of their employer. They will persevere through difficulties provided they perceive these aims are being met. Mobility brings conflicts between these aims such that not all can be achieved. When the point is reached where individuals feel they can compromise no further, they may seek a way out that is least detrimental to their personal circumstances. Should the employee give up on an assignment, refuse to transfer their skills or leave the company, the organisation will suffer along with the employee. For reasons outlined at the beginning of this chapter, the sample here is unlikely to contain those who did give up on a secondment, or those who have already left the company.

It must be emphasised that the secondment and business travel processes followed here were not those that would generally be perceived as traumatic. These accounts do not present situations where employees had to overcome language barriers or significant cultural barriers or encounter hostile locals, significant change in climate or lifestyle. Most secondees are perceptive individuals able to accommodate to changes and accept them. Where immediate family are willing to move and there are few constraints on leaving the home country, there should be little impediment to the organisation securing a successful secondment. It should be noted then how close these ‘successful’ secondments came to being ones that didn’t take place at all.

Many conflicts in the career-organisation-family triad have been exposed by this analysis. A common theme has emerged that full satisfaction of aspirations and responsibilities in all aspects of the triad was impossible. A compromise always had to be reached by the individual which would lead to inevitable dissatisfaction in some parts of the triad some of the time. These are the conflicts that have been exposed. The usual direction of the compromise is for organisations to utilize the career aspirations of their employees to encourage mobility which fulfils the international aims of the company. Often this is at some cost to the individual’s family obligations, where the strains of the move itself were most often visible. Danger arose however if this endeavour by the company was pushed too far and ignored other needs. A situation could arise where individuals abandoned the move in order to preserve their other responsibilities, notably to the family.

This chapter has analysed the areas where organisation, career and household priorities conflict

21 Members of the family also had to reach a compromise, and these concerns are addressed in the following chapter.
when an individual moves to work overseas. Underlying these conflicts however were deficiencies in the four ways in which individuals interact with their environment. Information systems failed in both prediction and delivery, through the home and host personnel departments' inability to understand their role in information provision and the importance of adequate preparation. Organisations also needed to understand better the role of the individual's sense of belonging to a particular milieu, and the fact that it could be harnessed for their own ends. Disregarding this could lead to employee feelings of rootlessness and direction of their effort in a direction detrimental to the organisation. The close interconnection between frame of reference and adaptation also needed to be understood if stress was to be minimised. Whilst the clarity of the frame of reference could be maintained through isolation or assimilation, options available did not always permit a choice and adequate preparation and equating of home and host cultures to ease the behavioural shift was required.

Thus the findings presented here concur well with earlier theories of personal readjustment in the overseas setting. Lysgaard's U curve hypothesis (Lysgaard, 1955) and Torbiorn's linking of the shape of the satisfaction curve to individual's success in adjusting frame of reference and behaviour to the new environment (Torbiorn, 1982) are portrayed clearly. The term 'frame of reference' is referred to in individuals' own assessments of their attempts to readjust.

The inner conflict between one's frame of reference and the appropriateness of one's behaviour to the current environment is forwarded by Torbiorn as the principal source of stress for those moved from one setting to another. Torbiorn translates this stress as a negative satisfaction score. Whilst this can be identified here, there is also evidence to suggest that individuals have responsibilities beyond that towards their own satisfaction that need to be fulfilled as function of their own behaviour. Thus, whilst there is evidence here to support Torbiorn's hypothesis, it does not fully explain the mobility stress-relationship. Employees have to develop a frame of reference and adapt behaviour to many factors other than Torbiorn's culture change: new family dynamics, hierarchies and measure of control, a new social milieu, introduced uncertainties and absence of previous knowns. Other aspects of the mobility process can also introduce potential threat into employees lives: insufficient preparation, the non-availability of adequate information, and potential rootlessness. These factors also apply across a wide range of corporate-engendered moves, from relocation to secondments, return moves and business travel.

These accounts demonstrate that mobility creates conflicts between vital components of the individual's life; the interests of their family, those of their employer and of their own career. Individuals who found that they were unable to adapt their behaviour to resolve all these conflicts had encountered potential stress-generating situations. A more information rich environment might
enable employees to adapt their behaviour more readily and thus reduce the stress attributed to
the threat of the unknown or uncertain. This approach needs to be balanced such that interaction
with the new environment is not suppressed. It needs to be recognised that some conflicts will
be impossible to resolve and short of not moving at all, individuals will need to have a frame of
reference that takes this on board. Adequate preparation (advanced in Chapter 11) could thus
ensure that futile changes in behaviour (such as attempting to maintain stability in a spouses
career across many moves), are avoided.
Chapter 9: The family

9.1 Introduction

The previous chapter examined the way in which corporate-engendered mobility affected the interaction of employees with the principal components of their immediate environment: career, organisation and family. Many sources of threat and potential stress were identified: adaptation to cultural changes, new family relationships, different systems of control within the organisation and a new social milieu; insufficient information and preparation, and disruption to sense of belonging. These factors applied across both long- and short-term moves.

This chapter aims to assess the way in which business travel and secondments affect the part of the individual’s career-organisation-family triad which is least connected to the organisation (the motivating force behind moves) the family. Qualitative analysis of interview transcripts was carried out with a view to isolating the ways in which family members communicate with their environment and how stress could result from deficiencies in that communication. It sought to assess the way such familial stress can affect the employee and the organisation and suggest improvements to mobility infrastructure to prevent such shortcomings.

The term family is used here to denote the spouse, children or extended family, where appropriate, with whom the employee is normally resident. This definition excludes employees who live alone. The term household is used to refer to the individual plus any resident family.

9.2 The survey

At the time of interview, of the 47 who successfully completed all aspects of the survey required of them, 39 had a family of some kind. Of these, 28 lived with spouse and children, nine lived with spouse alone, and one had spouse, children and mother-in-law resident at home. The children of one other couple had already left home. Two individuals with families had lost their previous partners (one through divorce, one through bereavement) but had remarried. Of the eight individuals living alone, four were bachelors, three were spinsters and one was a divorcee. In three cases, the spouses of the employed individuals were male, and worked full-time. Less than a quarter of female spouses, seven out of 36, undertook full-time paid employment. One other undertook part time work.

Two male and 16 female spouses were interviewed by arrangement through their partners. Interviews concentrated on how the mobility engendered by partner’s occupation affected spouse’s lifestyle, their responsibilities and aspirations. In the twelve cases where it was relevant, spouses were also asked to comment on the effect of mobility on their children. The same
approach to presentation of spouse interviews was adopted as for employees in the previous chapter. Generalisations and salient points generated in interviews with the eighteen are conveyed through the four spouse accounts chosen for presentation below.

The only relationship in the career-organisation-family triad which follows the individual from cradle to grave, is their relationship with their family and household. The family members represent major targets of the working individual's aspirations and beneficiary of the individual's responsibilities. The majority of an individual's lifespan will be spent putting time and effort into interactions with parents, spouse, children and extended family. In turn, the family relationship is the one on which individuals are dependent during the most vulnerable periods of their own lives, when young, old, sick or isolated from their other interactions with career or organisation.

The composition of a family or household and the nature of relationships within it is a personal matter. The latter can be as flexible as the individuals involved and the legal and moral codes of the prevailing society. Family relations can be an institution, but are rarely contractual or institutionalised. They are the aspects of individuals' lives into which commercial organisations normally seek to have no formal input.

Nevertheless, organisational codes do constrain an individual's freedom of choice to organise the spatial and temporal aspects of their lives. By constraining individuals to be in a certain place at a certain time, organisations place an immediate constraint on the family's ability to organise itself as it might wish. Complex surrogate structures, nannies, creches and nurseries have been developed to restore aspects of family unity lost to organisational demands. Household activities are normally structured around regular time and place demands. It is when organisational mobility requires individuals to spend more time in geographically disparate locations or visit at frequent or irregular intervals that demands upon the family change quite dramatically. Whether or not the household moves, there is need for readjustment and thus a potential for stress.

Should an individual be requested to undertake a long term move by their company, the choice for the individual is whether or not to move. However, for the family there is a wider range of options. The entire household could choose to move along with the individual, or the household could be split by some of its members choosing to stay or to move elsewhere. Where the household is split, children could move to boarding school or to live with friends whilst the spouse moves with the employee, or the spouse could choose to stay behind as well. The household is thus either faced with the disruption of the move, the more common choice, given that it maintains the integrity of the household, or it is faced with the upheaval of splitting the household.
There is thus seen to be a degree of voluntariness in the family’s decision to move or split and stay, albeit a decision on the lesser of two ‘evils’. From the family’s point of view, however, there would be no need to make such a decision without the intervention of the company. There is thus a degree to which the family is making decisions at the request of the organisation. These decisions will affect most aspects of family members’ lives in terms of home location, work location, career, income, family relations and social life. There is a great potential for changes in these aspects to cause stress. Whilst overseas the family will be dependent on the organisation for its major source of income, will have altered lifestyles to suit the organisation and, in the case of the spouse, will be called upon to represent the organisation in an unofficial and official capacity. The company thus benefits from family decisions which countenance the move. In mobility, commercial organisations seek to have an input into family decisions, in both an overt and a covert sense. Where household structure, dynamics, location and activities change to suit the company’s ends and benefits are received for doing so, the distinction becomes blurred between employment of the individual by the company and employment of the whole family.

Whilst the individuals comprising the family are only part of the employee’s triad of aspirations and responsibilities (Chapter 2), they each have their own exogenous links. Spouses may have aspirations and responsibilities towards their own career and employing organisation, as may their children towards their education, school and friends. All individuals will be part of a local social environment into which they contribute and from which they benefit. Secondments involve the shifting of the employee’s career-organisation-family triad out of its local context, but the triad itself remains intact since the individual maintains contact with and contributes to the family, organisation and career whilst overseas. However, working spouses almost inevitably have to leave their work organisation and hence forsake their career prospects when they accompany their partners overseas. Children also have to leave their school to resume their education overseas where teaching methods and curricula can vary widely. The family members thus find themselves removed from not only the context of their local social contact but their career and organisational environment as well. There is thus an additional source of disruption to their lives, against which can be balanced fewer positive benefits. This is because family members are

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1 Despite a dramatic increase in the number of foreigners relative to host nationals attending schools in Western Europe, there is still no uniform policy relating to what education immigrants are entitled to receive and doubts exist about the quality of education received. The existence of language and cultural barriers, have been identified as of greatest importance in explaining underachievement (Blot, 1990). Though the same author predicts a lessening of these barriers with increasing length of stay, the children of skilled international migrants who accompany the employee may not stay sufficiently long to be able to overcome these communication difficulties. Home country boarding school (or state school whilst staying with friends or relatives) is often available as an alternative, although parental objection can be strong. Children have also been shown to suffer distress when separated from home for long periods (Fisher et al., 1984, see Chapter 3). The solution for many is thus an international school, or British or American community schools overseas. Standards of education in these establishments can be high, but cultural barriers may persist. For older children, international schools are rarely available and other schools’ syllabuses may not correspond to home examination and college entry requirements. Correspondence courses can be undertaken but require patient parental surrogate teachers (Piet-Pelon and Hornby, 1986). Few of these options can avoid disruption in the continuity of children’s education engendered by short secondment lengths and unpredictable or mid-term departure dates.
disconnected from the driving forces behind moves. They are not part of the organisation seeking to promote the move, nor are they the beneficiary of any career enhancement as a result of it. Benefits for the family are less tangible, such as international experience and indirect financial advantage. Moves may be a greater source of stress for family members than for employees because they interrupt and change many more well established areas of their lives. The lack of voluntariness or control may also create resentment. Business travel, too, brings about a temporary change of environment for family members, to one where the employee is absent from the household. Travel can thus be anticipated to engender a threat and require readjustment wherever family members are less able to cope as a result. Thus both secondments and business visits will affect the way in which the family interacts with its new environment.

The mechanisms controlling interaction with the environment that need to be harnessed to minimise stress which are of concern to employees seconded overseas are of concern to family members. People disconnected from the driving force behind moves would be expected to be of even greater need of accurate predictive and descriptive information about their new environment. Their sense of belonging would be anticipated to have suffered as their home and employment milieus changed dramatically. Thus frame of reference would have to shift further and behaviour adapt to the many more changes in daily life required by the new environment. These mechanisms by which individuals interact with their environment (information, sense of belonging, frame of reference and adaptation) formed the basis of the analytical framework through which interview transcripts were analysed. The potentially stress-generating situations created by relocation or secondment are addressed first in each section: problems prompted by employee absence are addressed towards the end.

9.3 The family and mobility

9.3.1 The role of the information system

The family does not possess the employee's direct line of communication with the organisation. It is thus more distant than the individual from formal methods of information provision. The information 'system' available to the family is thus more haphazard: sometimes formal - through company arrangements, sometimes informal - through friends; sometimes self administered; sometimes none at all. Although formal family briefing can often be provided by the company, it is not always in the same detail as that provided for the employee, who is at liberty to ask more questions, and in a better informed environment to ask those questions. The family can only communicate its requests to the company, which may be very different to those of the employee, via an intermediary. A possible advantage to the family of this barrier to communication is a potential shielding from some of the uncertainties when a move is first intimated.
Yet the family is taking a potentially much bigger step into the unknown than the employee. It is inevitable that some elements of moves will be seen as opportunities by the family: children can broaden their education, spouses can gain the experience of living and working in a potentially exciting environment. There are also inevitable losses. Family members will lose contact with their accustomed social environment, with additional changes in any organisational or career interactions. This can threaten the life stability of the family. The threat of the unknown and dramatic changes in life processes are potential sources of stress. If it is given that breaks have to be made and changes occur then adequate planning of those breaks and changes becomes the substitute for stability. Controlled change can only exist in an information rich environment. This makes the provision of adequate knowledge to reduce elements of the unknown (those known only to the organisation) essential.

The first and foremost unknown for a family was whether or not their lifestyle was to be a mobile one. 25% of spouses did not know when they married that their partners would be mobile as part of their career. This was to be expected if it is assumed that marriage occurs at random in relation to propensity to move. Opportunities for travel and secondments arise unpredictably and are offered to individuals according to criteria based on skills, experience and potential. Only 45% of employees interviewed started their career with the intention of it being an internationally mobile one. Until relevant qualities have been identified and made known to the individual, or a move promulgated, it is unlikely individuals, or their spouses, will be aware of their international potential. Therefore, a major issue for spouses, and indirectly for children since it disrupted their education, was the discovery that mobility was to become a way of life, not just a one off occurrence.

Mrs. Wood: “If we had known that that was the beginning of a series of moves, we might have done something different, because I do think [the children] have suffered a little bit because of that move. Not so much the going up there as the coming back from there afterwards, very difficult.”

There would seem to be little scope for organisations to predict earlier who they are likely to require as mobile managers. Organisations, dependent on a flexible internal labour market and the use of international secondments to fill skill gaps within it, are unlikely to be able to change this situation. The impasse thus exists that a limited knowledge of future mobility is required, in order to plan satisfactorily spouse’s career and children’s schooling, but companies will never be able to provide such a long term forecast. Planning schooling is a long-term task with critical time-specificity to school year dates, examinations, and transitions to primary, secondary and tertiary

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2 Mrs. Wood, 43, was a nurse until, three years after she married her husband, they were relocated and she had her first child. They were relocated on two more occasions as a household. More recently Mr. Wood took up a two-year secondment unaccompanied to a developed English speaking country. She now undertakes part-time voluntary work. Her two children were aged 19 and 16 at the time of interview.
education establishments. The impasse thus makes it all the more essential that once a move is probable, an adequate warning is provided which takes into account the planning needs of the family. In contrast to this, amongst the sample, lead times were far from adequate, with as little as four weeks being given to over a third of couples\(^3\). In this time they would be expected to conclude all their activities in their home region, prepare for the secondment and take up residence overseas. To undertake adequately such preparation, however, three months was viewed as a more appropriate period, extensions having to be fought for.

Mrs. Oakwood: "My husband actually finally accepted...just before the Christmas holiday, and we eventually left about the middle of March, but he had been asked to be out there on the first of January so in fact it took a lot of work on his part to extend for as long as we did."\(^4\)

A similar unpredictability existed regarding the length of secondments. Again, corporate labour needs change constantly and accurate prediction of length of secondment is difficult. Nevertheless, a family's ability to plan ahead was dependent on such information. Many secondment contracts were for a standard two years which could be curtailed or extended as and when necessary. There was some evidence to suggest that individuals were relying too heavily on this poor indication of secondment length. Since planning was dependent on a timetable, even a crude estimate of sojourn length by the company would have been better than this arbitrary definition. Producing a list of possible end dates would at least allow for optional planning by the family. Ideally such dates would be negotiated to coincide with suitable departure times for the family (such as at the end of the school year).

Mrs. Wood: "We were told it was a two year assignment. We were very naive in those days, or I was. I believed what I was told. It turned into four and a half."

Many families thus had to undertake preparation for living on secondment, ignorant of the amount of time they would be spending there\(^5\). In the limited time period before departure, individuals will seek to organise the mechanics, or time-specifics, of the move first. Housing, schooling and employment concerns will receive primary attention. There is thus a danger the issue of life overseas will not be addressed until after arrival overseas. They are thus rendered unable to take

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\(^3\) The mean lead time for couples seconded together was 11 weeks (with a range from two weeks to 12 months). This was the same as the mean lead time for unaccompanied individuals (range one day to 12 months). Over 56% of lead times for this latter group were under a month, compared to 39% for couples and 44% for secondments as a whole (N=59). This indicates the skewed nature of the distribution, unaccompanied secondees tending to receive shorter lead times.

\(^4\) Mrs. Oakwood, 38, was a secretary and secretarial trainer in a large international organisation for fourteen years prior to marrying, and four years afterwards, until they were seconded to the Far East for three years. Her duties then involved limited international travel. Her husband travelled extensively both before and after the secondment. She is currently a housewife, caring for her one child aged three, at the time of interview.

\(^5\) Of 31 completed secondments amongst the sample, upon which sufficient information was obtained, only half (16) commenced with any indication of how long they would be. 15 secondees were told their secondment length was indefinite or unknown. Seven secondees were given estimates of length which were inaccurate by six months or more. The mean of the percentage errors in the sixteen predicted durations was ±48%.
advantage of the previous experiences of their compatriots, the possibly superior language and cultural briefing facilities at home, and the ability to make informed decisions as to what belongings will be appropriate or inappropriate. Without an adequate lead time individuals will be entering a new culture blind, not knowing what adaptation will be required on their part or whether they will be able to cope with it at all.

Despite a professed policy encouraging the use of cultural briefing centres by transferees and their spouses (Chapter 7), few opportunities were offered to the individuals interviewed. Of 59 secondments discussed in interviews, 53 (90%) had no cultural briefing. One provided cultural briefing for the employee alone, and another provided an offer of cultural briefing which was not taken up. On only four secondments did both husband and wife take part in a formal cultural briefing session. Opinion on the success of such courses was generally positive, but with reservations.

Mrs. Holloway: "The company...had a week's orientation and that was tremendously helpful...They gave us just some basic language phrases, counting and a bit of cultural indoctrination which made a world of difference because when you're going to such a foreign culture, just knowing where they're coming from, what makes them tick and a little bit about what differences to expect really helps."6

Mrs. Oakwood: "We went to a course at [an outside briefing centre] which was helpful in some respects - I think talking to people who'd been posted before, and talking to people who'd been to [destination]. There were a lot of aspects of it, I mean talking about the economy of the area and that sort of thing which was possibly of interest but at that time I didn't particularly want to get involved with that. I thought other things were more important. I still went out there without knowing what [the country] was going to be like. I think probably because the people who you were talking to obviously were trying to put things across without frightening you."7

There was thus room for greater tailoring of courses to suit individuals' requirements. Because briefing centres catered for clients travelling for a wide range of purposes and time periods, their information was found inappropriate in some areas and lacking in others. One briefing centre's information pack was dismissed a 'tourist' pack. Better ways of imparting information which would be more appropriate to corporate needs and corporate spouse needs were suggested by a

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6 Mrs. Holloway, 40, had moved house 13 times prior to marrying. She took up a teaching post almost immediately after, in a non-English speaking developing country. She has since moved 11 times, ten with her husband's existing company. Five of the company's moves were international, and for the first two she was in their employment. More recently, and up to the present, she has been a part time teacher at an international school. She has two children, aged 14 and nine at the time of interview.

7 Enrolment on cultural briefing programmes would be partially dependent on sufficiently long lead-times. At the time of the survey a four-day country briefing at a recognised centre of the type described by Mrs. Oakwood cost £810 for the working partner and £760 for accompanying spouse (less for some popular destinations). Five-day total immersion language training costs £785 per person. The bill for nine days of cultural briefing for a couple would thus be a little over £3000. This is a substantial initial outlay, and in practice is half or a quarter of this amount as language or spouse components are omitted. Nevertheless £3000 represents less than 1.5% of the average cost of a three-year secondment salary (£69430 per annum according to the Inbucon Survey of Expatriate Salaries, P-E International, 1990). Two weeks of briefing incur a similar cost to two weeks of expatriation (£3140 versus £2670, estimated from same source), likely to be significantly less than the costs of expatriate failure and finding a replacement.
number of individuals. They wished to see greater utilization of resources already available ‘in-house’ through the experiences of past secondees and their families.

*Mrs. Oakwood:* "The company had access to people who’d been there and who had worked in the offices there, who had lived there, and I think just to arrange for [my husband] and I to sit down with them somewhere for a couple of hours and talk would have been useful."

Such practice was rare as part of a company’s formal orientation programme. However, some individuals were able to negotiate such arrangements through friends and office contacts. Formal arrangements did exist for pre-secondment visits, during which it was possible for future secondees, employee accompanied by spouse, to meet current incumbents of posts, and their families. The company provided such visits to enable individuals to make the final decision as to whether to take up the secondment. As such, these visits greatly eased the threat of the unknown, as they offered a final chance for individuals to withdraw from the secondment process. Although companies would wish to avoid such an outcome, withdrawal would prove less costly at this stage than later. Such visits also enabled cultural briefing to be placed in context. Accompanied pre-secondment visits were popular amongst employees and spouses as a way of becoming acquainted with the host culture, and arranging basic provisions prior to arrival. They were undertaken prior to 33% of all secondments monitored, and lasted between two and seven days.

Pre-secondment visits were often seen by the organisation and individuals as the best way to prepare the family for secondment. Whilst there was much justification for their role in reducing the threat of the unknown, and hence the potential for stress, they could not be seen as an alternative to an integrated orientation package. If individuals were expected to house hunt whilst on the visit, they needed more time, and to be armed with accurate information about the house hunting process. This required relevant cultural briefing, and language skills in many cases. Insufficient briefing prior to the trip, and failing to allow enough time for the house hunting process, negated many of the benefits of the pre-secondment visit.

*Mrs. Holloway:* "They gave us some hand-outs, I believe, but there were more errors in them than accuracies in terms of what sort of appliances to bring...This is where I think companies could do a lot better - or at least this company - to be willing to send people over to house-hunt and let them stay there till they find a place, instead of saying well you’ve got a week and if you don’t find something that’s tough. Because unless you know exactly what you’re getting into, you don’t know what to bring with you...We were given conflicting advice [by personnel departments] about whether to look for furnished accommodation, or for unfurnished."

Inaccurate or incomplete information was, in many cases, worse than no information at all. The developing frame of reference needs to fed knowledge that effects the correct behaviour. If behaviour is inappropriate to the host environment, stress can result. Individuals may not be able to utilize their common sense or inquisitive skills in a culture where different ground rules apply. They therefore depend on information they can act on in confidence from an informant they can
trust. Should doubts about accuracy or completeness arise, that trust may be lost, and with it the willingness to be exposed to unfamiliar environments again.

Where information relates to health or security matters, the availability of accurate and complete information is paramount. Misinformation here can result in tragedy. The vulnerability of families, particularly those involving children, when travelling overseas, must be recognized. Even when companies did provide advice, it was still not necessarily sufficient for an informed decision to be made.

Mrs. Oakwood: “Before I went out there I saw the [company] doctor who’d actually been out there and looked at the facilities and said that he didn’t see any reason why we shouldn’t have a baby [abroad], but if I wanted to, I could come back. [The company] would pay for the flight. When [first child] was born it wasn’t easy because the communication was very difficult and I didn’t like being in hospital at all but, because nothing went badly wrong, I would have said it was quite successful. I then had a second baby out there, last year and he died and I think that was largely as a result of deficiencies in the health facilities.”

Thus it did not actually matter whether the doctor’s prediction was right or wrong. As far as the individual was concerned the advice was wrong. A tragedy had occurred for which the individual felt her new environment was responsible. She would worry about health care facilities, hence stress would not have been avoided. She was also capable of passing on her worries to others. Not only could her experience colour the household’s future decisions to second, but her experience could influence other employees’ propensity to take up the posting. In such cases the only way the company could have absolved itself from such blame would have been to have advised the individual to travel back to the U.K. for health care or to have funded better facilities in the host region. It is not known whether company policy changed as a result of this bad experience. A prime concern of the organisation in maintaining a flexible internal labour market must be to reduce negative feedback from returned secondees which might deter others from being willing to move. Ensuring that the return to home proceeds smoothly is thus essential. This should allow sufficient time for housing, schooling, employment and shipment of belongings to be arranged. Date of return is usually based on the end of project work in the overseas region rather than immediate business demands at home. This should provide a better framework for planning the return timetable than the more immediate business demands allow for the outward journey. Often however, lead times to return were as short, or even shorter than for the outward journey. The Oakwoods only had four weeks notice of return.

Mrs. Oakwood: “We were pleased about coming home. We weren’t too chuffed about how quickly we had to get out. We left things undone, certainly on the social side, which I think is quite important. [My husband] didn’t have the chance to sever his business contacts the way he would have liked. Packing up the house was a mess and resulted in a lot more work when we got back.”

One personnel department gave the reason for open-ended secondment lengths and short lead time to return as the need to prevent individuals’ concerns turning to the home location too soon. Whilst this transfer of attention was an inevitable side effect of secondment, it could not have
been good business practice for employees’ work to be deserted unconcluded, or for individuals to return in a hurried and stressed manner. One spouse was visiting her family at home when the instructions to return were issued.

*Mrs. Holloway:* “As soon as I got back [home], [my husband] called me and said ‘They’re sending us back [home].’ So I never even got a chance to go back to [posting] and pack my things, and that was a sore point. [My husband] packed all the wrong stuff. We didn’t have what we needed for the baby. I had to go out and buy things. By the time we found out we were moving more permanently and they shipped the things, he had grown.” “I always thought as though they did that to save money. To save the cost of the air fare they didn’t let me go back to [posting] to pack up.”

Such short lead times to return do little to save company time or effort. Inefficient packing or ineffective planning will cost time on the family’s and on the individual’s part. In his wife’s absence and with such a short lead time, Mr. Holloway had to spend time away from his work in order to pack and unpack. The reduction in individual morale and the creation of stress and resentment of the company are high prices to pay in order to minimise individuals’ consideration of the future. Apprehension on the part of individuals must be seen as partly the product of insufficient information about the future. More information about what employees’ position might be on return could work to minimise contemplation of the future better than denying knowledge of when that future might be.

Families are equally if not more vulnerable to culture shock in reverse on return to home. This is because they are not part of the organisation and are more likely to have become involved with the host society and culture than the employee. Arguments in Chapter 8 relating to the provision of information which maintains contact with the home culture, and thus eases readjustment on return, are thus equally applicable to spouses and children.

Information systems also play an important role in minimising familial stress during business travel. Changes for the family are of a qualitatively different kind to that experienced during secondment. Instead of the household moving as a unit from a familiar social and work environment to an unfamiliar one, it remains in that milieu whilst the family and employee are separated. Information is thus not required concerning changes in the external environment but about changes in the family’s internal environment. The information system is thus that which keeps the household members in contact with each other. This was usually real-time information provided by the office in the home location or in the destination country or direct contact by telephone with the employee. This provided reassurance to prevent stress through the threat of the unknown, for example, where family or employee health was at risk.
Anxiety arises when the information system breaks down; this was often for reasons beyond the employee's control. Most spouses were content with the organisation's provision of real-time information. Inevitably, the organisation was in possession of more precise information than the family.

Mrs. Holloway: "For the most part I don't even know about it, I tend to forget about it from one week to the next, until something happens where I need to get a hold of him and can't and then, then I'm annoyed and upset. Then for a while I'll ask him to leave me his itinerary. Even when he tells me where he's going to be I forget because it isn't like he goes to the same place all the time. He's in different countries so I don't really pay much attention any more. For the most part he calls in almost every night." [Once] I was amazed that, I didn't even know what country he was in, and within 10 minutes [the company] had him calling me back - so they knew exactly where he was."

Advance information concerning the date and duration of travel is required to enable households to plan for the near future. Organisations were less reliable in their provision of advance information than in their aiding of real-time communication. The effect of this failure is dealt with under adaptation below.

Family members were not part of the organisation whether based in the home or host location, yet their lives are dramatically altered by company decisions. Attempts were made by organisations to brief employees and their families about changes likely to occur as a result of business travel and relocation. Informing family members was seen to be particularly important since, unlike the employee, they did not have access to the informal exchanges with sources within the company. Where formal briefings were accurate and relevant they could help inform families in the development of a new frame of reference and adaptation. However, failure of the organisation to predict efficiently the occurrence of the changes they imposed on family life or to provide accurate information led to stress, resentment, reluctance and potential tragedy.

9.3.2 The role of sense of belonging

Chapter 8 discussed the satisfaction employees gained from their strong sense of belonging to their organisation, to their families and to their local social environment. In moving overseas they break one of these ties, their sense of belonging to their social locale. Family members can also have a sense of belonging to a work organisation or school, to other household members and to their local social milieu. Moving for the family engenders breaking all but the ties to the family and is thus a greater threat to the satisfaction they gain from their sense of belonging. Family-

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* Mrs. Osterley, 27, was a nurse in the medical centre of a large international company until shortly after her marriage. She and her husband then undertook a two year secondment to the Far East. For the two years since their return she has continued her nursing work. Mr. Osterley undertakes extensive business travel. She has one child, aged one at the time of interview.
organisational ties tend to be weak. Instead family members tend to have stronger links to friends, relatives, neighbours and community networks (Marshall and Cooper, 1976). The threat posed to their sense of belonging by separation from these was thus greater and affected their ability to invest effort and feel at home in a new locale. There was thus a risk that a failure to find satisfaction in the foreign location after several moves would manifest itself as rootlessness - a failure to feel at home anywhere.

For some the progression to rootlessness began in childhood. Spouses recalled withdrawal from interaction with their local social environment at any early stage in their lives. It could be assumed that a similar erosion of sense of belonging would be taking place for the children of such mobile parents.

Mrs. Holloway: "We moved a lot when I was little. I had responded to all the moves by becoming very introverted and never making friends, so there wasn't any wrenching in leaving. That was my defence mechanism, just not getting close to anybody so that it wasn't painful to leave and I've still carried on. I'm not as introverted but I don't make close friendships. I have a lot of acquaintances because I don't want to get so attached to anything or anybody that it's going to be that difficult."

Amongst the 25% of spouses who had previously had no knowledge that their partners would be geographically mobile as part of their career, the need for a move away from an established home could be met with disbelief.

Mrs. Wood: "I was devastated because we had lived in [home town]. I had both the children there. I was in a lovely little rut and really thought that we'd end our days there. I had a tremendous number of friends and had a fantastic social life and I just couldn't believe that we were going to have all that whipped away."

Those who had moved less in childhood, and been able to invest time and effort in a more permanent home, communicated a sense of belonging in the layers of friendship and acquaintance built up over the years. Geographic mobility threatened the sense of belonging by breaking all but the obvious links.

Mrs. Wood: "When you live in a community, your whole life is built up. You've got very close friends but you have a lot of people on the fringe who are just acquaintances really and they actually make up that life that you have got in a place. When you go back to somewhere you still have that contact with the very close friends because that's never been broken but it's all those other fringe people that have drifted away."

Such an attachment to the former home environment could manifest itself as a desire to return at the earliest opportunity. This did not aid assimilation in the new region, and could thus contribute to stress there. Future relocation decisions by the organisation or employee could also be prejudiced by the spouses need or desire to return 'home'.

Mrs. Wood: "When I first [relocated] my sole objective was that we should come back to live in [home town]. That was paramount. One day that was what we would do. I think it was about 18 months later that I realised that that would never work because all our friends, even though we were close to them still, their lives had moved on, ours had moved on and to go back there would be a very hard thing to do."
The point came where the spouse realised that after an absence of some years, the 'home' as it was remembered would no longer exist. This was not so much a case of the individual's frame of reference having changed. In fact, the problem arose because the sense of belonging had not changed. It was a case of the former environment having changed, so that the frame of reference was no longer appropriate to any existing region. In an increasingly mobile world, such feelings would seem increasingly inevitable. Further moves could further disorientate the frame of reference, leading to a dissatisfaction that was hard to rationalise but whose cause ultimately lay in rootlessness.

*Mrs. Wood: "I still feel I haven't thrown myself in in the way I threw myself into life in [home town]. I love it down [here] and I often wonder why I do. I don't have the same friends, it's a much older community: an awful lot of local people. It's not so much of a professional society and yet I like it. The children love it and are very settled, got a lot of friends. I think I feel rootless now."*

It has been suggested that stress for families can be greater in an international move because in the absence of company loyalties, they are more dependent upon the social environment to fulfil their sense of belonging. In the modern welfare state, responsibility towards the extended family requires less in the form of direct support from other family members. Thus close geographic ties are seen as desirable but not essential. Sibling/parental links are thus viewed here as ties to a social environment rather than as immediate family ties. In times of illness or frailty however, such responsibilities become more pressing. Thus the possibility of secondment away at such times was viewed less enthusiastically.

*Mrs. Wood: "I know my reaction to [a potential secondment] would have been horror. By that time my father had died so my mother was on her own and even though we didn't live terribly close to her, she was to an extent reliant on that contact."*

Although families were not part of the organisation, they could be called upon to represent it. This was more common in the overseas setting where an ambassador role - entertaining visiting guests of the company - formed an important element of the overseas manager's assignment. Spouses found that they too were expected to occupy an ambassador role by extending their hospitality to company guests through the provision of meals and accommodation in their homes. In isolated locations where new markets were being developed by the company there was also likely to be an increased involvement in company social functions which the spouse would be expected to attend. Whilst such events were not necessarily disagreeable in themselves, a certain amount of resentment arose from the company's reliance on people they did not employ.

*Mrs. Oakwood: "Sometimes you were called upon to attend functions and you felt you were being called upon rather than invited. There were occasions where I thought I don't actually work for [the company], I don't think I should necessarily be told what to do."*

Spouses own lives overseas could be affected by their 'ambassador' role for the company. Spouses seen as company representatives could encounter hostility from local residents where the organisation's presence was politically or environmentally sensitive.
Mrs. Wood: "There was a small amount of animosity from some people, regarding the 'big bad [company]' moving in to do terrible things in [local environment] and I was very conscious of that."

Such hostility coming from the environment into which the spouse was attempting to integrate and establish a sense of belonging could be particularly distressing and threaten the spouse's ability to gain satisfaction from this interaction.

Aside from the loss of sense of belonging to a familiar local environment, spouses often had left careers once their partners became mobile. For the spouse then, the readjustment required at the loss of a familiar work organisation and routine had to be undergone at the same time as readjustment to new culture and social environment. Such change could be anticipated as stressful. However, nearly all (female) spouses had anticipated the requirement to forfeit their careers at some point, and were altruistic in their deference to their husbands' careers. Such forfeiting could take the form of following a career path which can be readily interrupted and reestablished, in portable professions such as teaching or nursing.

Mrs. Osterley: "I realised that I was getting married to [my husband] who was going to be travelling and my job would take second place. It's such that wherever [he] works I can fit in. I mean obviously I try to get along as much as I can but within the limits of [his] employment.

The forfeit could be complete, such that spouses, often professionals, had made the decision to give up juggling their careers with their other responsibilities and aspirations in order to devote time to their families.

Mrs. Wood: "I think sometimes I've tried to hold back my feeling because I've chosen to be the one who's at home with the children, and not to bother with a career. Therefore, I want his career to be as fulfilling to him as it possibly can be."

Mrs. Holloway: "I was a professional, and there was room for advancement but it was limited because I couldn't commit to the long hours, the weekends, the travelling. There were limitations on me, I could never hope to advance as far as he had because somebody had to be home for the kids." "The hardest thing for me in not working is the loss of the feeling of independence. When I worked as a professional, I always felt as though I could support myself. If our marriage didn't work out, if something happened to him, whatever. I always felt as though I had a professional position that paid well enough that I could support myself and the kids. Now I don't have that and that is a very hard thing to adjust to."

The lack of a work organisation removed a source of independent income and hence independence for spouses. There was a suggestion here that a mobile lifestyle in itself can pose threats to the stability of a relationship. Were a divorce or split in the relationship to occur this would take family members once again away from a familiar environment. Where it exists, a sense of belonging towards an organisation could transcend a split in the relationship, and

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* Only two cases of divorce were found among the sample. One occurred before mobility featured in the relationship. Mr. Vauxhall's divorce, occurred whilst he was under a requirement to make frequent and long trips overseas: "My first wife saw a lot of my travel in a negative way...the travel exacerbated problems in the marriage, without causing problems. That is my version and that is confirmed by the psychiatrist who treated my wife."
provide some comfort. Abandoning the spouse’s career prevents this and leaves spouses with few familiar environments to turn to, financially or emotionally. Whilst resentment and other pressures could encourage divorce, the loss of an independent career and source of income can act to tie individuals together artificially whilst any emotional attachment was undermined (Bayes, 1989). This was not an arrangement found among the spouses interviewed, but the method used to contact spouses (section 9.2) would preclude such spouses from being approached. The non-career spouse is thus faced with a choice between the status quo, albeit a mobile status quo which offers the potential of at least varied environments, and forsaking every aspect of life towards which the spouse has a sense of belonging. Such a trap can lead to feelings of isolation and resentment, with stress for both spouse and employee.

Employees can also find themselves in a mobility trap akin to that described in Chapter 8, where not moving would greatly damage their career prospects. Spouses thus had to take into account the effect of their partner’s career stagnancy or suspension when making the decision whether or not to move.

_Mrs. Oakwood:_ “It was a joint decision. I really didn’t want to go but I could see the reasons for going and I could see that [my husband’s] reasons for going were probably more sound than mine for not going. He felt that if he said no there would be little chance of him moving out of the job he was in then...It wasn’t only a case of lack of promotion prospects but it could have been lack of a prospect of a job altogether. It was obviously a positive career move for him. I was disappointed that it had come up, particularly at that time when we were expecting a family.”

At the end of the assignment the spouses view had not changed, she had undertaken the move not because she wanted to but because she had to.

_Mrs. Oakwood:_ “I didn’t particularly enjoy the experience, but it was an experience, and I know my husband certainly enjoyed the job. So it could have been a lot worse if we hadn’t gone from his point of view. I think we had to do it.”

It can be seen here that the extent to which spouses were happy with their altruistic behaviour was dependent on the extent to which their satisfaction could be derived from intra-household relations rather than external relations. For a large part therefore, spouse satisfaction was related to the extent of their devotion to their partners. An important factor in the willingness to move encountered by companies was thus the extent to which spouses were altruistic towards their partners and willing to sacrifice their own careers for those of their partners. This is a factor organisations may be less able to rely on should trends towards dual-career couples increase.

Altruism on the part of the spouse extended to tolerance of business travel, especially where similar career threats were in existence.

_Mrs. Wood:_ “I didn’t mind him travelling at all. I felt that was good for his career and I think we had known other people who worked in [the company], I was only too aware that if you started turning things like that down you got black marks against your name, the future wasn’t too rosy.”
Business travel differed from secondments in that it threatened the integrity of the household. It was not the sense of belonging to a particular milieu that was under threat but the sense of belonging within the household. Spouses reported their partner's distress at their loss of interaction with the family, and their own at having no other adult family members with which to share the burden of child-rearing.

Mrs. Osterley: "Very much it's a hurt there. It is for him, he gets upset and he misses her and when she started walking he was away, and things like that. I find it a pressure that, because we live away from home and I don't have my parents with me, I don't have the stop-gap that I can say: 'Have her for an hour, I've had enough'."

Thus family members' sense of belonging was exposed to greater risk as a result of mobility. Families moved accompanied by less of their familiar environment than employees. Their sense of belonging to a particular milieu was under threat, with no interaction with career or their organisation to compensate. Any interaction with the employee's organisation was unpaid and occasionally resented, Where spouses had already abandoned their career and thus had invested greatly in their local social environment the effect of movement away from their home locale was more intense, whilst those who left careers to move had to contend with loss of sense of belonging to their organisation and to their career. To the extent that spouses were prepared to do so, organisations could be seen to be dependent on spouses' altruism and devotion to their partners in order to maintain their overseas labour objectives. The rise of the dual career couple will see sense of belonging acting as a greater constraint on the geographic flexibility of organisations' internal labour markets.

9.3.3 The role of frame of reference

For the family to begin to interact effectively with a new environment, the frame of reference of individual family members has to change to be applicable to the host location. In addition behaviour must be modified to become appropriate to the new environment. To gain satisfaction from this behaviour it should also correspond to the new frame of reference. This is the process of readjustment described in Chapter 3. Until it is successful individuals can be exposed to stress. Spouses and children normally occupied a less dynamic environment than the employee, one which changed less frequently. A move for the family would thus represent a greater qualitative change in their environment than it would for the employee. In addition, since they were more involved with their local social environment and local organisations, a greater proportion of their daily interactions were with aspects of their environment that changed dramatically as a result of the move. A greater magnitude of readjustment was thus required of the family, to aspects of the environment that would have themselves undergone greater change. Overall readjustment would thus be expected to take longer for the family.

Dual-career couples were one of the two most pressing issues identified by Tung in her review of expatriate management (1988).
The spouse’s view of the way the world should be, their frame of reference, would initially correspond to the home location. Moving to the region for which they have no existing frame of reference could be seen as threatening and undesirable, especially where personal gains were few. This was where reluctance to move might have been reduced by effective briefing to reduce some of the threat of the unknown.

Mrs. Oakwood: "I didn’t like the sound of the place; it was too far away and it was too much the unknown and I had in my mind formulated how life was going to be, that I was going to keep working and so it was a case of adjusting to a lot of different things in my life. To be perfectly honest there wasn’t a lot in it for me. There weren’t many pluses for me, but we did talk it through."

For these same reasons, on arrival spouses would be expected to seek out as familiar an environment as possible, usually found in the local ‘expatriate’ community. Such an enclave lifestyle could minimise modification required in the frame of reference, but would also minimise interaction with the local environment and corresponding adaptation. The magnitude of the stress outcome would be dependent on whether a need arose for greater interaction with the host locale. The enclave resident would be ill-equipped for such a change especially where formal briefing had been poor.

Mrs. Wood: "I got to like [the new location] fairly quickly. We were living on an estate which I think was a good thing. It was full of people from the [same] industry, the barriers were broken down very quickly and so we had a social life very rapidly but made very few of those close friends. Because people were aware that they were always moving in and out, it was almost like an expatriate community so that was quite helpful. What I was surprised about was that there was no company support at all for families coming up. There was no sort of welcome package, or anything to give you an idea what was what."

On arrival it was often the spouse who bore the brunt of adapting the household’s lifestyle to what could be established in the new location. Employees were often required at work and thus unable to spare time to organise the shopping, decorating and transportation necessary to reestablish a home life. The spouse and family were thus more likely to be required to interact with the unfamiliar. To reduce stress from this threat of the unknown, at least when the family is most vulnerable (see Chapter 8), the more preparation carried out by the company the better. One family, on relocation back to the home country, but to a new region, found very little preparation, which compounded with other factors to create a very stressful experience.

Mrs. Holloway: "When we first got the house we had to rent furniture until our things were shipped over from [posting]. We brought up the things from [first home after arrival], so that was one move, getting the rented furniture in. Then we had things in storage while we were abroad, so those had to be delivered, so that was another move...Then the things arrived from Europe so that was a third move...The rental furniture wasn’t collected before the other furniture was unloaded so that to shift it out to the patio...was a total nightmare. Meanwhile I had a baby who was just a few months old and my mother-in-law decided to come and help and made things even worse. * "This apartment that the company had provided for us...there were no linens, no towels, no food, nothing was open...So that was not a very good introduction to corporate life. It was a day or two before we could get things organised. It was not a very smooth transition.*

Where, through extensive experience of international work, the employee has developed a frame of reference better matched to dynamic environments, the employee would be anticipated to gain
satisfaction from behaviour appropriate to this frame of reference - in practice, a highly mobile lifestyle. As spouses remained outside international organisations' work environments, they were unlikely to have a frame of reference matched in the same way. Spouses work on very different agendas from those of the company. Thus the same move could bring about dramatically different responses from employee and spouse. At the same time as Mrs. Holloway had a desire to settle down, her husband did not want to contemplate becoming too established in one place.

Mrs. Holloway: "I think, basically, [my husband] is afraid of being tied down. He still likes the feeling that he could pick up and go at a moment's notice. So I think he's afraid of buying a house and feeling committed to something. I think that's why he's never checked into it."

The (literal) marrying together of different views of the world lasts only so long as partners are able to draw sufficient satisfaction from their interactions with the world. Tensions can be created by mobility which can threaten to split the household. Nevertheless, the more partners moved together, the more frames of reference were developed by both partners to anticipate dynamic changes in lifestyle. After an extensive series of moves, therefore, there might be little for families to gain from a less mobile environment, recognised as being as unfamiliar as the next alien one.

Mrs. Holloway: "It can tear marriages apart or it can force you together, because if you don't have roots somewhere, if you don't have some place to go to, it can force you to stick with the situation that you might not stick with if it were easier for you to get out of it. Now, there were many times when if I'd lived closer to my family I think I probably would have picked up and left, but when you're halfway around the world it's a little difficult to do that. Also, although there's an awful amount of stress involved in moving, while you're on that treadmill, you don't have time to think about something else that could be a problem. So it can have the effect of keeping you together. Now, I don't know whether that's good or bad but (laughs)."

The frame of reference of spouses could differ from the company view of how an expatriate wife should live. Companies could hold the view that spouses had a relaxing time, free of domestic chores and financial worries on a paid vacation. The provision of a maid was often the example given to show this. Yet on more than one occasion this was rejected by spouses. 'Lives of luxury' were not necessarily regarded as satisfying by spouses left without some sense of purpose to their existence. The spouse might also rate privacy highly in their view of the world, an attitude that would conflict with the attendance of maids.

Mrs. Oakwood: "I was the only wife I knew who didn't have a maid...For one thing I don't like people around the house, and for another I was doing so little that I thought, if I haven't got the house to look after I'm really going to be a vegetable."

The greatest fears and potential for stress arose, however, where health and security were at risk. Risks to both were ever present and not specific to particular stages of the secondment. Thus concerns could arise in advance of, during and after any encounter. A frame of reference appropriate to health care at home where communication was possible with all medical staff conflicted with the environment experienced in many host hospitals.
After the individual’s frame of reference and behaviour had developed to match the environment abroad, they were no longer appropriate to the home environment on return. As discussed in Chapter 8, individuals often returned to an environment much different from the one they had left. Readjustment was thus necessary on return to be able to act appropriately back home. The same imbalance seen between employee and family in readjustment required in the outgoing direction, is likely on return. The employee maintains a familiar organisational environment, whilst the social and cultural environment, likely to be of greater importance to the spouse, are those most likely to have altered, especially, as in Mrs. Oakwood’s case, when a child has been born abroad.

Secondments can thus engender an even greater change in the frame of reference of family members than in the individual. By contrast, business travel required a less dramatic frame of reference shift by the family than by the employee. The shift for employee, spouse and children is from an environment in which the household is complete, to one in which the employee is absent and the household is split. The employee has to accommodate to the additional changes outlined in Chapter 8. Due to these changes, the traveller may have an altered frame of reference on return, and this may alter perceptions of what home should be. During the period of both family and employee redeveloping frame of references appropriate to their reunited household state, misunderstandings and tension may arise.

Additional threats to the family could be posed by the locations to which travel was taking place and its association with behaviour potentially threatening to household integrity.

Some individuals found it difficult to cope with the increased levels of work and responsibility bestowed upon them by their partner's absence. If travel had unexpectedly intensified, or children required care whilst both partners were working and one was travelling, stress could result, exhibited as emotional distress, or post-natal depression.
Mrs. Holloway: "I guess I started on anti-depressants a year after youngest son was born, and it was related to the job, my husband was travelling constantly at that time with work and I guess I was trying to do everything myself."

The demands placed by children on the sedentary partner were closely related to their needs at any one time. This, in turn, was related to their stage of development.

Children were not interviewed directly and thus their reactions to mobility had to be drawn from spouses' accounts. In all cases where a child's adaptation to a new environment was discussed, the older the child, the more difficult the readjustment. Evidence provided by the cases of siblings moved together particularly emphasised this tendency. This could be related to the stage reached in the child's development. The earlier children were moved the less likely they were to have had significant interaction with the outside world. In addition, younger children would be less likely to have developed a view of the world that excluded mobility as abnormal. Younger children have a greater ability to develop language than adults (Meltzer and Grandjean, 1989) which can act to facilitate adaptation.

Mrs. Wood: "They were terribly upset moving out again and yet they were quite keen to come back to England. They actually adjusted again very quickly, at least on the surface. I think [my daughter], the younger one adapted better, I think she's more adaptable than [my son]. [He] is the one I think who has suffered more educationally because he sort of takes several steps back. That's the way it shows in him, he will cope with it in a way emotionally but he can't adjust to new teachers and things like that."

Mrs. Holloway: "[My son] was completely fluent in local language. Within two months he was completely bilingual and local language quickly became his first language. When he played by himself or talked in his sleep it was in local language. But he would not allow us to speak [local language] to him. He would get very upset if we tried to. He knew the distinction."

Mrs. Holloway: "The older the kids are, the more difficult it is for them. Every time we've moved, [our eldest son]'s had a horrible time adjusting. The younger one is very resilient, we can take him anywhere and he's just fine. He's a bouncy happy little kid. But the older one is very brooding and has a very hard time adjusting and it isn't until we move that he realizes he liked the last place. I mean, the three years that we were here, I don't think it was until the last year of it that he was beginning to be more happy. I was very worried about him because he really seemed to me to be clinically depressed. When we moved to [new location], again the adjustment. He seemed terribly unhappy the whole time we were there."

Young children thus seemed to be the least affected by culture shock or problems of adaptation in the short term. Determining whether in the long term such children developed the insularity described by Mrs. Holloway was beyond the scope of this study. Older children however did seem to encounter more difficulty. This could be associated with such children having got beyond the preliminary stage of being able to develop a new frame of reference rapidly. The same children may not yet, however, have the mental capacity to rationalize fully the changes in their external environment.

Business travel could also create a situation in which children were placed in a different environment (one in which there was only one parent present). Children appeared to
communicate their awareness of the absence of parents from a very young age - two or three years old. The effect of the loss was exemplified by children's attempts to seek out parental substitutes of the same gender as the missing parent. Children who were older still might offer themselves as a missing parent's substitute.

Mrs. Holloway: "My younger son has a male teacher and I think that's terrific because, with [his father] gone so much I think it's nice that he's got a male role model. [My son] is...particularly clingy. I see him go up and throw his arms around the teacher. [The teacher] has been very understanding about that because he knows that [my son] doesn't have his father at home much of the time and really needs that attention."

Mrs. Wood: "I was also conscious that I must not try to put a strain on the children whose initial reaction was 'we mustn't go out evenings or weekends because mum's on her own' and I had to force them into not taking that attitude because it wasn't fair of me try and burden them with me being on my own."

Children thus seemed to be sensitive to their parent's mobility, whether or not they were actually moved themselves. Whilst innate developmental ability enabled speedy frame of reference shifts and language learning in the early years, children were not always developed sufficiently mentally or emotionally to understand the reasons behind changes in their environment and their own role within them. Children were much more dependent, emotionally and physically, upon their parents and thus any change in the status quo was likely to be threatening. Where the reason for the move, or its duration, cannot be fully comprehended, this threat will be of the unknown. Thus whilst some factors related to the early stages of a child's development could account for a reduction in stress, the delay in the occurrence of other factors could account for an increase.

In order to shift frame of reference appropriately therefore, the individual needs to be in possession of sufficient information to be able to understand the new environment. This information must also be appropriate to the age and experience of family members.

9.3.4 The role of adaptation

Once in a new environment, a new frame of reference can begin to be formed and the individual adapt until frame of reference and behaviour are compatible with each other and the outside world. The less time this readjustment process takes the less prolonged the stress the individual is likely to encounter (Capel and Gurnsey, 1987). For the family such a process entails encountering the new world so that a new frame of reference can be built up. Culture shock on encountering the host culture would thus be expected to be greater for those whose milieu overseas was still that of their own 'home from home', than for those who immediately sought out interaction and attempted to integrate and adapt. Those who encountered the least culture shock and adapted well being those who interacted most with the host environment.

Mrs. Holloway: "Pretty quickly...I was hired as a substitute teacher. So that kept me busy so I didn't have the cultural shock that you get when you're home all the time."
Mrs. Oakwood: “I didn’t adapt at all. I wasn’t there such a long time but I never really got into it. I was living a very isolated and lonely life for the first 18 months. I found it very difficult to find anybody, to have any friends...The standard of my lifestyle deteriorated because I went from being busy and working happily to doing nothing and being bored out of my mind.”

Where paid employment was not readily available, similar interaction could be sought through charity work. However, few career spouses were content with such an existence for any length of time.

Mrs. Osterley: “I didn’t work immediately when I went out there...I did quite a lot of charity work. I used to work in a charity boutique and I taught riding to the disabled. I played in a lot of sports, squash, netball, and then after about six months I thought, ‘I’m sick of this, I want to do something.’ So I got a job in the [foreign run] hospital.”

An attempt to minimise stress might be made by choosing not to participate in the host culture. Where the previous location had been preferred, this choice could be through resentment. Alternatively, it might be to avoid developing attachment to a new region. More than one spouse interviewed made a conscious decision not to interact or adapt. This was in a deliberate effort to minimise stress on departure. Up until return however, such individuals were prone to isolation and culture shock. Should the organisation underestimate the length of the sojourn, intentional non-adjustment may persist for longer than originally intended. Whether this engendered greater stress would depend on the outlook of the spouse and whether long-term adaptation posed less of threat than prolonged ‘short-term’ isolation.

Mrs. Wood: “If I had been told that it was four years I think I might have thrown myself in a little bit more but I was still hurting from leaving [home town] and my friends and couldn’t bear to go through that sort of hurt again. So I know I held part of myself back from activity. It just sort of drifted on because there was no sign of anything to go back or on to.”

Overestimation of the length of the secondment can be equally unwelcome for those who have made efforts to integrate and have adapted to their new lifestyle. It can prevent the temporal coordination of career and organisation responsibilities and aspirations of husband and wife.

Mrs. Osterley: “When I got my second job, in the British school, I’d have been happy to stay there. It was typical, you just get sorted out and you’re coming back. I think we both now, on reflection, wish we had been able to stay a couple of years.”

The point at which a newly developed frame of reference and behaviour were appropriate to each other and the environment was hard to determine. Torbiörn (1982) used estimates by individuals of the point at which they felt satisfied with the secondment. By these ratings amongst the current sample, spouses took a mean of three months (12 months versus nine months) longer to readjust than their partners.

Mrs. Holloway: “I remember thinking it was about a year before I felt like I was at home there. But I don’t know whether I was experiencing all the moodiness and things like that...after about a year I felt like I was at home. I felt comfortable.”
The time taken to readjust to the new environment was dependent on the time taken for a new frame of reference to be formulated and behaviour to adapt. This could take spouses longer than employees because they were not part of the organisation. This would mean that they did not have access to a readily available social circle or a recognisable daytime environment. In an expatriate community, however, there was evidence to suggest that it was easier to make British friends than in the U.K., albeit more informal ones.

Mrs. Osterley: "[It was] much easier out there than it is here. Obviously you have your circle of friends there. They're maybe not friends you would choose here. They're sort of 'British' people. You're all in the same situation so you get on with it."

The process of adaptation on secondment necessitated successful exposure to the host culture. This required a number of barriers to integration to be overcome. New behaviours then had to be developed appropriate to the surroundings. The more involved the individual was, the better the adaptation.

Separation due to business travel was a more temporary phenomenon, such that adaptation would be inappropriate for a majority of the timescale. Adaptation is also a long term process, one unlikely to be accomplished in the short term separation engendered by business travel. Some spouses did adapt through adopting a more independent role and attending social events on their own. This strategy was effective when the partner was frequently and unpredictably absent. It did tend to create greater conflict during the time when the two 'independent' lifestyles of the partners were reunited. Others withdrew from social activity for the duration of their partners' absence. This minimised conflict, except where travel was unpredictable, and planned joint events misfired.

Mrs. Osterley: "We’d planned a weekend away with a few couples, walking up in the Yorkshire Dales. [My husband] was called away."

Longer term separation provided a better opportunity for adaptation to take place. Partners could adapt to their new lifestyles without each other. Whilst readjustment would be stressful this would minimise stress in the long term as behaviour had been adopted which matched the partners' new spouse-less environments. Whilst this was an effective strategy in the partners' absences, reuniting created conflicts as the new behaviours of both partners conflicted.

Mrs. Wood: "I became very independent as did [my husband]. When we went over there he would get cross if I did things in his flat and I'd feel the same when he came back home...I did feel that I was a single parent. In that same way my married social life came to a halt, and there are things that I think you can't do when you're on your own."

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Results from surveys conducted with over 800 Canadian relocatees and their spouses has shown, albeit anecdotally, that people who have relocated many times have difficulty developing close personal friendships (Pinder, 1989). Many respondents reported ability to make new friends as a benefit of mobility. Pinder suggests that such relationships less intimate than those developed over longer periods.
After balancing the threat posed by separation and the ways in which individuals adapted to it with the threat of relocation, one spouse made a conscious choice to undertake frequent and disruptive relocation with her husband rather be separated from him due to business travel.

Mrs. Holloway: "In the early days of our marriage I did not want him travelling and when we lived in [home country], he could have got into Sales and it would have involved a lot of travelling. I wouldn't let him do it then, because I did not feel as though I could cope with the baby and being by myself. So he didn't get into Sales. He might have been even more successful if he'd done that then, but at that point I couldn't cope with it. So he stayed in an area that meant our moving as a family, every few months it seemed, but at least we were all together."

When business travel was combined with a secondment, spouses were separated from the employee in the new host environment. Greater isolation could ensue for some. For others, newly developed contacts with an expatriate spouse social network proved to be supportive. Amongst this network, separation due to business travel was a more common phenomenon than among their social contacts back home.

Separation of the employee from the rest of the family perhaps posed the ultimate dilemma for the mobile household. There was no ideal solution, there was no 'best' way to adapt. Difficulties were encountered by all who valued the household time together. So long as international companies are dependent on the transportation of their employee's skills within their global internal labour market, to wherever they may be required, the families involved will be faced with the choice to relocate or to split. Stress is an outcome whatever, it pays no heed to how well the company labour mobility policy can be justified. The company cannot prevent such stress, it can only seek to minimise it. Where the transfer of labour is justified and necessary, a mobility support policy has to encompass the needs of all whom its decisions affect. A casualty will be the household's sense of belonging to a particular milieu, one that can be substituted for only partially by links to be formed with the new environment. The more moves the company requires of the individual the less dependent the household will become emotionally on its surroundings and social environment. Feelings of rootlessness may develop. These may be compensated for by the development of a greater sense of belonging within the family, where circumstances permit, and the establishment of functional links with the new environment. For both the highly mobile and less well experienced therefore, accurate and appropriate information becomes the key to harnessing the individual's own ability to readjust to the changes the organisation wishes to take place. Information is essential for individuals to be able to 'read' their new environment in order to form a frame of reference, and develop behaviour, appropriate to it. Supportive employers will thus obtain individuals adapted to the new locale and able to work effectively in the new setting.

Failure to acknowledge the needs of every member of the household can cause secondments to fail, end prematurely or be otherwise altered from the organisation's objectives. Increased
reluctance may be encountered from the household to any future proposed move. Communication between families may also cause other potential secondees to be more cautious. One family refused to accompany the employee on a secondment to a developed English-speaking country because of past disruption.

Mrs. Wood: “I think we felt very much that the children had been mucked about. If we’d known all this perhaps we would have been better putting them in something stable, boarding school, but then on the other hand, I feel I didn’t have children to put them into boarding school. I wanted them with me. They were too old at that point for us to make a decision on their behalf. [The company] said that they would pay for them to go to boarding school or to live with friends in the area for me to go out. I would have found it very difficult to put them with friends. I knew that [my husband] wanted to go and that he was absolutely torn... I felt it had to come from him, if he really wanted to go we made it as possible as we could for him to do it, but I did resent the company for putting us in that position.”

Mrs. Holloway: “At that point I put my foot down and said ‘We’re not moving any more.’ I told [my husband] ‘You can travel as much as you want to on business, but I’m not moving again’ and we ended up staying there for two and a half years. We were having a lot of trouble with [eldest son, then 7]. He was getting kicked out of schools, nurseries, kindergartens, things like that. We were having a lot of trouble with him. I think the moving was very unsettling for him, and I knew how much I had hated moving as a child, and the bad effect it had had on me. So I hated to do that to him.”

Families then, along with employees, could feel trapped. Family members could find it difficult to live their lives around the activities of an organisation of which they were not a part. Nonetheless, they were willing to accommodate to changes through loyalty to the employee, a desire for household integrity and life stability. Employees in turn were willing to make compromises with their careers and their organisation’s aims to minimise stress in the household. When asked whether she would undertake a move again, past experience made one spouse reluctant. Nevertheless, she was cautious to embrace her husband’s resignation - his threatened response to the way poor organisational support caused stress for his family.

Mrs. Wood: “At times he’s said he will leave the company and that fills me with horror too. I’d be less inclined to go with the experience that I’ve had so far.”

Some spouses had thus acknowledged the paradox that the ever-changing organisation was a source of stability in itself, compared to the mid-career employment challenges posed by the world beyond.

9.4 Conclusion

As an unwritten element of its contract with the mobile employee, the organisation can be seen to have purchased the altruism, labour and loyalty of the family. The company’s unpaid representatives can forego their privacy, cohesion, security, careers or education to enable the employee’s skills to be freely available worldwide for the company’s use. Such allegiances are not secured lightly however. Resentment, reluctance to move, premature return and non-participation can all affect the company in the long term, either directly or via their effect on the employee. The company must recognise that its decisions threaten the sense of belonging and
require the readjustment of not just the individuals they employ, but their spouses and children too. All will require accurate and appropriate information to prepare for the changes requested of them. The realisation by the organisation that its demands upon the lifestyles of spouses and children are as great if not greater than its demands upon its employees should create conditions in which a more thorough approach to the secondment or business travel decision is taken.
Chapter 10: Quantifying the mobility-stress relationship

10.1 Introduction
This penultimate chapter of analysis aims to address the hypotheses generated from the conclusions of the previous three chapters. A statistical analysis is undertaken to test the theories originating from detailed consideration of the accounts of those involved in the mobility process - employers, employees and spouses. Thus the chapter seeks to quantify the relationship between the events engendered by mobility and the stress experienced by those who undertake it. This is carried out via an analysis of the events undergone by mobile employees, the short-term symptoms of stress they experience and other potential variables in the event-stress equation. Stepwise regression is undertaken to determine the importance of mobility events among other factors in accounting for variation in the stress-outcome indicators observed. The empirical validity of the MEI (Chapter 6) is thus also assessed.

As has been shown (in Chapter 7), the employee mobility strategies in use within international organisations are determined by many factors. The dynamic nature of the global economy and labour market, the internal labour market of companies, national fiscal and immigration policies, market volatility, task specificity and corporate capital availability will all play a part in the decision-making process which determines the mobility strategy employed. Thus for any given company or task the temporal and spatial nature of employee mobility is by no means fixed.

Chapters 8 and 9 have shown that there is a conflict of interests at work in the way individuals and companies seek to maximise benefit from these international mobility strategies. Whilst families need stability, careers require challenge to develop. Companies require flexibility in their internal labour markets to achieve operational aims in an unpredictable, competitive environment. Fieldwork for this study was thus designed to establish how employer-induced international mobility affects the balance of the household-career-organisation triad and thus creates conflicts of interest within it.

10.2 Survey summary
The approach to sample selection (outlined in Chapter 5) dictated that the realm of experience within the sample would be broad. By definition, all individuals had had experience of either international business travel or secondments. Examination of stress outcome concentrated on a recent three-month period, monitored real-time by diary, for groups A (foreign secondees visiting the U.K.) and C (business travellers) and retrospectively by checklist for group B (returned secondees). While group B were asked to recall the events that occurred during the
first three months of their assignment, group A were asked to record real-time the events that occurred after the first interview. In many cases, this was several months after their arrival here (mean time-span 15 months). Two respondents were more than 24 months into their secondment before they were interviewed. This means that, as devised, groups A and B cannot be regarded as homogeneous or representative of secondees in general, only of their distinctive sub-groups.

The prior career background of individuals was extensive and could not be ignored. This background had to be regarded as a combination of experiences unique to each individual which would prepare them in very different ways for the period of mobility under longitudinal study. Diversity of background meant that groups were not homogeneous and variation could be anticipated as much within groups as between them. Analysis was divided between that based on groups as units of classed data, and that based on variables such as frequency and intensity of event experience and of stress analysed across individuals for evidence of association.

10.3 Results and analysis
10.3.1 Events profiling and stress outcome
The independent variables in the conflict-stress relationship were individuals' life and mobility experiences (Chapter 5). There was thus a prime need to establish the frequency and quality of the events that made up those experiences and caused changes in the dynamics of the family-career-organisation triad. Whilst the MEI was created to establish the quality and extent of effect of those changes (Chapter 6), checklists and diary monitoring sought to establish their occurrence empirically. At this stage, diaries were used to provide information solely on event frequency. A more comprehensive exploration of diaries as a longitudinal data source is made in section 10.4.

The mean number of mobility and life events on the MEI profile encountered by each individual during the 98 days study period was 19.5, with a range from one to 59. The large variance was to be expected as the activities and lifestyles of those in the sample varied greatly. Overseas secondees to the U.K. (group A) experienced the smallest number of events (a mean of 12.0) whilst U.K. returned secondees (group B) experienced a mean of 24.8, and business travellers (group C) a mean of 22.7. Company C had no returned secondees available for interview, whilst international circumstances dictated that its business travellers were relatively immobile over the period. This accounted for the low event score of the company's employees (Table 10.3).
The most frequently occurring events were those connected with international business travel, namely taking a short haul (187) or long haul (96) international air journey (Table 10.1). Living and working out of hotels cropped up 91 times on events profiles, whilst separation from spouses of 2 to 10 days occurred 59 times. The least frequently occurring events were those which would be anticipated to be rare in a random three-month period.

Table 10.1: Mobility and other event frequencies

<table>
<thead>
<tr>
<th>Mobility or Life Event</th>
<th>Frequency across sample (N=45)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOP TEN</strong></td>
<td></td>
</tr>
<tr>
<td>International short-haul air journey</td>
<td>187</td>
</tr>
<tr>
<td>International long-haul air journey</td>
<td>96</td>
</tr>
<tr>
<td>Living and working out of hotels</td>
<td>91</td>
</tr>
<tr>
<td>Separation from spouse/partner, 2 to 10 days</td>
<td>59</td>
</tr>
<tr>
<td>Geographical separation from children, 2 to 10 days</td>
<td>28</td>
</tr>
<tr>
<td>Geographical separation from children, 11 days - 1 month</td>
<td>28</td>
</tr>
<tr>
<td>Major change in responsibilities at work</td>
<td>26</td>
</tr>
<tr>
<td>Working in culture where language not known</td>
<td>24</td>
</tr>
<tr>
<td>Major change in sleeping habits</td>
<td>23</td>
</tr>
<tr>
<td>Vacation</td>
<td>23</td>
</tr>
<tr>
<td><strong>BOTTOM TEN</strong></td>
<td></td>
</tr>
<tr>
<td>Troubles with the boss</td>
<td>4</td>
</tr>
<tr>
<td>Working where laws forbid or limit alcohol consumption</td>
<td>3</td>
</tr>
<tr>
<td>Living or working in hostile or threatening country</td>
<td>2</td>
</tr>
<tr>
<td>Son or daughter leaving home</td>
<td>2</td>
</tr>
<tr>
<td>Change to new school (children)</td>
<td>2</td>
</tr>
<tr>
<td>Accident</td>
<td>2</td>
</tr>
<tr>
<td>Foreclosure on a mortgage or loan</td>
<td>1</td>
</tr>
<tr>
<td>Major business readjustment</td>
<td>1</td>
</tr>
<tr>
<td>Minor violation of the law</td>
<td>1</td>
</tr>
<tr>
<td>Major reorganisation at work</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: MEI Checklists and Diaries

The main interest in these results at this stage is that they quantify the different processes individuals undergo as part of a mobile lifestyle. Little more can be said about the effect of one person's event load versus another without some quantification of the potential stress
associated with events. To know whether a particular combination of events over a period is potentially more stressful for one individual than another required a method of weighting the events relative to each other. The MEI developed in Chapter 6 provides a framework for such quantification. The event frequencies outlined above were thus converted into measures of event intensity - mobility events scores - which quantify the stress-generating potential of event profiles.

a) Mobility events scores

The events profile of each individual consisted of a list of the frequencies of occurrence of each of the 42 mobility and life events (Appendix V). Each of these frequencies was multiplied by its corresponding event score from the MEI - where an MEI score had been obtained - or by its Holmes-Rahe SRRS score where it had not. The sum of these event frequency x MEI score products for each individual was termed their 'mobility events score'. Mobility events scores corresponded to the three-month monitoring period. No attempt was made to multiply up to create an annual score. For the purposes of intra-group and intra-individual comparison, such an exercise was unnecessary. The exercise would be of questionable validity anyway, as the three months monitored could not be considered representative of a random quarter-year. Such weighted scores would cease to equate with the corresponding symptom scores.

The mean mobility events score was 338, but with a range from 15 to 808 (standard deviation 212). The mean scores for each of the mobility groups (A, B and C) differed significantly (Table 10.3), suggesting that the potential for stress generated for British secondees (now returned) in their first three months overseas is greater than that for a three-month period of mobility for business travellers. Both these groups in turn experienced events with a greater potential to cause stress than overseas secondees in the U.K. The discrepancy between the two secondee groups (A and B) may have been due to the monitoring period used (section 10.2). This discrepancy between the pre-defined groups is compensated for in section 10.4 by comparisons between individual diary characteristics as continuous variables, rather than comparisons between the less than distinctive personnel department-selected classes presented by group categories.

1 The problems surrounding the scoring of the 'Change in residence' item when subdivided into the three categories 'finding accommodation', 'moving self and belongings' and 'disposing of housing in old area' have been referred to (Chapter 6). The item was the only one to show substantial divergence from SRRS scores. In fieldwork, the item was not presented in its subdivided form for the events profiling exercise. Thus, erring on the side of caution, the events score used for 'Change in Residence' here, was the original SRRS rating of 20.1.

2 Two tailed Student's t tests were carried out for each mobility group pair (A versus B, B versus C, etc.). All produced t statistics significant at the 95% confidence level. It is thus reasonable to assume that on the basis of MEI scores, groups A, B, and C are drawn from different populations.
No attempt was made to use the mobility events scores as outcome measures for long term stress symptoms and degenerative health conditions. The limitations of the MEI's predictive value were discussed in Chapter 6. Scores, which would be very high according to the Holmes-Rahe prediction model, have been obtained for which no adequate predictive model exists. The magnitude of the mobility events scores obtained is likely to have some relevance to a stress-related outcome, but the extent of the relationship is not known. Producing a statistical prediction model of proven validity would require application of the MEI and SRRS against a sample of employee's health records. Thus, the use of MEI scores here has been restricted to that of quantifying the significance of the events relative to each other.

b) Health events responses

Once the frequency and quality of the independent variables, life and mobility events, had been established. There was a need to measure the dependent variable, stress. An outcome measure was sought which would scale the quantity and quality of stress-related emotional and physical ill health. A sensitive monitor of this type, scaled for a three-monthly period, was the Gurin Index (GI, described in Chapter 5). The GI symptom list was printed in the diaries, and each member of the sample answered a symptom tick-sheet in the final interview.

Gurin Index responses are scored by the allocation of between one and four points per symptom depending on the frequency of occurrence (Gurin et al. 1960). These were summated to produce a symptom score per individual. The list was designed to be of comparative value between individuals, both quantitatively, as used here, and qualitatively in that different symptom load combinations are characteristic of different outward expressions of emotional stress: psychological anxiety, physical health, physical anxiety and immobilization. Weighted means indicated the tendency of the sample to score those symptoms associated with psychological anxiety (trouble getting to sleep, desire just to be left alone, nervousness and tension) with greater frequency (Table 10.2). Symptoms of physical anxiety (hard beating of heart, shortness of breath) were least common. Detailed analysis of the different manifestations of stress was unreliable due to the small sample size. Analysis thus concentrated on the use of the symptom scores as ready-reckoners of the short-term outcome of stressful activities.

Scoring enabled the association of short-term stress symptoms with life and mobility events occurring within the same monitored three-month period. Temporal association between more degenerative long term illness and events in life career profiles would be a much more uncertain process. Thus there was no measure in the study to scale the outcome of long-term stress.
<table>
<thead>
<tr>
<th>Symptom</th>
<th>Symptom score (N=45) from checklists</th>
<th>Symptom frequency (N=28) from diaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trouble getting/staying asleep</td>
<td>78</td>
<td>95</td>
</tr>
<tr>
<td>Difficulty getting up in morning</td>
<td>71</td>
<td>82</td>
</tr>
<tr>
<td>Bothered by nervousness, tense</td>
<td>68</td>
<td>57</td>
</tr>
<tr>
<td>Troubled by headaches/pains in head</td>
<td>57</td>
<td>25</td>
</tr>
<tr>
<td>Easily induced tiredness</td>
<td>69</td>
<td>23</td>
</tr>
<tr>
<td>Desire just to be left alone</td>
<td>72</td>
<td>21</td>
</tr>
<tr>
<td>Inability to get going</td>
<td>54</td>
<td>19</td>
</tr>
<tr>
<td>Tendency to cry easily</td>
<td>52.5</td>
<td>19</td>
</tr>
<tr>
<td>'Put out' when unexpected happens</td>
<td>64</td>
<td>15</td>
</tr>
<tr>
<td>Mentally exhausted/impaired thought</td>
<td>64</td>
<td>14</td>
</tr>
<tr>
<td>Bothered by an upset stomach</td>
<td>56.5</td>
<td>13</td>
</tr>
<tr>
<td>Loss of appetite</td>
<td>49.5</td>
<td>11</td>
</tr>
<tr>
<td>Trembling of muscles</td>
<td>31.5</td>
<td>10</td>
</tr>
<tr>
<td>Bothered by hard beating of heart</td>
<td>49</td>
<td>7</td>
</tr>
<tr>
<td>'On verge of nervous breakdown'</td>
<td>98*</td>
<td>6</td>
</tr>
<tr>
<td>Ill-health affecting work completed</td>
<td>50</td>
<td>6</td>
</tr>
<tr>
<td>Bothered by nightmares</td>
<td>49</td>
<td>4</td>
</tr>
<tr>
<td>Suffer particular health problem</td>
<td>98*</td>
<td>3 named</td>
</tr>
<tr>
<td>Not healthy enough to do tasks</td>
<td>92*</td>
<td>3</td>
</tr>
<tr>
<td>Spells of dizziness</td>
<td>48</td>
<td>3</td>
</tr>
<tr>
<td>Pains/ailments in different parts</td>
<td>100*</td>
<td>0</td>
</tr>
<tr>
<td>Hands sweat to produce clamminess</td>
<td>55</td>
<td>0</td>
</tr>
<tr>
<td>Shortness of breath</td>
<td>50</td>
<td>0</td>
</tr>
</tbody>
</table>

Source: Scores from checklists, frequencies from diaries.
* = These four symptoms have higher scores (2 or 4) on Gurin Index.

Symptom scores ranged from 27 to 54.5, with a mean of 33.3. Mean scores for mobility and company groups are presented in Table 10.3.

Business travellers and British secondees recorded higher mean symptom scores than overseas secondees. Company D and E's employees appear to suffer more than their
Company B or C counterparts\(^3\). Limited support is thus offered here for hypotheses ventured in Chapter 7 (sections 7.4.6b and 7.5) that stress outcome would be less for those companies which offered more extensive employee support (notably A, B and D), though the high standard deviations indicate no group can be seen as homogeneous.

### Table 10.3: Event and symptom scores

<table>
<thead>
<tr>
<th>Company/Group</th>
<th>N</th>
<th>Mean Events</th>
<th>No. of Events</th>
<th>Mean Mobility Events Score</th>
<th>Mean Symptom Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPANY A</td>
<td>13</td>
<td>19.7</td>
<td>9.8</td>
<td>353.6</td>
<td>203.5</td>
</tr>
<tr>
<td>COMPANY B</td>
<td>11</td>
<td>16.3</td>
<td>7.3</td>
<td>292.9</td>
<td>152.9</td>
</tr>
<tr>
<td>COMPANY C</td>
<td>6</td>
<td>7.0</td>
<td>6.6</td>
<td>124.9</td>
<td>111.6</td>
</tr>
<tr>
<td>COMPANY D</td>
<td>11</td>
<td>20.6</td>
<td>11.4</td>
<td>396.4</td>
<td>225.6</td>
</tr>
<tr>
<td>COMPANY E</td>
<td>6</td>
<td>35.7</td>
<td>12.7</td>
<td>494.3</td>
<td>173.5</td>
</tr>
<tr>
<td>Overseas Secondees to the U.K. (Group A)</td>
<td>16</td>
<td>12.0</td>
<td>10.5</td>
<td>179.1</td>
<td>116.0</td>
</tr>
<tr>
<td>Secondees returned to the U.K. (Group B)</td>
<td>14</td>
<td>24.8</td>
<td>7.8</td>
<td>506.7</td>
<td>156.0</td>
</tr>
<tr>
<td>Business Travellers (C)</td>
<td>17</td>
<td>22.7</td>
<td>14.0</td>
<td>358.0</td>
<td>208.5</td>
</tr>
<tr>
<td>SAMPLE TOTAL</td>
<td>47</td>
<td>19.5</td>
<td>12.5</td>
<td>337.8</td>
<td>211.2</td>
</tr>
</tbody>
</table>

Comparison of the final two columns of means in Table 10.3 reveals a degree of concordance between mobility events scores and symptom scores. Pearson’s coefficient of correlation between the sample mobility events and symptom scores is 0.53 (Spearman’s Rank correlation=0.55), significant at the 99.9% confidence level. The correlation is to be expected since this is the relationship between the potential of an event load to cause stress and its corresponding short-term stress symptom outcome\(^4\). A regression equation for the relationship was obtained, though slight positive skewing and the existence of tied variables required caution in interpretation.

\[
s = 27.9 + 0.0155e \quad (r^2 = 27.9\%) \quad \ldots \ldots \ldots \quad (i)
\]

According to the equation, the mobility events score \(e\) statistically explains 28% of the

\[^3\] Two tailed Students t-tests were carried out for each of the mobility and company pairs (group A versus group B, group B versus group C, etc., and Company A versus Company B, Company A versus Company C etc.) Group A’s symptom scores differed significantly (at 95% confidence level) from those of groups B and C, though there was no significant difference in the stress load between groups B and C. Company C’s employees’ low events scores were found significantly different from all other company samples. The only other significant disparity was between company B and company D, on events scores.

\[^4\] The association helps to validate the MEI scale developed in Chapter 6.
variance in the stress symptom outcome (s). The scattergram and regression line are shown in Fig 10.1. The intercept of 27.9 is to be anticipated since 27 is the minimum symptom score. This indicates that mobility and life events account for over a quarter of the variation seen in stress symptoms experienced, but that other variables account for over two-thirds of the variance. It is anticipated that factors such as experience will explain variance in the stress outcome and thus these will be incorporated in analysis, with reference to equation (i) in section 10.3.3.

10.3.2 False responses

A vital consideration in such life experience analysis, whether based on recollections or real-time study, is the degree of conscientiousness across respondents. These issues have been discussed in Chapter 5. Post-facto rationalisation by Group B was minimised by cross-checking ticksheet responses in the interview. However a check was possible by testing the association between tick-sheet responses and the time elapsed since three months after the time of posting overseas. No associations were found between time elapsed and number of events recorded (Pearson’s r=−0.061), MEI scores (−0.002), or symptom scores (0.120). It was thus assumed that time elapsed between the three-month period arrival phase monitored and the presentation of the tick-sheets in interview (an average of 52 months) did not bias the

![Fig. 10.1: Mobility events scores and stress symptom scores (n=46)](image-url)
The best control measure available to indicate whether symptom recall and subsequent score were related to ability to recall events was the association between the number of events recorded by the sample and the corresponding symptom scores (Chapter 5, section 5.6.2).

If a conscientious person could be assumed to record more than a non-conscientious one, then a high correlation would be expected between the number of events and symptoms. Conversely, if the sample recorded both events and symptoms accurately there was less likely to be a relationship between the two variables due to conscientiousness. In both cases, however, there was likely to be a relationship between the variables due to the stress reaction. This relationship is exemplified by the correlation coefficient of 0.528 between mobility events scores and symptom scores (significant at 99.9% confidence). A correlation coefficient of a lower order than this for number of events versus symptoms would indicate that conscientiousness was a less significant factor in the relationship than the stress reaction. The coefficient obtained was 0.441 (significant at 99.5% confidence). This indicated that the relationship between the potential of events to cause stress and symptoms of stress experienced is not due solely to the individuals' powers of recall or their willingness to record events or symptoms. In the absence of more conclusive evidence, as is common with studies dependent on self-report, conclusions are dependent on the accuracy and honesty of respondents' recording.

10.3.3 Experience rating

A tentative relationship has emerged here between the potential of mobility events to cause stress and the occurrence of short-term stress symptoms. This corresponds to stress theory (Capel and Gurnsey, 1987). The theory also presumes a negative relationship between prior experience of a situation or adequate preparation for it and the size of the potential threat it poses for the individual. A hypothesis to test is that the magnitude of the stress reaction experienced is related to experience - measures of the latter being derived from the sample career profiles.

A number of variables were chosen which might indicate the extent of an individual's experience of a mobile lifestyle. These were quantified according to criteria presented in Appendix XII and appear in Table 10.4. Also shown is the degree of association between

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3 A similar test was conducted using satisfaction ratings (section 10.5) but was inconclusive. Respondents satisfied with their lifestyle over the diary period recorded fewer events (14.4 versus 26.0) and had lower MEI scores (206.2 versus 383.4) than those not satisfied. The differences obtained were in the same ratio and Mann Whitney's U failed to discriminate (U=71, n=8, n=17). This test was thus inconclusive.
each experience variable and stress symptom outcome, in the form of Pearson's coefficient of correlation.

Table 10.4: Mobility experience and stress outcome

<table>
<thead>
<tr>
<th>Measure of experience</th>
<th>Mean value</th>
<th>Correlation with Symptom Scores</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language ability</td>
<td>4.8</td>
<td>0.252*</td>
</tr>
<tr>
<td>Age</td>
<td>40.2</td>
<td>0.078</td>
</tr>
<tr>
<td>Number of international secondments</td>
<td>1.8</td>
<td>0.138</td>
</tr>
<tr>
<td>Number of internal relocations</td>
<td>1.1</td>
<td>0.105</td>
</tr>
<tr>
<td>Years since first secondment</td>
<td>9.0</td>
<td>0.192</td>
</tr>
<tr>
<td>Years since first abroad</td>
<td>15.3</td>
<td>0.278*</td>
</tr>
<tr>
<td>Number of years of secondment work overseas</td>
<td>4.3</td>
<td>0.055</td>
</tr>
<tr>
<td>Number of years of business travel</td>
<td>7.1</td>
<td>0.227</td>
</tr>
<tr>
<td>Other factors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of years married</td>
<td>12.33</td>
<td>0.030</td>
</tr>
<tr>
<td>Age of eldest child</td>
<td>8.5</td>
<td>0.065</td>
</tr>
</tbody>
</table>

Starred values are those associations that are significant at the 95% confidence level.

These correlations show little relationship between past experience or other factors, and stress symptoms during current mobility. The only significant correlations are positive and suggest an association between the extent of known international contact and stress, and between language ability and stress. This association is contrary to that which would be anticipated under stress theory (Capel and Gurnsey, 1987). Correlations, however, are not indicative of causal relationships, merely association. Factors may thus mediate in a direction other than that hypothesised, namely that the occurrence of stress generates certain behaviour rather than occurs as a result of it. For example, language ability is usually acquired according to need, perhaps even developed as a response to stress when overseas. Language ability would thus be expected to improve over time. Indeed, there is a significant correlation between language ability and years since first overseas (r=0.330). Given the lack of correlation between stress and other variables, the association between years since first overseas and stress symptoms may be due to the length of time that has passed since any previous experience. A statistical explanation of the relationship can only be indicated through the use of regression analysis (Hammond and McCullagh, 1978 p.250).

In order to establish the nature and importance of any causal relationship between experience
and stress, a stepwise regression was performed for stress symptoms (s) using 11 predictors: mobility events score (e), language ability (l), age (a), years since first overseas (y), years since first secondment (f), years married (m), age of eldest child (c), number of internal relocations (r), number of secondments (n), total duration of secondments overseas (d), and duration of business travel experience (b). The order of the variables in the equation (ii) corresponds to their significance in explaining the variation in stress symptoms experienced.

\[
s = 0.0166e - 0.44l + 0.40b + 0.92n + 0.55c - 0.37y - 0.55r \\
- 0.49m + 0.14a + 0.06f + 0.03d \quad (r^2=59.2\%).........(i)
\]

Nearly 60% of the variance in stress symptoms is explained by these 11 variables. However, comparison with equation (i) (section 10.3.1) reveals that the addition of ten variables has done little more than double the \( r^2 \) value. The most important factors, after the mobility events scores, are language ability, business travel experience and number of secondments experienced. A regression equation based on these four alone raised \( r^2 \) to nearly 50%. It should be noted that the positive correlation between language ability and stress is contrary to the contribution language ability makes to the regression equation. In each stepped equation, increased language ability has the effect of reducing the gradient of the stress symptom line. This suggests increased language ability reduces the ability of mobility events to cause stress. The number of years spent on business travel and the number of secondments undertaken have a positive influence, increasing the stress symptom gradient. The number of previous internal relocations and years since first overseas have a negative effect.

There was a high probability that individuals with the greatest experience of mobility would be the most highly skilled and sought after by employers for challenging new projects and exposed to new stressful situations. In this way, experienced individuals could find themselves in as stressful situations as their less experienced counterparts. Without knowledge of such controlling or selection factors, therefore, the relationship between experience and mobility is difficult to substantiate. To determine such factors, 'objective' accounts of posting characteristics would have to be associated with career experience, and the criteria for selection and recruitment by employers examined. These two processes were beyond the scope of this study. In addition, the complex relationship between mobility events and the role strain and conflict they represent (exposed in Chapter 8 and 9) may not lend itself well to explanation by the use of the crude parameters of experience delineated here.

There is thus no clearly defined relationship between prior mobility experience and the current experience of stress symptoms. This does not rule out a long term stress effect. A problem
here was the inadequacy of quantitative measures of experience. Only a detailed enquiry into
the extent of relevant experience and adequate preparedness could be a true measure of the
extent to which threats diminish with awareness and familiarity. Even then, it would be difficult
to quantify adequately the measure such that it was comparable between individuals. The
tests employed here have proved inconclusive because of the difficulty in quantifying all the
relevant measures of experience and other variations in people's perception of threat and
ability to cope. It is nevertheless possible to conclude that of the factors identified, the
intensity of mobility events experienced is the principal determinant and language ability, the
principal counter-determinant of stress outcome during mobility.\(^6\)

10.3.4 Role of secondment destination
The role of the secondment destination on stress outcome has been discussed in terms of
culture shock, culture distance and readjustment in Chapter 3 and elsewhere (Furnham and
Bochner, 1986; Harris et al., 1989). Problems of cost and logistics have made quantitative
measure of stress 'in the field' rare, however some questionnaire studies have been
successful (Torbiörn, 1982). Most studies have involved the rating of cultures according to
their 'cultural distance' from the sending country, a measure that quantifies differences in such
factors as linguistic group, social and economic variables and development status.

Within the fieldwork structure presented here, the only multi-destination secondment group
available for comparison was group B (N=13). This sample is too small to allow all but the
crudest of comparisons of destination against symptom score. Health tick-sheet and event
profiling exercises had been carried out with reference to the most recent secondment. Thus
Mobility Events Inventory and symptom scores were available which referred to the first three
months in each location. The thirteen locations were divided into two groups - developed and
developing\(^7\) - and the results compared.

Those seconded to the developed group (N=6) recorded a mean symptom score of 32.6 and
mean MEI score of 541.4. Those seconded to the developing world recorded a mean
symptom score of 36.0 and a mean MEI score of 466.2. The initial indication was thus that a
greater number of potentially stressful events occurred within the first three months of
secondment to a developed rather than a developing region, but that the stress that resulted
was less. A Mann-Whitney U test failed to distinguish between the two groups on MEI scores.

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\(^6\) Both factors may, of course, be acting as surrogates for more influential attributes or experience.

\(^7\) The 'developed' group contained Westernised, developed countries where English was widely spoken (such as the U.S.,
Canada and Singapore) whilst the 'developing' group contained non-English speaking developing regions (such as India and Indonesia).
Countries such as Saudi Arabia and South Korea were assigned to the latter group on language grounds.
A similar U test for symptom scores found the difference between the two groups significant only at the 88% confidence level (U=12, n₁=6, n₂=7). Firm evidence for increased stress resulting from relocation to a less developed region was thus denied by the small sample size.

10.4 The temporal relationship between mobility and symptoms

The method chosen to record the occurrence of mobility and stress over time was diary completion (Chapter 5). Individuals in groups A and C were issued with logbook-diaries (Appendix V) in which to record their experiences. These were to act as surrogates to the 'ideal': continuous physiological measurement and activity monitoring. In this surrogate role, diaries had five functions (detailed in Chapter 5): to enable events profiling, to monitor health events, to aid health tick-sheet response, to monitor the frequency of business travel and its spatial-temporal aspect and to allow respondents to record their concerns or emotions real-time. In this way many factors that in the second interview might have been subject to post-facto rationalisation had a greater chance of being detected by the survey.

10.4.1 Principal results

Diaries were used to assess patterns of business travel and their potential stress outcome. This tracking of symptoms and travel was only possible with the 28 whose diaries were received. As discussed in Chapter 5, no control group of non-travellers was selected. However, five from group A and two from group C did not travel. Diaries from both the groups A and C were used for analysis. Group A comprised secondees to the U.K. who were subject to a whole range of mobility pressures not necessarily business travel related. It was noted that symptom scores for this group could not be attributed to business travel as their sole form of mobility. Thus it was possible for a 'mobile' group of non-business travellers to be included in the analysis below. 'Non-travellers' characteristics nevertheless differed from those of a control.

a) Frequency of travel

The groups completing diaries (A and C) comprised 21 individuals who actually travelled during the course of the three months (98 days). All of the 28 could be classed as mobile by virtue of inclusion in the survey, and so are included in the descriptive statistics. Information about 'travellers' refers only to the 21 who actually went overseas during the period. Members of groups A and C left the U.K. 85 times (3.04 times per person, 4.05 times per traveller), to enter 115 foreign countries (4.11 destinations per person, 5.47 per traveller).

53 Long-haul flights (beyond Europe) were undertaken by 18 of the 21 travellers, a mean of nearly one per traveller per month. In addition, 166 short-haul international flights were
undertaken by 18, a mean of nearly three per traveller per month. These figures do not include flights made for other purposes, of which there were 34 amongst the sample of 288. One individual had made 32 short haul flights, 2 long haul and 2 holiday flights over the period, an average of a flight every two and a half days. Unfortunately, no survey of international business travellers exists with which to compare these figures.

b) Duration of trips
The diary sample spent a mean of 11.21 days out of the country (14.95 per traveller). This meant that the travellers spent, on average, about 15% of their time out of the country. The longest single visit was one of 21 days, whilst the most time out of the country for any one individual was 42 days (43% of their time).

10.4.2 Business travel intensity
It was assumed that it was not the frequency of trips, or their duration, per se that interfered with the organisation-career-family triad sufficiently to produce stress, but the trip intensity. Intensity is the term used to denote the way in which trip duration and frequency combine to disrupt family and work life. No pre-definition was made. However, hypotheses about its effect were devised to establish the aspects of the mobility process most associated with stress:

1. That more time away from home in a given period would be a greater source of stress than less time away.

2. That for any given number of days away, these would be more stressful when broken up into short and frequent trips rather than long occasional trips.

3. That in any given period, short-term stress symptoms would cluster on or about the times of trips, rather than during non-travel periods.

Diaries permitted many facets of the business travel experience to be isolated and tested individually against coinciding stress symptoms.

a) Business travel and stress
Over the three-month period, diary respondents recorded a mean GI symptom score of 33.19. The association between symptom scores and various components of the business travel

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8 23 vacations cropped up in the diaries, being undertaken by 19 individuals. This implies a mean of two vacations per employee per year, assuming uniform coverage. These plausible findings combine with negative responses to a second interview question as to whether the diary period was atypical to indicate that vacations were not a major source of distortion in the recording of business travel across the sample.
process are shown in Table 10.5.

Most factors associated with the frequency or duration of overseas travel show a significant positive relationship with stress symptoms experienced. The number of non-work flights correlates negatively with stress symptoms, as might be expected since these are mainly vacation flights. The number of flights per se, is less important than the number of places visited and the time away from the U.K. These correlations lend some evidence to support hypothesis one. However, this high degree of association can be linked to the fact that the business trip components in Table 10.5 are highly correlated amongst themselves and principal factors are hard to isolate.

<table>
<thead>
<tr>
<th>Business trip component</th>
<th>Mean recorded frequency per three months</th>
<th>Correlation with Symptom Score (Pearson’s r)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of destinations</td>
<td>4.1</td>
<td>0.44*</td>
</tr>
<tr>
<td>Number of U.K. departures (=trips)</td>
<td>3.0</td>
<td>0.33*</td>
</tr>
<tr>
<td>Time away from U.K.</td>
<td>11.2</td>
<td>0.50*</td>
</tr>
<tr>
<td>Longest individual trip</td>
<td>5.8</td>
<td>0.32*</td>
</tr>
<tr>
<td>Number of long haul flights</td>
<td>1.89</td>
<td>0.40*</td>
</tr>
<tr>
<td>Number of short haul flights</td>
<td>5.93</td>
<td>0.22</td>
</tr>
<tr>
<td>Number of flights</td>
<td>9.04</td>
<td>0.30</td>
</tr>
<tr>
<td>Number of non-work flights</td>
<td>1.21</td>
<td>-0.22</td>
</tr>
</tbody>
</table>

* Starred values are those associations that are significant at the 95% confidence level.

To overcome this difficulty data were classified by individuals’ travel intensity. As no statistical definition has been derived for intensity, the five categories shown in Fig. 10.2 were derived from the travel patterns recorded in diaries (Chapter 5, Fig. 5.2). The trend seen in Fig. 10.2 suggests that the more trips undertaken or time spent out of the country, beyond a threshold of one to two trips per quarter, the more short term stress is experienced. This would support hypothesis one. The symptom scores of those spending more than 25% of the time out of the country are significantly higher than those of the other four groups combined9. The discrepancy between the stress experienced by the long trip and the short trip categories would lend support to hypothesis two, since both spent similar periods in total out of the country (9.7 versus 10.8 days).

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9 Mann-Whitney U=30, when critical value (n1=7, n2=22) is 39 for one-tailed test at α=0.05.
Whilst the categories of business travel produced are useful for descriptive purposes, the sample size is too small and the variance too great for any findings of general statistical significance to be established. This approach also treats the three-month study period as a single incident. To increase the sample number and enable comparison of travel and non-travel, it was necessary to utilise the longitudinal data provided by the diaries.

10.4.3 Longitudinal analysis of business trips and stress
A very rich source of data existed within diary responses. It was desirable to identify and extract independent variables from each diary which might influence individuals’ stress outcomes. There was however, a need for variables to be comparable with those from other diaries. Comparable sub-diary length periods thus had to devised. The diary periods were divided up into travel and intervening non-travel periods. These were termed ‘trips’ and ‘intervals’ respectively. Two variables were recorded for each period, its duration, and the number of symptoms that occurred. Means, counts and sums of these variables could thus be calculated as required. The use of such periods had the advantage of increasing the sample size to a level where a detailed comparison of stress outcome by trip duration was possible.

Once the two categories of trips and intervals had been established, and consecutive diary
entries allocated accordingly, these could be analysed. It was important to note that any results would be valid only in relation to the population of business trips. This was because assessing each trip as an analytical unit in its own right implied over-representation of the experiences of the most frequent travellers.

GI stress symptom scores could not be used since they are derived from frequency tick-sheets requested at the end of the study period. The source of data for stress symptoms was thus the frequency of occurrence of symptoms as indicated by respondents on the pages of the diaries. The symptom intensity was not requested, and thus a system had to be evolved which would indicate the numerical frequency of symptom occurrence whilst preserving the quality of the responses given. The system involved scoring one point for each symptom. These points were summated over the period of concern. Where a symptom occurred on two or more consecutive days, it was scored only once, for the first day. A symptom would thus register a point only if it occurred on a day following one when it did not occur. This approach was necessary to avoid points being awarded for both duration and frequency of symptoms. Findings from a study of this type, looking at the clustering of symptoms around events might be indistinct if there were no definite cut-off point when a symptom could be judged to have ended. Errors arising from serial autocorrelation might result. The stress load here thus indicates how often stress symptoms arise, not necessarily their persistence. The symptom points over the length of a trip or interval were summed and divided by the number of days of trip or interval duration. This score was termed the 'stress load per day' in Table 10.6.

<table>
<thead>
<tr>
<th>a) Business trip length</th>
<th>b) Stress load per day</th>
<th>c) inter-trip interval</th>
<th>d) Stress load per day</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 day 39</td>
<td>0.08</td>
<td>1 day 5</td>
<td>0.00</td>
</tr>
<tr>
<td>2-3 days 14</td>
<td>0.27</td>
<td>2-3 days 15</td>
<td>0.05</td>
</tr>
<tr>
<td>4-10 days 16</td>
<td>0.21</td>
<td>4-10 days 32</td>
<td>0.14</td>
</tr>
<tr>
<td>11+ days 7</td>
<td>0.53</td>
<td>11-31 days 24</td>
<td>0.15</td>
</tr>
<tr>
<td></td>
<td></td>
<td>31-97 days 42</td>
<td>0.03</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Non-travellers 7</td>
<td>0.08</td>
</tr>
</tbody>
</table>

Trip lengths are rounded to nearest 24 hours

The daily stress load for business travellers was 0.33 whilst travelling, and 0.08 whilst not travelling. So clearly travel imposes considerable stress over sedentarism. This approximated to a symptom every three days whilst out of the country compared to one every twelve whilst at home. This fourfold increase in symptoms during travel lends support to hypothesis three.
The diary sample as a whole (travellers and non-travellers) also experienced a mean daily stress load of 0.08 whilst not travelling. Columns b and d of Table 10.6 show the mean stress load per day experienced on different lengths of business trip and trip interval.

It was difficult to test the significance of the trends shown in Table 10.6. Stress load per day was the weighted mean of a frequency count for which few tests were valid. However, there was a clear trend towards higher daily symptom counts, the longer the trip. Spearman's rank correlation coefficient ($r_s$) between duration of trip in days and number of symptoms per day (symptom load) is 0.602$^{10}$, significant at the 99% confidence level. A similar calculation of $r_s$ for interval symptom load was not significant ($r_s=0.248$). A cumulative effect is observed with the stress load of each trip becoming disproportionately greater with increasing duration. Symptom counts were lower during inter-trip intervals, though it was interesting to note that those who undertook one day trips encountered a similar daily load to that of non-travellers, suggesting that this form of trip was substantially less stressful than those requiring several nights away. It may be that one day trippers had an insufficient time for any symptoms of stress to be manifested during the course of the trip. This issue will be addressed under post-trip symptoms below.

Inter-trip interval data exhibited higher daily symptom scores for intervals of moderate length than for short or long intervals. This again may have been due to insufficient time for stress symptoms to be manifested. Alternately, it may be that the disruption to a routine was greater once there had been time to re-establish it, as with more moderate duration intervals. The non-travellers displayed a daily symptom load twice that of the inter-trip intervals of one to three months. The non-travellers were mainly those who have been seconded to the U.K. Perhaps this in itself contributed to the stress load. However, there may have been some stress associated with international inactivity, especially where travel had previously been the norm.

*Hypothesis two* was not proven conclusively. Trips of over 11 days in duration were more stressful than shorter ones and inter-trip intervals had to be of over a month in duration before their stress load was minimised. The evidence here suggests that for a period of business travel comprising trips of moderate length (two to ten days), the key determinant in stress load would be the ratio of trip days to interval days. *Hypotheses two and three* thus only hold where interval length is high compared to the length of trips.

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$^{10}$ Spearman's $r$ was used due to existence of many tied ranks.
There is a temptation to derive a practical optimum for travel intensity from these results. However, it must be remembered that mean trip and interval stress loads have been produced from a component breakdown of the continuous experience of individuals. No meaningful stress predictions can thus be derived from the construction of new continuous experiences from these components\(^1\). The only valid pointers to 'optimum' combinations of trip and interval are the differences seen in stress outcome across travel intensities identified in Fig. 10.2 (section 10.4.2a) where less than 5% of time travelling (in preference to no travel) produced the lowest stress outcome. The data in Table 10.6 inform these findings, but without an explanation of the relationship between trips and intervals, hypothetical constructions cannot be validated. One aspect of this is the relationship between time and the expression of stress symptoms, discussed below.

10.4.4 Post-trip symptoms

The way in which stress manifests itself over time is variable between individuals. One cannot expect symptoms of stress to occur concurrently with the stressful event, whilst it is unusual for effects related to a particular effect to be manifested months later. Each symptom, (eg. headaches, sleeplessness) will develop uniquely subject to the immunological responses and coping abilities of the individual. It is thus difficult to predict whether a particular event is responsible for a particular symptom, or whether stress associated with a business trip, for example, will manifest itself during the trip, or as a latent effect afterwards.

A frequent concern whilst travelling, and immediately following return, is the amount of work that must be carried out on return. Individuals normally return with work resulting from their trips; work may also have been generated at home whilst they have been out of the country. In addition they will seek to renew relations with their family. Individuals may encounter many pressures on time during a period when they are at their most vulnerable or tired. This may create conflicts between the organisation's demands and those of the family.

To assess the symptoms that may arise post-trip, either due to a latent effect or pressures on return, stress loads were calculated for the period immediately following return. It will be recalled that mean daily stress load whilst on business travel was 0.33. The mean for the day of return was 0.28, whilst the mean for the two days subsequent to return was 0.18. This compared to the 0.08 mean daily stress load found for inter-trip interval days as a whole.

It would seem that some stress can be attributed to the latent effect of the trip and pressures

\(^1\) Since frequent travellers' experiences are over-represented.
on return, though it is difficult to isolate the two causes. Whilst stress is rarely manifested
during shorter trips, where these occur frequently they may generate a latent stress effect that
proves detrimental over time. Conversely, the problems of return would be expected to be
less for one-day trips and thus the 'pressure of return' stress effect diminished.

These results have shown the complex nature of the relationship between employer-
determined short term travel out of the country, and the effect on the individual. Whilst long
trips could manifest stress symptoms at the rate of one every two days, more frequent shorter
trips could engender greater disruption and a latent stress effect. All three hypotheses relating
to the positive relationship between travel intensity and stress have been verified to some
extent. Non-travel was not as productive of symptoms as travel, but intervals which allowed
routines to be reestablished before being disrupted could produce more stress than shorter
visits home. Complete absence of travel could also be more stressful than an occasional one
day business trip. Stress can thus be seen as an ever present phenomenon, its symptoms
occurring more frequently, the more stressful the circumstances. These findings correspond to
Selye's (1956) definition of stress as the rate of wear and tear on the body produced by life.

10.5 Stress, satisfaction and mobility outcome
Symptom scores give some indication of stress symptoms experienced. Corporate concerns
will however focus on the need to translate employee stress into dissatisfaction and
unwillingness to move. Previous researchers (such as Torbiörn, 1982) have used subjective
assessments of satisfaction as an indicator of inverse stress levels. Whilst the validity of this
approach has been questioned here (Chapter 3), the value of obtaining a crude index of the
impact of stress on individual motivation and perception is recognised. A series of direct
questions was thus asked in interview (the second interview for groups A and C) which
assessed the willingness of respondents to re-experience the type of mobility monitored
during the diary period and related measures of satisfaction, such as feeling valued by the
organisation. Interviews were designed essentially for the construction of career profiles and
evaluations of experience (Chapter 5). Neither the survey structure nor the sample size was
intended to be appropriate for the generation of definitive answers to these questions. As
interviews were semi-structured, direct questions were asked systematically at the end.
Affirmative and negative responses were given and identified, but a number of extended
answers were given by respondents who balanced different aspects of each question. The
translation of such responses required the creation of categories such as 'somewhat' and
'depends'.

The questions were answered in retrospect for the recent monitored study period. For groups
A and C this was the recent diary period. For group B, this was the first three months of their last assignment. To ensure comparable results, only the answers given by groups A and C (N=31) are presented here. The responses to each question are presented in Figure 10.3 with the mean symptom score for each response group.

Figure 10.3: Direct question responses and associated mean symptom scores

1. Over the diary period were you satisfied with your lifestyle?

   - No
   - Somewhat
   - Yes

2. With hindsight, would you undertake this [mobility type] again?

   - No
   - Somewhat
   - Yes

3. Are you happy with a system of career progress dependent on mobility?

   - No
   - Somewhat
   - Yes

4. Would you choose to undertake a move in the future with [Company name]?

   - No
   - Somewhat
   - Yes
   - No choice

5. Do you feel valued by [Company name]?

   - No
   - Somewhat
   - Yes

6. As far as you are concerned, were there any alternatives to your mobility?

   - No
   - Somewhat
   - Yes
Those who were less satisfied or unwilling to undertake the same type of mobility again exhibited higher mean symptom scores, but few other clear differences could be observed. Given the limitations imposed by interview design and sample size, conclusions can only be tentative, but some association appears to exist between symptom experience and satisfaction, and willingness to move. Nevertheless, Mann-Whitney’s U test failed to discriminate between response groups on stress symptom scores other than for satisfaction (Mann Whitney U=59 when critical value ($n_1=15$, $n_2=17$) is 83 for a one-tailed test at $\alpha=0.05$. At this level of analysis, it is not possible to rule out the possibility of unrecognised intervening factors acting to produce any manifest association.

10.6 Conclusion

From medians, and means, where appropriate, a composite Mr. Average can be identified. Mr. Average, age 40, was a business traveller who had joined the company 17 years ago, aged 23, married four years later and had two children, now aged eight and eleven. The company moved him within the U.K. 15 years ago and sent him on his first overseas secondment at the age of 31, accompanied by his family. He returned two years later. Since his return he has been travelling internationally, averaging 12 trips a year, of mean length four days. Every fourth trip involves more than one destination country. He has a working knowledge of one language besides English. His travel was interrupted by a two-year secondment overseas which, due to difficulties of family readjustment, he found initially very stressful. On return he has continued to travel. The most stressful element of his current travel pattern is the occasional long period of separation from his wife and children that his travel demands, though he also finds the occasional periods of ‘few days on, few days off’ disruptive.

Mr. Average has an illustrative rather than an explanatory value. It is not Mr. Average who leaves the company because of insufficient information on his secondment, who prematurely returns from secondment because his family cannot cope or who has a coronary failure with fifteen productive years still unworked. However, it is the Mr. Averages who continue to work for the company, and who are likely to be identified as participants for surveys of the present kind. Thus we must infer from the experience of events and circumstances of Mr. Average, the factors that have led to the loss of Mr. Burnout. Whether the cost to the company of losing one Mr. Burnout is greater than that due to the underperformance, refusal to move, ill health and absenteeism of nineteen Mr. Averages is not for this study to say. What it can inform is the identification of what causes Messrs. Burnout and Average to behave in the way they do.

This work has exposed the difficulties of measuring stress - ‘measuring the action of the unquantifiable on the infinitely variable’. Thus, as with any attempt to externalise and quantify
stress, only some components within the complex web of cause and effect surrounding mobility and stress have been identified. The sample size was not large enough to permit universal generalisation. Nevertheless, results were sufficiently distinct to allow the factors in mobility patterns that cause stress to be identified.

The results have shown that stress is indeed perceived in the family-organisation-career conflicts hypothesised. Qualitative analysis in Chapters 8 and 9 has informed what separation, cultural conflict and lack of preparation mean in these contexts to individuals. Quantitative analysis in this chapter has shown the association of these events and experiences with the generation of stress symptoms, and the temporal nature of the stress-mobility relationship. They have also suggested ways in which stress could be minimised through the prudent planning of travel, adequate preparation, and culture training.

The fieldwork results indicate that there was substantial variation in individuals' responses to different mobility strategies. Those relocated to the U.K. showed very few signs of stress during the course of their assignment, corresponding to the later stage in secondment at which individuals were approached and the smaller number of events then experienced. This was not the case for British secondees, during the early stages of their secondment. Those who were relocated to developing regions recorded somewhat higher symptom scores, a possible by-product of a need for greater readjustment. The high level of stress associated with stages of transition was borne out by the higher levels of stress symptoms amongst business travellers, especially the strong association between frequency of travel and symptom scores. The link between these processes and the need to readjust was shown by increases in the daily stress load the longer the trip, and the occurrence of stress symptoms during the period following return. The association between symptom scores and the scaling of items according to their requirement for readjustment (indicated by mobility event scores) also confirmed this link.

Business travel was not inherently stressful. Very low levels of stress were recorded for one day trips. There was evidence to suggest that absence of travel was in itself a source of frustration. However, prolonged separations from home (culture, office or family) were seen to be disproportionately more stressful than shorter visits. Secondments were, overall, less intense sources of stress, with the exception of their early stages.

Much more research will be required before the links between employee attributes, mobility strategies and stress can be argued with certainty. It is evident that many person variables whose measurement was beyond the scope of this survey act to account for the way in which
individuals interpret, adjust to and cope with potentially stressful life events. A rigorous attempt to accommodate all such variables would not necessarily explain variation in stress outcome to any greater degree since the measurement techniques available lack sufficient sophistication. The techniques themselves could add to rather than subtract from the variability observed. Stress outcome is long-term and short-term and this study has been restricted to considering only those manifestations which are immediate and identifiable. Longitudinal or follow-up studies are essential if the long-term manifestations of stress, physical and emotional, are to be recognised and equated with prior experience. The role of the MEI as a measure in quantifying mobility experience has been validated. Nevertheless, as with the SRRS, its item list will always be vulnerable to addition and subdivision. Validation of its prognostic outcome is as yet limited to relative incidence of short-term symptoms. A rigorous long-term validation with medical examination as suggested in Chapter 6 is thus required. In addition, in this survey there has been time to explore the meaning of events and quantify their outcome only across so many. Using these devices, a survey across a larger sample of the mobile would be required (a hypothetical 600 if variation across the sample were to be reduced to variation only to the nearest symptom at the 95% confidence level) to place full confidence in the tentative conclusions reached here.

\[ n = \left( \frac{zs}{d} \right)^2 \]

Uses the formula \( n = \left( \frac{zs}{d} \right)^2 \), where \( n \) is the required sample size where a pilot survey has exhibited a standard deviation of \( s \), and \( d \) is the tolerable margin of error at a 95% level of confidence for which the corresponding \( z \) value is used.
11.1 Overview
The thesis set out to establish the relationship between the effects of mobility policies currently in use within international organisations and the stress experienced by their mobile staff, to answer the question: 'How do mobility policies at work within international organisations produce stress for their employees?'

This was an exploratory study, investigating the processes of mobility which create stress-generating situations. The events and circumstances likely to generate stress have been hypothesised and rated by a sample of mobile employees. The resulting MEI has proved of value in explaining some of the variation in stress outcome across a mobile sample. Separation has been found to be a powerful stressor, made the more potent by its frequency. Relocation posed short-term challenges at the stage of transition. Interviews exposed the long-term concerns of individuals, the age-related 'mobility trap' and the unpredictability of the lifestyle.

11.2 Summary
The objectives of this thesis were threefold: i) to establish a means of measuring stress, ii) to identify the stressful components of international mobility, and iii) to determine how stress arises in a mobile lifestyle. The research achieved qualified success in all three objectives. The complex nature of the stress reaction, with its multiple short-term and long-term outcomes, none of which are exclusive to stress, meant non-invasive measures tended to be unreliable or lack validity (Chapter 3). An established stress symptom list was adopted to determine the primary outcome variable which had applied relevance as symptom categories implied decreased performance. Identifying stressful components of international mobility involved the construction and testing of the MEI (Chapter 6). The exercise was successful, although the outcome scale had validity at the aggregate rather than individual level. 28% of the variance in stress symptom outcome could be accounted for by the frequency and intensity of mobility events - an $r^2$ value that doubled when ten other variables corresponding to individuals' experiences were added. The meaning of these events at the individual level was evaluated via depth interviews. Interviews also permitted the long-term implications of a mobile lifestyle to be identified. Thus both frequently-occurring and persistent threats in the lives of mobile individuals were identified. This approach enabled a summation of the commonality of experience. However, comprehensive aggregation is impossible given the multiplicity of events, processes and circumstances acting on individuals at any one time, and the variation in individuals' perceptions of the existence and magnitude of threats. An exploratory study such as this is hypothesis generating rather than proving. Thus the study has permitted a relationship between mobility and stress to be hypothesised, and is shown in Fig.
Foci of each individual's environment towards which they have responsibilities: their family, career, organisation and social and cultural milieu, have been proposed. The nature of commitments and interactions between these foci has been considered in detail, with specific emphasis on the ways in which responsibilities and aspirations towards career could conflict with those towards family; and those of career or of family with those of the organisation (Chapter 2). Role strain was identified. Reconciling one interest against another would prove impossible since the interests normally pulled in different directions. The effect of mobility was either to separate geographically or break links in the tripartite system, or move the complete system into another context. Qualitative analysis revealed that situations in which stress occurred were those where threats arose in interactions due to changes in the immediate external environment (Chapters 8 and 9). Four aspects of interaction were identified from transcripts: sense of belonging; information and preparation; frame of reference; and adaptation. Success in all four aspects minimised role strain for employees. When individuals failed to achieve a sense of belonging from their current location, homesickness and rootlessness could result; where corporate or personal information systems failed, confusion and disorientation could ensue; where a frame of reference for the current situation was lacking, individuals could feel dissatisfied with their own behaviour; should they fail to adapt their behaviour to suit the new environment, competency and efficiency could suffer. These four processes which underlie individuals' interactions with their environment may be linked to stress theory, and specifically to the perception of threat. Analysis found the principal factors identified by individuals as affecting the success or failure of their readjustment to be their perceived success in achieving aspirations in work and home lives. A divergence in work and home interests could be preserved up to a threshold; beyond this it was found that further strain led to abandonment of employers' mobility aims in deference to family responsibilities.

Individuals experience strain through mismatches in four mechanisms of environmental interaction: preparation, sense of belonging, frame of reference and adaptation. These strains, ever-present at the micro-level of the individual's position in space and time, are exaggerated as a result of international mobility. Uncertainty and doubt are significant features of a mobile lifestyle. Mobility creates new divisions in space and time which mean the individual gains less sense of belonging from their current situation than they did before. Frame of reference lacks clarity with the new aspects of their surroundings. Their behaviour is less applicable and must adapt to their new roles in these situations. Strains act along the arrows in Figure 11.1, as individuals experience mismatches between the state pertaining and that desired. These strains can occur in their roles with all aspects of their environment. The greater the magnitude of the
Fig. 11.1: The mobility - stress relationship

MOBILITY

Individual

Person

Variables:

Experience

Personality

Coping

Strategy

<table>
<thead>
<tr>
<th>Sense of belonging</th>
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<tbody>
<tr>
<td>Preparation/Information flow</td>
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<td>Frame of reference shift</td>
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<tr>
<td>Need for adaptation</td>
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Family

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<th>Sense of belonging</th>
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<td>Preparation/Information flow</td>
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<td>Frame of reference shift</td>
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<td>Need for adaptation</td>
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Organization

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<th>Sense of belonging</th>
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<td>Preparation/Information flow</td>
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<td>Frame of reference shift</td>
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<td>Need for adaptation</td>
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Career

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<th>Sense of belonging</th>
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<tr>
<td>Preparation/Information flow</td>
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<td>Frame of reference shift</td>
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<td>Need for adaptation</td>
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Environment

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<th>Sense of belonging</th>
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<tr>
<td>Preparation/Information flow</td>
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<tr>
<td>Frame of reference shift</td>
</tr>
<tr>
<td>Need for adaptation</td>
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</tbody>
</table>

CONFLICTS AND PERCEIVED THREAT

That perceived to pertain
differential at any one time, the greater the perceived threat posed and the stress that results. To minimise the strain and resolve the mismatches, interactions must be brought closer to the desirable state.

Conflict can also exist between competing demands from different roles. Conflict does not determine the magnitude of stress. The stress resulting from conflict is that due to strains, the persistence of which is extended by constraints placed on the individual's position in space and time - due to mobility - and their resultant inability to allocate time appropriately to the magnitude of the strain posed within each role, and mechanisms of interaction with that role.

Mobility events are thus examples of strains which can develop as a result of mobility. These require readjustment. The magnitude of this adjustment has been quantified across a sample. These quantifications generally have been inclusive of a time factor as individuals rated duration as well as magnitude of readjustment. A ready reckoning of the magnitude of strains has thus been obtained. Strain indicates the amount of readjustment required. Stress is proportional to the difference between the amount of readjustment required and the individual's perceived ability to undertake the readjustment, that is, the size of the threat. A number of person variables are thus important in mediating the conversion of strain into stress. It was not the purpose of this study to define rigorously and measure these, but they characterise the variability of the readjustment resources possessed by individuals. These are experience, personality and coping strategy and are shown in Figure 11.1.

Interviews with employees' spouses were analysed to ascertain the effect of mobility policies on the family. The experiences of family members centred on the breaking or splitting of both their own tripartite exogenous links and their strong links to a particular environment and social milieu. Under business travel, the family itself was split, leading to role conflict. Spouses and children were found to be exposed to greater elements of change when the family moved, since personal-organisational links, maintained throughout the move by the employee, were broken by other family members. Adaptation was a particular problem for families where the employee undertook lengthy business visits. Behaviour appropriate to family separation had to be learnt and unlearnt for each trip, leading to conflict during the transition back to living together on return. The resultant requirement for extra readjustment was often frustrated by inadequate interaction with corporate information systems. The transmission of familial stress to the employee and the potential for negative repercussions for the company were discussed in relation to the established importance of family links to the employee.

Stress occurs in response to a threat. In a non-physically demanding world, threats are those
situations which demand a readjustment of an individual's mental resources in order to accommodate them. These situations to a greater or lesser extent change the individual's environment away from one in which they perceive they are coping, to one in which new demands are made. Changes are tangible and observable by others; the individual's perceptions of those changes are not. An aggregate approximation of the amount of readjustment required in situations arising in skilled international migration and travel has been obtained in the form of the MEI. Yet it has become clear through quantitative analysis that there is a greater variation in stress outcome than that which can be explained by these demands for readjustment alone (Chapter 10). It must thus be recognised that no matter how well the components of international mobility that cause stress are identified, the difference in stress outcomes between individuals will remain subject to the action of many person variables, the effect of only some of which are recognised and becoming understood.

11.3 Discussion: implications and recommendations

Poor preparation, rootlessness, disorientation and maladaptation are potential products of the mobility process which, though difficult to quantify financially, can incur financial penalties for the firm should the individual underperform, have to return prematurely, discourage others, refuse future moves or leave the company. Organisations are unable to take such effects, the cost of alternatives or support programmes into account because the efficiency of commercial organisations is measured using profit-and-loss, year-end accounting. This method does not encourage investment which shows a return only over the long term, yet some of the most physically-, emotionally- and hence economically-damaging aspects of stress are only exhibited over the long term.

Stress has ambiguous causes and proof is never conclusive. Humans are persistent and can subject themselves wilfully to stressful situations. Thus outcomes and outcome thresholds vary. There is no direct answer to the question 'How much stress is too much?' (Benson and Allen, 1980). If the threshold is taken as cardiac arrest, then the answer comes too late. Potential outcomes are many and can be additive - sleeplessness, absenteeism, alcoholism, sexual difficulties, family strife, divorce, ulcers, cardiovascular or mental illness - all are unwelcome at any stage. Minimising stress must be a humanitarian as well as a corporate aim.

The findings from this study recommend a much broader cost-benefit type approach by companies to their need for mobility and to the means used to achieve it, than that currently in operation. Some of the costs identified by the present study need to be weighed against benefits as summarised in Table 11.1. In order to perform a full cost-benefit analysis of mobility companies need to be able to adopt an approach which encompasses individual satisfaction as
a variable to be balanced against the costs and benefits of the assignment and travel processes. This approach needs to be as holistic as possible to embrace the effect of mobility on all the individuals (principally family members) affected by the move, and on the quantity and quality of interactions of those individuals with their new environment.

The allocation of funds requires much careful thought. Since the principal causes of stress for the highly skilled are not found in their salaries, the solutions will not be found there either.

The creation of a MEI has aided the recognition of those aspects of corporate mobility policies most likely to engender stress in those individuals who experience them. Thus a MEI has a role to play in

Table 11.1: Cost-benefit summary of mobility policy

<table>
<thead>
<tr>
<th>Business Travel</th>
<th>Cost</th>
<th>Benefit</th>
</tr>
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<tbody>
<tr>
<td>Organisation</td>
<td>Travel and accommodation, lost work time, employee stress.</td>
<td>Ability to locate skills globally short-term.</td>
</tr>
<tr>
<td>Individual</td>
<td>Separation from family, travel stress.</td>
<td>International experience</td>
</tr>
<tr>
<td>Family</td>
<td>Separation from employee, missed events</td>
<td></td>
</tr>
<tr>
<td>Relocation/Secondment</td>
<td>Cost</td>
<td>Benefit</td>
</tr>
<tr>
<td>Organisation</td>
<td>Cost of relocation package, accommodation, education and travel costs, locating replacement, employee stress, future reluctance.</td>
<td>Ability to locate skills in desired location long-term, develops managerial experience.</td>
</tr>
<tr>
<td>Individual</td>
<td>Loss of familiar social and cultural environment, lost contact with home organisation, stress, disruption to family</td>
<td>Career development, international experience, new opportunities.</td>
</tr>
<tr>
<td>Family</td>
<td>Loss of familiar social and cultural environment, stress, disruption of career and education, loss of income.</td>
<td>International experience.</td>
</tr>
</tbody>
</table>

Financial costs in **bold**, intangible/stress costs in *italics*.

a cost-benefit approach. It is not a panacea, however. It comprises the mean ratings obtained from a large sample of judges for a limited number of key mobility events. The same events will vary between individuals in the way they affect career, organisation and family links. The perception of the threat posed by events will, in addition, be mediated by personality and prior experience. The outcome scores of the MEI have not been systematically equated with stress-related illness or breakdown. Thus further work is required, within organisations, to monitor events, symptoms and outcomes against the person variables of those experiencing them before the MEI can contribute fully to an appraisal of mobility at the individual level. Nevertheless, at an
aggregate or policy level, the products of MEI values and event frequencies can already contribute crude evaluations of the stress outcome of current mobility strategies, and point to the elements of moves most in need of support or revision. One conclusion of this study is not that cultural briefing is an essential pre-requisite of all assignments and should be adopted uniformly, but that where it can been shown to effectively reduce the potential threat posed by cultural challenges in the host location, then it is to the benefit of organisation, individual and family if briefing is offered.

Packard (1972) and others (Jennings, 1967; Toffler, 1970) have questioned the relentless increase in short- and long-term mobility, and twenty years on, this thesis must do so too. Findlay (1991) and Germidis (1978) have argued that it is not in the interests of MNCs to make use of local skilled labour and thus spread or reduce the mobility burden borne by employees. Using the current criteria of measuring corporate efficiency, this is indeed likely to be the case. It is argued here, however, that until underperformance, errors in decision-making, burn-out, premature retirement (from mobility and from work), illness and absenteeism have a place in the mobility efficiency equation, final conclusions cannot be drawn. A shift or evolution in policies, perceived to a limited extent in analysis of secondary data (Chapter 4) and in discussions with employers (Chapter 7), away from relocations and long-term expatriation and onto shorter and more frequent sojourns, would make such a review of the effects of different aspects of the mobility process all the more relevant. Mobility cannot be expected to increase indefinitely when it is dependent on depleting the company's most valuable and costly resources - its middle and senior management. The remainder of the burden of corporate moves is currently carried by those the company does not employ - family members whose allegiance cannot be guaranteed indefinitely. Already 60% of managers refuse a move at some stage in their careers because of the disruption it may cause (IMS figures, taken from Luo and Cooper, 1990). As the number of dual-career couples grows, and with it the dependence of organisations on those aspects of mobility perceived as the most stressful - familial separation and initial readjustment overseas - MNCs may well see this proportion increase.

11.4 Future research agenda
Inevitably, a multi-disciplinary study such as the present one raises as many questions as it answers. A recent review of the relocation and stress literature called for future research to examine the interaction of the multiple factors involved, to adopt a longitudinal design and prospective analysis across a large and representative sample (Luo and Cooper, 1990). This study has sought to adopt this approach but has been limited by constraints upon sample size. A larger study might hope to expand and validate the MEI to realise its potential as a personnel management tool. Whilst the potentially stress-generating processes which have been identified
and rated in the MEI are those which pose a significant threat for a significant number of individuals, the nature of stress is such that the perception of threat cannot always be tied to observable phenomena. In these cases, threat is tangible to the individual alone. Identifying such specific situations, which may nevertheless be powerful stressors, calls for a more psycho-analytic case study approach and extended individual in-depth interviews. A temporally and spatially extended diary study might be sought to monitor the effect of long- and short-term moves over years rather than months. The long-term health outcome for employees might also be pursued through follow-up surveys. Other forms of skilled mobility could also be addressed: group moves *en masse*, long distance weekly commuters (Hogarth and Daniels, 1987) and those moving in the ELM.

The present study has also highlighted the dearth of research examining the effect of business travel on those who undertake it, and the role of business travel in the global spatial division of labour. Whilst flows of short-term moves look likely to increase, and with it the potential stress highlighted by the present study, a systematic review of these large flows of labour has not been undertaken. Future work must entail an examination of the extent to which moves are explained by geographical, economic, organisational, political and task-specific factors, and the relationship between moves of different lengths and frequency. Only then can the true implications of the effect of stress on the mobile individual and its commercial and human costs be identified.
Appendix I: Glossary

Adaptation

The process whereby an individual modifies his or her behaviour from that corresponding to accepted norms for his or her position in an old environment, e.g. in the country of departure, to that corresponding to the norms of a new environment, e.g. the destination country. Adaptation here is used in its objective context, in contrast to subjective adjustment (Torbjorn, 1982). Successful adaptation is defined as that where the outward behaviour of the individual matches, or has reached its maximum equilibrium in matching, the behaviour of host nationals (see frame of reference).

Business travel

Visits of short duration carried out for commercial or work purposes. The words 'visit' and 'trip' are used interchangeably. In this thesis, international business trips were defined as all such visits under 3 months in duration (see STA), although in practice no visits of more than six weeks in duration arose. The International Passenger Survey defines international visitors as those entering or leaving the U.K. for purposes of business, whose stay abroad, or in the U.K. does not exceed 12 months in duration. The IPS does not define business, but the definition of 'business' used here is necessarily broad, and encompasses promotional and sales visits, trouble-shooting, servicing, attending conferences and meetings, leave replacement, training, technical, supervisory and managerial functions which are carried out in the duration of such a trip.

Career

The term career is used in this thesis as a very broadly to denote the position of the individual on their progress through life and work. Career progression is determined by past and future decisions from a limited range of options. In an organisation ILM, career options are presented by those above the individual in the organisation's decision-making hierarchy (Larson, 1977). Here, career moves are generally either promotions or lateral transfers, placing the individual on equivalent or higher decision-making planes within the hierarchy. The elevated position is usually equated with an aspiration for increased freedom to make decisions over a wider range of options. Enhancement of career prospects may also account for the decision to change organisation by entering the ELM. The individual, as against organisational, definition of career used here, grants career success wherever the individual is able to fulfill their aspirations towards themselves, and not just in the attainment of a position on a higher rung in one organisation's career hierarchy.

Coping

Coping refers to the actions that people take on their own behalf as they attempt to avoid or lessen the impact of potentially stressful events. This can be done by changing the situation, managing the meaning of the situation ('dethreating' chapter 3), or keeping the symptoms within manageable bounds (as in the suppression of emotions, see Somatisation) (Pearlin, 1989).

Culture Distance Index (CDI)

The extent to which societies differ externally from each other, on a variety of dimensions such as climate, geography, economic resources and socio-cultural patterns, can be termed culture distance (Furnham and Bochner, 1986). This concept has been developed into an culture distance index (CDI) of different countries by a number of researchers. One such study found the extent of culture differences predicted the degree of social difficulty encountered by visitors overseas (Furnham and Bochner, 1982).
"Europat"

A term used within MNCs to describe an expatriate worker from one country in the EC, on secondment or STA 'abroad' in another country of the EC. The term has been developed to distinguish between such staff, and those working further overseas, in recognition of the increasing harmonisation of legal and fiscal policy within the EC. There is a general perception that the amount of readjustment required by such individuals is less due to the relative homogeneity of climatic, socio-cultural and economic characteristics of EC countries, and hence 'Europat' remuneration packages have been developed with the traditional overseas hardship payments reduced or omitted to reflect this.

External labour market (ELM)

The pool of labour outside a firm upon which it can draw to supplement its own labour force. In the recruitment of such individuals, the firm has to compete with other companies requiring the same skills.

Family

There are two possible definitions of family. The first is that of the primary social group consisting of generations of parents and their offspring, the extended family. The second is the immediate family of wife or husband and their children - the nuclear family. The terms 'extended family' and 'family' are used throughout this thesis to describe these two groups. The first definition is appropriate to all individuals whereas the second will only apply where the individual is a partner in marriage or similar relationship.

Frame of reference

The values, attitudes, opinions, ideas and knowledge which the individual has accumulated as a result of his experiences (Torbörm, 1982). These cognitive elements are drawn upon by the individual to inform behaviour. Information received by the individual is structured against the frame of reference and is given meaning by this process. Thus the frame of reference provides the norms against which individuals judge their behaviour. Where behaviour is applicable to the environment and corresponds to the frame of reference, the latter is said to have high clarity. In a new or unknown setting, where norms are not known or understood, behaviour will be inapplicable and the existing frame of reference will be inappropriate. Clarity will be high initially as behaviour is still reinforced by the frame of reference (Torbörm, 1982). As time proceeds in the foreign setting, a new frame of reference will develop which takes on board the norms of the receiving country. Old behaviour will be perceived by the individual as inappropriate, and clarity will drop until new behaviour is adopted, applicable to the new environment and corresponding to the new frame of reference. This is the process of adaptation (see above). Torbiörn uses the term subjective adjustment to describe the initial and later stages of the sojourn when clarity is high, though adaptation applies to the increasing appropriateness of the behaviour outcome (which may or may not be successful, and may be curtailed in the event of an early return).

General adaptation syndrome (GAS)

see stress reaction

Globalisation

The process of international expansion such that institutions and organisations grow across national boundaries instead of, or in addition to, within them.
Indigenisation

The type of interaction between a foreign-owned employing organisation or MNC with its host labour market such that recruitment is centred increasingly upon its local ELM. Over time, locals are recruited into increasingly senior posts until the major part of decision-making is in the hands of local staff. Indigenisation can thus be accompanied by decentralisation should ownership be wholly or partly transferred, or decision-making hierarchies or management structures move more towards the norms of the host country.

Internal labour market (ILM)

The pool of labour inside a firm upon which it can draw upon to fill vacancies and support new projects. The internal labour market of companies is usually structured hierarchically and often (as with international organisations) geographically. Individuals in possession of particular skills will follow one of a number of pre-determined routes as they are promoted and transferred from one position to another within the company.

International company

A company which operates internationally. In the context of this study, operations are taken to include the short-term or long-term transfer of employees overseas. This definition does not necessitate international companies to have deployed capital beyond the borders of their home country, but this is often the case. Thus both MNCs and transnationals are types of international companies.

International mobility of skilled labour (IMSL)

The movement of skilled workers across borders to carry out duties associated with their work function. This broad definition encompasses SIM (after Gould, 1989), but also STAs and business visits.

Mobility Events Inventory (MEI)

A 33-item scale of life events and processes associated with the international mobility of skilled labour (Chapter 6, Table 6.3). Each item is scaled and has an MEI score corresponding to the mean amount of readjustment it requires on the part of the employees who experience it. MEI scores were calculated from 204 responses to a rating questionnaire (Appendix IV) despatched to employees of member companies of the CBI Employee Relocation Council (see Chapter 6).

Multinational company (MNC)

A large company operating and deploying capital in more than one national economy. MNCs make use of the short-term and long-term transfer of skilled employees, and telecommunications to centralise information whilst decentralising operations, an increasing number of MNCs operate at a world-wide scale, exercising locational flexibility in response to changes in the world economy. Minor changes at the MNC level, however, can represent major changes at the level of host economies in which the MNC's operations plays a major part.

Readjustment

The process whereby an individual re-establishes his or her relationship with an aspect of the environment that has changed. Those changes perceived by the individual to exceed their accepted norms (of behaviour) and thus create a need for readjustment are termed threats. Stress occurs in reaction to threat and thus a relationship exists between the demand for readjustment and stress. Stress is assumed to persist in the presence or perception of threat until appropriate readjustment has taken place (see adaptation and frame of reference).
Relocatee

An employee of a company whose role within the organisation is transferred from one geographical location to another. The employee thus has to undergo a change in home and work environments. In relocation, there is no commitment to a return move (see secondment).

Relocation

The permanent transfer of employees from one geographical location to another. Their roles within the organisation are implied to have shifted permanently since no commitment exists to return to the origin. Relocation may occur as a result of the transfer of all or part of a business (and thus be accompanied by the transfer of capital), or it may be targeted at reorganising manpower within the ILM in some way.

Returnee

A secondee who has returned to the country from which his or her secondment originated.

Rootlessness

The converse of sense of belonging. The individual is rootless if they no longer derive a sense of satisfaction from their relationship with their current environment (see Chapter 8). As used here, the term does not implicitly relate to cultural or genetic 'roots'.

Secondee

An employee of a company whose role within the organisation is temporarily transferred to another geographical location. The employee thus experiences a change in home and work environments on departure and, in addition, has to readjust to altered home circumstances on return.

Secondment

The temporary transfer of a skilled employee to a new, generally foreign, workplace destination, with an understood intention to return the employee to the country (and often workplace) of origin. Secondments are distinguished from STAs by their length, although temporal definitions vary (see Chapter 4), and by their accompanied status. Spouse and children will usually accompany a secondee. In this study, secondment is any temporary stay abroad of more than one year, with a commitment to return.

Sense of belonging

The sense of satisfaction gained by an individual through their relationship with their current environment (Seamon, 1979). Changes in environment (through moving or neighbourhood change) threaten the sense of belonging in a particular environment, or topophilia (Tuan, 1974). Frequent and dynamic changes, particularly those engendered by mobility, can disrupt the sense of belonging and result in feelings of rootlessness, typified by the lifestyle of the 'executive gypsy' (Cooper, 1979). Genetic or historic cultural linkages are not implied, in that where strong ties form with the host locale in each new location, a new sense of belonging can develop.

Short-term assignment (STA)

The temporary transfer of a skilled employee to a new, generally foreign, workplace destination, with an understood intention to return the employee to the country (and often workplace) of origin. STAs are distinguished from secondments by their length, although temporal definitions vary (see Chapter 4), and by their unaccompanied status. Spouse and children will rarely be given the
opportunity to accompany a short-term assignee. In this study, STAs comprise any stay abroad of more than three, but less than twelve, months in duration.

**Skilled International migration (SIM)**

The movement of skilled manpower across national frontiers. Definitions vary in their inclusion or exclusion of *business travel* in SIM flows (Findlay and Gould, 1989; Gould, 1989), thus the global term IMSL has been adopted in this study. SIM is generally used here to refer to skilled international moves of one year or longer duration.

**Social Readjustment Rating Scale (SRRS)**

A 43-item scale of life events generated by Holmes and Rahe (1967) (Chapter 6, Table 6.1). Each item is scaled and has a score which corresponds to the mean amount of readjustment required on the part of the individuals who experience it. Item scores were calculated from responses to a rating questionnaire by 394 individuals. The inventory was developed to have a predictive value. Scores for events monitored over a period of twelve months could be cumulated to provide a prognosis for stress-induced health breakdown (see Chapter 6).

**Somatisation**

The occurrence of recurrent and multiple physical symptoms for which there are no apparent physical causes (eg. vague pains, allergies, gastrointestinal problems, psychosexual symptoms). Psychological factors are presumed to be implicated in symptom causation (Reber, 1985).

**Stress**

Stress is defined here as the inappropriate application of the *stress reaction*, engendered by the perception of threat by the individual. Threats are those changes in the individual's environment perceived by him or her to exceed their accepted norms and thus create a need for readjustment. The stress reaction prepares the individual for action physically and mentally, through the hormonal and nervous activation of energy-yielding systems and the suppression of non-essential processes. This reaction is inappropriate whenever the threat is one which does not demand a physical response. Over-application of the stress reaction in these cases, and a failure to utilise the liberated metabolites, is implicated in a broad range of emotional and physical degenerative illness. Stress thus embraces an individual-environment interaction setting in motion a sequence of metabolic pathways which have the potential to engender illness outcomes in the short- and long-term.

**Stress reaction**

The complex set of physiological reactions engendered by the perception of threat. The mechanisms which comprise the reaction are manifestly concerned with preparation of the body for 'fight or flight' (Cox, 1978). Many are connected with energy production, stimulation of enzyme systems or release of metabolites. Hans Selye was the first researcher to use the term stress as outlined above. He described it as the state which manifested itself by the *General adaptation syndrome (GAS)* - the accommodating processes undertaken by the organism in reaction to external stimuli (Selye, 1956). The GAS is analogous to the stress reaction.

**Third country national (TCN)**

A national of one country, who works in a second country, employed by a company whose headquarters are located in a third country, is a TCN. Generally, the term is used to describe staff recruited in their home country, from the company's ELM, and as such the presence of TCNs will be indicative of skills shortages in the country of employment, or differentials in labour costs between the countries involved. The definition used here, however, does not exclude TCNs.
recruited within the ILM of firms, or those already 'abroad' when recruited from the ELM.

**Topophilia**

The emotional attachment of a person to their physical environment (see Tuan, 1974). Places are either imbued with personal meaning or are perceived as symbolic of qualities meaningful to the individual. See **sense of belonging**.

**Transnational**

A distinction is drawn in this study between multinationals (MNCs) and transnationals. MNCs are those companies which centralise information and decentralise operations, based on 'hub and spoke' coordination from the home country. Transnationals have developed to the stage where information and decision-making is also decentralised, to national or regional headquarters in host regions. 'Hub and spoke' movements give way to more regional networks and an international web of information flows and skilled employee transfers.

**Tripartite system**

A model of the interactions between individuals and the exogenous factors in their immediate environment. A three-way system of the aspirations and responsibilities of individuals is ventured, comprising obligations and ambitions towards themselves, to their organisation and to their family. Where these ties exist, they are the ones that persist throughout mobility. The individual will also have ties to their local environment (see **sense of belonging**, **topophilia**), but this element is regarded as least consistent, as change of environment is a given in all mobility. **Stress**-inducing changes are likely to arise not only from the changes in location, but the effect of locational change on relationships in the tripartite system. The relationships are examined in detail in Chapter 2 to establish their nature; their role in the mobility process; and the implications of the relationships - and the potential conflicts between them - for stress production.

**Video-conference (VC)**

A live video link between meeting rooms. Conventionally VCs are two-way, but multi-location simultaneous meetings are possible. VCs can be conducted between most cities in the developed world, using hired equipment and meeting rooms. Companies can also purchase equipment for their own use, internally, or with client/partner companies. The advantages of VCs include a reduction or removal of need for travel (and a thus in any stress resulting from travel), the possibility of meetings with individuals who due to other commitments would be unable to travel, a permanent video record of the meeting being available and a potential cost-saving over airfares. The disadvantages are VCs high start-up and running costs, the inability to meet and develop working relationships 'face-to-face' or view projects and the artificial nature of meetings which carry a high cost penalty per minute.
Appendix II: The stress reaction

The stress reaction is the physiological homeostatic reaction of the body to a change in environmental demand. The physiological pathways are illustrated in Chapter 3, Figure 3.1, and are described below.

Immediate sources of threat which are picked up by the senses activate the amygdala, in the limbic regions of the mid-brain (that associated with emotion). There is a neuronal response (i.e. via a nerve cell) to the hypothalamus (the part of the hind-brain which monitors the blood metabolite concentration and stimulates hormone release), but this is moderated by input from the higher centres of the forebrain, associated with intelligence and reasoning. Hence stress only exists where the subject believes the risk is genuine and the ability to cope is challenged. It is this conscious control which permits a degree of interpretation in the stress response, accounts for intra-individual variation, and offers scope for self-control of the extent to which one is affected by stress. It is also what makes the phenomenon so difficult to test or measure, and hampers location of experimental controls (Singer, 1980).

The hypothalamus responds in two ways. The first is by the release of corticotrophin releasing factor which stimulates the pituitary gland (which, along with the hypothalamus, is concerned with homeostasis). The second is to stimulate the adrenal glands via the autonomic nervous system, the direct effect of which is to increase heart rate and suppress the action of the gut (Capel and Gurnsey, 1987).

Following stimulation, the pituitary in turn releases three hormones. The first is thyroid-stimulating hormone, which acts on the thyroid gland to produce thyroxine and increases the rate of metabolism. The second is vasopressin, which causes dilation of blood vessels to skeletal muscle and the heart whilst other artery walls constrict, resulting in an overall increase in blood pressure, thus enhancing the blood coagulation process. The third, adrenocorticotropic hormone (ACTH) acts on the adrenal glands, to produce the hormone adrenalin.

The adrenals are small glands located close to the kidneys. They have two regions, the peripheral medulla, which manufactures adrenalin and the neurotransmitter noradrenaline, and the central cortical region which produces the corticosteroids such as cortisol. Adrenalin, often thought of as the 'stress' hormone, is responsible for a number of reactions which increase the individual's potential for energy production. Under its influence, fatty acids are released from stores into the blood stream and energy-producing enzyme systems are activated. Adrenalin also acts on the liver: glycogen (starch) stored there is converted to glucose and insulin, the hormone which acts to restrain energy production, is itself suppressed (Lamb et al., 1984).
Appendix III: A gravity model of business travel

There are two main determinants of population mobility, the desire or need to move, determined by 'push' or 'pull' factors, and the ease with which movement can take place, determined by distance, transport availability, immigration laws and other restrictions. The hypothesis for a gravity model is that for international business travel between two regions, the push or pull factors are determined by their economic standing, and that the primary constraint on the ease of mobility is their physical separation. The gravity model has been used to describe flows of people between two points in terms of their separation and potential ability to generate mobility (Flowrider & Sal, 1979). From the analogy with physics, number of possible migrants or population size is taken to be representative of the mass of a potential donating country and number of possible immigrants or population size likewise the mass of a potential receiving country. Where \( F_{ij} \) is the flow of business travellers between two points, \( i \) and \( j \), distance \( D_{ij} \) apart, of population size \( P_i \) and \( P_j \), the model takes the form:

\[
\log F_{ij} = a + b_1 \log P_i + b_2 \log P_j - b_3 \log D_{ij}
\]

and as only moves to and from the UK are being considered, \( P_j \) can be taken as constant, the equation becomes:

\[
\log F_{ij} = a + b_1 \log P_i - b_2 \log D_{ij}
\]

Whilst flows of migrants may be explained by reference to population size of the interacting regions, movement of a more economically determined nature requires a better measure of the economic standing of the respective regions. GDP is a measure of this kind which is readily available for all world states and can be incorporated as the \( P_j \) term in the equation. However, population size must be expected to influence the size of the potential pool of highly skilled travellers from each state that can participate in such mobility. GDP, rather than GDP per capita, was thus used to maintain a component of population size in the equation. For groups of countries, GDPs were summed. The flight distance between the capital or principal city of each country or group of countries was used for \( D_{ij} \) and the model fitted using multiple regression. Thus for flow into the UK the equation reads:

\[
\log F_{ij} = -0.97 - 0.451 \log P_i - 0.613 \log D_{ij}
\]

[with \( R^2 = 0.608 \)]

For flow out of the UK it reads:

\[
\log F_{ij} = -0.526 - 0.407 \log P_j - 0.845 \log D_{ij}
\]

[with \( R^2 = 0.732 \)]

The model is therefore better at predicting flow outwards from the UK than flow into the UK,

---

1 1986 is the most recent year from which GDPs of all world states are available, consequently IPS travel flows from that year are used in calculating the model.

2 Problems arose with calculating distance to groups of countries, and calculations for these categories can only be regarded as estimates. The distance to the most important commercial centre or most populated city in a country group was used rather than the distance to a hypothetical centroid (towards which little actual movement would be taking place) or the average of the distances to all the major cities (since this would involve the assumption that travel to each was equal). Hence, for the Commonwealth Caribbean, London-Kingston is the distance used; for Latin America, it is the distance to Caracas (in the absence of information for Rio); for the Middle East, Bahrain; North Africa, Cairo; Rest of Africa, Lagos; Eastern Europe, Moscow; Rest of Western Europe, Ankara and for the Rest of the World, Hong Kong. To offset East or West Coast bias for the U.S.A. the distance to Chicago is used. The air distances were taken from Whitakers Almanack (1986).
particularly as far as distance is concerned. The $b_2$ values suggest that British business travellers are discouraged more by distance than their overseas counterparts.

However, significant deviations occurred. The ten most underpredicted and overpredicted flows for equation I above are shown in Figures 1 and 2 respectively along with the numbers of visits expected, based on GDP and distance, calculated from the equations. For travel to the UK, the greatest underpredictions, which indicate travellers are making trips more often than would be expected based on distance and GDP alone - are those obtained for the USA, Eire, West Germany and Holland. This suggests strong business links with the USA which make distance less of an obstacle. The high number of visits from the two continental EC neighbours is harder to explain. This may be linked the closer proximity of major business centres (such as the Ruhr and the Hague) to London compared with Frankfurt and Amsterdam from which the distance component of the equation was calculated. More probably, the large discrepancies are highlighting the important commercial and industrial ties between Britain and the two countries. The high Irish underprediction may be due to frequent crossing of Britain's only mainland frontier into Northern Ireland by Irish nationals, the traditionally strong economic and cultural ties to the UK or the use of the UK as an overnight stepping stone by Irish business travellers en route to other destinations.

The greatest overpredictions are found among controlled economies (Yugoslavia, Eastern

---

3 Use of population instead of G.D.P. resulted in a worsening of the fit, with $R^2$'s of 44.3% and 66.5%, for inflow and outflow, respectively.
Europe) and South Africa, countries where there is artificial restraint on the free flow of visitors. Also, developing regions with moderate GDPs (Latin America and North Africa) show weak business connections. Anomalies are the overpredictions for the Rest of Western Europe (predominantly Turkey) and Austria, a country for which it is hard to explain the UK's reduced business ties.

Travelling out from the UK (Figs. 3 and 4), underprediction of flows indicate close business connections with the USA, Eire and nearby European Community members. The block of distant European states (Yugoslavia, Eastern Europe and Austria) and South Africa feature once again in the prominent overpredictions. An anomaly in Fig. 4 is Sweden which still does not rank highly as a destination for UK business travellers.

Figures 1 and 3 indicate the importance of Switzerland as an origin and destination of business travel. Apart from the country's financial importance, its high position may be explained by the use of GDP in the model where the country's modest population size disguises the highest GDP per capita in Europe and hence its highly mercantile and mobile population.
Appendix IV: Methodological rationale and selection of measurement devices

An analytical framework had to be developed which could embrace an individual's entire career experience, and its cumulative nature, in its spatial and temporal context.

In order to enable valid comparison, information on the life experiences of each individual had to be structured such that the occurrence of life and mobility events was measured on the same time scale, from individual to individual. Standardisation was required to ensure that dates and details were recorded about life events and changes (starting employment, marriage, births of children, moves, business travel and career changes) and personal attributes (age, language ability, international experience). Standardised interview techniques and double checking could be used to ensure that for each mobility or life event, the responses from each individual and the information recorded in career profiles were of a comparable quality. However, career profiles cannot be standardised for length. Older individuals, or those with more career experience would be expected to have experienced more life events and moves. No direct means of comparison thus exist between career profiles. Whilst the effect of mobility-related events within profiles could be compared in isolation - such as secondments, or periods of business travel - this would deny the importance of the accumulation of experience and personal attributes (such as language ability) over time, other concurrent life events, cohort effects and the support offered by the employer. Post-facto rationalisation could also be anticipated where the elapsed time since the occurrence of events varied between respondents.

For comparison of types of mobility, it was necessary to place individuals into classes which defined their mobility experience. Over a career, the range of experience of one individual was likely to be extensive and difficult to categorise differently from that of another. In the short term, current 'business travellers' could be identified as distinct from 'secondees', for example. A dual approach was thus devised. Information on stress and experience could be recorded for a short standard-length, recent period encompassing a single type of mobility. The wealth of experience and attributes acquired by the individual prior to the survey period would not be ignored since these were available from the relevant career profile. The results from survey periods could be grouped appropriately to compare the current stress outcome of different types of mobility. In addition, the results could be grouped by employer, to investigate the effects of company support packages on past and present stress outcomes. Figure 1 shows a simplified outline of this approach. Employees' career profiles of varying length are grouped by employer X, Y or Z. This approach enables measurement of past stress outcome on the basis of career profiles and current stress on the basis of the fixed-length survey period. In this way, the stress attributable to different mobility strategies could be compared and the effectiveness of different policies of company assistance inferred.

The length of the recent period to be surveyed for mobility and stress experience was a matter of analytical convenience and sample acceptability. It was recognised that the longer the survey period, the greater would be the administrative and analytical load. Sample goodwill was essential if a continuous contribution was to be maintained over a period of time. Thus, whilst the survey period could have been as long as 12 months, maximization of the sample size required minimisation of sample workload and prevented prolonged involvement in the survey. As some event and stress recall would inevitably be in retrospect and subject to post-facto rationalisation, a three-month monitoring period was chosen. This would be long enough to encompass most types of short-term mobility and to counterbalance sporadic fluctuations in behaviour from a notional norm, but short enough to maximise the response rate and recall ability.

The monitoring of events and their repercussions over the three-month period required a surrogate for observer presence. The best means of realising this, with minimal resources and intrusion, was a diary study. Diaries have been used to extract precise data on the events that precede or follow the onset of illness (see Chapter 3, 3.4.3d). The advantages offered by diaries in such studies include increased recall of experience when compared to post-facto studies, and a better indication of the temporal and spatial context of cause and effect in environmental...
Fig. 1: Representation of career profiles and fixed-length survey period

CAREER PROGRESSION

- Work for another company
- Work for Company X
- Work for Company Y
- Work for Company Z

Time

PRESENT

- Secondment
- Period of business travel

Time of joining company Z

Fixed-length survey period
interactions. Their principal disadvantage lies in the time they take to complete, and in their interference in the very same real-time processes they were designed to record (Murray, 1985, Fisher et al., 1984). The diary exercise in the present study thus had to carry a minimal time penalty.

The study required international geographical mobility categories to be devised to permit valid comparative analysis between mobility groups. The contention surrounding the nature of stress and its measurement has already been highlighted in Chapter 3. It was argued that in order to devise a comparable quantitative measure with which to gauge stress, compromises had to be reached. Designating measures for both geographic mobility and stress thus necessitated a return to their respective theoretical concepts. Attention is turned to these considerations in the following two sections.

Selection of measurement devices

Having established requirements for life events quantification of experience quantitative outcome measure, and diary or retrospective recording, survey measure and techniques had to be distinguished which could best operationalise those requirements.

a) Stress outcome measure

The nature of stress measurement is such that all existing scales have some level of inaccuracy. Rating the accuracy of scales to predict stress depends on comparison with an objective measure of some kind. In most cases the 'objective' measure has been a psychiatric assessment - an evaluation itself not immune to dispute (Szasz, 1971). The Crown-Crisp Index, for example, has been shown to have a reliability of 85% in diagnosing 'free floating', or chronic, anxiety - occurring for no identifiable cause (Crown and Crisp, 1966). This makes the test 85% as reliable as psychiatric consultation, but true reliability of questionnaire measures in the absence of a completely objective test cannot be determined.

Chapter 3 concluded that the best measure of stress outcome for the present study would be a self-report symptom checklist questionnaire such as the General Health Questionnaire (Goldberg, 1978), the Gurin (Gurin et al., 1960; Cooper, 1981) or Crown-Crisp indices. To identify stress, as defined in Chapter 3, as the inappropriate application of the stress reaction, a questionnaire which picked up manifestations of the stress reaction was desirable. Of the three questionnaires listed above, the Gurin Index was chosen since it identifies outcomes of the release of adrenalin and cortisol as well as short term illness symptoms and psychosomatic complaints. Elements from the Gurin Index appear in nearly all symptom-approach questionnaires (including the Crown-Crisp Index and the Indicator, Cooper et al., 1988).

The Gurin Index was adopted in the form adapted by Cooper (1981) for a European, as well as American, audience. The list was originally developed as a diagnostic aid with items which would differentiate respondents diagnosed by psychiatrists as having psychological difficulty from those diagnosed as not having such difficulty. Over the years, it has been promoted as a self-analysis aid for individuals to determine whether they are under stress or not (Cooper, 1981). Items on the list are presented as stress symptoms, not stress-related illness symptoms, and are thus of benefit to a real-time study of this type seeking to determine current stressful activity as distinct from long-term repercussions of past activity. The device has an additional advantage over the General Health Questionnaire, in that it was designed to cover a three month period in retrospect, equivalent to the proposed diary study duration. It was thus decided to use the Gurin Index for the study, renamed the 'Daily Health Inventory' for the purposes of the survey sample.

The Gurin Index is not an absolute scaling device. Its scoring mechanism does not embrace threshold levels to indicate significant intensities of stress experienced or prognoses for stress-related illness outcome. It is a relative scale which enables one group to be compared against another in terms of stress experienced. Each stress symptom is allocated to one of four frequency
of occurrence categories (over the three month period) by self-response. Individual 'symptom scores' are then established through coding. Scores are structured such that the greater the frequency of occurrence, the greater the symptom score. The symptom list also has a qualitative value in that particular combinations of symptoms, or 'clusters' indicate the way in which stress is manifested. Such manifestations could be physical health problems, physical anxiety, psychological anxiety or immobilization. Although the principal use of the symptom list was to be in the production of symptom scores to imply the magnitude of the stress experienced over a particular period, this qualitative value could also be drawn upon as an aid to analysis in Chapter 10. The Gurin Index enabled the direction of the stress load to be assessed for different individuals and mobility patterns.

b) The mobility events measure

To relate outcome measures appropriately to the life experiences engendered by mobility (Chapter 5, 5.2.1b), it was necessary to develop a device which both identified those experiences and quantified their importance in some way. For a number of reasons, discussed in Chapter 6, the SRRS was not acceptable for this purpose in its original form, or in any of its revised forms (Masuda and Holmes, 1973). Work was thus undertaken to construct a parallel scale called the Mobility Events Inventory, specifically applicable to the professionally mobile. This minimised many of the rating sample experience and individual applicability problems of the SRRS, whilst maintaining SRRS compatibility. SRRS and MEI events for the present sample were combined to provide an events profile measure over the three-month study period (Chapter 5, 5.6.1). The development and use of the MEI is discussed in Chapter 6.
The first eight and final two pages of sample Group A log book. The diary issued to Group C was identical but for a more detailed request for visit details. The health checklist used for all groups (with wording appropriate to the relevant study period) appears on page 287. The MEI checklist used for group B appears on page 288. Although pages here are sized to A4, the diaries were issued as A5 booklets.

SKILLED INTERNATIONAL MOBILITY SURVEY

EXPATRIATE LOG BOOK

The purpose of this log book is to register important events that occur to you and any problems they may cause, whilst you are working overseas. It is divided into three sections as follows:

1) Life Events Inventory.

2) Daily Health Inventory.

3) Diary pages: Thirteen weeks 14/5/90 - 13/8/90

You are asked to read over the first two sections now. These will tell you when it is appropriate to make notes in the diary. You will not be expected to make notes every day. When it is appropriate, notations should not take more than a minute of your time.

If you undertake any business travel within or outside the U.K., travel overseas for any other reason, or receive visits from friends or relatives abroad during the course of the thirteen weeks, please make a note of these visits on the relevant days in the diary.

If there are any difficulties please do not hesitate to contact me, Reuben Ford, at the Department of Geography, University College London 071-637 0540 or at home on 081-674 8053.
LIFE EVENTS INVENTORY

Below is a list of situations and events that can occur from time to time when you are working overseas. If any of these situations or events occurs to you during the next three months, please write the number of the event on the relevant day in the diary. If the event is not time-specific, please make an approximation as to the week of start or end and record under 'comments', or use the 'space for notes' at the end.

If you experience any other important positive or negative events other than those listed here (eg. an outstanding personal achievement or death of a close friend), it would be useful if you could make a note of these too.

1) Geographical separation from spouse/partner, 2 to 10 days
2) Geographical separation from spouse/partner, 11 days - 1 month
3) Geographical separation from spouse/partner, over 1 month
4) Major Change in health or behaviour of a family member
5) Major change in financial state (eg a lot worse off or a lot better off than usual)
6) Major change in living conditions (eg building a new home, remodelling, deterioration of home or neighbourhood)
7) International air journey, beyond Europe (indicate if you prepared for a flight which was then cancelled)
8) International air journey, within Europe (indicate if you prepared for a flight that was then cancelled)
9) Working in culture where customs and conventions are unfamiliar
10) Working in culture where language is not known
11) Working in country where laws forbid or limit the consumption of alcohol
12) Major change in eating habits (a lot more or a lot less food intake, or very different meal hours or surroundings)
13) Major change in responsibilities at work (eg promotion, demotion, lateral transfer)
14) Major change in working hours or conditions
15) Geographical separation from own culture for 11 days - 1 month
16) Geographical separation from own culture for more than 1 month
17) Major change in usual type and/or amount of recreation

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18) Foreclosure on a mortgage or loan
19) Major change in social activities (eg clubs, dancing, movies, visiting etc)
20) Major change in number of family get-togethers (eg a lot more or a lot less than usual)
21) Major change in the number of arguments with spouse/partner (eg either a lot more or a lot less than usual regarding child-rearing, personal habits, etc)
22) Major change in church activities (eg, a lot more or less than usual)
23) Major change in sleeping habits (a lot more or a lot less sleep, or change in part of day when asleep)
24) Changing to new school (for children)
25) Outstanding personal achievement
26) Taking on a mortgage of less than £10,000 (eg purchasing a car, TV, freezer, etc)
27) Spouse/partner beginning or ceasing work outside the home
28) Changing to a different line of work
29) Return to home after stay abroad
30) Revision of personal habits (dress, manners, associations, etc)
31) Living and working out of hotels
32) Troubles with the boss
33) Change in residence
34) Taking on a mortgage greater than £10,000 (eg purchasing a home, business, etc)
35) Son or daughter leaving home (eg marriage, attending college, etc)
36) Major business readjustment (eg merger, reorganization, bankruptcy, etc)
37) Geographical separation from children, 2 to 10 days.
38) Geographical separation from children, 11 days - 1 month.
39) Geographical separation from children, over 1 month.
40) Working in country where telecommunications systems are inefficient.
41) Living or working in country where your appearance distinguishes you from natives.
42) Living or working in country which is hostile or threatens personal safety.
DAILY HEALTH INVENTORY

Below is a list of different troubles and complaints which people often have. If you experience any of these over the next thirteen weeks, please indicate on the relevant day in the diary with the appropriate letter.

a) Trouble getting to sleep or staying asleep.
b) Bothered by nervousness, feeling fidgety or tense.
c) Troubled by headaches or pains in the head.
d) Loss of appetite.
e) Easily induced tiredness.
f) Bothered by an upset stomach.
g) Difficulty getting up in the morning.
h) Ill-health interfering with the amount of work completed.
i) Bothered by shortness of breath when not exercising or working hard.
j) Feeling 'put out' when something unexpected happens.
k) Times when there is a tendency to cry easily.
l) Bothered by hard beating of heart.
m) Spells of dizziness.
n) Bothered by nightmares.
o) Trembling of muscles (e.g. hands tremble, eyes twitch) sufficient to cause irritation.
p) Mentally exhausted such that ability to concentrate or think clearly is impaired.
q) Hands sweat sufficiently to produce feelings of dampness and clamminess.
r) Prevented from being able to take care of things by inability to get going.
s) Desire to just be left alone.
t) Bothered by pains and ailments in different parts of the body.
u) Not feeling healthy enough to carry out chosen tasks.
v) Feeling on verge of nervous breakdown.
w) Suffer any particular physical or health problem.
DIARY PAGES: Thirteen weeks 14/5/90 - 13/8/90
Thursday 17 May

Friday 18 May

Saturday 19 May

Comments
Sunday 20 May

Monday 21 May

Tuesday 22 May

Wednesday 23 May
SPACE FOR NOTES
DAILY HEALTH INVENTORY

Below is a list of different troubles and complaints which people often have. For each one please tick the column which tells how often you have felt like this during the first three months of your recent overseas assignment.

I felt like this:

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Trouble getting to sleep or staying asleep.</td>
<td>A lot</td>
<td>Quite often</td>
<td>Occasionally</td>
</tr>
<tr>
<td>b) Bothered by nervousness, feeling fidgety or tense.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c) Troubled by headaches or pains in the head.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d) Loss of appetite.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e) Easily induced tiredness.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f) Bothered by an upset stomach.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g) Difficulty getting up in the morning.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>h) Ill-health interfering with the amount of work completed.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>i) Bothered by shortness of breath when not exercising or working hard.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>j) Feeling 'put out' when something unexpected happens.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>k) Times when there is a tendency to cry easily.</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>l) Bothered by hard beating of heart.</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>m) Spells of dizziness.</td>
<td></td>
<td></td>
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<tr>
<td>n) Bothered by nightmares.</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>o) Trembling of muscles (e.g. hands tremble, eyes twitch) sufficient to cause irritation.</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>p) Mentally exhausted such that ability to concentrate or think clearly is impaired.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>q) Hands sweat sufficiently to produce feelings of dampness and clamminess.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>r) Prevented from being able to take care of things by inability to get going.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>s) Desire to just be left alone.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>t) Have you felt bothered by pains and ailments in different parts of your body?</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>u) For the most part did you feel healthy enough to carry out the things you would like to do?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>v) Have you ever felt that you were going to have a nervous breakdown?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>w) Do you have any particular physical or health problem?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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MOBILITY EVENTS INVENTORY

Below is a list of situations and events that can occur from time to time when people are working overseas. If any of these situations or events has occurred to you during the first three months of your recent overseas assignment, please indicate the frequency of occurrence by circling the appropriate number (0 for at no time, 1 for once, 2 for twice, etc.).

If you experienced any other important positive or negative events other than those listed here (eg. a vacation or death of a close friend), it would be useful if you could make a note of these too.

<table>
<thead>
<tr>
<th>Event Description</th>
<th>Frequency</th>
<th>More</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Geographical separation from spouse/partner, 2 to 10 days</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>2) Geographical separation from spouse/partner, 11 days - 1 month</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>3) Geographical separation from spouse/partner, over 1 month</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>4) Major Change in health or behaviour of a family member</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>5) Major change in financial state (eg a lot worse off or a lot better off than usual)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>6) Major change in living conditions (eg building a new home, remodelling, deterioration of home or neighbourhood)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>7) International air journey, beyond Europe (indicate if you prepared for a flight which was then cancelled)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>8) International air journey, within Europe (indicate if you prepared for a flight that was then cancelled)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>9) Working in culture where customs and conventions are unfamiliar</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>10) Working in culture where language is not known</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>11) Working in country where laws forbid or limit the consumption of alcohol</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>12) Major change in eating habits (a lot more or a lot less food intake, or very different meal hours or surroundings)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>13) Major change in responsibilities at work (eg promotion, demotion, lateral transfer)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>14) Major change in working hours or conditions</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>15) Geographical separation from own culture for 11 days - 1 month</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>16) Geographical separation from own culture for more than 1 month</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>17) Major change in usual type and/or amount of recreation</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>18) Foreclosure on a mortgage or loan</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>19) Major change in social activities (eg clubs, dancing, movies, visiting etc)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>20) Major change in number of family get-togethers (eg a lot more or a lot less than usual)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>21) Major change in the number of arguments with spouse/partner (eg either a lot more or a lot less than usual regarding child-rearing, personal habits, etc)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>22) Major change in church activities (eg, a lot more or less than usual)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>23) Major change in sleeping habits (a lot more or a lot less sleep, or change in part of day when asleep)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>24) Changing to new school (for children)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>25) Outstanding personal achievement</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>26) Taking on a mortgage of less than £10,000 (eg purchasing a car, TV, freezer, etc)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>27) Spouse/partner beginning or ceasing work outside the home</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>28) Changing to a different line of work</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>29) Return to home after stay abroad</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>30) Revision of personal habits (dress, manners, associations, etc)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>31) Living and working out of hotels</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>32) Troubles with the boss</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>33) Change in residence</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>34) Taking on a mortgage greater than £10,000 (eg purchasing a home, business, etc)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>35) Son or daughter leaving home (eg marriage, attending college, etc)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>36) Major business readjustment (eg merger, reorganization, bankruptcy, etc)</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>37) Geographical separation from children, 2 to 10 days.</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>38) Geographical separation from children, 11 days - 1 month.</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>39) Geographical separation from children, over 1 month.</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>40) Working in country where telecommunications systems are inefficient.</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>41) Living or working in country where your appearance distinguishes you from natives.</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
<tr>
<td>42) Living or working in country which is hostile or threatens personal safety.</td>
<td>0 1 2 3 4 5 6 7 8 9 more</td>
<td></td>
</tr>
</tbody>
</table>
Appendix VI: Employee and spouse interview schedules

Schedules from interviews with employees and spouses are presented below.

1. Interview one - Group A = First interview.
2. Interview - Group B = Only interview.
3. Interview one - Group C = First interview.
4. Interview - Spouse = Only interview.
5. Interview two - Groups A and C = Second interview.

1. INTERVIEW ONE: GROUP A

The 'Employee' sample Interview Design (No. 1 GROUP A)

(1) PREVIOUS MOBILITY EXPERIENCE (possibly from CV or career profile, if made available).
   i) Years in present company. Previous employers and dates.
   ii) Build up mobility profile (see 2) Employers and moves in chronological order.

(2) MOBILITY PROFILE

For every move, since commencement of full-time employment, lasting longer than six months or involving a change of residence:
   i) Date of move.
   ii) Destination of move.
   iii) Length of stay in that location.
   iv) If within company: was there a change of title/job description or promotion? (If to new company: what was new position?)

(3) PERSONAL PROFILE

   i) Date of Birth
   ii) Marital Status.
   iii) Current employment of spouse.
   iv) No. of Children (with age).
   v) Language ability prior to first move.
   vi) Experience of working abroad prior to employment?
   vii) Spouse and own knowledge of mobile career

(4) DETAIL OF MOVES (IN CHRONOLOGICAL ORDER)

   i) Was the move a family move?
   ii) Reason for move. To what extent was the move self-determined/externally administered?

       Extent to which move was a joint decision with spouse.

   iii) Adequacy of remuneration package.
   iv) Lead times. i) First direct question from seniors, ii) When 95% certain.

Stage 1: Period following the original announcement of the move. INITIAL REACTION
Stage 2: **PLANNING** phase. Affect on family.
Arrangements for new schooling,
Spouse's employment,
Sale or lease of existing home and acquisition of a residence overseas,
If international: Training prior to the move (language, cultural orientation).
Was there a visit to the location prior to moving there?
Category of visit (fact-finding, spouse approval etc.).

Stage 3: Bidding **FAREWELL** to friends and relatives.

Stage 4: The **TRAVEL PROCESS ITSELF**.
Problems with flight
Did everything arrive ?
Paperwork problems (visa).
Someone there to meet you ?

v) Problems with the new location.

**Working environment.**
Nature of the task. Time consuming ? Intensive ?
HOW DID YOU FIND THE PEOPLE in ZZZ were to work with?
Relations with others: working as part of a team ? on your own ?
Sponsors (guides) - formal or informal.
Did you find yourself RESENTING THEIR STABILITY, or that of those back home ?

Subjective assessments of **SATISFACTION WITH THE POSTING INCREASE OR DECREASE AS IT PROGRESSED ?**: Was there a particular point in your assignment where you BEGAN TO FEEL ON TOP OF THINGS ?

**Living environment.**
Cultural and political conditions.
Food.
Climate.
Housing standards and systems of health care.
Knowledge of host language (able to hold conversation; understand; limited to use of phrases).
Social life (sources of entertainment).
Children's education.
Spouse's career.
Social contacts. Relationship with spouse, children affected by move ?
Provision of trips home for self, spouse, children.
Homesickness.
Financial worries (tax, exchange rate etc).

How well did employee and family members **ADAPT TO NEW LOCATION**.

WHERE APPROPRIATE: Did you feel your normal ability to complete the job was affected by any of these problems ? (Took longer/more effort than usual. Any way this could have been avoided ?)

If not a permanent relocation: **PROBLEMS OF READJUSTMENT ON RETURN**.
Re-establishing lifestyle and social links.
(5) BUSINESS TRAVEL INVOLVEMENT

i) Date of first business trips. Destinations.
ii) Training, relevant language ability.
iii) Remuneration, work-after-travel moratoriums, benefits.
iv) Extended periods away from home?
v) Prolonged periods of frequent travel. Each stage discussed generally:

Stage 1: PLANNING travel and accommodation.
Who packs clothes and other essentials. Evolved a system for this process?
Postponement or cancellation of intervening social and business events.

Stage 2: The TRAVEL PROCESS ITSELF.
Flight delays
Fear of/qualms about flying: choose airlines based on factors other than cost,
Misdirection of luggage,
Paperwork problems (visa),
Met/guide?

vi) Working environment.
Purpose/nature of the task. Time consuming? Intensive? How quickly get into working mode?
Relations with others: HOW WERE PEOPLE of ZZZ to work with? working as part of a team? on your own? RESENT STABILITY?

Living Environment:
Accommodation: living and working out of hotels?
Cultural and political conditions.
Food.
Climate.
Knowledge of host language (able to hold conversation; understand; limited to use of phrases).
Sources of entertainment.
Missing spouse or children.
Social contacts. Relationship with spouse, children affected by travel?
Homesickness.

Missed family events.

IF APPROPRIATE: Do you feel your normal ability to complete the job was affected by any of these factors? More time/effort than usual needed.

(6) CONCLUDE

i) Any MOVES YOU WOULD NOT HAVE UNDERTAKEN given the choice again (knowing what you know now)?

ii) Would you consider there to be ANY ALTERNATIVE to your appointment?
Would that alternative be desirable?

iii) Explain DIARY

iv) If appropriate, SIMILAR QUESTIONS TO SPOUSE?
2. INTERVIEW: GROUP B

The 'Employee' sample Interview Design (GROUP B)

(1) PREVIOUS MOBILITY EXPERIENCE (possibly from CV or career profile, if made available).

i) Years in present company. Previous employers and dates.
ii) Build up mobility profile (see 2) Employers and moves in chronological order.

(2) MOBILITY PROFILE

For every move, since commencement of full-time employment, lasting longer than six months or involving a change of residence:

i) Date of move.
ii) Destination of move.
iii) Length of stay in that location.
iv) If within company: was there a change of title/job description or promotion? (If to new company: what was new position?)

(3) PERSONAL PROFILE

i) Date of Birth
ii) Marital Status.
iii) Current employment of spouse.
iv) No. of Children (with age).
v) Language ability prior to first move.
vi) Experience of working abroad prior to employment?
vii) Spouse and own knowledge of mobile career

(4) DETAIL OF MOVES (IN CHRONOLOGICAL ORDER)

i) Was the move a family move?
ii) Reason for move. To what extent was the move self-determined/externally administered?

Extent to which move was a joint decision with spouse.

iii) Adequacy of remuneration package.
iv) Lead times.
   i) First direct question from seniors,
   ii) When 95% certain.

Stage 1: Period following the original announcement of the move. INITIAL REACTION

Stage 2: PLANNING phase. Affect on family.
   Arrangements for new schooling,
   Spouse's employment,
   Sale or lease of existing home and acquisition of a residence overseas,
   If international: Training prior to the move (language, cultural orientation).
   Was there a visit to the location prior to moving there?
   Category of visit (fact-finding, spouse approval etc.).

Stage 3: Bidding FAREWELL to friends and relatives.
Stage 4: The TRAVEL PROCESS ITSELF.

Problems with flight
Did everything arrive?
Paperwork problems (visa).
Someone there to meet you?

v) Problems with the new location.

Working environment.
Nature of the task. Time consuming? Intensive?
HOW DID YOU FIND THE PEOPLE in ZZZ were to work with?
Relations with others: working as part of a team? on your own?
Sponsors (guides) - formal or informal.
Did you find yourself RESENTING THEIR STABILITY, or that of those back home?

Subjective assessments of SATISFACTION WITH THE POSTING INCREASE OR DECREASE AS IT PROGRESSED?: Was there a particular point in your assignment where you BEGAN TO FEEL ON TOP OF THINGS?

Living environment.
Cultural and political conditions.
Food.
Climate.
Housing standards and systems of health care.
Knowledge of host language (able to hold conversation; understand; limited to use of phrases).
Social life (sources of entertainment).
Children's education.
Spouse's career.
Social contacts. Relationship with spouse, children affected by move?
Provision of trips home for self, spouse, children.
Homesickness.
Financial worries (tax, exchange rate etc).

How well did employee and family members ADAPT TO NEW LOCATION.

WHERE APPROPRIATE: Did you feel your normal ability to complete the job was affected by any of these problems? (Took longer/more effort than usual. Any way this could have been avoided?)

If not a permanent relocation: PROBLEMS OF READJUSTMENT ON RETURN.
Re-establishing lifestyle and social links.

(5) BUSINESS TRAVEL INVOLVEMENT

i) Date of first business trips. Destinations.
ii) Training, relevant language ability.
iii) Remuneration, work-after-travel moratoriums, benefits.
iv) Extended periods away from home?
v) Prolonged periods of frequent travel. Each stage discussed generally:
Stage 1: PLANNING travel and accommodation.
Who packs clothes and other essentials. Evolved a system for this process?
Postponement or cancellation of intervening social and business events.

Stage 2: The TRAVEL PROCESS ITSELF,
Flight delays
Fear of/qualms about flying: choose airlines based on factors other than cost,
Misdirection of luggage,
Paperwork problems (visa),
Met/guide?

vi) Working environment,
Purpose/nature of the task. Time consuming? Intensive? How quickly get into
working mode?
Relations with others: HOW WERE PEOPLE of ZZZ to work with? working as
part of a team? on your own? RESSENT STABILITY?

Living Environment:
Accommodation: living and working out of hotels?
Cultural and political conditions.
Food.
Climate.
Knowledge of host language (able to hold conversation; understand; limited to
use of phrases).
Sources of entertainment.
Missing spouse or children.
Social contacts. Relationship with spouse, children affected by travel?
Homesickness.

Missed family events.

IF APPROPRIATE: Do you feel your normal ability to complete the job was
affected by any of these factors? More time/effort than usual needed.

(6) CONCLUDE

i) Were there ANY ALTERNATIVES to your assignment? Would that alternative
be desirable?

ii) With hindsight, would you undertaken your move again?

iii) Have you been happy with company support? Would you choose to undertake
a move in the future with XXX?

iv) Are you happy with a system whereby career progression is dependent on
mobility.

v) Do you feel valued by XXX?

vi) Employee satisfaction with lifestyle and workload.

vii) MEI and DHI

viii) If appropriate, SIMILAR QUESTIONS TO SPOUSE?
3. INTERVIEW ONE: GROUP C

The 'Employee' sample Interview Design (No. 1 GROUP C)

(1) PREVIOUS MOBILITY EXPERIENCE (possibly from CV or career profile, if made available).
   i) Years in present company. Previous employers and dates.
   ii) Build up mobility profile (see 2) Employers and moves in chronological order.

(2) MOBILITY PROFILE

For every move, since commencement of full-time employment, lasting longer than six months or involving a change of residence:
   i) Date of move.
   ii) Destination of move.
   iii) Length of stay in that location.
   iv) If within company: was there a change of title/job description or promotion? (If to new company: what was new position?)

(3) PERSONAL PROFILE

   i) Date of Birth
   ii) Marital Status.
   iii) Current employment of spouse.
   iv) No. of Children (with age).
   v) Language ability prior to first move.
   vi) Experience of working abroad prior to employment?
   vii) Spouse and own knowledge of mobile career

(4) DETAIL OF MOVES (IN CHRONOLOGICAL ORDER)

   i) Was the move a family move?
   ii) Reason for move. To what extent was the move self-determined/externally administered?
      Extent to which move was a joint decision with spouse.
   iii) Adequacy of remuneration package.
   iv) Lead times. i) First direct question from seniors,
      ii) When 95% certain.

Stage 1: Period following the original announcement of the move. INITIAL REACTION

Stage 2: PLANNING phase. Affect on family.
   Arrangements for new schooling,
   Spouse's employment,
   Sale or lease of existing home and acquisition of a residence overseas,
   If international: Training prior to the move (language, cultural orientation).
   Was there a visit to the location prior to moving there?
   Category of visit (fact-finding, spouse approval etc.).

Stage 3: Bidding FAREWELL to friends and relatives.
Stage 4: The **TRAVEL PROCESS ITSELF**.

Problems with flight
Did everything arrive?

Paperwork problems (visa).
Someone there to meet you?

v) Problems with the new location.

*Working environment.*
Nature of the task. Time consuming? Intensive?

*HOW DID YOU FIND THE PEOPLE* in ZZZ were to work with?
Relations with others: working as part of a team? On your own?
Sponsors (guides) - formal or informal.

Did you find yourself **RESENTING THEIR STABILITY**, or that of those back home?

Subjective assessments of **SATISFACTION WITH THE POSTING**
**INCREASE OR DECREASE AS IT PROGRESSED?** Was there a particular point in your assignment where you **BEGAN TO FEEL ON TOP OF THINGS**?

*Living environment.*
Cultural and political conditions.
Food.
Climate.

Housing standards and systems of health care.
Knowledge of host language (able to hold conversation; understand; limited to use of phrases).
Social life (sources of entertainment).
Children's education.
Spouse's career.
Social contacts. Relationship with spouse, children affected by move?
Provision of trips home for self, spouse, children.

Homesickness.
Financial worries (tax, exchange rate etc).

How well did employee and family members **ADAPT TO NEW LOCATION**.

WHERE APPROPRIATE: Did you feel your normal ability to complete the job was affected by any of these problems? (Took longer/more effort than usual. Any way this could have been avoided?)

If not a permanent relocation: **PROBLEMS OF READJUSTMENT ON RETURN**.
Re-establishing lifestyle and social links.

(5) **BUSINESS TRAVEL INVOLVEMENT**

i) Date of first business trips. Destinations.

ii) Training, relevant language ability.

iii) Remuneration, work-after-travel moratoriums, benefits.

iv) Extended periods away from home?

v) Prolonged periods of frequent travel. Each stage discussed generally:

Stage 1: **PLANNING** travel and accommodation.
Who packs clothes and other essentials. Evolved a system for this process?
Postponement or cancellation of intervening social and business events.
Stage 2: The TRAVEL PROCESS ITSELF,
Flight delays
Fear of/qualms about flying: choose airlines based on factors other than cost,
Misdirection of luggage,
Paperwork problems (visa),
Met/guide ?

vi) Working Environment,
Purpose/nature of the task. Time consuming ? Intensive ? How quickly get into
working mode ?
Relations with others: HOW WERE PEOPLE of ZZZ to work with ? working as
part of a team ? on your own ? RESENT STABILITY ?

Living Environment:
Accommodation: living and working out of hotels ?
Cultural and political conditions.
Food.
Climate.
Knowledge of host language (able to hold conversation; understand; limited to
use of phrases).
Sources of entertainment.
Missing spouse or children.
Social contacts. Relationship with spouse, children affected by travel ?
Homesickness.

Missed family events.

IF APPROPRIATE: Do you feel your normal ability to complete the job was
affected by any of these factors? More time/effort than usual needed.

(7) CONCLUDE

i) Any MOVES YOU WOULD NOT HAVE UNDERTAKEN given the choice again
(knowing what you know now) ?

ii) Would you consider there to be ANY ALTERNATIVE to your appointment ?
Would that alternative be desirable ?

iii) Explain DIARY

iv) If appropriate, SIMILAR QUESTIONS TO SPOUSE ?
4. INTERVIEW: SPOUSE

The 'Employee Spouse' sample Interview Design

(1) PREVIOUS MOBILITY EXPERIENCE (prior to marriage, and since if different from employee).
   i) Build up mobility profile. Employers and moves in chronological order.

(2) MOBILITY PROFILE

For every move, since commencement of full-time employment, lasting longer than six months or involving a change of residence:
   i) Date of move.
   ii) Destination of move.
   iii) Length of stay in that location.
   iv) Career changes

(3) PERSONAL PROFILE

   i) Date of Birth.
   ii) (Confirm) no. of children (with age).
   iii) Language ability prior to first move.
   iv) Experience of working abroad prior to employment ?
   v) Knowledge of spouses mobile career

(4) DETAIL OF MOVES MADE BY SPOUSE, INCLUDING THOSE WITH PARTNER (IN CHRONOLOGICAL ORDER)

   i) Was the move a family move ?
   ii) Reason for move.          Extent to which move was a joint decision with spouse.
   iii) Adequacy of remuneration package.
   iv) Lead times.       i) First direct question from partner's seniors,
                              ii) When 95% certain.

Stage 1: Period following the original announcement of the move. INITIAL REACTION.

Stage 2: PLANNING phase. Affect on family.
Arrangements for new schooling,
Sale or lease of existing home and acquisition of a residence overseas,
If international: Training prior to the move (language, cultural orientation).
Was there a visit to the location prior to moving there?
Category of visit (fact-finding, spouse approval etc.).

Stage 3: Packing belongings, clothes and essentials,
Bidding FAREWELL to friends and relatives.

Stage 4: The TRAVEL PROCESS ITSELF.
Problems with flight
Did everything arrive ?
Paperwork problems (visa).
Someone there to meet you ?
IF WORKING: Working environment.
Nature of the task. Time consuming? Intensive?
How did you find the people in ZZZ were to work with?
Relations with others: working as part of a team? on your own?
Sponsors (guides) - formal or informal.
Did you find yourself resenting their stability, or that of those back home?

Subjective assessments of satisfaction with the posting increase or decrease as it progressed?: Was there a particular point in your assignment where you began to feel on top of things?

ALL:
Living environment.
Cultural and political conditions.
Food.
Climate.
Housing standards and systems of health care.
Knowledge of host language (able to hold conversation; understand; limited to use of phrases).
Social life (sources of entertainment).
Children's education.
Social contacts. Relationship with spouse, children affected by move?
Provision of trips home for self, spouse, children.
Homesickness.
Financial worries (tax, exchange rate etc)

How well did family members adapt to new location.

Where appropriate: Did you feel your normal ability to support your spouse was affected by any of these problems? Took longer/more effort than usual. Any way this could have been avoided?

If not a permanent relocation: Problems of readjustment on return. Re-establishing lifestyle and social links.

(5) Moves where partners are separated: Business travel involvement

i) (confirm) Date of first business trips. Destinations.
iii) Extended periods away from home?
iv) Prolonged periods of frequent travel. Each stage discussed generally:

Stage 1: Extent of awareness of partner's future travel schedule
Involved in preparation in any way?
Postponement or cancellation of intervening social (and business) events.
Stage 2: Absence of Partner.
RESENT:  
  i) ACQUAINTANCES WHOSE PARTNERS ARE LESS MOBILE?  
  ii) PARTNER FOR JET SETTING LIFESTYLE?  
Entertain a social life while partner is away?  
Miss spouse?  
Missed family events.  
How do children react?  
Social contacts. Relationship with spouse affected by mobility? (Would you have a different relationship if they were home every night?)  
IF APPROPRIATE: Do you feel your partner's normal ability to complete the job is affected by any of these factors? (More time/effort than usual needed).

(6) AFFECT ON FAMILY'S LIFESTYLE

  Children's Education, follow through Mobility Profile with changes of school: mobility related- or other- reasons? Felt beneficial/detrimental to their education?  
  Spouse's Career, follow through Mobility Profile with changes: mobility related- or other- reasons. Spouses feelings about this.

(7) CONCLUDE

  i) Any moves you would prefer not have undertaken given the choice again (knowing what you know now)?  
  ii) Would you consider there to be ANY ALTERNATIVE to your partner's assignments/business travel? Would that alternative be desirable?  
  iii) Do you feel your views have been taken into account sufficiently: i) by your partner, ii) by the company
5. INTERVIEW TWO: GROUPS A AND C

The second interview was tailored to match the circumstances outlined in the first interview, and questions varied depending on the extent of completion of the diary, and the experiences revealed therein.

i) Change in function or position within company?

ii) Was this period typical or atypical for business travel frequency?

iii) DIARY REVIEW: Problems with diary, periods not completed.

iv) SPECIFICS: Two business trips - purpose, staying in hotels? Aunt died, mother injured: would have behaved differently if in home country? Did XXX cover trip costs?

v) Business Travel

   - How remunerated for travel (incentive or salary)
   - Qualms about travel.
   - Travels light.
   - Most frustrating aspect of business trips (work or travel).
   - Most satisfying aspect of business trips (work or travel).
   - Used internal travel agents?
   - Opinion of travel agents.

GENERAL QUESTIONS

Over the diary period, were you satisfied with your lifestyle?

Are there any alternatives to your business travel/assignments?

With hindsight, would you undertaken your move again?

Have you been happy with company support? Would you choose to undertake a move in the future with XXX?

Are you happy with a system whereby career progression is dependent on mobility.

Future moves - New boss and (definite?) job to return to.

Do you feel valued by XXX?

vi) CHECKLIST - Indicate frequencies.
Appendix VII: Pilot survey, fieldwork strategy and timetable

Fieldwork was based on applying the methodology outlined in Chapter 5, the rationale for which appears in Appendix IV. A pilot survey was conducted from which necessary improvements to survey design were identified and implemented. The fieldwork strategy was then developed to apply the methodology and revised approach to the survey sample.

The pilot survey

Patterns and experiences of skilled international mobility are such that this ruled out use of standardised interview or mail techniques. A complex data-gathering exercise, based on in-depth, semi-structured interviews, the keeping of diaries and health and event inventories - presented as checklists - was thus devised (Appendices V and VI). The pilot survey was designed to test the use of these survey instruments.

Timetable of pilot

Companies were to be asked to supply interviewees corresponding to the categories A) secondees to U.K., B) returned secondees and C) international business travellers (with no reference made to duration or accompanied status). Pilot samples were thus drawn from from groups A, B and C, and were interviewed over two days at the headquarters of a large British multinational, in mid-March 1990. Each interview lasted for about one hour. Pilot interview schedules, a trial MEI and Gurin Index were used to record events occurring over the three months prior to interview. The one-off nature of the pilot prevented pre-testing of diaries or second interview schedules. The schedules used were modified as a result of the pilot, the MEI rating exercise conducted (Chapter 6) and the MEI checklist redesigned. The revised interview schedule appears in Appendix VI and revised checklist in Appendix V.

The seven interviews proceeded without complication. Subjects responded well to questions asked. Few questions and no objections were raised about the events or health inventories.

Summary of findings

Across the sample groups there had been nine completed expatriations (secondments over one year), with a further two still in progress. Of those completed the average duration was three years, four months. The longest was five years two months, the shortest seventeen months. The survey also picked up three short term assignments (one month to one year) of five weeks, ten months and twelve months duration. Amongst the three members of sample C, seventeen business visits had been made within the three month period (eleven by the same person) of average length five days, the longest lasting 24 days. On average each member of the group had spent 30 days of the three month period out of the country. This coincides well with their own estimates of spending up to 120 days in any 365 abroad. The ability of schedules to record different types of international mobility was confirmed.

Individuals attitudes to their own lifestyles were generally positive, all felt valued to some extent by their employer, only for one was this a grey area. There were no moves individuals would not have undertaken given the choice again. Most spoke favourably of their spouses reaction to a mobile lifestyle, though as children grew older greater selectivity towards acceptance of secondments was apparent. Where subjects were married, decisions to move were said to be joint. Some common themes were: difficulty readjusting on return; dissatisfaction with the implanted travel agency in getting travel arranged; the uncertainty of future job prospects when working abroad as valuable contact with head office was lost; and the extent to which lives were planned around existing or probable future mobility. Individuals reported reduced emotional and social investment in their immediate environment and their efforts to avoid disruption in their children's education. These topics were thus highlighted for inclusion on revised survey instruments.
Gurin Index (Gl) scores averaged 33.3, the lowest was 31, the highest 38. These were very consistent across the group (st. dev. 2.6). As far as individual questions were concerned, the most frequently occurring symptom was trouble with getting to sleep which all experienced to some extent. Five expressed feeling 'put out' by the unexpected. Four occasionally experienced difficulty getting up in the morning. Only one indicated ill-health interfered with the amount of work completed.

MEI scores averaged 294, the lowest was 0, the highest 1010. There was very little consistency between responses (st. dev 369.8). There was little relationship between MEI and Gurin Index scores at this stage, however the new categories on the MEI could not be scored, since readjustment ratings had not been satisfactorily determined. Preliminary calculations based on the readjustment ratings of the UCL Geography Department staff sample of convenience produced the bracketed scores in Table 1.

Table 1: Pilot event and health scores

<table>
<thead>
<tr>
<th>No.</th>
<th>MEI Crude Score</th>
<th>12 month Score</th>
<th>Prob. of Breakdown</th>
<th>GI Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>256 (269)</td>
<td>1024 (1076)</td>
<td>80%</td>
<td>33</td>
</tr>
<tr>
<td>2.</td>
<td>0 (75)</td>
<td>0 (300)</td>
<td>low (50%)</td>
<td>31</td>
</tr>
<tr>
<td>3.</td>
<td>286 (389)</td>
<td>1144 (1556)</td>
<td>80%</td>
<td>38</td>
</tr>
<tr>
<td>4.</td>
<td>187 (274)</td>
<td>748 (1096)</td>
<td>80%</td>
<td>35</td>
</tr>
<tr>
<td>5.</td>
<td>26 (174)</td>
<td>104 (696)</td>
<td>low (80%)</td>
<td>34</td>
</tr>
<tr>
<td>6.</td>
<td>386 (740)</td>
<td>1544 (2960)</td>
<td>80%</td>
<td>31</td>
</tr>
<tr>
<td>7.</td>
<td>1010 (1792)</td>
<td>4040 (7168)</td>
<td>80%</td>
<td>31</td>
</tr>
</tbody>
</table>

Applying the Holmes-Rahe statistical prediction model (Chapter 6) produced a probability of major health breakdown that could be considered unrealistic. This was the case even if the new category ratings (in brackets) were ignored. Thus, it was evident that the MEI measure needed to be substantially refined to be able to cope with the frequently reoccurring life events in mobile lifestyles. The MEI was thus to be refined as described in Chapter 6.

Preliminary interview analysis

In interviews, the first stage, 'the period following the initial announcement of the move' generally involved discussion of reactions to the news amongst the family - all generally positive. The 'planning phase' where arrangements were made for housing and children's education was less well defined. Few complications were encountered. Only occasionally were pre-secondment visits made, so these could not be compared. The third stage, packing and farewells was not viewed with great distress, although pets were put down in two cases, causing anguish for children. The travel process was rarely a problem, not surprisingly, few expressed a fear of flying (beyond a cursory 'I choose my airlines well'). There were few complaints, even where seating for the family was not adjacent ('enjoyed the peace and quiet'). No luggage was lost. Nearly all were met on arrival. Where answers were obtained here, these could be compared clearly. In a majority of cases however 'stages' were ill-defined, and circumstances surrounding each stage were so different that comparison meant little. Whilst these problems would be elevated to a certain extent by the adoption of a larger sample size, direct reference to 'stages' was dropped and questions concerning more salient events such as 'when the idea of a move was first first intimated' and 'when you were 95% certain you would move' developed. Comparison of stages still has a vital role to play in linking up the accounts of many different secondments and travel periods across the sample base. There are few other ways to systematise the qualitative analysis required in comparing individuals reactions to mobility. To create a greater number of such comparable categories a series of more direct questions were adopted such as 'Was there a particular point in your secondment where you began to feel on top of things ?', and, for comparing reactions to business travel: 'which aspect of business travel do you find most frustrating/satisfying ?'
With business travellers, discerning the stages was much simpler. Without the available time to talk through every trip in turn, 'generalised' typical trips were discussed. Unsurprisingly, few difficulties were recorded here. The use of diaries to record tangible features of trips was thus vital to enable further analysis.

In the pilot, all respondents were equally potentially liable to post facto rationalisation in the pilot survey. To the extent that this will not be the case in the real time study of samples A and C in the main survey, post-facto rationalisation may create as yet unforeseen problems for comparison with sample B.

Elements of crucial importance arising from the interviews, however, were the significance of i) the acceptability of a mobile lifestyle to the spouse and ii) the success of individuals' ability in minimising disruption of their children's education, in ensuring employee and family satisfaction whilst overseas. Since this was such a common theme in responses, this was developed into a frame for comparison between the different moves/mobility categories (A, B and C). Questions to probe family reaction and planning were still to be asked in the context of stages prior to and after moves, but there will also be a longitudinal development as education/spouses career assume greater or lesser importance. This can be tied in longitudinally with the individual's career progression and dependence on mobility. This required more detailed questions about the children's education and that spouses be interviewed.

Sample B individuals were the least prepared for their mobility (little language ability, cultural awareness training), went to the most hostile locations and experienced the most severe problems, they also registered the highest GI scores. Sample C individuals registered the highest MEI scores, but as stated above this is a function of the frequency of travel and not necessarily an indication of the amount of readjustment individuals were undergoing. There were no inconsistencies between the responses given on the questionnaires and those given in interview.

Discussion: technique

The qualitative (interview) and quantitative (event and health inventory) elements of the survey tied together well. By the time the questionnaires were presented at the end of the interview, individuals memories were well refreshed. It was assumed that remembering life events and states of health for the questionnaires was made easier, though no independent assessment was possible. In addition, inventory items often encouraged more detail about particular events that occurred whilst away from home. In this way the two elements were supplementary.

A less immediate problem, but one for concern when analysing results is adaptation of the scoring system of the SRRS to control for frequency. This could involve altering the system such that repetitive events' scores are no longer cumulative, either i) each consecutive recording of the event would score progressively less, or iii) each items score for a particular period would be dependent on its frequency. Another system could involve making scores dependent on the length of time they apply (short periods of time implying lower scores). Two problems here are the practicalities of recording the length of time each item applies (by use of the interview responses) and also determining by what factor scores should change with time. After a certain point a change in lifestyle is no longer a change requiring readjustment, it is the norm; readjustment scores would not be expected to increase.

Semi-structured one-to-one interviews followed by a short tick-sheet style questionnaire session were an appropriate way to gain the information required. There was little difficulty in arranging interviews to this pattern, though time constraints were much in evidence. The company had not been able to arrange career or mobility profiles prior to the interviews so valuable time at the beginning of each interview was used establishing the individuals mobility history. In addition, where individuals arrived late for the meeting, time was lost. One individual had not been fully briefed and had set up a group interview, which had to tactfully disbanded.
A difficulty with studies of this nature is that they are very much at the mercy of the participating organisations upon whose hospitality and goodwill the venture relies. Ideally interviewees would form a representative stratified random sample. Without access to company records, this is difficult to arrange and asking companies to perform such a function may stretch their support too far. In any case, the study is still left with the non-random self-selection of participants. Companies were informed that the sample should be randomly selected. Thus, any introduced sample bias was that of the selection process by personnel departments rather than by the researcher.

- Recording

A practical difficulty in the one-on-one interviews was recording sufficiently quickly and in sufficient detail, the interviewee's accounts of their experiences. Accuracy in transcripts depended on writing up shortly after the interview, so that 'unwritten' detail was not lost or confused. Some valuable phrases, descriptions and adjectives were lost and other hasty abbreviation by the interviewer (perhaps to one word where the interviewee used a short phrase). This imposed the subjective assessment of the researcher onto the interviewee's responses, even before transcription. In addition the full detail of each move was not recorded in each case: the exact length of the stay away or business trip, the post occupied and the type of work involved. These failings were enhanced by the time constraints mentioned above.

The use of a tape recorder in the interview to supplement note-taking would remove some of the problems with recording detail from the interviews, and enhance qualitative analysis. Two original objections to the use of a tape recorder were that individuals might find its presence distracting and that knowing they were being recorded reduce the amount of information divulged. Personal experience of the interview situation and the characteristics of the interviewees would suggest otherwise. Subjects, to a certain extent, expected to be taped. No concern was expressed by the individuals about confidentiality; some were unconcerned to whom their responses were revealed. Information lost through incomplete note-taking would at least be equivalent to that the presence of a tape recorder prevented from being divulged.

The introduction of a tape recorder, as an additional means of recording data would offer a substantial improvement in the accuracy of transcription and interpretation. Note-taking would continue, as a back-up should the tape fail, and as a shorthand means of organising and sorting responses post-interview.

- Checklists

One or two did not fully understand the frequency scoring system of the MEI, writing 'yes' or 'no' instead of the frequency of occurrence. The form design needed to be simplified. In the main survey MEI it is only group B who have to indicate the frequency of occurrence of items, post-event (the others will be recorded real-time via a diary). The questionnaires will be restructured to offer a series of numbers representing frequencies, the appropriate number for each item can be circled by the respondent. The GI was clearly understood.

- Duration

One hour would appear to be the minimum time required to complete one of the pilot interviews well, given the need to record mobility profiles and complete questionnaires. Interviews with groups A and C in the main survey will be less time demanding than their pilot equivalents, as two interviews will be carried out, once at the beginning and once at the end of a three month period. Judging by the experience of the pilot for group B however, the interview with main sample B may take longer and companies need to be briefed accordingly.

Without being so overbearing as to discourage compliance, instructions about the randomness of the sample and the necessity for interviews to be one-on-one and personal must be re-
emphasised to the participant companies.

**Pilot survey conclusions**

The pilot survey proceeded without complication and within its limited frame of reference drew attention to some shortcomings of the original schedules. A number of interesting concerns came out of interview responses, which enabled the relative emphasis placed on the consideration of stages and on longitudinal analysis of family and career progression to be revised. The qualitative elements of interview tied in well with the more quantitative health and event inventories. However problems remained in one aspect of scoring the latter. More immediately, a number of easily effected steps remain which could be implemented to significantly improve the presentation and data recording aspects of the interviews.

The pilot survey was successful, both in terms of obtaining a valid data set that could be scrutinised and in terms of identifying where methodology and techniques applicable in theory, need further improvement in practice. There would appear little reason to doubt that, with modifications, the methodology is applicable to this study and can be employed in the main survey to meet the required aims of the project. Each individual's mobility patterns can be established. The effect of different movement patterns on individuals' lifestyles and work patterns can be determined. The relative importance of company's remuneration and training packages can also be assessed. There was no evidence to suggest a radical change in approach was required.

Survey methods were thus adopted and a fieldwork strategy and timetable devised which were based upon the methodology derived from thesis objectives and the findings of the pilot survey.

**Fieldwork strategy and timetable**

Fieldwork strategy was devised with a view to maximisation of sample size within available resources, to maintain survey validity. A suitable comparative framework was constructed which would incorporate the cross-comparison of company approaches and mobility strategies. A prime concern established in section 5.2.1b was the need to maximise the sample size with a broad range of mobility experience, to minimise the effect of inter-individual variation and enable identification of appropriate study groups.

It was envisaged that few more than one hundred interviews could be conducted in the fieldwork time available and therefore sample size should be little more than half this number. Initial company approaches had indicated that 12 individuals were the maximum likely to be available from each organisation. Since five companies agreed to participate\(^1\), a sample size of 60 was envisaged. Obtaining a larger sample size by increasing the number of firms would have proved counter-productive since the size of the (12-strong) units of analysis would have remained the same.

Each company sample was further subdivided into the three mobility categories (Chapter 5, Table 5.1). With a sample size of 60, a restriction on the mobility categories under study was appropriate. The establishment of a typology in Chapter 4 (Table 4.12) demonstrated that no mobility category could be considered discrete or independent. For maximum empirical validity and sample comprehension, two classes of mobility strategy were chosen for initial comparison, to be subdivided where appropriate. Classifying mobility strategies into business travel and secondments, allowed two clear comparative categories to be created. Whilst, post-survey, duration of stay was one of the few characteristics of an overseas trip which could be objectively quantified and used as a simple classification criterion, care was taken not to specify duration of stay as a criterion for sample selection. Being a continuous variable, duration of stay would throw

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\(^1\) The criteria for selection of companies is outlined in Chapter 7.
up anomalies around the chosen delimiter. Accompanied/unaccompanied status was another criterion, but would be an ambiguous if not inappropriate means for incorporating the single, or those on bachelor postings. Short term assignments, permanent home moves of under 12 months in duration, for example, could form a third category, since they tend to combine the unaccompanied domestic impermanency of business trips with the project orientated permanency of secondments. However, some secondments of over 12 months in duration would be unaccompanied, and the creation of a third category would have created another delimiter to generate anomalies. Short term assignments were therefore to be included within the secondments category, with which they would have greater similarity.

Samples were identified according to current mobility category, although it was recognised that during the course of a career, most skilled employees would have undertaken at least some business travel. Accordingly, ‘business travellers’, who may or may not have been seconded at some time, were specifically requested for 20 of the sample (group C), the remaining 40 were to be equal numbers of those recently returned from overseas assignments (group B, n=20) and those from overseas subsidiaries, currently working in the U.K. (group A, n=20).

The use of diaries, interviews, checklists and repeat visits among 60 individuals, plus interviews with spouses and employers, necessitated a complex fieldwork design. Given that interviews were sought wherever possible to clarify information obtained, the timetable pertaining to mobile employees had to include:

i) An interview to determine career profiles, and attitudes to previous moves,
ii) Introduction to the diary (groups A and C).
iii) An interview to confirm recent experiences during survey (three-month) period
iv) Symptom and MEI checklist completion with reference to the survey period,
v) Collection of diary (groups A and C).

The survey required a sample that was actively employed, undertaking travel (group C) and likely to hold a fairly senior position and be geographically dispersed. Seeking appointments, to carry out processes i) to v) above, with such busy individuals thus required careful coordination.

The diary study was to be carried out for a three month period immediately following first contact and initial interviews. Start dates were staggered between May and September 1990 as and when interview opportunities arose. Over a period of ten months then, more than fifty mobile individuals were interviewed. This interview was to determine career profile. Once a career profile had been established, individuals were asked to consider the many potential sources of conflict or stress, chronologically from the time of joining the first employer up to the present date. These could be where career needs conflicted with organisation needs, where the career conflicted with household aspirations, or where the household needs did not match those of the organisation. In addition, groups A and C were introduced to the diary, whilst group B's interviews addressed the most recent secondment (which included the three-month study period). Group B were asked in detail about the progress of their secondment and the occurrence of life, mobility and health events during its first three months. For groups A and C, mobility events and stress symptoms during the three months of business travel or secondment, following the initial interview, were self-assessed via the issued diaries. These diaries provided the focus for a second interview at the close of the three-month period. Individuals were free to elaborate on any point during interviews and were asked several general questions which allowed them to expand upon their circumstances (see Chapter 8). All diary respondents were given a telephone reminder - to ensure completion was proceeding and to check on any problems encountered - two weeks after receiving the diary.

Where employees from each group were willing, their spouses were also interviewed, on a one-

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2 Response rates are discussed in Chapter 5, section 5.7.
to-one basis. A similar interview schedule was used, but symptom checklists and mobility events inventories were omitted³. An account of the spouse sample and interview process is presented in Chapter 9.

Interviews varied in length according to circumstances, but were rarely less than 45 minutes in duration. The length of the interview was often determined by the amount of experience, and hence the length of the career profile, for each individual. Pilot work involved taking notes, but had proved unsatisfactory for recording sufficient detail, especially for qualitative analysis. As pilot respondents had anticipated tape recorder presence, and valuable information was being lost without, tape recording of interviews, with respondent's permission, was favoured for the main survey. It was not anticipated that willingness to respond would be affected sufficiently by recording devices to merit their exclusion (Jones, 1985). Only one employee, who later dropped out of the project refused the use of the tape recorder.

³ The MEI was developed to be applicable to the experiences of mobile employees. It was therefore inappropriate to issue the device to spouses.
Dear Sir/Madam,

The CBI Employee Relocation Council and University College London are carrying out research into the stress associated with international assignments (both short and long term) and foreign business trips. Your employer has agreed to assist us in this project.

It is well known that people must readjust to changes in their lives and that this process is a source of stress. What is not known, however, is the degree of readjustment that is associated with particular events linked to frequent mobility and hence the levels of stress that these generate. We should like to develop a "mobility events inventory" and to compare this with an established scale which ranks the most stressful events - i.e. those which cause the greatest need to readjust - associated with various other changes in people's lives.

For this we need your help. Your experiences of international relocation and/or business travel will assist us in determining sources of stress and their relative importance. We should therefore be grateful if you could spare around 15 minutes to complete a short questionnaire.

The results of the survey will be used to construct a Mobility Events Inventory so that the stressful components of individuals' international relocation and business travel can be identified and ranked. By using this inventory we can offer you the opportunity to compare your own experiences with those of others.

We should like to emphasize that you will not be identified in any way from this survey; all replies will be anonymous. However, in order to interpret the results, we need to be able to categorize responses. Therefore, we should be grateful if you would complete the section overleaf concerning details about yourself.

What we should like you to do

Overleaf are 32 life events often associated with international relocation, secondments and business travel. We should like you to rate this series of life events as to their relative degrees of necessary readjustment. Readjustment measures the amount and duration of change in one's accustomed pattern of life resulting from various life events. As defined, it measures the intensity/amount of change and length of time necessary to accommodate to an event, regardless of its desirability.

We have put an important life event: 'major change in responsibilities at work' (e.g. promotion, demotion, lateral transfer) at the top of the list and given it an arbitrary value of 100. You are asked to assess the amount of readjustment required by each of the following events relative to this one. As you complete each of the remaining events think to yourself, "Is this event indicative of more or less readjustment than 'major change in responsibilities at work'?". "Would the readjustment take longer or shorter to accomplish?" If you decide the readjustment is more intense and protracted, then choose a proportionately larger number and place it in the [ ] space alongside the event. If you decide the event represents less and shorter readjustment than 'major change in responsibilities at work' then indicate how much less by placing a proportionately smaller number in the [ ] space. If the event is equal in actual readjustment to 'major change in responsibilities at work', record the number 100 opposite the event. (Remember: if an event requires intense readjustment over a short time span, it may approximate in value an event requiring less intense readjustment over a long period of time).

In scoring, use all of your experience in arriving at your answer. This means personal experience, as well as what you have learned to be the case for others. Some persons accommodate to change more readily than others; some persons adjust with particular ease or difficulty only to certain events. Therefore, strive to give your opinion of the average degree of readjustment necessary for each event rather than the extreme.

We have given you a reply-paid envelope in which to return your questionnaire directly to us at the C.B.I. All replies will be anonymous. Please return your completed questionnaire before 31 October 1990.

Thank you for your help.

Yours sincerely,

Sue Shattland
Manager
Major change in responsibilities at work (e.g., promotion, demotion, internal transfer).
[100]
Geographical separation from spouse/partner. 2 to 10 days.

Geographical separation from spouse/partner. 11 days - 1 month.
Geographical separation from spouse/partner. over 1 month.
Spouse/partner unable to work.
Spouse/partner no longer able to pursue career.
International air journey, short haul (including pre-flight preparation, the flight itself, post-flight procedures and yet lag).
International air journey, long haul (including pre-flight preparation, the flight itself, post-flight procedures and yet lag).
Living and working out of hotels.
Working in culture where customs and conventions are unfamiliar.
Working in culture where language is unfamiliar.
Working in country where laws forbid or limit the consumption of alcohol.
Geographical separation from own culture for 11 days - 1 month.
Geographical separation from own culture for more than 1 month.
Major change in sleeping pattern (i.e., more or less sound, or change in part of day when asleep).
Major change in usual type and/or amount of recreation.
Geographical separation from children. 2 to 10 days.
Geographical separation from children. 11 days - 1 month.
Geographical separation from children. over 1 month.
Major change in number of family get-togethers (e.g., a lot more or less than usual).
Major change in social activities (e.g., cinema, dancing, movies, visiting etc.).
Working in country where telecommunications systems are inefficient.
Working in country where transport systems are inefficient.
Working in country where climate is different.
Living or working in country where your appearance distinguishes you from natives.
Living or working in country which is hostile or unaccepts personal safety.
Identifying and arranging suitable education for children at home or abroad.
Loss of communication with colleagues/head office in home country.
Major change in eating habits (a lot more or less food intake or very different meal hours or surroundings).
Change in residence - finding housing/accommodation in new area.
Change in residence - disappearing of existing housing in old area.
Change in residence - moving of self and household belongings from previous residential location to new.
Return to home after stay abroad.

Please check you have placed a number in every [ ] space. Remember, where you do not have direct experience, indicate a score corresponding to what you have learned to be the case for others.

A few details about yourself will creata aid our analysis of the results:

If you are or have been a business traveller for approximately how many years have you travelled on business? [ ]
If you have been seconded/relocated overseas for more than 6 months, please indicate how many times [ ]

Which of the following would best describe your position in the company? (Tick one box)
Chairman/President [ ], Senior Manager [ ], Manager [ ], Assistant [ ].

Please indicate whether you are Male [ ] or Female [ ] and whether you are or have been married [ ].

Please tick the box corresponding to your age group.
Under 30 [ ] 30-39 [ ] 40-49 [ ] 50 or over [ ]

Please return to Sue Shortland, CBL Centre Point, 103 New Oxford Street, London WC1A 1DU, or use the reply paid envelope provided.

THANK YOU VERY MUCH FOR YOUR HELP.
Appendix IX: MEI questionnaire logistics and methodology of analysis

Logistics

Once the decision was made to produce an events inventory scaled by a sample of the population of interest, an appropriate means of locating such a sample and conducting a rating exercise had to be devised (Chapter 6). The best option available was through a collaborative venture with the Employee Relocation Council (ERC) at the CBI.

Major advantages arose from this approach, not least access to a broad cross-section of respondents from over fifty international companies. The comprehensive nature of coverage represented by the ERC list of member companies' was of major significance in selecting this method of approaching rating survey respondents. The ERC was also able to offer considerable support in the preparation, production and despatch of letters and questionnaires and in the receipt of responses. The sponsorship of the survey by an organisation, respected among employers - and yet viewed as independent - was a major gain for the project and no doubt helped to increase the size and spread of responses. Certain constraints were imposed, however, in that some flexibility in questionnaire construction and production was lost (the ERC had certain items that it wanted added or altered in the inventory, and one method of testing the validity of responses, by the split-half method, was precluded). The questionnaire and covering letter had to be designed to maximise the response rate, and document length of greater than two sides of A4 was to be avoided. The nature of the sample and methods of despatch and return had to be considered, the covering letter was designed to include instructions for the rating exercise. To avoid the inventory becoming separated from its instructions, the questionnaire and letter were backed.

A two stage approach was adopted, an introductory letter was first despatched by ERC to their member company contacts (usually personnel managers) to ask whether they would like the company's employees to participate. Only companies judged by the ERC to have sufficient international interest were approached. Contacts responding positively were despatched a set number of questionnaires and these were distributed among employees with international experience by the company's ERC contact. This method of approach prevented a response rate as such being calculable. A little over half the number of questionnaires despatched by the ERC were returned completed, but the number of these questionnaires which failed to be despatched at the company end remains unknown. Responses were mailed back to the ERC directly by respondents in pre-paid envelopes provided.

Methods of analysis

Returned questionnaires were coded and ratings entered onto a spreadsheet with respondent characteristics. In the absence of baseline data, the representative nature of the sample was hard to test. However, superficial comparison with limited information on population characteristics available from sources detailed in Chapter 4 indicated the characteristics of respondents to be those anticipated of internationally mobile skilled workers, though attention was drawn by the ERC to the relatively high proportion (10%) of females in the sample (Figures 1 to 6). The distribution of ratings was plotted and population sub-groups established. The responses of sub-groups were compared by testing the extent of correlation between them. The results are presented in Chapter 6. These methods of validation mirrored those used by Holmes and Rahe (1967) to validate the reliability of their findings. MEI values were calculated (given as geometric and arithmetic means of all respondents ratings, Chapter 6, Table 6.2). Standard errors were calculated to determine how far obtained means differed from hypothesised population means. A second set of MEI values, applicable to individual distinct groups of respondents was also calculated, based on those subgroups exhibiting the greatest divergence from norms (eg. women, older men with less secondment experience), but these values, when applied to produce MEI scores for the main survey sample members with similar characteristics, produced no improvement in the association between MEI values and GI symptom scores.
Figures 1 to 6: Characteristics of respondents

**Gender**

![Gender chart](image)

**Figure 1**

**Marital status**

![Marital status chart](image)

**Figure 2**

**Age range**

![Age range chart](image)

**Figure 3**

**Position in company**

![Position in company chart](image)

**Figure 4**

**Number of years undertaking business travel**

![Number of years chart](image)

**Figure 5**

**Number of secondments undertaken** (of duration 6 months or more)

![Number of secondments chart](image)

**Figure 6**
Appendix X: The employer interview schedule

The exact emphasis in these interviews will depend on the subject's position and function and material already obtained from previous interviews and company literature. The following are guidelines of what information should have been secured about each organisation by the end of the second 'employer' interview at each firm.

COMPANY POLICY AND ORGANIZATIONAL AIMS.

i) Company Profile: Full details of the firm's business aims, main products, management structure, extent of product divisionalization and geographic/ regional spread.

ii) Policies for international movement of personnel: decision-making hierarchies, remuneration and training guidelines for all business travel, temporary duties, short and long term assignments and expatriation.

iii) The rationale underlying the policies in ii) above.

iv) Experience of change in policy, rationale or business travel: temporary duty: short/long term assignment: expatriation ratio over recent years.

v) External factors acting on the company to bring about such changes.

vi) Whether the cost- and human resource-effectiveness of achieving overseas objectives has altered over recent years.

vii) Future plans for manpower deployment.

viii) Plans for future international projects.

ix) Availability of data of international movements of staff within company.
Appendix XI: The mobility of employees within participating international organisations

The survey approached the five participating companies to gain a general overview of any overt or covert mobility policy operating within the company. Interviews were conducted with members of personnel departments. Requests were made for any collated information which might indicate numbers of, and trends in, secondments, short term assignments or business travel. Not all areas of concern were covered by the data collected by the companies approached. Thus, where data were not available, the interviewed managers' own interpretations of current movement patterns were sought. The information obtained is presented below in Table 1.

The perceptions of different companies of the need for monitoring of the movements of employees and the confidentiality surrounding such data varied across the sample. Fluctuations in companies' travel budgets were generally the only concrete documented indication employers had of changing trends in travel. Figures were disclosed where confidentiality allowed. However, budget records are crude as a source of information on trends as they can only indicate increased and decreased reliance on travel. Fluctuations seen will to a certain extent be dependent upon volatility in the travel market and the annual availability of discounts. Records provide no information about length of flight, duration of stay or frequency for particular individuals and so therefore do little to reveal the ratio between short and long term trips - a documented budget increase could be attributable to an increasing reliance on either or both.

Information concerning the use of secondments was much easier to obtain. Whilst all companies were aware of the numbers currently away from home base on secondment, obtaining data for past years, to examine specific trends was only successful with some companies.

Table 1 shows that Company B makes the greatest use of expatriation, with over 1.2% of its workforce working overseas at any one time. The company also has the largest travel spend of any UK company. Company E makes the least use of expatriation, with fewer than 0.2% of its workforce being expatriated. Trends between companies can also be seen to vary quite dramatically. Whilst expatriation has increased in recent years in Company A, it has declined in Company C. In Company E the expatriate body is small and ever-changing. The variation in numbers for Company E is due to the use of secondments primarily for geographic expansion. As new locations are developed, expatriate numbers increase and, as locations become established, expatriate numbers fall as they are replaced by locals, in a process of indigenisation.
Table 1: Mobility of employees within participating international organisations

<table>
<thead>
<tr>
<th>Company</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Chemical</td>
<td>Oil</td>
<td>Construction</td>
<td>Mechanical Electrical</td>
<td>Computer /IT Specialists</td>
</tr>
<tr>
<td>Number of employees</td>
<td>130400</td>
<td>126000</td>
<td>13000</td>
<td>85000</td>
<td>55000</td>
</tr>
<tr>
<td>Employees in U.K.</td>
<td>54770</td>
<td>31000</td>
<td>12400 (estimate)</td>
<td>23600</td>
<td>1400</td>
</tr>
<tr>
<td>Number of expatriates (number of short term assignees)</td>
<td>849 (425 inc.)</td>
<td>1541 (about 300 p.a. inc.)</td>
<td>50 (?)</td>
<td>700 (149+)</td>
<td>90 (?)</td>
</tr>
<tr>
<td>Number of British expatriates</td>
<td>300</td>
<td>1015</td>
<td>45</td>
<td>316</td>
<td>est: 9</td>
</tr>
<tr>
<td>Trends</td>
<td>41% increase 1986-1990</td>
<td>Stable</td>
<td>Dramatic decline in number of expatriates since 1980</td>
<td>Stable</td>
<td>STAs increasing. Expatriate nos. fluctuating</td>
</tr>
<tr>
<td>Countries of operation</td>
<td>Global</td>
<td>Global</td>
<td>6: Asia, U.S. + projects</td>
<td>Global</td>
<td>27: Europe Far East, ANZ.</td>
</tr>
</tbody>
</table>

ANZ = Australasia; (inc.) = included in previous figure; STA = Short term assignment; ? = Not known.
Appendix XII: Coding life experience

Life experience recorded in interviews was coded and quantified to produce numerical variables for correlation and multiple regression in Chapter 10. The codes used are as follows:

- Language ability (l)

Language ability was assessed from interview responses on a four-point scale for each language. Scores ranged from zero (= no ability) and one (limited knowledge, progressed little since learnt at school) to four (= good working knowledge and conversational ability). For each respondent, their mother tongue was excluded from rating. Scores obtained for each language were summed and ranged from 0 (= no ability beyond mother tongue) to 28 (one person who was multilingual in three languages (3 x 4 = 12) in addition to their mother tongue, had since acquired conversational ability in two more (2 x 4 = 8), and had a working though not expansive knowledge of four others (4 x 2 = 8) (8 + 12 + 8 = 28)).

- Age (a)

Taken as 1990 minus the year of birth.

- Years since first overseas (y)

Used to indicate the respondent’s experience of living abroad. Thus the y variable would equal 1990 minus the year of taking up permanent or semi-permanent settlement in a country differing from that of nationality of parenthood (up to age 8 years) or childhood (from age 8 years). Thus moves undertaken with the family, for educational purposes or in the armed forces were included. For most respondents, however, y = f.

- Years since first secondment (f)

Taken as 1990 minus the year the respondent, having started full-time employment, departed to work abroad for the first time, whilst remaining with the same employer. Student vacation work overseas was excluded by this definition (but, of course, included under y).

- Years married (m)

Taken as 1990 minus the year of first marriage, less any years the respondent had been divorced or widowed. Never married = 0.

- Age of eldest child (e)

Taken as 1990 minus the year of birth of the respondent’s first child. No children = 0.

- Number of internal relocations (r)

Taken as 1990 minus the year the respondent, having started full-time employment, was first transferred from one work location to another within the same country, whilst remaining with the same employer.

- Number of secondments (n)

The number of transfers overseas of six months or longer duration the respondent had undertaken after having started full-time employment, whilst working for the same employer in country of origin and destination.
- Total duration of secondments overseas (d)

The total number of years, to the nearest year, spent overseas on secondments enumerated under n.

- Total duration of business travel experience (b)

The total number of years, to the nearest year, since the respondent first experienced business travel of an intensity greater than four trips per year.
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