



# 2020 SURVEY IMPACT OF COVID-19 ON EXPATRIATION RESULTS

# INTRODUCTION

## Impact of Covid-19

In the midst of a global pandemic, professionals in the global mobility industry have been eager to find out how expats view the situation and how they feel about current or forthcoming assignments. However, it's also critical to understand the mindset of expat partners. Previously, a Global Connection survey revealed that the well-being of the expat partner has a significant impact on the well-being of the expat, and consequently on the success of the assignment. For that reason, Global Connection has conducted a new survey to find out what is on the minds of expat partners in the time of Covid-19. The survey received responses from 1,008 expat partners and partners of international hires. This large response shows that partners greatly appreciated being asked for their opinion and valued the opportunity to share their concerns and experiences.

Regarding the results, it is important to bear in mind that all partners participating in the survey are offered a partner support program. They appreciate such a program as it not only supports them in finding their feet at their host location, but, in general, shows recognition and acknowledgement from the employer, which, due to the uncertainty caused by Covid-19, turns out to be of even greater importance.

## Evolving mobile workforce

Please note Global Connection defines 'international hires' as employees moving to another country indefinitely (also known as 'foreign local hires' or 'third country nationals'). Why does the survey distinguish between expat partners and partners of international hires? In 2018, according to Global Connection's Partner Support Effectiveness Survey almost half of the mobile workforce were international hires, and this number is growing. Accordingly, and in line with Global Connection's long-held beliefs, many more corporate clients are also offering spousal support to partners of international hires. As there is a difference in support needs, partners of international hires usually receive a different support program. That's why Global Connection surveyed the two groups separately.

## Having a say

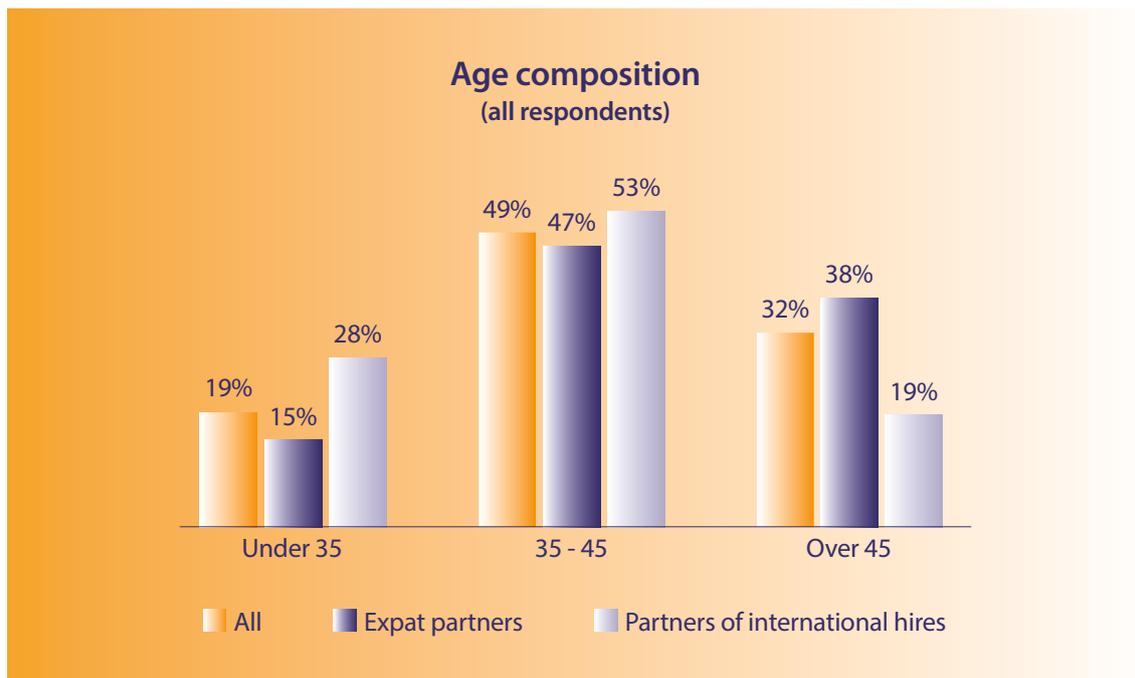
Numbers say a lot, but comments add an extra dimension. For that reason, partners had ample opportunity to elaborate in this survey. The open feedback provided a wealth of relevant insights and some of the quotes have been included in this report.

*"There is a new assignment around the corner. Pressuring my husband to not accept that will put a lot of additional stress on his life. I truly hate the situation as, honestly, we are not ready to move."*

# SURVEY ANALYSIS

## General facts

Of the 1,008 participating partners in this survey, 68% were expat partners, 32% partners of international hires. In terms of gender, 79% of all respondents were female (84% of all expat partners; 67% of all partners of international hires). Regarding the age composition of the survey, 49% of all participants were aged 35 - 45. The biggest differences between expat partners and partners of international hires were: 28% of partners of international hires were under 35 as opposed to 15% of expat partners; 38% of expat partners were aged over 45 compared to 19% partners of international hires.



## Doubts about upcoming posting

In the survey, 18% of all participants were preparing for their first move. Half of all first time movers had doubts about their upcoming move due to their experience of the Covid-19 pandemic. Partners of international hires who are in principle preparing for an indefinite move have more doubts compared to expat partners (60% vs. 41%).

Expat partners preparing to move expressed doubts regarding the restricted flexibility to travel home, not being able to explore their new location and the uncertainty concerning schooling of children. Many participants expressed an intention to go ahead with their relocation, although being more cautious.

*"I am feeling anxious and uncertain about the whole posting. I am worried about leaving our families behind who need our support."*

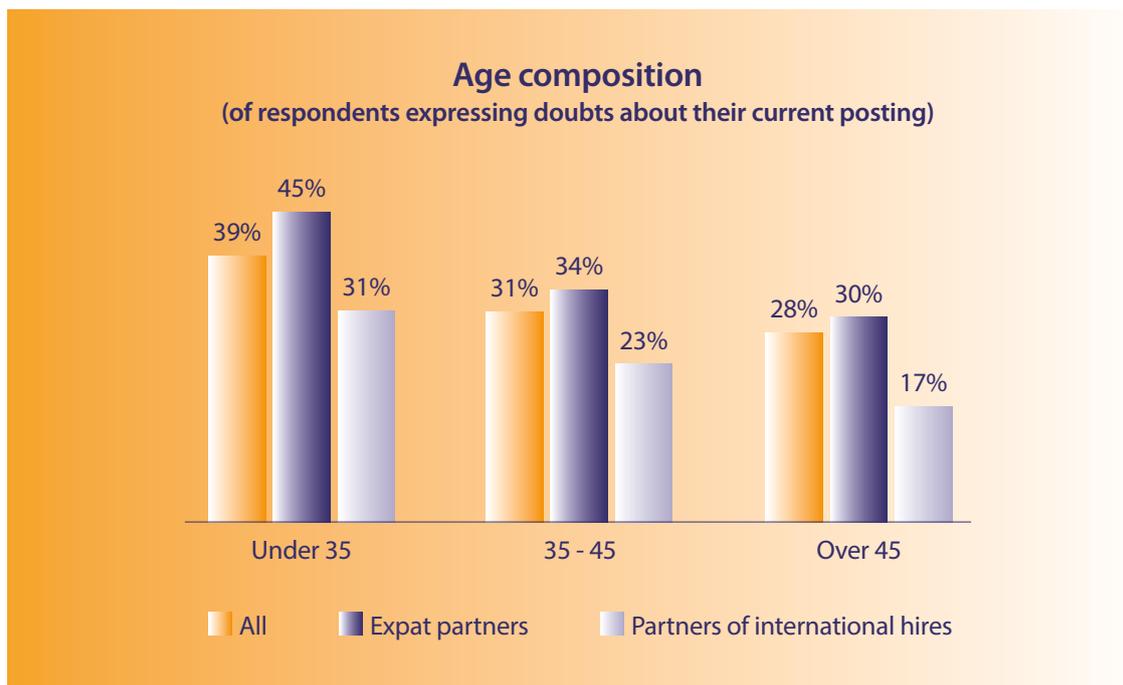
A number of partners of international hires pointed out that they are reconsidering the move based on how the crisis was or is still being managed in their potential host country. Other topics that caused doubts: it will be more challenging to build a new network (social and professional) and find a job, travel restrictions and limitations of a virtual house search.

## Temporarily returning home

Of all participants, 82% were already relocated or have already moved. Out of this group, 18% temporarily returned to their home country – not surprisingly, more expat partners than partners of international hires (22% compared to 10%). If there had not been any travel restrictions, this percentage (18%) would have been significantly higher. Some expat families decided to stay together to avoid unwanted split family situations.

## Doubts about current posting

Nearly a third (32%) of all participating partners who had already moved expressed doubts about their current posting. Of those expressing doubts, 35% are expat partners and 23% are partners of international hires. Looking at the difference between age groups, it stands out that people under 35 years of age have more doubts than partners over 35 years old; of those under 35, almost half of the expat partners (45%) and 31% of partners of international hires have doubts. Partners over 45 years old have the least doubts (30% of expat partners and 17% of partners of international hires).



Considering the details of partners at different stages of their expat life, it is noteworthy that partners on their second assignment expressed the most doubts (38%). After a second assignment, the percentage of expat partners with doubts drops and somewhat stabilises: 31% on a third assignment and 29% on a fourth (or more) assignment.

Examining the comments of expat partners, the biggest doubt is caused by travel restrictions and, consequently, not being able to physically support families/elderly relatives at home. Besides, partners said they will more carefully assess the safety and security situation in their potential host country. One of the incentives for expat partners going on assignment is the ability to travel – i.e. exploring their new location and surrounding countries. This incentive has, at least for the time being, gone. Other concerns raised in the survey include medical care and job insecurity of the expat, while some expat partners noted that they would have appreciated more understanding from the employer.

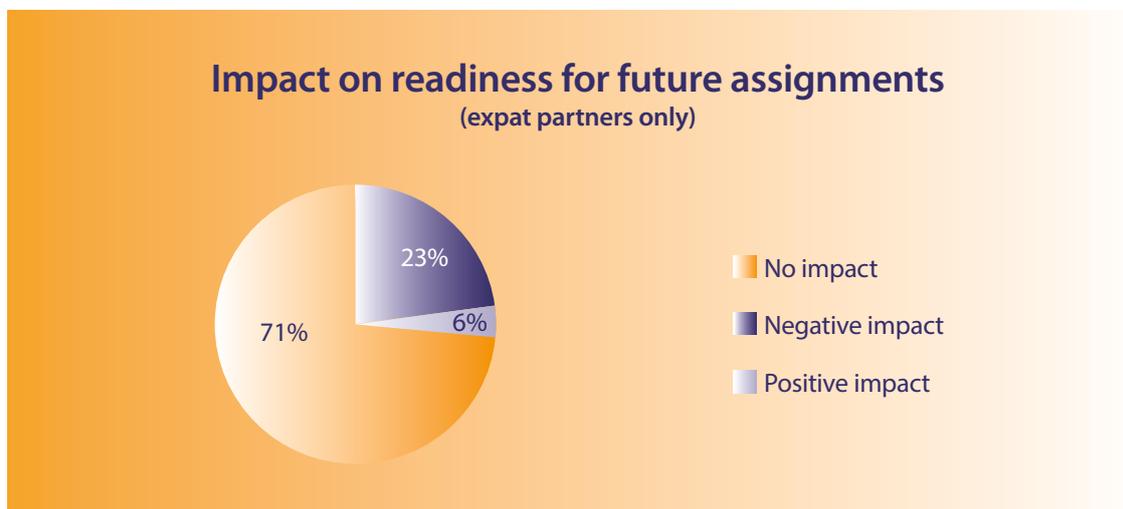
*“Well, the main reason I wanted to be an expat is the opportunity to explore cultures and travel around. If I can't do that ... what's the point?”*

Looking at the comments of expat partners who answered that the Covid-19 situation did not cause doubts about their current posting abroad indicates that although they acknowledged similar issues, the situation had not changed their opinion about the current assignment.

Partners of international hires expressed doubts regarding difficulties finding a job and travel restrictions and not being able to see their family.

## Readiness to relocate

Expat partners who are currently on assignment were asked if the Covid-19 situation would impact their readiness to go on another assignment. A total of 71% of expat partners answered it would not.



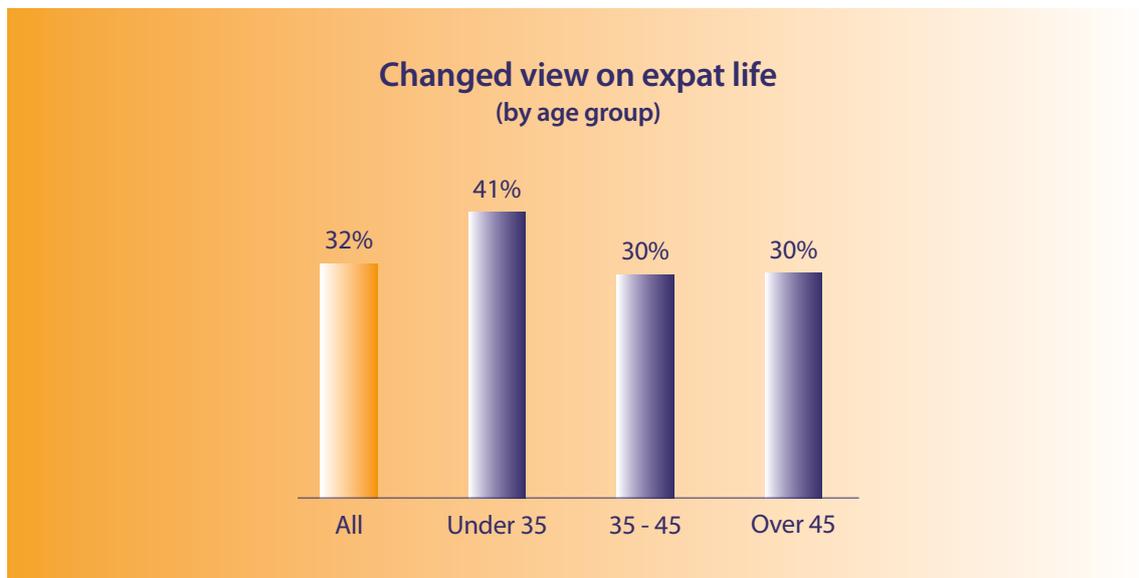
So for over two thirds of this group, experiences during Covid-19 do not appear to be part of the decision criteria for agreeing to another assignment. Still, from the comments it's evident that certain topics, such as assessment of the healthcare system, and distance from family, have gained in importance when considering a new assignment.

Analysing the comments of the participants who stated that Covid-19 has had a negative impact on their readiness (23%) shows that they are not ruling out another move per se. However, they did express more concerns. In particular, they are worried that travelling has become too difficult/dangerous especially with children and that family cannot come to visit anymore. There are some who don't want to go on another assignment, but many just feel more insecure and said they would give more thought to topics such as the political climate in a country, the distance to home (many being reluctant for intercontinental moves) and the healthcare system. For 6% of participants, Covid-19 has had a positive impact on their relocation readiness. When elaborating, they mentioned that experiences during Covid-19 have made them stronger as a family and as individuals.

*"I always thought I was only a few hours' flight away from home, so I could always go back if I needed to. I don't have that freedom anymore. That's why I believe expats will now challenge moving to another continent."*

## Views on expat life

Nearly a third (32%) of all respondents agreed that their general views on expat life have changed as a result of Covid-19, with no significant difference between expat partners and partners of international hires.



Who has changed their views? A total of 41% of partners aged under 35 years have, compared to 30% of partners over 35 years old. Of expat partners on their second assignment, 40% have changed their views on expat life in general (this group also scored highest on doubts about current assignments). Of the partners preparing for the first assignment 'only' 25% have changed their views compared to about 30% of expat partners on the first, third and fourth or more assignment.

In general, we may conclude Covid-19 has made partners more aware that the freedom they experienced before the pandemic can no longer be taken for granted. They have all experienced the impact of not being able to go home whenever they like. In turn, they have come to realise the importance of virtual networks. Some expat partners commented that they do not feel welcome in their host country anymore, citing experiences of (increased) discrimination of expats by locals.

*"It made me realize the importance of having a network abroad. The experience of expat life is really specific, especially in times of crisis. It's hard to share this with your network at home, they won't understand."*

The ongoing situation caused by Covid-19, has made expat partners more aware of the value of support (or lack thereof) from their partners' employers. The comments of expat partners aged under 35 reveal that, after 'missing family', they also greatly miss the freedom of movement they previously enjoyed. It's clear that for this group one of the great perks of being an expat has been travelling, exploring new places and meeting new people. This is either currently not possible due to restrictions or fraught with risks.

Comments from the partners of international hires generally revealed similar viewpoints.

## Concerns about expat life in general

Main concerns of expat partners:

1. Ability to go home
2. Loss of network / well-being of the children
3. General uncertainty, safety and security

Main concerns of partners of international hires:

1. Job opportunities for partners and therefore sometimes difficult financial situations
2. Loneliness and missing their families/network
3. Social integration

*"My biggest concern about expat life: will I be able to build a life that is, at least, on-par with what I left behind."*

## Additional thoughts

When asked if there was anything else they would like to share, many partners mentioned the importance of receiving (reliable) information from experts and employers. They have also come to realise their dependence on the government of their host country. At the same time, some partners are thankful not to be in their home country due to government measures and the healthcare system. Many voiced their hesitancy over intercontinental moves. All participants are aware that a network, both at home and in the host location, is crucial in difficult times as it gives stability. Split family situations have caused anxiety.

## KEY FINDINGS

Half of the first time movers reported doubts about their upcoming move. Most expat partners still want to start their expat adventure, just more cautiously, while a number of partners of international hires will consider reevaluating a proposed move based on how the crisis was/is being managed in their potential host country.

Nearly a third (32%) of all respondents who have already moved expressed doubts about their current posting due to the Covid-19 situation. Interestingly, all participating partners elaborated on the same topics in their comments. Of expat partners on a second assignment, 38% have doubts as a result of Covid-19. Notably, 45% of expat partners under the age of 35 had doubts over the situation.

For 71% of expat partners, experiences during the global pandemic do not appear to have influenced their willingness to continue their life abroad. However, their decision making process has changed. In general, the willingness to move to another continent has dropped significantly.

Nearly a third of all participants revealed that Covid-19 has changed their views on expat life in general. This rises to 41% in the under 35 age group. The ongoing situation has made expat partners more aware of the value of support (or lack thereof) from their partners' employers.

## FINAL THOUGHTS

We can conclude from the survey results that it's more important than ever to provide a professional support program, which can help partners to find their feet, build a new network, define a 'new fulfilling occupation', whatever that may be, and feel valued during their time abroad, or develop backup plans, when they need to opt for 'Plan B'. In stressful times, like the world is currently experiencing, a support program can also help to limit feelings of isolation and uncertainty.

Last but not least, we firmly believe the survey results confirm that support should be provided regardless of contract type and expat experience. Such a program does not just show the employer's recognition and acknowledgement. It also pays back in the form of a successful assignment.

## ACKNOWLEDGEMENT

The response to this survey was strong and Global Connection is very grateful to all of the expat partners and partners of international hires who participated to provide the global mobility industry with invaluable data and insights in the time of Covid-19.

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