Geographical mobility

Family impacts

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Introduction

Aim and scope of the study

This study examines the family impacts of geographical mobility, with particular emphasis on employer-initiated relocation. It is hoped that the results from this research will add to the understanding of the impacts on families of geographical mobility, and so will help to guide future policies. It is in the interests of employers and employees that the costs and benefits of relocation and other types of geographical mobility are fully understood and the negative impacts minimised.

In order to achieve this aim, the study involved:

- charting the changing role and nature of geographical mobility, especially relocation, in career development and corporate strategies;
- investigating the working and family life experiences of those who relocate;
- exploring family member experiences of geographical mobility;
- assessing the consequences of geographical mobility on career development;
- identifying elements in relocation policies that help to reduce the family frictions associated with mobility.

A particular emphasis of this report is on families with children. However, reflecting the diversity of family and household types and changes over the life course, as well as the interests of employers and policy makers, the experiences and concerns of single, widowed and divorced people, and of childless couples, are not excluded from the study. Similarly, although the main emphasis is on relocation – involving a change in residence as well as workplace, examples of the substitution of commuting for relocation, on a shorter- or longer-term basis, are

explored also. This broader canvas, encompassing geographical mobility in its widest sense, reflects the interests of employers, and the experiences of employees faced with the option of relocation. The main focus in this report is on geographical mobility within the UK.

Methodology

The research on which this report is based was conducted over a period from Autumn 2001 to Summer 2002. The approach adopted consisted of six main elements.

1. Literature reviews and limited background secondary data analysis

The first element of the project involved a wide-ranging review of the existing research base – focusing mainly on the UK and other western economies. Both academic and policy-related literature was included, drawing on work in human geography, sociology, psychology, business studies and economics. The review encompassed trends in the structure of employment and working practices, the role of geographical mobility in workforce development and corporate planning, developments in relocation policies and practices, changes in demographic and household structures, and trends in migration and commuting.

Despite the emphasis on case study and qualitative methods in the research approach adopted, it was considered important to conduct a review of information from secondary data sources, in order to provide a back-drop to primary data collection. In particular, reference

was made to the Labour Force Survey, the British Household Panel Study, the General Household Survey and the Census of Population.

2. Interviews with key informants

Interviews were conducted with key informants from the Confederation of British Industry (CBI) Employee Relocation Council and relocation companies/agencies, and with representatives from trades unions, central government and regional economic development agencies. A number of researchers with previous experience of undertaking relocation and migration studies were also consulted. A schedule was prepared to guide the key informant interviews (see Appendix A) – although in practice not all questions were covered with all interviewees. The purpose of the discussions was to:

- obtain expert overviews of the changing role of, emerging trends in, and prospects for,

relocation – within a broader context of geographical mobility and labour market and family changes;
- identify companies for detailed case studies; and to
- elicit information about developments in the nature and content of relocation policies.

Most of these interviews (and those with employers, employees and spouses/partners) were recorded, transcribed and analysed by manual content review.

3. Case studies and employer interviews

Case studies were conducted with 12 employers in order to obtain an employer perspective on the rationale for, and experiences of, implementing and devising, geographical mobility policies. Since issues of geographical mobility are pertinent across all sectors, a variety of sectors was covered in the case studies (see Table 1.1), encompassing a range of traditions

Table 1.1: Case study organisations

Company	Sector relocation	Group/ individual	Relocation agent	Employees who move	Size
BuildBlockCo	Manufacturing/ Distribution	Individual relocation	No	Non-manual – mainly sales	Large
ChemCo	Pharmaceutical	Group move	Yes for group move	Non-manual – nearly all professional	Medium
FuelCo	Utilities	Move from group to individual relocation	Yes	Non-manual primarily but some manual	Large
WorldCarCo	Manufacturing	Individual relocation	No, but outsources legal elements	Non-manual primarily, but some manual	Large
DrinkCo	Manufacturing	Mainly individual, some compulsory	Yes	Mainly non-manual, sometimes manual	Large
FizzCo	Manufacturing	Individual and group	Yes	Non-manual primarily but some manual	Large
SpiritOrg	Religious	Individual	No – for virtually all aspects	Ministers and Superintendents	Large
BigShop	Retail	Individual	Yes	Non-manual	Large
DesignCo	Research and development	Individual	Yes	Non-manual	Medium
BankCo	Financial services	Individual	No	Non-manual	Large
GrubCo	Manufacturing	Mainly individual, some group	Yes	Non-manual and some manual	Large
AllServCo	Services	Mainly individual, some group	Yes	Non-manual and manual	Large

and experience of relocation in workforce planning/development. Employing organisations have been ascribed fictional names to preserve their anonymity. Candidates for case studies were identified with assistance from relocation companies, the CBI Employee Relocation Council and other key informants, and by contacting a number of organisations directly. The researchers were dependent on the cooperation of the employers concerned in conducting the research. With 12 case studies it is not possible to provide a comprehensive or precisely representative overview of organisational perspectives on relocation. However, it is considered that the organisations selected provide a useful indicative picture.

Within each case study organisation, a face-to-face semi-structured interview was conducted with one or more representatives responsible for human resources. Topics discussed in each interview (see Appendix B) included:

- background to the organisation and the business environment;
- the rationale for relocation policies and the perceived benefits and costs of such policies from an organisational perspective;
- the nature, form and coverage of policies for geographical mobility currently implemented by the company – set within a context of previous practice and planned/possible future developments;
- employee attitudes to relocation – including changes over time;
- family issues; and
- assessment of the success/failure of relocation and commuting assignments.

At the end of each interview a request was made for the human resources manager to identify employees within the organisation who had been faced with a relocation opportunity in the last few years for potential inclusion in subsequent employee interviews.

4. Employee interviews

Individuals' attitudes to geographical mobility and associated impacts on family life and career development were explored in semi-structured face-to-face and telephone interviews with 64 employees from the case study organisations. Fifty-three interviewees were males, and most were employed in higher level non-manual occupations, reflecting the overall profile of persons moving for job reasons (see Chapter 2). The sample of interviewees included relocatees with single and multiple experiences of job-related moves.

Initially, potential interviewees were provided with a summary of the scope and purpose of the project and were invited to fill in a pro forma (see Appendix C) providing background information on residential and employment histories, experience of relocation and household structure. Following receipt of the completed pro forma a date and time for interview were arranged. Interviewees were sent a copy of the interview schedule (see Appendix D) prior to the appointment. Most interviews lasted around forty minutes. First, interviewees were asked to reflect on their career history and on their attitudes to, and experience of, geographical mobility. Then they were invited to outline in more detail their experience of the relocation process and the impacts of geographical mobility on family life, before providing an overall assessment of what geographical mobility was like for them, and their family. Those with multiple experiences of job-related moves were able to reflect on this wider experience during the course of the interview. At the end of the interview the interviewee was asked whether their partner (if they had one) would be likely to be willing to take part in an interview.

5. Partner interviews

The final phase of primary data collection involved partner/spouse interviews. It is important to take account of the views of partners/other family members, since they stand to lose or gain from geographical mobility. It is recognised that in assessing geographical mobility, the structure and content of the relocation 'balance sheet' may not be perceived in the same way by different individuals within the household and, thus, for the household overall. For example, there may be a net gain for individual A and a net loss for individual B, culminating in a net gain for the household.

A total of 21 partner interviews, each lasting around thirty minutes, were conducted by telephone. Of the partners interviewed, 18 were females. The topics covered in partner

interviews (see Appendix E) were similar to those included in the employee interviews.

6. Synthesis

The final part of the project synthesised the findings from the first five elements, in order to provide theoretical and practical insights into the changing role of geographical mobility in corporate strategy, on career development and on family life. In terms of policy and practice, it is hoped that the research will aid a fuller understanding of the impacts on families of geographical mobility, and the relative advantages and disadvantages of relocation for different family members.

Structure of the report

Chapter 2 of the report sets the context for the study in more detail. It begins by rehearsing the relevance of geographical mobility as a key cross-cutting issue impacting on many different policy domains. It moves on to outline the nature, volume and types of geographical mobility, and to explore the rationale for geographical mobility. Key labour market trends are described, and the nature and content of relocation policies are discussed. Changes in household and family structures are detailed also. This chapter draws on material from the literature review, secondary data sources and interviews with key informants and employers.

Chapter 3 is concerned with the relationship between geographical mobility and career development. It draws on the literature review and interviews with key informants, employers, employees and their partners. The impacts of relocation and other types of geographical mobility on employee careers and partner careers/jobs are described. The chapter concludes with an overview of career strategies and geographical mobility.

Most of the information presented in **Chapter 4** draws on employee and partner interviews, but reference is also made to material collected in employer and key informant interviews and from the literature review. Key issues for individuals and families at different stages of the life course are identified. The ways in which geographical mobility can act as a catalyst for family fission and family fusion are described. Particular emphasis is placed on the impacts of geographical mobility on children, young adults and older relatives, as well as on partners. Costs and benefits of geographical mobility are explored.

With a view to optimising geographical mobility and facilitating good practice, **Chapter 5** addresses the diversity of experiences of relocation, and the way in which such experiences are associated with variations in mind sets and expectations. An attempt is made to assess the components of 'success' and 'failure' in relocation. The role for initiatives to assist employees and other family members, outwith the traditional financial confines of relocation policies, is examined. This chapter draws on evidence from all employee, partner, employer and key informant interviews.

Chapter 6 summarises the main findings of the report and draws out their policy implications for different audiences.

Context

Background

Policy relevance

Geographical mobility is of increasing relevance to government policy, yet it does not fit neatly into a single policy sphere. Rather it is a cross-cutting issue that has implications on a macro scale for many different domains, including economic competitiveness, social well-being and sustainable development (Donovan et al, 2002). From an economic perspective, it can play a role in matching people to jobs, thus enhancing the utilisation of skills and leading to greater productivity, lower unemployment and greater wealth. In aggregate, geographical mobility is strongly related to upward social mobility (Savage, 1988), but some individual movers may suffer downward social mobility. It may disrupt social networks of friends and family (Aldridge et al, 2002), or even break up families, having a detrimental effect on social well-being, with knock-on costs to individual health. From an environmental perspective, geographical mobility may lead to additional pressure for development and claims on services in growing areas, with concomitant implications for congestion and quality of life as the infrastructure is stretched. Conversely, out-migration may lead to a cycle of decline in contracting areas and associated challenges for local regeneration.

At a micro level, geographical mobility has implications for individuals, families and households (Munton et al, 1993). It is these micro-level implications, and their broader consequences that are the focus of attention in subsequent chapters.

Structure of chapter

In the next section of this chapter the concept of geographical mobility is unpacked with reference to the migration literature, and secondary data sources are used to outline the volume of mobility and the characteristics of movers. The discussion then considers the nature of relocation policies, drawing mainly on material from interviews with key informants and employers, and on the relocation literature. Finally, key labour market trends are described and the changes in household and family structures that form the backdrop for an assessment of the family impacts of geographical mobility are discussed.

The nature, volume and types of geographical mobility

Definitional issues

Migration involves a permanent change of usual residence, with no intention to return. Each year about 10% of households in England migrate. Most of these are local moves over short distances, and are associated with the desire to improve the quality and nature of housing. According to the Survey of English Housing 13% of residential moves in 2000-01 were undertaken for job-related reasons (ONS, 2002). Such moves are typically over longer distances, and involve a greater disruption to everyday activity patterns of household members, than do short-distance moves. It is a subset of these longer, more potentially disruptive, moves that is the main focus of attention in this report.

Job-related *relocation* is used here to refer to intra-organisational moves between an origin workplace site and a destination workplace site in different geographic locations. Within relocation a distinction is often made in the literature between:

- *Group moves*: involving the move of a group of employees from one location to another, for reasons such as expansion or contraction of business, changing organisational structure and so on. Such moves can be considered as 'compulsory' or 'enforced' moves if there is no possibility of staying in post in the original location.

and

- *Individual moves*: involving the relocation of individual employees, often for career development purposes. In some instances individual jobs disappear, and a relocation might therefore be the only means of maintaining employment in the organisation, whereas, in other instances, employees are relocated as a result of successful applications, initiated by themselves, for internal vacancies. Sometimes individuals might feel pressurised

by their employers to relocate, even though their original job might have continued. Hence, individual moves encompass both 'enforced' and 'voluntary moves'.

The majority of interviewees and their families whose experiences are detailed in subsequent chapters are individual moves, although there are examples of group moves too (see Table 1.1). However, the moves covered may be conceptualised as occupying a full range of positions along a compulsory ←→ voluntary continuum, such that it was not possible to categorise all of them into discrete groups.

Traditionally, relocation has implied residential migration (that is, it has involved a relocation of residence as well as of workplace). Moves involving a change of residence as well as of workplace are the focus of this report. However, an intra-organisational workplace change does not necessarily imply residential change; rather it may be associated with some kind of non-permanent move of varying duration, encompassed within the term *circulation* (see Figure 2.1). While the main emphasis of this study is on relocation, all types of geographical mobility impact on the family. These were of key interest to the organisations, employees and partners interviewed, and are therefore given consideration here too.

Figure 2.1: Geographical mobility: migration and circulation

Duration			Reason for move	
			Production-related	Consumption-related
Time	Permanent relocation		Labour migration (inter- and intra-organisational moves)	Housing adjustment Amenity-led migration
	Circulation	At least one (usually several) overnight stay(s)	Short-term assignments Long-distance (weekly) commuting	Holidays
		Daily	Commuting	Shopping

Note: Shading indicates types of geographical mobility of relevance to this report, with the darker shading indicating the primary focus.
Source: from Bell (2001, 2002)

One alternative to migration, on either a short-term or a longer-term basis, is *long-distance commuting*. This may be on a weekly basis, with the individual living near the workplace during the week in rented accommodation and apart from the family, and returning to the main family home at the weekends. In other instances, long-distance commuting might be undertaken on a daily basis or in combination with flexible working, involving working from home for part or most of the week. A further variation on the migration ⟷ commuting theme is the use of *short-term assignments*. There is no universally agreed definition of such moves, but, typically, a short-term assignment would involve an employee working away from home for a fixed period of several months, often on a project basis, while the family remains in situ at the family home.

How many people relocate?

There are no reliable figures and there is no definitive source of information on the volume of relocation. The main reason for this is that the term is not well defined; rather, it means different things to different people. The term is used variously to refer to the shifting of a workplace to the next street right through to an international posting.

In the absence of a robust and widely accepted definitive baseline, it is difficult to be precise about trends in relocation and other types of geographical mobility. According to Incomes Data Services (IDS, 1999) about 120,000 employees are relocated by their employers each year in the UK (although information is not provided on the source for this estimate or the definition of relocation used). Of employers responding to the Employment Trends Survey 2000 (CBI Employee Relocation Council, 2001), 73% expected the number of intra-UK relocations to remain the same over the next year. This accords with the view of at least three in four employers and key informants interviewed that the volume of relocatees has remained relatively static over the last two to three years.

In contrast, there is a general perception (with 11 out of 12 case study employers supporting this view) that the adoption of commuting strategies (*circulation* in the terminology of Figure 2.1) is increasing. Information from the National Travel

Survey shows that commuting trips increased in distance and time taken during the 1990s (DTLR, 2001). This trend is in accordance with evidence from a review of relocation suggesting that employees may be less willing to relocate than previously, coupled with use of commuting as a partial substitute for relocation, perhaps combined with working from home a few days a week (IDS, 2002). The CBI Employee Relocation Council (2001) has also suggested that less emphasis is being placed on relocation, and more on the alternatives of commuting assignments and virtual working (that is, having no fixed place of work). Doyle and Nathan (2001) point to a trend towards greater blurring of different types of geographical mobility. This is supported by this study.

Who relocates?

Relocatees are not drawn evenly from all sections of the workforce (see Box 2.1 which shows the characteristics of individuals reporting job relocation in the 1994/95 Labour Force Surveys).

Box 2.1: Characteristics of job relocatees (1994/95)

- *Age*: disproportionately young – more than three quarters were aged under 40 years.
- *Gender*: males accounted for approximately four out of five relocatees.
- *Marital and family status*: seven in ten relocatees were married/cohabiting; under half had dependent children.
- *Occupation*: over three in five were from higher level non-manual occupations (compared with just over a third of the labour force); less than one in ten relocatees were from skilled, semi-skilled and unskilled manual occupations (compared with nearly a third of the labour force).
- *Qualification levels*: over a quarter were educated to at least degree level, and 60% to at least NVQ Level 3 (that is, upper secondary) level.
- *Relocation assistance*: more than three in five received financial help with the move, with three out of four who received help having all financial costs paid.

Note: 'Job relocatees' are defined here as individuals who moved in the last 12 months because their job relocated. *Source*: analysis of the Labour Force Survey (1994, 1995) (relevant questions on the so-called 'mobile workforce' were discontinued after 1995)

These characteristics are in accordance with employer perspectives that, in most instances, relocation tends to be confined to managerial, specialist and higher grade employees (see also IDS, 2002), and that those in less skilled and manual occupations hardly ever move – even if relocation assistance is available. This is borne out in the case of the ChemCo group move – one of the case studies in this report – where virtually all professional specialists took up the relocation package in an enforced move, while few of the administrative staff (to whom a package was also offered) did so. Another of the case studies also confirmed this. The GrubCo representative cited a case of only one or two out of 200 weekly-paid staff taking up the opportunity for relocation in the event of a factory closure: "At the end of the day they have a job with 'X', not a career". So, while migration is often seen as an integral part of many professional careers, it has little to do with the nature of most manual occupations (Hollywood, 2002).

Information from longitudinal data sources also confirms this picture (Boheim and Taylor, 2002). Using the Family and Working Lives Survey, Green et al (1997) showed that two thirds of professional people changed their place of residence more frequently than the British average. The same analysis showed that skilled and unskilled manual workers are disproportionately represented among the less mobile 'infrequent movers' and 'stayers' categories.

Rationale for geographical mobility

From the key informants, employers, employees and spouses/partners interviewed in this study, the two most common reasons given for geographical mobility were *business need* and *career development*. Other responses, including 'refreshment and renewal' and 'to demonstrate commitment', often displayed clear links with these two main imperatives.

Business need

Several employers spoke of a business requirement to have the right people in the right place at the right time. For some (but not all) employers, such requirements were absolutely paramount. One employer representative asserted that relocation:

"is a small price to pay to get the right person in the right place to do the job we want."

Some employer representatives acknowledged that, while the rationale for geographical mobility has always been based on business need, the drivers of business need might have changed over the past twenty years. One key informant from the relocation industry suggested that, in the 1980s, moves to lower cost locations were a key driving factor in relocation, while, during the 1990s, mergers, acquisitions and rationalisation became relatively more important drivers. Addressing skill shortages in the local labour market has also become more important. A representative of another of the case study organisations, WorldCarCo, indicated:

"If we need a skill in a specific place, we will relocate."

There are clear advantages to an organisation placing someone with known abilities and expertise in a specific role. Moreover, it was acknowledged that it is sometimes cheaper to move an existing employee than it is to recruit on the external labour market.

Many employers emphasised the quickening pace of change in the business environment during the 1990s, reducing the time available for relocation as a strategic planning process. A number of companies reported that they were increasingly responding to short-term business needs through temporary assignments (sometimes referred to as 'semi-permanent moves'), as well as through relocation. This suggests that, from a business need perspective, relocation (and other types of geographical mobility) may be being used increasingly as a rapid reaction measure in responding to business crises. Moreover, what one trade union representative referred to as a prevailing "everything has to be done yesterday" philosophy, in turn means that lead-in times to relocation shorten. The consequence is that relocation is often done on what one relocation specialist referred to as a "'hit and run' basis to provide a short-term quick fix", which, in turn, has implications for families' experiences of relocation (as outlined in Chapter 5).

Career advancement

Three of the 12 case study employers placed greatest emphasis on career development as the rationale for geographical mobility (see Chapter 3), with the GrubCo representative asserting:

"The rationale for geographical mobility has always been career development. It is made very clear that employees who are successful are those who have worked in more than one product area, in more than one function and in more than one company (in the group)."

In this, and other organisations, geographical mobility is linked to 'broadening perspectives' – enabling individuals to develop new skills and apply existing skills in different contexts. In the SpiritOrg case study great emphasis was placed on the desire to retain a fresh perspective. The necessary 'renewal and refreshment' is achieved through relocating personnel every five to seven years.

Some employers acknowledge that relocation and willingness to relocate are closely tied to career advancement – at least for *some* staff. As highlighted in Chapter 3, many employees see relocation as an opportunity to advance their career by enhancing their skills and experience and displaying commitment to their employer. Indeed, some employers view the opportunity for relocation (and other types of geographical mobility) as a valuable recruitment and retention tool within an overall career development programme. They recognised that the availability of opportunities for geographical mobility and career advancement may enhance their attractiveness as 'employers of choice' – particularly for highly qualified and ambitious younger employees.

The nature of relocation processes and policies

What types of relocation assistance are available?

Finance foremost

Most large employers have formal relocation policies (IDS, 2002). Traditionally such policies have given prime consideration to the financial and property transaction elements of mobility. Since home ownership levels are high in the UK, and a house tends to be an individual's or family's biggest financial asset, it is not surprising that it is the central feature of many relocation policies. The main types of financial assistance included in relocation packages by most of the employers interviewed in this study are detailed in Box 2.2.

Box 2.2: Relocation packages: types of financial assistance

- *Travel and subsistence costs* incurred in attempts to find a new home in the destination area – typically a maximum number of family visits is prescribed.
- *Expenses directly related to the process of moving* (including house sale and purchase): legal fees, estate agent's commission, mortgage valuation fees, stamp duty and actual removal costs (other provisions may be made for renters).
- A *disturbance allowance* or *duplicate expenses* to cover miscellaneous expenses of the move (such as carpets, curtains and so on) – sometimes this is a flat-rate allowance; sometimes linked to a proportion of salary.
- *Temporary accommodation, travel and subsistence costs* if a new home is not available to coincide with the start of the new job in the destination area – generally a maximum amount and time period for assistance is specified.
- Help with a *bridging loan* to assist with the purchase of a new home prior to the disposal of an old home – up to a specified maximum period.
- Home sale *guaranteed sale price (GSP) scheme*.
- An *additional housing cost allowance* to compensate for the increased cost of providing a comparable property in the destination area – designed to take into consideration housing cost differentials between areas.

Taking into account financial provisions only, significant costs are incurred in relocating employees. The Inland Revenue sets a ceiling of £8,000 on the income tax relief available to employees, and, at the time of the study, this amount has remained unchanged since 1993. Many employers agree to gross up their assistance beyond this to meet employees' tax liabilities. Information on the average cost of relocation is not readily available in the public domain. However, in 1998 an Industrial Relations Service (IRS) survey reported that the cost of relocation in the UK was typically £15,000, although there was a wide range around this (IRS, 1998). Case study information from IDS studies (1999, 2002) also highlights the wide range in costs between individuals and points to average relocation costs for relocating an employee of around £15,000-£20,000. Of course for some employees relocation costs are much higher. Property-related costs are the greatest element of overall sums spent on relocation. A strong housing market therefore pushes up employer costs (IDS, 2002).

In the face of such financial costs, there are pressures on employers to be cost-conscious. Two case study organisations covered in this research reported that they no longer offered a GSP facility or assistance with inter-area housing cost differentials, in order to constrain costs. Both these employers acknowledged that a consequence of this was that it was difficult to entice relocatees to the high-cost regions of London and the South East. Where relocation assistance is given, policies generally include pay-back clauses, involving a claw back on a sliding scale if the employee leaves the organisation within a specified time.

Other services

Some relocation policies may also provide access to home search and mortgage advice facilities and area guides (detailing facilities and services in the destination area). The debate among employers and employees continues about the extent to which relocation policies should extend in scope beyond financial provisions and the individual relocatee to the relocatee's family (this issue is discussed in Chapter 5), although it is widely recognised that a move does impact on all family members. Types of relocation assistance of particular relevance to other family members

include education advice, encompassing help in finding and brokering entry into schools, and partner employment assistance. Whether non-financial assistance is provided varies among employers, as do the terms and nature of such assistance. Six of the 12 case study organisations participating in this research stated categorically that they did not provide any non-financial assistance and in most other cases such assistance was limited.

Outsourcing of relocation

Most companies are not dealing with relocation all of the time, and often are reliant on human resources personnel who have built up relocation expertise on-the-job. Hence, they might prefer to concentrate on their core activities and buy in specialist services to deal with relocation. The term 'outsourcing' refers to use of a third-party supplier to manage non-core management functions, with the aim of bringing greater specialist knowledge efficiencies to these processes. This may be in terms of cost savings, improvements to service delivery, to enhance uniformity and consistency of policy implementation, improved administration and flexibility. IRS relocation surveys have shown that the proportion of companies using outsourcing for some or all of their relocation work has grown from one in four in 1989 to three in four in 1998 (IRS, 1998).

Some case study organisations outsource some aspects (such as the legal work and GSP), but not others. Others do not engage a relocation agency, but have a list of preferred suppliers for some services. Both large and small relocation companies and agencies draw on specialist consultants offering expertise in partner career counselling, school education issues and so on.

Who gets what?

It is difficult to be precise about who gets what relocation assistance, even within the same organisation, because eligibility for assistance, by extent and by type, tends to vary by seniority. In general, the more senior people get the greatest financial and non-financial assistance – in the words of a trade union official: "irreplaceable people get the cotton-wool treatment in relocation". Assistance might also vary according

to the reason for the move (with more assistance for enforced than for voluntary moves) and the speed of move.

In employer and key informant interviews a general recognition was apparent of the need for a certain amount of flexibility in relocation policies (see also IDS, 2002), in order to fit the complexity of individual employee and family circumstances, and the living and working conditions in origin and destination areas. Yet it was also recognised that such flexibility needs to be reconciled with a certain amount of formalisation, for ease of operation, as well as for transparency, equity and cost control. Indeed, relocating employees often expressed a desire for flexibility to suit their own individual and family circumstances, but were also very concerned about parity with colleagues. The case study organisations occupied different positions, and were moving in different directions, along the rigid $\longleftrightarrow$ flexible policy continuum. In a similar fashion, the pendulum appears to constantly swing between centralisation and decentralisation in terms of administration and responsibility for moves. There was no clear consensus among case study organisations about whether financial control and efficiency in policy delivery objectives were best achieved through centralisation or decentralisation.

Relocation as an element of a family–friendly employment policy

Logically, relocation is a fundamental part of a family-friendly employment policy. While many employers are strong on the rhetoric of work–life balance for their workforce, employees and their spouses/partners often see the difficulties of translation into practice in the context of geographical mobility. Indeed, some (but not all) employers admitted that relocation lies largely outside discussions about family-friendly employment policy, since family circumstances tend not to be taken into account in relocation. The representative from the BigShop case study admitted:

> "It sounds bad. We're so clued up on the family-friendly policy side of things that relocation seems to be a contradiction.... I think perhaps we have focused too much on the frilly outside bits that everyone sees and not on the internal bits that we

administer, we are well aware that our relocation policy isn't a guiding light...."

The very diversity of family circumstances and of individual preferences, however, means that achieving a consistent and transparent relocation policy across the board, within a broader work–life balance portfolio for employees, is a difficult challenge to address. As a male partner in his mid-fifties reflected on following his wife in her most recent relocation and formerly relocating for his own career: "when and where you move should be dependent on your situation". This same point was acknowledged by the GrubCo representative, who recognised that employees deal with relocation issues differently, and may be more or less willing to relocate and/or commute at different stages of their career or life course. There may therefore be scope for employers to enhance their understanding of the ways in which employee aspirations change over the life course (outlined in more detail in Chapter 4) and promote relocation as part of a strategy to achieve better work–life balance for individual employees and their families at certain stages in their lives (see Mauthner et al, 2001).

Key labour market changes

The changing composition of employment

There have been marked changes in the industrial and occupational structure of employment over the past twenty years. Manufacturing and primary industries have been characterised by job losses, and services by employment gains. There has been an accompanying shift from manual to high-level, non-manual occupations. This is indicative of the knowledge intensification of employment, associated with a greater premium on formal qualifications. Similar industrial and occupational shifts are projected to continue over the medium-term (Institute for Employment Research, 2001).

These industrial and occupational changes have been accompanied by shifts in the gender composition of the workforce and in employment status. Growth in female employment has outstripped that in male employment, and increases in part-time jobs have exceeded those in full-time jobs. While women remain concentrated in traditional clerical,

secretarial and personal service occupations, there have been marked increases in the number of women employed in higher-level, non-manual occupations.

Women and paid work

Given the central concern here with families, women's increasing participation in, and commitment to, paid employment is of particular importance. In 1999 three quarters of women of working age in a married/cohabiting couple were in employment. The number of women aged 25-44 years in the labour force increased by over 3 million between 1971 to 2001, to reach 6.6 million. During the 1990s the main increase in female economic activity rates was among women with dependent children. In 1991 48% of women with pre-school children were economically active, but by 2001 the proportion had increased to 57%. Despite the marked increase in women with dependent children working full-time between 1991 and 2001, such women remain more likely to work part-time, and less likely to work full-time, than those without any dependent children.

When and where work is done

Changes in the spatiality and temporality of work also impact upon families (Felstead et al, 2002; Hardill, 2002). Over the long term, the industrial world's timetable of the '9 to 5' office and silent Sundays, has given way to a more 'flexi-time, flexi-place' world (Hardill and Green, 2001; La Valle et al, 2002). This has been reflected in organisational restructuring and contractual relations – particularly in relation to hours of working (Hogarth et al, 2000; Dex and Smith, 2002) – and has been facilitated by technological change, which has increased the options for ways of working. This, in turn, opens up the possibility of an increasingly diverse choreography of living and working (Green and Shackleton, 2000), with important implications for families and for work–life balance more generally.

What are the implications?

Changes in the composition of employment and in ways of working suggest that:

- the number and proportion of women involved as prime movers in relocation is likely to increase;
- an increasing number of dual-earner and dual-career households is likely to lead to more constraints on household moves, as moves are more disruptive for employed than for non-employed partners;
- a greater proportion of relocations will involve graduates, who have often made an initial break with their family as young adults and who often have greater experience of, and willingness to, relocate than their less qualified counterparts;
- the premium placed on qualifications means that issues relating to the impact of mobility on children and their education are likely to remain extremely important.

Key family changes

Greater diversity: 'the incredible shrinking family'

There have been important changes in family structures in recent years (McRae, 1999). Formerly, a typical relocation involved a nuclear family, with the husband as relocatee, the wife as housewife/mother, and dependent children. According to a relocation specialist interviewed, in such circumstances the wife often played an extremely important role in "organising and orchestrating the move", and helping the family to settle into the new environment at the destination location.

However, family structures are changing in several different ways. Youth transitions to independent living are more extended and diverse than formerly, such that the average age at which children leave the parental home has risen. The average age of first marriage rose to 30.5 years for men and 28.2 for women in 2000. Women are also starting their families later: those giving birth for the first time in 2000 had an average age of 27.1 years, and the numbers of women aged 35-39 having a baby doubled in the 1980s and 1990s. The fact that women are

choosing to have fewer children, have them later in life, or remain child free, has implications for family life and work–life balance. More women are pursuing careers, and this in turn has led to a rise in dual-career households. The number of single person households has increased also: the proportion of households consisting of a married/cohabiting couple with dependent children declined from one in three in 1979 to one in five in 2000.

Reich has coined the term 'the incredible shrinking family' to describe:

> connections [that] are becoming more temporary, people spend less time together, couples are having fewer children, financial support between spouses is eroding, and care and attention are being subcontracted. (2001, p 170)

Although there may be more of what one relocation specialist termed "pick and mix families" co-existing alongside traditional nuclear families, family diversity does not necessarily equate with family decline. Despite changes to the family and increased individualism (Beck and Beck-Gernsheim, 1995, 2002), most people still have strong family ties: family continues to play an important role in the lives of individuals (Scott, 1997). Important family ties still exist across generations, with relatives often playing an important role in provision of care. Indeed, people aged between 50 and retirement have been identified as a 'pivot' generation, combining work with care roles up and down the generations (Mooney et al, 2002).

What are the implications?

Greater diversity in family structures, along with more variable and less predictable patterns of residence and co-residence, and with key demographic changes (notably the ageing of the population), would imply that:

- the potential family impacts of geographical mobility are likely to be more varied and diverse than formerly – perhaps leading to a need for greater flexibility in relocation and geographical mobility policies;
- problems relating to dual-earner/dual-career families are likely to become more prominent;

- there may be more single relocatees – with more varied family considerations to take into account;
- as young people remain in the parental home for longer, the impacts of parental relocation on young adults may become a more important factor in relocation decisions;
- care for older people is likely to rise up the policy agenda as it is increasingly an issue for those facing a relocation decision and may impact on people's willingness to be geographically mobile;
- the impact of mobility on children and their education is likely to remain a key concern for families with children, such that they are reluctant to relocate;
- there is an increasing need to consider family in terms of a system of relationships that change over time (rather than solely in terms of traditional household composition).

Conclusion

The developments in the nature of geographical mobility, in the labour market and in families and households outlined in this chapter suggest that the context for relocation has become more complex and diverse. Commuting strategies have substituted relocation in some instances, such that circulation accounts for a greater proportion of job-related geographical mobility than formerly. Labour market trends mean more women are in, and committed to, employment – whether or not they have dependent children.

Those individuals faced with relocation, particularly those in senior positions, may have a wider range of working and living arrangement options open to them than formerly. These options have implications not only for the individual employee concerned, but also for his/her family and employer, as well as for the economy and society more generally. For individuals and families, greater choice may be a good thing, while for employers it may be a bad thing. For the economy and society, whether greater choice is a good or a bad thing appears more uncertain.

3

Impacts on career development

Introduction

This chapter traces the relationship between relocation and career development. The first section draws on the literature to outline different types of career strategy, then reflects on their links with geographical mobility.

In the second section of the chapter the focus is on geographical mobility and employee careers (with the term 'employee' being used to refer to the individual employee given the initial opportunity for relocation by the employer). This section draws on material from employee, partner and employer interviews, and quotes from these interviews are presented in the text. Traditions and expectations of geographical mobility are discussed, and the career implications of moving and not moving are outlined. A continuum of employee attitudes to relocation is presented, encompassing those who are 'happy to move', those who are 'happy to move within reason' and 'reluctant movers'. The question of whether geographical mobility is necessary for career development is discussed also.

The third section focuses on issues raised by relocation for partner employment (with the term 'partner' being used to refer to the partner of the employee prompting the relocation opportunity). The partner may or may not be an employee themselves. Evidence from the literature on the implications of geographical mobility for partner employment is reviewed prior to a consideration of partners' willingness to move using case study material collected during the course of the research. Drawing on material from partner interviews, a continuum of partner attitudes to relocation is presented, encompassing those who

are 'happy to fit in' with the geographical mobility demands of another's career, those who feel that their own employment ambitions have been 'frustrated' and those who are 'resentful' of the relocation demands of another's career. Features of partners' careers that make relocation easier or more difficult are identified.

Key conclusions on the impacts of geographical mobility on career development are presented in the final section of the chapter.

Geographical mobility and career development

Career strategies

Traditionally, career progression within large multi-site organisations has been associated with geographical mobility. Individuals in such organisations were expected to gain experience in different functions in different locations for career advancement (Savage, 1988; Salt, 1990). Hence, social mobility was achieved through spatial mobility. With labour market restructuring, typical organisational careers have broken down to some extent, with fewer employees envisaging a lifetime career with one employer.

Building on the work of geographers and sociologists who have examined the relationship between career advancement and geographical mobility, Table 3.1 presents a simple typology of career strategies and their key features.

Table 3.1: Typology of career strategies

Career strategy	Description	Increasing/decreasing importance	Geographic mobility implications
Organisational	Individual pursues their career by moving through the career structure of an individual (often large) organisation	Decreasing	Mainly relocation between sites for career development
Occupational	An individual continually invests in skills-based (often, but not always, occupationally specific) assets – typically gaining experience with a range of different employers – in order to pursue their career	Increasing	Often residential immobility and workplace change associated with inter-employer moves
Entrepreneurial	A self-employed individual aims to become a small, and possibly large employer of labour	Increasing slightly	Usually residential immobility

Source: adapted from Savage (1988) and Green (1992)

Occupational and organisational strategies are quantitatively the most important (Green, 1992). The methodology adopted in this research, focusing on organisational case studies, would be expected to place emphasis on organisational careers. However, some employees interviewed indicated that they saw their time with their current employer as being limited, viewing it as one element within an occupational career strategy. Indeed, at least half of the case study employer representatives interviewed indicated a trend towards an increase in the importance of occupational career strategies on the part of individuals employed, with many employees expecting what one employer representative referred to as "a lifetime of jobs as opposed to a job for life".

What are the implications for geographical mobility of changing career strategies?

As outlined in Table 3.1, an organisational career strategy implies relocation at the behest of the employer. Employees are often concerned about the consequences for their career of refusing a move. An occupational career strategy might imply employees choosing to take greater charge of their own careers. For some employees, this might mean, in the words of a trade union representative, that: "the cloud that used to hang over the employee who turned down a move has dissipated to some extent". Adoption of an occupational career strategy could, in other circumstances, be a consequence of an employee forgoing a preferred choice of an organisational

career at the behest of a partner and/or other family members who desire residential stability. From a single residential base, an occupational career strategy might be pursued by changing employers – with the concomitant changes in commuting patterns, rather than with relocation. This is in accordance with the increasing importance of circulation relative to relocation outlined in Chapter 2. It is also endorsed by findings from a study of the locational and mobility strategies of dual-career households, which highlighted how many such households sought residential locations to maximise commuting potential (Green, 1997). Pursuit of an occupational career strategy, however, might involve adoption of relocation, as well as the commuting option.

Some individuals adopt different career strategies at different times of their working lives. In order to develop their careers they may be prepared to move both within a company and between companies. This implies experience of both relocation and of residential immobility coupled with workplace change.

Geographical mobility and employees' careers

Traditions and expectations

There are different traditions and expectations of geographical mobility in different industries, in

different job functions, in different companies and even in different parts of the same company. In some industries (such as hospitality) there is limited geographical mobility, but moves between employers within a limited geographical area for career development purposes are relatively commonplace. In other industries (such as pharmaceuticals) there is a much greater expectation of geographical mobility associated with career development. Similarly, in certain occupations (such as sales) there is an expectation of working in different locations to gain the breadth of experience necessary to progress up the career ladder.

Despite the emphasis in this chapter on career development and geographical mobility, it should be remembered that for much of the workforce and population at large, geographical *im*mobility has a strong rationale. Weighed against a variety of familial, social and housing factors, geographical mobility for employment reasons may not be an appropriate strategy for many of the low-skilled who have jobs rather than careers, or for the unemployed (Kitching, 1990).

What are the implications of geographical mobility for individual careers?

Many of the employees interviewed spoke of an awareness of the need for geographical mobility when they took up employment in their chosen occupation or joined their particular employer. Some took this on board quite readily, contending that it was advantageous for individuals in most walks of life to move around from time to time in order to benefit from fresh stimuli and encounter new challenges. One male employee in his early forties with experience of several relocations said:

"You clearly get different experiences and you clock up the different types of situation and apply them to new situations."

Some employees considered expectations for, and the advantages of, geographical mobility to be increasing, particularly in multinational companies:

"The world is increasingly global, major organisations are international, if you're going to make progress in one of those you

need to get experience in a number of locations." (Male employee of multinational company, mid-forties)

The FuelCo manager interviewed reported that the idea was entrenched that in order to advance your career you must be prepared to relocate. Similarly, a male employee in his mid-forties with a sales background declared:

"It strikes me as quite difficult to stay where you are and to continue your career. Certainly in my experience, with other people who have been geographically constrained, their aspirations have been very much constrained as a result. There's an expectation amongst employers that you should be mobile, and it holds you back if you're not."

In this context, it is not surprising that most employees regarded relocation as a vote of confidence and an upward move, and were concerned about the possible detrimental consequences to their career if they refused.

What are the implications of turning down a relocation request?

Some employers (for example, WorldCarCo) were unequivocal that, although employees are not forced to relocate, career prospects are diminished by an unwillingness to be geographically mobile. Similarly, the DesignCo manager stressed that "mobility is central to career progression": while it is possible for an employee to remain on one site, it is recognised that their career would not progress as quickly as that of someone who has relocated.

The general consensus among employees was one of acceptance of the benefits to be gained from new and broader experiences for career advancement purposes, such that: "by not being prepared to move you restrict your progression" (male employee, mid-thirties). Some families are reluctant to turn down a request for a move for fear of the consequences: "People are scared of not moving if they have the opportunity" (a female partner, mid-forties).

Are employees willing to move?

Before answering this question, it is important to recognise that many employees facing a relocation opportunity are aware that they need to be mobile if they want to advance their careers. Hence, the views emerging from employee interviewees are unlikely to be representative of the workforce at large. Rather, as outlined above, they are indicative of the range of views of a sample of workers many of whom recognised when embarking on their career or taking up a post with a particular employer that relocation requests would be forthcoming.

A continuum of views among relocating employees

On the basis of the employee interviews, it is possible to identify a number of positions that relocating individuals occupy along a 'happy to move' ⟷ 'reluctant mover' continuum (see Figure 3.1).

At one end of the continuum, the 'I am generally happy to move' respondents generally considered that the speed of business change necessitated moves and that it was definitely helpful, if not essential, to move in order to get the best jobs. Nevertheless, a positive view towards relocation, awareness of the potential benefits of geographical mobility in terms of career development and a willingness to relocate, does not mean that it is always easy to move in practice (as highlighted in Chapters 4 and 5).

Along the continuum is a category of relocating employees who fix parameters within which their willingness to move is constrained, so that they are 'happy to move within reason'. One male employee in his early fifties with several experiences of relocation captured this position: "The idea that anyone can move anywhere is a

myth". The constraints may be spatial (that is, only some locations might be considered) or temporal (that is, relocation might be possible in certain time 'windows' but not in others). The constraints may relate to other family members (notably partners and children) and/or encompass other broader quality of life issues.

Further along the continuum are employees who may be characterised as 'reluctant movers'. Typically, reluctant movers are making enforced moves or fulfilling obligations to relocate in order to show commitment to the organisation. Among such employees in this study there emerged a clear sense of not wanting to move, but of being unwilling to turn down a request from their employer to do so. This might have been for fear of a refusal to move counting against them, which would then constrain their promotion and development prospects. Moreover, if one move has been declined by an employee and their family, it may be even harder to turn down a potentially less attractive relocation at a later stage. One female partner in her mid-thirties described this dilemma as like facing "Hobson's choice" when her husband was asked to move to an area they would not have chosen to go to; reluctantly, they were "resigned to move". Rather than being viewed as a welcome opportunity, relocation might be regarded as a necessary evil. This sentiment was particularly well expressed by a male employee in his mid-forties who stated that the organisational "rhetoric of 'personal circumstances will be taken into account' is not matched by the reality".

Employees who 'would not consider moving' under any circumstances form a separate subset of employees who have not reached the 'reluctant mover' point on the continuum of relocating employees.

Figure 3.1: Relocating employees – continuum of attitudes to relocation

| Generally happy to move | Happy to move within reason | Reluctant mover | Would not consider moving |

Relocating employees
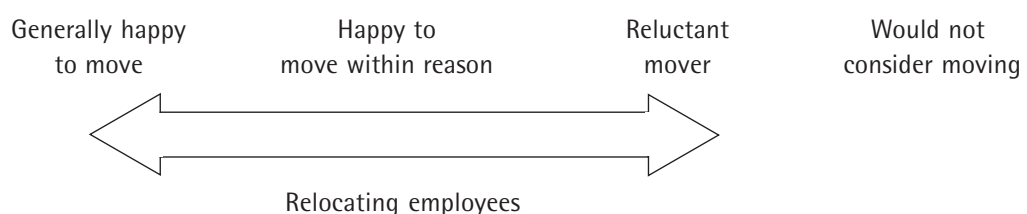
Is geographical mobility necessary for career development?

While a majority of employees interviewed subscribed to the view that moving had significantly enhanced their career, a minority (drawn particularly from non-multinational organisations) considered expectations of geographical mobility to be diminishing, while emphasis on flexibility has increased:

"A few years ago you had to be mobile to advance your career. This is less so now, and it is more important to be flexible – willing to work from home, hot-desking, etc. A willingness to be adaptable and to try new things is what is important and good for your career, not your ability to be physically mobile." (Male employee, mid-thirties, who had previously relocated to follow his partner's career as well as his own)

Virtually without exception the employer representatives interviewed stressed the importance of flexibility and adaptability among their employees – for both business need and career development purposes. One view forwarded by a male employee in his late twenties, with experience of both international and domestic relocation, was that "keeping 'a flexibility in the mind' is more important than geographical mobility". However, this view was not universally endorsed, on the basis of the evidence collected. Rather, many employers and employees appeared to be of the view that 'a flexibility in the mind' is enhanced by the experience of geographical mobility.

Geographical mobility and partners' employment

What are the implications of relocation for partner careers or jobs?

Relocation may be conceptualised as a deal between the employer and employee. The partner and other family members are not directly involved in this deal and so, for them, the implications of relocation may be more uncertain than for the other parties. Indeed, among all three main groups interviewed (employers, employees and partners) there was general

agreement that the benefits of geographical mobility accrue most to the employee's career.

Evidence from the literature

Much of the literature has documented the disruptive effects of migration on the labour force status of women in terms of unemployment, underemployment and interrupted careers. Mincer (1978), developing the concept of migration ties, identifies:

- *tied movers*: where disadvantages for one partner are insufficient to outweigh the overall net gain for the family; and
- *tied stayers*: advantages for one partner are insufficient to achieve an overall net gain for the family.

Migration decisions are contingent not only on the economic costs and benefits accorded primacy by Mincer, but also on gender ideology, life course events and other non-economic considerations. Building on the 'migration ties' concept, reference has been made to the 'wife's sacrifice' and the 'trailing wife' (Bonney and Love, 1991; Bruegel, 1996). But is becoming a 'trailing wife' a universally positive phenomenon? Hakim (2000) has emphasised the heterogeneity of women's preferences and priorities on the conflict between family and employment:

- For *home-centred women*, who prefer not to work, and for whom family life and children are the main priorities throughout life, the decision to follow their husband's career is often a simple one, since there is often a two-person commitment to a single career (Evetts, 1992).
- For the larger group of *adaptive women*, who want to combine work and family, but who may not be fully committed to an employment career, the challenge of relocation is greater. They may be inclined to make a sacrifice in terms of their own career – by postponing their ambitions or modifying their aspirations – for wider family benefits, but they may also resent their husband's moves (as highlighted below). Indeed, Cooke (2001) suggests that there is an important distinction between the 'trailing wife' and the 'trailing mother'. Using panel data he shows that family migration has a small, short-lived negative impact on the

employment of non-mothers but a large, long-term, negative impact on the employment of mothers.

- For *work-centred women*, among whom childless women are disproportionately concentrated, employment is the main priority and there may be greater unwillingness to relocate if there are likely to be negative career impacts.

There is also evidence that many women benefit from family migration. Using panel data on income dynamics from the US, Clark and Davies Withers (2002) show that while there are disruptive effects, these are mainly short lived for most households. Their results also suggest that the average masks very large variations in what happens to both husbands and wives who relocate.

Case study evidence: an introduction

What is clear from the employer case studies and interviews with key informants, employees and their partners undertaken in this study, is that the partner's career is more widely recognised than formerly as an important issue in relocation. This is in line with expectations, given the labour market and family changes described in Chapter 2, necessitating more dual-career negotiation surrounding relocation. Several key player and employer interviewees suggested that it might be that partner employment has always been a bigger problem than was enunciated. While perhaps, over time, openness about partner employment has increased, there was also a feeling among key players that concerns about partner employment tend to be under-reported by employees to their employers. Indeed, in the case studies there were very few instances of companies offering any assistance specifically for the partner on moving to a new area (as noted in Chapter 2).

Are partners willing to move?

The partner interviews highlighted a division between those interested in pursuing careers and those more content to have jobs that fit in around the lead career. On this basis it is possible to identify a range of partners' attitudes along a continuum from those who are happy for their jobs to fit in with the relocation requirements of their partner's job to those who resented the implications for their own career (see Figure 3.2).

At one end of the continuum, the 'happy to fit in' contingent includes those partners who volunteered that they were not career-oriented, but were happy to pick up work, often on a part-time basis, in a new location. Typical of the sentiments of members of this group is the comment of a female partner in her late forties:

"I always had jobs to fit in around the children. I am very much a secondary earner."

Some partners occupying a similar position on the continuum were more career-oriented, but had specifically chosen work (such as teaching, nursing, and so on), which they perceived would be reasonably easy to transfer to new locations and adapt around care for children. Similarly, one of the younger partners, who had started her career in personnel and training, subsequently refreshed her clerical and administrative skills, with a view to having a strong base of transferable skills, attractive to a wide range of employers. She reported:

"It was quite easy to get a job. It depends on what field you are in and what expectations you've got once you move; if you're expecting to go for the 'high flying' career as well, then you might be a bit more limited, but I was quite happy to take clerical work."

Figure 3.2: Relocating partners – continuum of attitudes to relocation

Happy to fit in   Frustrated ambitions   Resentment

Relocating partners
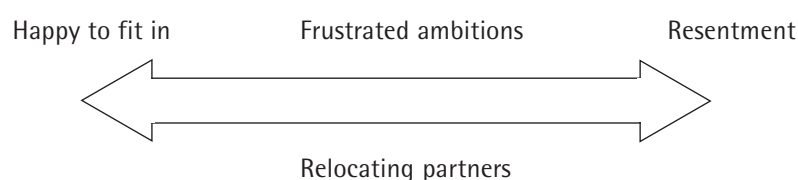
Occupying positions further along the continuum are those partners with 'frustrated ambitions'. Members of this group were less prepared to play a subservient role to the relocation demands of other careers. One partner in her late thirties had already retrained once to change her job in order to more easily accommodate her husband's working hours and her childcare responsibilities, thinking that this would facilitate the re-launch of her own career. With another relocation for her husband's job, she was unable to take up a job she had secured that built directly on her training, but had to change her planned career path yet again. Another interviewee, keen to pursue a career, and with strong transferable skills, reported that labour shortages are such that she could always find a job as she moved around with her husband's relocations, but not always at the same level of seniority. In frustration, she reported: "It seems like starting over again in a new place". Her frustration was not about the need for compromise in dual-career households, but more about the fact that one partner needed to compromise more than the other (see Bielby and Bielby, 1992).

Yet further along the continuum, frustration among partners boiled over into 'resentment'. Such partners were often bitter that relocation meant that they had not made as much progress in their chosen career as they would have liked. One female partner reported that moves were so frequent that she was never in one place for long enough to get established. Another, in her mid-forties, had turned down an excellent career opportunity requiring relocation because her husband would not move. She asserted:

"I am living life according to my husband. … My life and career have not turned out as I would have wanted."

One partner in her early fifties, who had followed her husband on his job relocations in the early years of their marriage, and who had subsequently stayed behind to pursue her own career rather than relocate with her husband, confessed:

"We did not think things through at the start of the marriage … the impact that relocation would have on my career when we first started out, or later the implications of living apart."

Other partners were resentful of the fact that financial considerations often dominated which career was accorded higher status in terms of geographical mobility. One female partner in her early forties reflected:

"One partner's job may pay more, and so be regarded as the 'main job', even if the other partner is equally committed and ambitious."

For some partners, the apparent lack of appreciation by employers about the difficulties posed by relocation exacerbated feelings of frustration and resentment:

"Companies have no conception how difficult it is for partners with careers – they don't care and you can't complain." (Female partner, late forties)

Considering such forceful comments highlighting partner frustration and resentment in the face of relocation, it is easy to overlook the possible gains of relocation from a partner employment perspective. Relocation may involve moving to an area with more, rather than fewer, employment opportunities. Furthermore, in a similar vein to employee and employer reports relating to 'fresh perspectives', several spouses and partners interviewed indicated that they were pleased to have the opportunity to move to change direction or take up a new job. One female partner in her early forties who had always lived in the same area until undertaking relocation to follow her husband's career reflected: "It did me the world of good!"

What makes relocation easier or more difficult?

A balancing strategy of pursuing two complementary careers is harder to achieve than a modification strategy – characterised by preparedness to modify the aspirations of one career for the advantage of the other. One female partner in her mid-thirties considered:

"It must be much harder if you're both really career-minded. I'm not, and that makes it easier. If we were in that situation, one would have to commute. There has to be one career that comes first, so there's no tension there."

Evidence from employee and partner interviews suggests that relocation is easier if one partner does not set their aspirations or expectations that high, and is content to take advantage of what employment opportunities are on offer in any local area to which they may move.

Expectations and aspirations aside, relocation tends to be easier if the partner has a job that is geographically transferable; locationally-specific jobs pose more difficulties. One partner reported that she had a relatively location-specific specialist job that she had worked hard for and was loath to give up. Since her daughter did not want to move either, the compromise was for the family to stay where they were rather than relocate with her husband's job. In the face of a 2 to 1 decision to stay, the family became a dual-location household, with the husband engaging in long-distance weekly commuting to his new job.

Similarly, jobs based around a local network tend to be more difficult to transfer to new locations. One female partner had established her own mobile business in the area where she had always lived: "I picked up clients because I had lived in [the area] all my life". Yet it was difficult to re-establish the business following relocation: "Breaking into a new area not knowing anybody is very difficult". While she easily found a part-time job in the new area, she admitted that "it was quite difficult working for someone else again".

Overview and conclusions

This chapter has highlighted the diverse traditions and expectations of geographical mobility in different sectors, occupations and companies, and various attitudes regarding willingness to relocate and the implications for employee and partner careers of geographical mobility. Despite the diversity of views among both employees and partners there are some clear findings:

- Relocating employees' partners are generally less sympathetic than employees to requirements for geographical mobility. Although relocation offers an opportunity for activity change, it poses more uncertainty for partners than employees, and there is a greater likelihood that the partner will end up sacrificing their own job or career in the face of relocation.
- Employees and partners are becoming less passive:
  - employees are more likely to set constraints on when and where they will relocate;
  - even among those partners who acknowledged that they were happy to follow their partner's career, few would see this as a 'duty' in the same way that perhaps their forebears would have done;
  - it can no longer be expected that the (usually female) partner will play a supporting role to her spouse in fulfilling his job (although some do), in a way that was perhaps once taken for granted by some employers.
- A common plea to employers, from partners and employees alike, is for more sensitivity to the needs of partners.
- An opportunity to relocate may act as a catalyst, stimulating reassessment not only of career aspirations but also work–life balance and future directions more broadly.

4

Impacts on families over the life course

Introduction

This chapter examines the impacts of geographical mobility on families over the life course. The first section draws on the literature to introduce the concept of the life course as an organising paradigm for considering key issues in relocation at different stages in individual and family lives. Material from employee and partner interviews is used in an assessment of whether it is easier to move at some stages of the life course than at others. Extensive use is made of quotes from the case study interviews, both in this and subsequent sections of the chapter, in the text and in section sub-headings. The importance of understanding the individual and family context of relocation when assessing its impacts is emphasised.

The second section of the chapter examines how relocation and other types of geographical mobility may act as a catalyst for family fission and family fusion. Using material from employer, employee and partner interviews, ways in which families in the case studies were split up and otherwise reconfigured are outlined. In the third section of the chapter, material from employee and partner interviews is utilised in a discussion of the impacts of geographical mobility on three groups of family members: children, young adults and older people. The fourth section of the chapter seeks to identify beneficiaries and losers in the face of geographical mobility. The issue of how to measure costs and benefits from geographical mobility is examined, and the relocation balance sheet is considered from employment, financial and family perspectives using the employee and partner case studies. Particular reference is made to costs and benefits for partners/spouses. A synthesis of key findings is presented in the final section.

Geographical mobility and key issues for families

The life course as an organising paradigm

The life course of an individual, or of a family, may be conceptualised as a series of interrelated events that are bound up with larger social forces, structures and geographical contexts (Clark and Dieleman, 1996). The life course paradigm recognises the interplay between demographic, economic and social factors that influence the process of geographical mobility (Clark and Davies Withers, 1999).

Historically, each stage in the life course has been characterised by a different family size and composition. Transitions between life course stages often provide the impetus for housing change/relocation, while at other times relocation may be more difficult. Recognising this fact, one key informant suggested that there is a need for greater employer recognition that some employees will opt out of geographical mobility at one point in time, but might not opt out for their whole career. One male partner in his mid-fifties – a veteran of several relocations – reflected: "deciding when to move can be more difficult than actually moving".

Relocation: an individual challenge and a family challenge

Mobility engenders changes and conflicts, which sometimes seem irreconcilable, in the relationship of an *individual* with their immediate environment – conceptualised by Ford (1992) as a tripartite system of organisation, family and career aspirations, and responsibilities. Furthermore, it

alters the physical space within which these relationships take place. It is akin to a transplant.

Geographical mobility of any kind also presents a challenge for the *family*. It may result in polarisation, with different family members expressing different attitudes. Each individual within the family has a frame of reference, developed in such a way as to be appropriate to their own circumstances, through which they understand the external world and how it relates to them. An individual's sense of belonging relates to this frame of reference. Changes in the external environment, such as those engendered by a geographic move, or change in work, school, social environment and family context, disrupt the clarity of the frame of reference and require adjustments to be made to that frame of reference and behaviour (Ford, 1992; see also Seavers, 1999). Given the individuality and personal nature of these frames of reference, relocation is experienced very differently by each person affected.

For people closely involved in locally based community and kinship networks the disruption of relocation is particularly pronounced. It is relevant to note here that the partners interviewed were more likely than the employees interviewed to have such links. For example, in one instance, moving away from an area in which there was a strong network of family and friends compromised the female partner's attempts to find work immediately after relocation since there was no ready-made support structure in place to provide childcare and informal links to employment. Another male employee and his family who had moved away from extended family support in a previous relocation were reluctant to move again and make a similar split from a friendship network they had built up as a substitute.

A number of employees and partners interviewed cited having made the break with family when they went to university. Others, with no experience of such a move and who had always maintained close links with family in the local area, were much less willing to contemplate relocation. One such male employee in his early forties, who drove 75 miles per day to work rather than relocate, noted:

"We've both lived in this area all our lives. ... I can't see any point in us moving ... it

would be a strain on us as a family with no other support around as family and friends are important to us. The quality of our life in terms of family and friends would be quite a big option to weigh up alongside relocation. A lot of the activities we do in this area are not transferable."

So, relocation is not just about changing people's jobs; it is about changing lives. Hence, relocation (and other types of geographical mobility) has consequences that extend far beyond an individual's employment, disrupting what Jarvis (1999) refers to as the 'tangled web' of networks and relationships that characterise the household economy and behaviour. Partners, relatives and children are not unaffected extensions of the employee. The wider consequences of relocation on other family members may, in turn, impact on job performance.

As is outlined in Chapter 5, relocation can be an overwhelmingly positive experience, bringing about new opportunities for all family members, but it can also be a negative experience. As one male employee in his early fifties observed: "Handled badly, relocation is killing from a family perspective". From the evidence of the employee and, more particularly, the partner interviews conducted for this project, many of those who had experienced relocation felt that employers: "don't really recognise the upheaval it causes to a family" (female partner, late forties).

Is it easier to move at some stages of the life course than at others?

"Young, single and fancy free" ⟶ *onset of family responsibilities*

The evidence from employee and partner interviews indicates that life course stage is a key determinant of whether people are prepared to relocate. In common with a number of other interviewees, a female employee in her early fifties indicated that she had used "opportunities for relocation to suit myself [ie for personal reasons]" when young. A male employee in his mid-forties noted that it was "important at that stage to advance my career".

Reflecting on their experiences, the general consensus was that interviewees would urge

their younger colleagues to move around to maximise experience at the start of careers, before they have children. After all, as a male employee in his mid-forties commented: "It's difficult to have a 'one-track mind' when children come along". There was general agreement with the sentiment expressed by another male employee in his mid-forties with two young children that "having a family changes your emphasis". Faced with an opportunity to relocate, there are other family members to consider, and potential trade-offs between career ambitions and family ambitions. This is illustrated by the comments of a male employee in his late forties who found himself more reluctant to move as family commitments impinged more forcibly:

"I've been happy to move around, but as I get older and my family grow around me it's definitely harder to do ... not job wise (as I've lived all over the world) but as a husband and father."

Many interviewees echoed the more general sentiment expressed by a female partner in her early forties:

"There are times in your life when you are more prepared to do more than at other times."

Getting older, desiring stability

Despite differences in attitudes to geographical mobility within age groups, on the basis of the evidence from the individuals interviewed in this study, a general trend was evident that willingness to relocate declines with age. As one partner in her mid-forties with two young children reflected:

"In my twenties I was happy to move around and explore. As you get older you like to stay longer and put down roots. The people around you become more important."

Most employers indicated that they tended not to relocate those approaching retirement. However, with an ageing workforce and an increasing business need to utilise the skills and experience of older workers, the number of people in the older working age groups faced with relocation requests may increase. Some of these individuals may be unwilling to do so, unless such a move is

in keeping with other work–life balance ambitions.

Reiterating the importance of context

The importance of family considerations, links with friends and lifestyle considerations underline the salience of context in understanding willingness to move. Moreover, in practice, the conjunction of relocation with other life course or family events – such as family illness, the birth of grandchildren, and so on – can, and did, influence the moving experience. At a time of stress in other spheres of family life, relocation can be (as a male employee in his early forties stated, reflecting on the nervous breakdown of his partner) "the straw that breaks the camel's back".

Geographical mobility as a catalyst for family fission and fusion

What splits families up?

Relocation can trigger family break-up. Some examples of the types of family fission (interpreting 'family' in a broad sense) attributed by the employees and partners interviewed to relocation are outlined in Box 4.1. Reflections on the family impacts of such arrangements in the face of relocation decisions are explored both later in this chapter and in Chapter 5.

Among the interviews conducted for the research there were also examples in which relocation was used as a convenient means of exiting a failing relationship. Faced with a choice of enforced relocation or redundancy, one female employee in her early thirties commented that she would have taken redundancy had her marriage not been breaking up. She decided that relocation was a good way to effect a clean break. The AllServCo employer representative also noted that some employees use relocation to help make the break from a failing relationship:

"The relationship is over; they are divorcing, but it just so happens that they have a job move.... It makes it easier on them because they have people in to buy the property and they have a guaranteed sale price ... it's helped them make a clean break."

Box 4.1: Examples of family fission in the context of relocation

- *Young people* leaving the family home prematurely to form part of a new household – without relocation they would have been expected to remain in the family home for longer.
- Moving away from *children from previous relationships* such that face-to-face contact becomes less frequent.
- An *older parent* (or other relative) who had been living in the family home moving out on relocation to establish an independent household.
- A *dual-location household* being established as one partner (and children – perhaps at a crucial time in their education) remain in the family home on a seven-days-a-week basis while the other engages in a long-distance commuting lifestyle, living away from the family during (much or all of) the working week.

In the context of long-distance commuting, short-term assignments and other dual-location household arrangements, some interviewees observed that families can become used to living apart, and in some circumstances this might lead to eventual family break-up (see also Green et al, 1999). On the basis of the interviews undertaken, it seems that some individuals are much better at coping with this situation of 'living together apart' (Winfield, 1985) on a regular, medium- or longer-term basis than others (see Chapter 5 for further discussion). One interviewee expressed relief when a prolonged spell of long-distance weekly commuting ended and the family returned to living together as a single unit. Another reported that her teenage daughter had likened her situation of having her parents living apart for part of the week to that of friends and acquaintances with divorced parents. Other interviewees felt the greater independence implied in 'living together apart' helped make family members more self-sufficient, and strengthened the family unit.

How else are families reconfigured?

Box 4.2 shows two examples of ways in which families and households were reconfigured as a consequence of relocation.

Box 4.2: Examples of family fusion in the context of relocation

- An *elderly parent* moving into, or immediately alongside, the family home in the destination area.
- *Older dependent teenagers or semi-independent young adults* undertaking a short-distance move to live with a grandparent or other relative in the origin area when parents relocate.

Such reconfigurations of family living arrangements were generally welcomed by relocatees, who would otherwise have been concerned about leaving behind vulnerable family members. One employee in his early fifties was so concerned about moving away from his elderly parents, who had been living independently within easy travelling distance, that the family took the decision to move them to the new location too, installing them in an adjoining granny flat. In the case of older teenagers and younger adults, often at the end of compulsory education or at the start of their working lives, living with grandparents was viewed by relocating parents as a 'reassurance' in the face of changing family living arrangements, and was reportedly welcomed by grandparents. One female partner in her mid-forties, on leaving behind her mother and 17-year-old son in the origin area, reported:

"My mum was minutes away from us before, so we saw her every day. We were very close. I think it's hard for her because we lost my father just six months before [the move], so it was all a bit of bad timing. But having my son there, she's a doting granny and he has his friends and his job."

Impacts of geographical mobility on family members

In this section the impact of relocation on three groups of family members at different stages in the life course are considered in more detail: children, young (often semi-independent) adults and older people.

Children

How do children cope with relocation?

Relocating parents were, without exception, concerned about the impact of relocation on their children. If children were happy and settled in an area, this went a long way to the family being settled; indeed one female partner in her early forties with young children likened it to going on holiday: "If your children are happy, you are happy!" Moreover, it was noted by both employees and partners that having pre-school or young school-age children helps partners, in particular, to make contacts and friends in the new area from the outset, in a way that is not as easy for childless couples and single people.

Among the key informants interviewed there was a feeling that "children cope well" with moves, although there are exceptions. Many interviewees reported that, within the same family, one child coped better with the move, settling in more quickly in the destination area than another. Some children were initially very hostile to moving and were scared of leaving their friends. One female partner in her late forties who had moved around a lot as a child, reported that she had always resented "having to give up friends and hobbies" as she was growing up. She commented: "It is a huge culture shock for children to move from place to place". New friendships are forged in the destination areas, but, particularly for older children, parents reported that it was often difficult, and takes time "to break into already established circles of friendships" (female partner, early forties). Alongside the new opportunities afforded by relocation, some parents considered that children realising that they can make new friends is one of the main benefits of relocation.

Education: "absolutely the key issue"

In general, the middle classes have tended to regard education as important, and (as emphasised in Chapter 2) this is a very important economic and cultural asset in modern societies. The importance placed on children's education in the context of geographical mobility was emphasised by all interviewees with children. A number of employees and partners described education as 'taking centre stage' in a context within which, in the most sought after destination areas in some parts of England, popular schools are invariably full. In theory, the introduction of the national curriculum should have reduced some of the problems facing children in changing schools. In practice, the introduction of league tables and class size limits, along with the diversity of school systems (within England, and between England and other parts of the UK, as well as internationally), tend to operate in the opposite direction. As is highlighted in Chapter 6, educational reforms have tended to favour local residents over longer-distance migrants in finding places in what are perceived to be good schools. Differences in the institutional structures of childcare provision between local areas also posed problems for relocating parents.

For several interviewees, finding places for their children in schools of their choice was a difficult experience. A male employee in his mid-forties with two children aged 10 and 13 years old volunteered that:

"Finding the right schools, and ascertaining what differentiates them, was the most difficult part of the move."

Several interviewees undertook a school search, followed by a house search, on the basis that finding suitable school places was the most difficult part:

"... the problem was finding a house that allowed us to choose the school that we wanted our kids to go to. The problem with parental choice is that all the perceived good schools are full. A lot of schools just said 'sorry, we're full'. It's harder with two children – in one school there may be a place for one child, but not the other." (Male employee, mid-forties, with two children at primary school)

Except for those with very young children, many interviewees tried to time the relocation of their family to coincide with the start of the academic year. For children of secondary school age, in particular, the need to tie in moves with crucial stages in children's education is emphasised, so as to avoid moving children in the middle of courses leading to public examinations (such as GCSEs, AS and A levels). Where there are two or more children in a family, the windows of opportunity for moving are further reduced. Indeed, the FuelCo representative reported relatively few relocations of people with children in the 13-17 age range. The desire to prevent disruption to education emerges as a key driver in the formation of dual-location households, at least on a short- to medium-term basis.

Young adults

"How could you do this to us?"

The evidence from the interviews suggests that relocation may prove particularly problematic for older teenagers at school or in training, and for young adults who have finished compulsory education but who have not yet completed the process of becoming independent of their parents. For this semi-(in)dependent group, interaction with friends and peers is particularly important. One male employee in his mid-forties with two teenage daughters reported that his 16-year-old had been extremely reluctant to relocate:

> "She blames everything on relocation – if she has a bad day, if she falls out with one of her friends. It can be very difficult at times."

He reflected that if the daughter had been slightly older she would not have moved and the family would have been split.

"Breaking up the family home"

As indicated in Box 4.1, one impact of relocation on young people was for them to leave the family home prematurely. Some relocating parents reported feeling what one female employee in her mid-fifties referred to as "a burden of guilt" when this happened.

In one instance an older teenage daughter (who had just completed a part-time course and who was engaged in part-time work in the origin area) relocated with the family for only a few weeks. She found the new area so quiet and missed her friends so much that she returned to the origin area where she was able to live with grandparents and be close to her boyfriend.

The case studies also included another example of relocation prompting an older teenage daughter (of a 50-year-old female employee) to leave home earlier than she otherwise would have done. By the time of the move the girl's older brother had returned to live at the parental home, after struggling financially in his first attempt at independent living. The new home was small for two young adults and their parents, and, moreover, the girl discovered that the A level options at the school in the destination area were far more restricted than at the college she would otherwise have attended. She stayed in digs while starting her A level courses at the college, returning to the parental home at weekends. When the digs proved not to her liking, she moved in with her boyfriend: her mother reported that "her home is now there, with him". Her brother found it difficult to commute a relatively long distance to his job after his parents' move, and eventually changed his job and moved out of the parental home once again. The mother's verdict was that the move had comprehensively "messed up" family life.

Older people

"Care of elderly parents is not fully appreciated"

Proximity to elderly parents, who might be quite frail, is an increasingly important factor that needs to be taken into consideration in relocation. In SpiritOrg, where the age profile of workers is skewed towards older people, it was reported by those organising moves that elderly parents are more important for them as a family issue than the needs of school-age children. Generally, it was considered that the organisation had become more understanding about the needs of those who care for older relatives. Two other employers reported that they were increasingly asked about care for older relatives in the context of relocation. With an ageing workforce, together with changes in the ideology

and infrastructure of residential care towards greater preference for providing more intensive care within the older person's home, the care of older adults is likely to rise up the policy agenda.

Two employee interviews revealed that relocation also necessitated changing the care home of an elderly relative, so that the family could still visit on a regular basis. As highlighted above, there were also examples of families making arrangements to move their currently independent, but often frail, parents closer to them alongside relocation.

A substantial minority of employees expressed a wish not to be too far away from elderly parents(-in-law) with declining health. Responsibilities towards parents (and towards adult children) emerged even more strongly in the partner than in the employee interviews. For some employees and partners this was a current issue, and for others it was acknowledged as a likely consideration for, and constraint on, future moves. For some relocatees a move taking them a further distance from parents had not been fully appreciated until a parent became seriously ill, and the logistics and costs of more frequent visits became difficult to deal with. While many employees and their partners spoke of keeping in touch with family and friends by 'phone and, in some cases, by email, and some parents talked about children 'texting' their old school friends, it was recognised that geographical proximity remains important for frail older people. This is a case in which "electronic communication does not substitute for physical visits" (male employee, late forties).

Grandparents, parents and grandchildren

Some employees and partners considered that their parents missed out on seeing their children and grandchildren when relocation took them further away from one another, such that frequent regular contact was unable to continue. One female partner in her late thirties, who had relocated with her husband several times, considered that her moving around was particularly tough on her parents because she was an only child and:

"... they rely on me. Mum and Dad obviously feel they want to be near us but

they can't really be because they couldn't afford to move about like we do."

Another female partner in her early forties had moved away from the area in which her mother lived for the first time in her life. She noted:

"I've left my Mum on her own and I never thought that situation would arise."

A relocated female partner in her mid-fifties missed seeing her grandchildren and helping her adult children and extended family. She admitted that the family was financially better off having relocated, but her family ties and sense of unfulfilled responsibilities were such that "I would go back in the morning if I could".

Reflections on the benefits and costs of geographical mobility

Who benefits? Who loses?

Since each family has its own set of circumstances, and within a family each individual has their own set of circumstances it is to be expected that some people will benefit and some will lose out from relocation. Despite some diversity in views from, and among, employees and partners, generally male employees saw themselves as the greatest gainers from relocation and their generally female partners as the greatest losers.

It is also apparent that those employees who are happy to move and have partners who are happy to fit in, therefore going to their first-choice destinations, see the most benefits from moving. Conversely, reluctant movers tend to see more of the costs of relocation.

Employee career benefits

Overwhelmingly, the benefit of geographical mobility most frequently cited by employees was a more interesting and rewarding job. When the new job was going well, this was also recognised by partners, as illustrated by a female partner in her mid-forties who stated: "My husband has the kind of job he has always wanted". Although not all relocations were associated with promotion, generally the new challenge afforded

by a move was welcomed, as were associated opportunities to broaden experience. However, as indicated in Chapter 3, a minority of interviewees qualified such job gains with a wish that "home life could be better" (male employee, mid-forties). A male employee in his late forties found it impossible to quantify the trade-off in relocation between career benefits and family costs, and reported that he felt:

"pulled in different directions. The move has been good for my career but has compromised my family life and my family."

Partner career losses?

Partners were less likely to cite benefits for their own career or job as a consequence of relocation. As outlined in Chapter 3, although some partners found that employment opportunities were better in the destination area than in the origin area (and cited enhanced economic prospects as a future gain for children), others felt that relocation had impacted negatively on their career. Some of the employees interviewed regretted the sacrifices that their partner had made in this respect. In other instances, the logic of following a more financially rewarding career was emphasised.

Financial benefits and costs

The majority of both employees and partners considered that the family had either gained financially (or at least not lost out) from relocation. In part, this reflects the association between relocation and promotion for the employee (in some instances), and the nature of financial assistance available for relocation.

Some evidence emerged of interviewees using relocation assistance to climb the property ladder. For a small minority, this had been one of the primary motives for voluntary relocation. Some employees and partners, including some who had initially been reluctant to move, pointed to the likelihood of future house price gains in the destination area: "it might prove to be the best thing we've ever done" from a financial perspective, reported one female partner in her early forties. An unrelated male employee from northern England noted that it had been "a good move" to the South East, even though the quality of life was poorer in terms of traffic, congestion

and the standard of some public services, than in the origin area.

A few of the employees and partners interviewed had been less fortunate with regard to the timing and direction of moves in conjunction with the geography of house price increases and decreases. They considered that the vagaries of the property roller coaster, together with the extent and nature of financial assistance they had received on relocation, meant that they had 'lost out' on moves.

The partner's burden

It is often the partner who is primarily responsible for the day-to-day management of the move and for taking the lead in dealing with the upheaval faced by the family (discussed in more detail in Chapter 5). When there are conflicts of interest regarding geographical mobility between different family members it is often the female partner who gives way and sacrifices her own interests.

Several of the employees recognised with a certain regret that their partner had borne most of the burden of relocation, and that the costs had also been greater for the children than for themselves. As one male employee in his mid-forties with young teenage children remarked:

"My wife had to change jobs, the children had to change school, they had to lose all their friends, find some new friends ... and that whole process takes much longer than you ever anticipate."

What is the appropriate time horizon for measuring costs and benefits?

Adjusting one's frame of reference on relocation and settling in at the destination area takes time. When asked to reflect on the costs and benefits of relocation, several employees and partners indicated that it was either too early to judge or, more usually, echoed the sentiment of one male employee that "the jury's still out". This raises the question, returned to again in the assessment of 'success' and 'failure' in relocation in Chapter 5, what is the appropriate time horizon for measurement?

No clear consensus emerged from the interviews on this question: some suggested that settling in took six months, while others considered two years would be a more appropriate time frame. What is evident, however, is that the timing will influence the responses obtained. One male employee in his early forties with a daughter at secondary school and a son at junior school indicated that he had "seriously underestimated" the short-term emotional costs of relocation to himself and his family. However, looking back 14 months later, he considered that "the experience has outweighed the costs".

Conclusions

This chapter has highlighted the impacts of geographical mobility on families. Despite the fact that the experience of relocation is different for different people, the following conclusions can be drawn:

- Individuals tend to be more willing to relocate when they are young and before the onset of family responsibilities, whereas the desire for stability tends to increase with age.
- Relocation may lead to a reconfiguration of family living arrangements.
- Parents tend to be very concerned about the possibility of relocation disrupting children's education.
- Relocation poses a particular challenge for young adults in the family, for whom friends and peers are particularly important, but who may not yet be ready or have the financial resources to establish an independent household.
- Physical proximity is important for older relatives and relatives with declining health, but if they move to be near their adult children they may lose their own friendship networks.
- The benefits of relocation tend to be focused most on the working life of the employee who prompts the relocation, whereas the partner tends to be most likely to shoulder the burden of the costs.
- It takes time to adjust and settle in at the relocation destination and, although the settling in process takes longer for some than for others, the time involved can be underestimated.

5

Optimising geographical mobility: 'gain without pain'

Introduction

As highlighted in Chapters 1 and 2, relocation and other types of geographical mobility have implications for many different policy domains. Since an aim of government policy is to maximise economic competitiveness and social welfare within a framework of sustainable development, an allied objective must be that of *optimising* geographical mobility.

With a view to optimising geographical mobility and facilitating good practice, this chapter draws on information from employee, partner, employer and key informant interviews to address the diversity of experiences of relocation, and investigate the ways in which such experiences are associated with variations in mind sets and expectations. The question of assessment of 'success' and 'failure' in relocation is examined – from employer, employee and partner perspectives. The most useful elements of existing relocation policies are identified, and a role for greater non-financial assistance is examined. In the final section of the chapter the trade-offs between migration and commuting are explored.

The diversity of experiences of relocation: the importance of mindsets

Contrasts and commonalities in experiences

For some employees the whole moving process was reported to have gone "very smoothly" and was "without doubt a positive experience" – both for themselves and most members of their family.

Some reported that everything had "slotted into place" such that they "fell on their feet". Only a small minority of employees and partners, however, seemed to find the moving experience "exciting" and "enjoyable". Most relocatees acknowledged that moving was "stressful"; several commented that it involved more emotional strain than they could ever have imagined (as indicated in Chapter 4).

In the face of this diversity of experiences it is appropriate to ask:

- What makes moving easier or more difficult?
- Are there common features of good experiences and of traumatic experiences?
- How useful is relocation assistance in easing the moving process? And which elements of assistance are most valuable?

In the first three sections of this chapter information from the employee, partner, employer and key informant interviews is used to address these, and related, questions.

Cultures of mobility and immobility

The importance of context was emphasised in Chapter 4. How migration is experienced depends on both the cultural context of the migration decision and the cultural characteristics of the migrant, such that it is possible to identify different migration behaviours (Fielding, 1992). Drawing on Fielding's work, it is possible to make a distinction between two migration behaviours (the 'Stairway to heaven' and 'Crippled inside'), which may be conceptualised as occupying two poles of a continuum (see Box 5.1).

Box 5.1: Contrasting migration behaviours

'Stairway to heaven'	'Crippled inside'
• *Focus*: 'excitement' and 'challenge' – migration is associated with progress (that is, career advancement).	• *Focus*: 'rootlessness' and 'sadness' – migration is associated with rupture (for example, loss of stability, break-up of family and friendship patterns).
▶ Exemplified by the comment of a FizzCo interviewee relocating to take up a promotion in a different part of the country:	▶ Exemplified by reflections of a partner of a SpiritOrg relocatee who would have preferred to 'stay put' rather than relocate:
"We were feeling in a bit of a rut. [It was] exciting – a chance to make a new start and get ahead."	"I felt completely bereaved at having to leave X. I had a job I wanted, friends and good childcare. Everything was there for me. I was clinically depressed ... after leaving."

Mindsets and expectations

Most people display a degree of resistance to change. If an individual or family has no expectation of relocation, moving might be anticipated to be more traumatic than it otherwise would have been. Moreover, cumulative inertia might also be expected to play a role: the longer one stays, the harder it may be to move.

Among employers, employees and partners in this study there was widespread recognition that people differ in terms of mobility mentality. One relocation specialist likened the situation to some people having 'roots' and others having 'wings'. The BankCo employer representative noted that some employees are more adaptable and able to cope with the change associated with relocation than others. Several interviewees volunteered that having a happy disposition helps in relocation. Whatever the objective difficulties faced, a number of comments were made (by employers and employees) that if an individual is generally positive they may cope better than an individual who is generally negative. This distinction is illustrated by observations on relocation from two female partners. The first, in her mid-fifties and with several experiences of relocation for her husband's job, indicated:

"I am a laid back kind of person. I do not mind moving – you just get on and do it. You need to be of a certain mentality to deal with relocation."

The second, who was in her late thirties, had a young family and was keen to pursue her own career, felt unable to adopt such an outlook. She was "not happy" when her husband changed his job to one that would involve regular moves. After a particularly traumatic move, she felt vindicated in her view. She was already "dreading" the next move, and the disruption it would entail for the family.

Many interviewees highlighted the fact that companies and families have different cultures, which serve to inculcate mindsets and therefore dispositions towards mobility and immobility. As highlighted in Chapters 2 and 3, moving may be a rational option for some groups of workers, but not for others, and this is reflected in different cultures of mobility and immobility. As a human resources specialist reported, in some professional labour markets, "people are more willing to 'up sticks' and move country let alone region", whereas in other labour markets, with no such tradition of mobility and where outlooks tend to be much more localised, "the concept of moving to follow your work would be utterly unrealistic".

On the basis of the evidence from the employee and partner interviews, the experience of moving and the settling in process is eased when expectations most closely accord with reality. One employee who had relocated a number of times indicated that he had adjusted his expectations downwards in order to cope better with the relocation process. Relocation may therefore become easier with experience, as individuals and families become more attuned to the relocation process and what to expect.

Does practice make perfect?

A number of more experienced movers would endorse the sentiment expressed by one male employee in his early forties that:

> "It is just one of those things you take in your stride really."

While an unrelated female partner in her late thirties commented that:

> "Each move you do get better at it … you know what's going to happen and you just get on with it."

Indeed, one frequent mover in his mid-thirties likened the experience to learning to drive:

> "Once you first step into a car it's very difficult, even thinking about your indicator while you're thinking about driving while you're thinking about braking: it's all very difficult. Once you've done it, it almost becomes like a programme and you go into overdrive."

The more seasoned movers pointed to the fact that relocation gets easier with practice because "you're not entering the unknown". However, experience does not necessarily mean the more difficult aspects of relocation go away. One experienced mover, a female employee in her mid-fifties, commented:

> "[Relocation] is a horrendous process … it takes a long time. I accepted that there were going to be days that were bad days. So, because of my previous experience, I was quite philosophical and [knew] that the bad days would eventually go away."

The evidence suggests that knowledge of the relocation process, gained through experience, does help in relocation. Perhaps what is more important, however, is for a mover to adapt their 'mindset' to one of acceptance of mobility. One female partner considered that she had overcome most of her initial hostility to the idea of relocation and it was this change in attitude that had made the most difference:

> "For me the moves have got easier. I think at the beginning I did not want to move around so much, and now I don't mind … so that's what made it easier."

However, as outlined in Chapter 4, experience of relocation in the past, does not necessarily make moving any easier with the passage of time. Rather, changes in individual work–life balance considerations may contribute to a modification in mindset and a diminution in willingness to be geographically mobile.

Assessing 'success' and 'failure' in relocation and their components

Measurement issues

Assessment of the 'success' or 'failure' of relocation is an activity fraught with difficulties. To begin with there is the question of what measures should be used for assessment purposes. Then there is the related issue of what time scale should be adopted for appraising success and failure. Some possible measures suggested in employer interviews are presented in Box 5.2 (see also the discussion on appropriate time horizons in Chapter 4).

It is evident that, from an *employer* perspective, success and failure are gauged mainly in terms of business performance and employee productivity. This is in keeping with the business need rationale for relocation outlined in Chapter 3. However, in some of the measures there is also recognition that employee dissatisfaction and family unhappiness can impact negatively on productivity.

A measure encapsulating whether productivity is in line with expectations does not feature uppermost on *family* or *employee* lists in assessing relocation success or failure. But job satisfaction (a second measure identified in Box 5.1) is an important criterion of relocation success or failure for employees and partners. However, it is only one measure from a more complex array that reflects the different motives individuals and families have for moving and the goals they wish to achieve.

Lack of assessment

On the basis of the evidence from employer and key informant interviews conducted for this study, it would appear that employers rarely undertake formal assessments of relocation

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Box 5.2: Selected measures of relocation 'success' and 'failure' – employer perspectives	
Success	Failure
• Employee expectations of new job matches reality (DrinkCo). • Productivity is maintained following relocation (ChemCo). • Employee is performing well in new position following relocation (GrubCo).	• Mismatch between employee expectations and reality (DrinkCo). • Employee leaves the company within two years of relocation (WorldCarCo). • Family unhappiness following relocation has a negative impact on productivity (FizzCo). • Employee is not satisfied and/or performance is poor following relocation (BigShop).

success or failure and its impacts over the medium term. As the FuelCo representative acknowledged, if there is an assessment it tends to be of relocatees' satisfaction with the practical relocation services provided. This 'lack of assessment' sometimes accompanies incomplete knowledge on the part of some employers about the financial, as well as the non-financial, costs of relocation and other forms of geographical mobility.

So does this neglect matter? The DesignCo representative admitted: "We recognise it is something that we have let slip". Several other employer representatives acknowledged that a more broad-based formal assessment is perhaps "something we should be doing" – even if only because of the importance of the moves that do take place being successful.

Beyond financial assistance – adding a human dimension?

Are families satisfied with the relocation assistance provided?

As outlined in Chapter 2, the extent of relocation assistance made available to relocatees and their families varied by employer and often by occupation, grade and circumstances between employees relocating with the same employer. Satisfaction with the assistance offered by employers also varied, even among interviewees working for the same employer. A minority of employees described arrangements as 'excellent' and one female partner in her early fifties acknowledged: "They do their best to relocate us as harmlessly as possible". Others were less satisfied. Dissatisfaction did not, in most cases, relate to the quality of assistance that was

provided, but with aspects of relocation that were not covered, such as provision of more information about the destination area, counselling, help and understanding of the impacts of relocation on family members other than the employee and so on. Overall, however, the general sentiment emerging from the employee and partner interviews was one of contentment with the financial assistance provided.

What elements of assistance provided are most useful, and why?

The relocation support offered by most employers is overwhelmingly, or entirely, financially focused (see Chapter 2 for further details). Predominantly, the most valuable assistance offered by employers was associated with the financial costs of moving home. For those who received it, the GSP was identified as the single greatest main source of help, because "a hassle free sale is what is important" (male employee, early forties). Of particular benefit is the "peace of mind" that it provides:

"It takes the strain out of having to worry about your old property when finding a new one." (Male employee, mid-forties)

Mortgage support, where available, was also identified as being particularly useful when moving from lower to higher cost areas. The importance of this kind of support is underlined by the fact that those not in receipt of GSP and without any mortgage assistance, who had relocated to areas of higher-cost housing, had the most gripes about the financial side of relocation. In order to achieve anything like comparable housing (in terms of size and quality), these relocatees typically had to take on larger

mortgages than they wanted. There were also indications that higher house prices meant that families were restricted in the choice of residential areas that they could consider. This meant that some ended up living further from their place of work than they would have liked.

Help with financing of the house move, legal fees, removal costs and so on, plus an allowance for temporary accommodation, where provided, was generally much appreciated, because not having to worry about financial aspects of moving meant more time was available to focus on other issues. However, it is clear that financial assistance cannot solve all problems associated with relocation. After all, as a male employee in his early fifties noted:

> "There is no point being offered loads of money if you and your family are unhappy."

Do the services of a relocation agent help?

Where the services of a relocation agent were available, the main benefit was seen as the provision of a person "to pull the different agencies together – the removal company, the estate agents, etc" (female partner, late thirties). A few relocating employees and their families reported that they had a very good personal support service encompassing help in finding houses and schools, in addition to the provision of area guides containing information about the local area, provided through a relocation agent. When support was provided by an identified contact person, who was also in close touch with the employer's human resources department, it was generally considered very valuable:

> "The move was very stressful. Support from the relocation company was crucial in getting through it." (Male employee, mid-forties)

Some relocatees acknowledged that they and their families liked to do all the work associated with moving themselves, but always would like to be in a position to know that there is someone "to fall back on" should the need arise.

In the vast majority of cases, it can be concluded that having the services of a relocation agent does help.

Is it appropriate for employers to incorporate personal aspects in relocation assistance?

The question of whether employers *should* get involved in family issues, and the extent of such involvement, remains unresolved in the minds of employees and partners. On the one hand are those who overtly volunteered a view that employers should not provide any non-financial help, and that any personal assistance is "for wimps" (although these were in a tiny minority). On the other hand, some employees and their partners resented the fact that, while their employers were generally "good" on the financial aspects of relocation, "they just don't care" about other issues (female partner, early forties). Some employees and partners in this group considered that there should be more emphasis on the non-financial aspects of relocation. However, they were mindful of the fact that different families would have different needs for assistance, and recognised that this could be problematic, particularly in terms of the greater flexibility therefore required in the allocation of resources.

More generally, however, there was widespread acknowledgement on the part of employees that, from a family perspective, it is the partner who needs caring for most during the relocation process, because they are "out on a limb" (male employee, mid-forties). Moreover, as outlined in Chapter 4, it is often the partner who orchestrates a relocation and bears the burden if things go wrong. Typically, it is also a time when the relocatee is so engrossed in work there is little time for family. For the employee, relocation involves a "lot of change" all at once: having a new home and a new job is a "double whammy" (male employee, early thirties), and, in such circumstances, the family is easily neglected.

Some partners indicated that they would have appreciated more assistance with identifying and assessing schools in the destination area, and guidance on strategies for finding school places. Others wanted to know about nurseries or nursing homes. Meanwhile, some partners were at a loss to suggest what non-financial assistance employers could usefully provide. One female partner in her mid-forties, regretting the loss of a job she had loved, asked:

> "What could they do about my job? They are a large company and cannot be concerned about individuals."

Others agreed with the sentiment that, realistically, the help that employers could usefully provide is limited:

"I think you've got to do quite a bit of it [home search, school search, dealing with elderly relatives] yourself because, at the end of the day, there's only so much they can help you with. A lot of it is personal choice." (Female partner, late thirties)

Nevertheless, many partners would have appreciated a sympathetic ear, suggesting that, at a minimum, the employer could make contact from time to time and ask how things are going.

A role for listening and mentoring

Partners and employees alike echoed the plea for employers "to listen more". Several employees considered that their company was "not sufficiently emphatic" to understand all that was involved in a move. While acknowledging that "it's all very nice having the money thrown at you" (male employee, mid-forties), some relocating employees still felt taken for granted by their employers. One male employee in his early fifties expressed this sentiment with particular vehemence, commenting that his company was

"like a sponge – willing to take everything you give, no matter at what cost."

When asked what other assistance would have been helpful in the context of geographical mobility, among those employees and partners who could think of an answer, the most common response was that they felt that there was scope for mentoring or counselling. Various suggestions were forthcoming about the form that this might take:

- on a one-to-one basis, about the options faced at a time when making a decision on relocation;
- appointment of a mentor to talk to, if desired, for a limited period (of months), both before and after the relocation;
- group discussions – one long-distance weekly commuter suggested that he might find it helpful to meet with others engaged in a similar lifestyle on a quarterly basis, to discuss their concerns and share experiences.

In general these respondents considered that:

"There is a lot to be gained through 'knowing people' who have been through the same experience." (Male employee, late twenties)

However, not all employees and partners would necessarily welcome such assistance. Indeed, one male employee in his early forties from BuildBlockCo considered that mentoring and counselling were not in keeping with "the culture of the business"; he would not expect it, and so was not sure if it should be provided.

One trade union representative interviewed contended that employers do not appreciate the hidden costs of moving that could be addressed in part through mentoring or counselling. He suggested that the costs of moving could be likened to an iceberg (that is, that most lie below the surface). While some partners and employees also felt that employers underestimated the impacts and upheaval of moving, particularly on the family, there was an acknowledgement from some employees and partners that employers were trying to do better.

Employer perspectives

The employer interviews revealed concerns about the non-financial aspects of relocation, including impacts on families. Employers have traditionally been reactive rather than proactive to the non-financial demands of relocation. The DesignCo representative, with particular reference to partner career counselling, stated:

"We haven't been terribly proactive, I guess mainly because we don't want to face it or have managed to find other ways around it.... We haven't been proactive to be honest. [It is] something we will probably have to do".

Likewise, the GrubCo representative, acknowledging the importance of partner employment and children's education in relocation negotiations, indicated that the company is "aware of these issues, rather than responding to them". Most employers echoed the sentiment: "we may have to consider more non-financial assistance" in the future. For some, non-financial assistance was seen mainly as a

means of retaining valuable employees, while, for others, it was recognised as an essential component of work–life balance (see Chapter 3). Nevertheless, it is evident that many employers remain unwilling to open up what one referred to as the "Pandora's Box" of non-financial issues, for fear of what might emerge.

Migration and commuting trade–offs

Why select the commuting option?

In Chapter 2 it was noted that circulation is becoming increasingly important, relative to relocation – a view endorsed by employers, employees and partners – although the trend is difficult to quantify. Faced with a relocation opportunity, it can no longer be assumed that a partner will follow.

So why had 10 of the employees interviewed chosen long-distance commuting (whether on a daily or a weekly basis, or a mixture of the two) rather than relocation? Two main sets of reasons may be identified:

- *Family reasons*: Long-distance commuting internalises costs of moving on the employee, rather than externalising costs (in terms of potential disruption to the partner's career or to children's education) onto other family members. As one male, long-distance daily-commuting employee in his mid-forties reflected:

   "To drive an extra hour and a half each day is one thing; I'm the only one [in the family] who gets the impact of that, but to up sticks and move house completely, that affects the whole family much more."

   Selection of the commuting option in preference to relocation enables the family to maintain a certain stability and strengthen roots in the origin area, while the employee "takes the pain".

- *Economic reasons*: Despite financial assistance to help with housing costs in the case of many relocatees, inter-regional house price differentials may mean that it is not possible to achieve housing of a similar nature or quality on relocation. Likewise, those in high house

price regions may be unwilling to relocate elsewhere for fear of losing out financially – particularly if a return move is likely.

There are also a number of practical reasons that might explain an increase in commuting. The tendency for lead-in times for migration to shorten (as outlined in Chapter 3) means that more people who contemplate relocation are involved in long-distance commuting on a daily or a weekly basis, at least for a short period. Similarly, a greater use of shorter-term assignments is likely to lead to an increase in commuting and a decrease in migration. As noted in Chapter 2, the diffusion of information and communications technologies has facilitated remote working, enabling some individuals, particularly those at higher skill levels, to combine longer-distance commuting with partial home working (Felstead et al, 2001). Moreover, over time, it would seem that commuting tolerances have increased (Green et al, 1999).

What are the impacts of long distance commuting?

For those families in which both partners were pursuing a demanding career, especially if there were no children, the long-distance weekly commuting option, with relocation assistance being used to rent a flat in the destination area, was sometimes considered to have benefits outweighing costs. Typically, this arrangement allowed both partners to work long hours and pursue their careers during the week, and come together for work-free quality time at weekends. However, when children were involved in such arrangements, the pressures on families were acknowledged more readily. In such circumstances the employee has two lives – a 'work life' and a 'home life' – with the former often being fulfilled at the expense of the latter. One male employee in his fifties commented that, during the week, he worked "all the hours God sends" and did not socialise except with work colleagues. A male employee with experience of long-distance commuting for over a year prior to relocating admitted that it was: "more difficult to live away from the family than I thought". In this instance the commuting arrangement was not conducive to integration in the destination area and was also unsatisfactory from the employee's perspective for family life.

Some employees undertook long daily commutes in preference to relocation. However, most who had selected this option found such commuting a draining experience. One male employee in his early forties (who subsequently relocated) admitted:

> "I was mentally and emotionally drained, virtually the whole time."

Another male employee in his mid-thirties reported that, because it was such a long journey home, he was conscious of watching the clock to see if it was time to go, and commented:

> "I don't think you're as effective as you should be when you're at work."

The volume of traffic on motorways, unpredictability of journey times and fear of accidents, all contributed to the emotional stress. Some tried to relieve the stress by working from home at least one day per week, and another reported that he shared the journey with a colleague making a similar trip one or two days per week.

Is long-distance commuting sustainable?

Some employees and their partners felt themselves better able to adapt to a long-distance commuting lifestyle than others. Some felt that they got used to it, that it was beneficial for the family in the circumstances and that the lifestyle was sustainable in the medium term. Others, however, felt that long-distance commuting was only sustainable in the short term. One male employee in his late thirties, coming to the end of a stint of long-distance weekly commuting, admitted that living apart during the week was hard:

> "We're certainly very pleased that it's coming to an end, because if it wasn't I don't think we could sustain it for much longer and it could have led to the break-up of the relationship."

While most of the employers were willing to facilitate long-distance commuting over a limited period and recognised that there might be good reasons for it (in terms of children's education, partner career and other special considerations), relocation was generally their preferred option.

Questions about the sustainability of long-distance commuting were raised in relation to the stress of commuting, potential implications for reduced employee productivity, and health and safety considerations. Looking ahead, attitudes to commuting long distances may be influenced by any future legislative changes on the use of company cars and limitations on driving hours, and by Health and Safety Executive guidelines on stress at work, as well as by congestion and environmental considerations.

Conclusions

This chapter has emphasised considerable diversity in the experiences of relocation and has highlighted the existence of cultures of mobility and immobility. General conclusions are as follows:

- The chances of a successful relocation are increased when expectations accord with reality and that, with experience, individuals and families tend to learn what to expect, such that the feeling that moving involves 'entering the unknown' tends to diminish.
- A positive approach to relocation is helpful in minimising the stresses involved in leaving the origin area and settling in at the destination area.
- To date, little attention has been paid to formal assessment of the impacts of relocation on employees or their families, and, for employers, 'success' tends to be measured in terms of business performance and employee productivity.
- While employees and their families welcome financial assistance to ease the costs and diminish the hassle of relocation, and generally find the services of relocation agents helpful in coordinating a move, non-financial elements of relocation packages are less developed.
- There is general agreement that more employees faced with the option of relocation are choosing to commute long distances rather than relocate, in order to internalise the costs of geographical mobility rather than externalising them to other family members. However, long-distance commuting also has impacts on families and its sustainability is questionable.

6

Conclusions and implications for policy

The research reported here has aimed to enhance understanding of the family impacts of geographical mobility. This final chapter presents a review of and reflections on the key findings emerging from the research, and discusses their associated policy implications for different audiences.

Key findings

An inadequate information base

There is a lack of quantifiable evidence on the volume of relocation. The term 'relocation' is not well defined and means different things to different people. Evidence on other types of geographical mobility is even more sparse, particularly in relation to those movements that are not undertaken regularly on a daily basis – for example, long-distance weekly commuting and short-term assignments. Hence, it is difficult to be precise about the volume of, and trends in, relocation and other types of geographical mobility. Rather it is often necessary to make use of partial information from a variety of sources to derive an overall picture.

Measurement issues also hinder attempts to assess the 'success' and 'failure' of relocation. Issues about what might be appropriate measures of success and failure, and on what time scale it is sensible to focus remain unresolved. Evidence suggests that employers pay little, if any, attention to formal assessment of relocation success and failure over the medium term, such that there is incomplete knowledge about the costs and benefits of relocation and other forms of geographical mobility.

Why relocate?

There are different traditions and expectations of relocation in different sectors, occupations and companies. From an employer perspective, relocation is predicated on business need and career development considerations. The quickening pace of business change was considered by several interviewees to have led to a shortening of lead-in times to relocation, with an emphasis on getting people 'just in place, just in time'. This is a cause for concern if it is also associated with an increase in 'hit and run' relocation – such terminology is indicative of a lack of consideration about wider family impacts.

While many employees appreciated the fact that relocation offered an opportunity to broaden their experience, often as a basis for career advancement, some considered that geographical mobility was not a necessary prerequisite for developing and maintaining the flexibility, adaptability and fresh perspectives valued by employers. Generally, employees' partners were less sympathetic than employees themselves to the requirement for geographical mobility; there is an overall lack of consensus between employers, employees and partners regarding whether relocation is 'necessary', as opposed to 'desirable' or 'helpful', to satisfy career development or wider business needs. As noted above, a comprehensive evidence base on which to judge 'necessity' is lacking.

Family and labour market trends and their implications for geographical mobility

Trends in family structures and ways of working have created a more complex context for relocation. Relocation traditionally involved a

male breadwinner accompanied by his dependent wife and children. As divorce rates have risen over recent years, existing family units have broken up and many new families are formed which involve remarried or repartnered individuals. This means that some family relationships involving dependent children – particularly father–child relationships – are conducted across households.

Trends in delaying both marriage and choosing to have a family mean that women keen to pursue a career may be further up the career ladder when they take on board family responsibilities. There is therefore greater potential for conflict between work-related geographical mobility and family responsibilities. Furthermore, a growth in the commitment of women to their careers means that the number of dual-earner families has increased and more women are likely to be involved in relocation as prime movers. Women may also be less willing than formerly to sacrifice their own career to the relocation demands of their partner's employer.

Relocatees are disproportionately drawn from among more highly educated individuals working in non-manual occupations. While most are keen to pursue their careers and so may be willing to contemplate relocation at the behest of their employer, in a tight labour market their bargaining position with their employer strengthens. The trend from organisational to occupational career structures, with fewer employees contemplating staying with one employer throughout their working life, also means that employees may be less willing than formerly to accept relocation under any terms. Greater possibilities for remote working, at least for some occupational groups, on either a regular or an occasional basis, opens up a wider range of working arrangements than was formerly the case. The evidence from employers, employees and partners suggests that employees and their families are increasingly unwilling to be passive in the face of employer relocation requests, and are more likely to ask for information on the destination area, including schools and educational facilities and employment opportunities for their partner. Employers may face more constraints on relocation in future as employees may be increasingly assertive in 'fixing the parameters' about when and where they will move.

Geographical mobility over the life course

Evidence from a range of statistical sources points to the fact that younger people tend to be more mobile than are older people. Younger people faced with a relocation opportunity will be building their careers, and may be at a stage in their life when they are more willing to explore new areas and grasp opportunities for change. The desire for stability tends to increase with age, so despite the fact that the evidence suggests that the process of relocation becomes easier with practice, willingness to move may diminish. Relocatees are mindful of the fact that the benefits of relocation tend to accrue disproportionately to them, whereas partners and other family members may be more at risk from negative consequences. Hence, with the onset of family responsibilities, there are more considerations vying for attention in a relocation decision than an employee's career. Two main concerns of employees faced with relocation are the impacts on children's education and partner careers. With the ageing of the workforce and the ageing of the population more generally, concerns about older relatives are also increasingly likely to be an issue for employees considering relocation.

Geographical mobility reconfiguring family structures

Relocation may lead to family fission. Young people on the cusp of independent living may face the prospect of moving with their parents and having to adjust their further education or initial employment plans, and leaving behind their friends and peers. Facing this option, many choose to stay and therefore leave the parental home prematurely. In order to avoid disruption to children's education (especially when they are studying for public examinations) and/or to a partner's career, an employee faced with a relocation opportunity may choose to adopt a long-distance commuting lifestyle. Evidence from key informants, employers and individuals alike, suggests that this is an increasingly popular option. The employee's rationale for this is likely to be that the costs of mobility are predominantly internalised on themselves, rather than externalised on other family members. However, in these circumstances a partner may become a part-time lone parent. The reconfiguration of living arrangements still has implications for

family life, and some families seem better able to cope with such a lifestyle than are others.

Relocation assistance

The extent and nature of relocation assistance available to employees and their families varies – by grade, reason for relocation and by company. However, it is clear that relocation assistance is overwhelmingly financially focused. Property-related financial assistance undoubtedly is welcome in easing the financial costs and diminishing the hassle of relocation. Similarly, employees and their families see the services of relocation agents as playing a helpful role in coordinating the various elements of the moving process. Employees, partners and employers alike recognise the fact that non-financial elements of packages, concerned with the impacts of geographical mobility on families, tend to be less developed. It would appear that some employers are unwilling to delve into the 'Pandora's Box' of non-financial issues for fear of not knowing how to cope with what might emerge. It is evident from the research that employees and their families have diverse circumstances and different concerns, although several indicated that they would have benefited from mentoring or counselling.

Policy implications

The challenge for employers, employees and their families

The foremost challenge for policy is to balance business, employee and family needs in geographical mobility. The ideal is to achieve a win-win position – for the employer on the one hand and for the employee and their family on the other. As noted above, individuals facing relocation may have a wider range of working and living arrangements open to them than was formerly the case.

The growth in available options may also be associated with an increase in pressures on individuals in terms of family and career considerations. The options that are eventually selected have implications for:

- the individual employee and their family;
- the employer; and also more widely for
- the economy, society and the environment (as described below).

Towards a better understanding of impacts: scope for assessment

It is in the interests of employers and employees that all of the costs and benefits of relocation and other types of geographical mobility are fully understood, from both family and organisational perspectives, and the negative impacts minimised. The research reported here has uncovered some of the costs and benefits of relocation and of long-distance commuting. There is ample scope for enhancement of the understanding of these costs and benefits through more thorough assessment and quantification of 'success' and 'failure', and their components.

For *employers* there is a need to take a step back to examine in more detail the rationale for relocation, what the business hopes to gain from it and whether such goals could be achieved better by other means. In other words, whether relocation is really necessary should be carefully considered. If 'yes', the next step might be to assess whether there is greater scope than currently for intra-regional moves in order to meet organisational needs – an approach that SpiritOrg has taken on board. These may be less disruptive for families than longer-distance moves. It would also be useful to consider the benefits, costs and impacts of long-distance commuting, in order to arrive at an enhanced understanding of when and how it is an effective substitute for relocation and when and how it is not. However, there are also wider societal, economic and environmental interests to consider here if this type of commuting adds to already serious congestion problems in some areas.

It should not be forgotten that some individuals choose to forgo a relocation opportunity by neither relocating nor taking up the option of long-distance commuting to a new workplace. From an *economic and social policy perspective*, there is scope for placing greater emphasis on enhancing understanding of the reasons underlying such non-events (White and Jackson, 1995) and their outcomes, particularly for careers.

Inculcating mobility mentalities?

It is clear that individuals, families and companies have different cultures of mobility and immobility. It is also apparent that a positive approach to relocation is helpful in coping with the stresses and strains of the moving process, and in facilitating settling in at the destination location. This raises questions about whether it is possible, or indeed desirable from a wider economic and societal perspective, to inculcate a mobility mentality to assist in relocation.

From a life course perspective it is has been emphasised how willingness to relocate for job reasons tends to decline with age, as factors other than career aspirations assume greater prominence in individuals' lives and the desire for stability often increases. The ageing of the workforce means that *employers* may need to seek better utilisation of older workers. In future, increasing numbers of older workers may be faced with relocation opportunities, at a time when 'mindsets' tend to be more attuned to geographical immobility – at least from a work-related perspective. Moreover, the ageing of the population poses a challenge for employers, as older employees more frequently have either caring responsibilities for older relatives or feel constrained in how far they feel they could or should move away from frailer family members.

The need for employers to devise mobility policies to meet diverse requirements

The evidence presented in this report suggests that families are increasingly diverse. The very diversity of family circumstances and of individual preferences means that 'one size does not fit all'. Achieving a consistent, equitable and transparent relocation policy across all parts of the organisation for all employees and their families is a difficult challenge to address and resolve.

Logically, relocation is a fundamental part of a portfolio of family-friendly employment policies, since, as explained by the GrubCo representative, it is about understanding and responding to "what employees value in life". As employees and their families become more assertive, employers are likely to find that they have reduced room for manoeuvre if they want to retain valuable staff. This is likely to mean that:

- there is a need to heighten awareness among employers of the impacts of geographical mobility on families;
- it is likely to become increasingly difficult to ignore non-financial considerations in relocation to the same extent as is currently the case.

However, whether, and how far, relocation and related policies should consider the family impacts of geographical mobility is contentious. Some employees and partners interviewed indicated that they would not expect employers to take on board such considerations. This is an area in which the role for employer relocation policy is not necessarily clear-cut and translating awareness of the issues into a response is by no means straightforward.

Employers recognise that there is a need to bring together relocation and related policies into a coherent package in order to deal more effectively with changing behaviour. As the FizzCo representative acknowledged, there was a need to review company policy in this field:

> "We have realised that it's not just a matter of moving someone permanently to a job in another location – there is much more to it than that. We realise also that we have got people who are doing long commutes and short-term assignments, who stay in hotels a lot. We need to get everybody so that they are within the [same] policy and try and make sure that everybody is working in the best way for themselves, their family, the business, etc."

There needs to be a more customised response that considers all the family issues and business needs. The DrinkCo representative termed this "flexibility within parameters", in order to meet different individual and family circumstances. This might entail making a specified amount of money available for relocation assistance to an individual relocatee and letting them choose how to spend that money from a set of specified options (that is, a 'pick and mix' approach to support). The options available might include counselling services, the services of an education specialist, expenses incurred in visits to the destination area, and so on.

Other government policies: appreciation of unintended consequences

Geographical mobility is a key cross-cutting issue. As such, policies in other domains may have unanticipated consequences for relocatees. A key example of this is provided by recent educational reforms in England. The extent of local variation and diversity in school structures means that it is often very difficult for relocatees to find their way around the system. On top of this, increased testing in the context of league tables, parental choice and upper thresholds on class sizes, means that relocatees tend to be disadvantaged relative to locals in finding places for their children in schools of their choice. Given the importance afforded to education and the concerns that parents have about disrupting their children's education, difficulties in placing children in preferred schools adds to a host of other pressures facing relocatees and their families. The problems of finding suitable school places may discourage families from relocating and this, in turn, may have knock-on economic consequences – from individual employer and local economic development perspectives.

Employers must find ways of addressing the unintended consequences of other policies on employee and family attitudes to relocation. They may have to consider provision of rented accommodation in some areas in order to provide a local address in order to aid entry into desirable schools. Likewise, they may have to investigate options for making their own workplace more attractive to a relocating partner, or building partnerships with other employers in the destination area with a view to facilitating opportunities for partner employment.

Similarly, geographical mobility has impacts on a range of *broader policy domains*. For example, choosing to commute as a substitute for relocation by some employees has implications for housing (with dual-location households often requiring two homes) and for planning and environmental policies (if more and/or longer journeys are undertaken).

Enhancing the information base

Finally, as noted at the beginning of this chapter, there are inadequacies in the information base. There is a relative paucity of information on the volume, nature, extent and characteristics of relocation. While there are a number of different cross-sectional and longitudinal data sources on migration providing an overall picture of geographical mobility, it is not currently possible to identify the precise extent of relocation initiated by employers. The greater the extent of 'variable' living and working arrangements (and the evidence reported here points to an increase), the more difficult it will be to undertake any kind of measurement of relocation and long-distance commuting. As traditional concepts such as 'usual place of residence' (and 'usual place of work') become more fluid, there is a need for *statistical agencies* and *policy analysts* to develop new data collection mechanisms and measurement concepts in order to monitor trends in the economy and society, and to help provide insights into their likely impacts on families.

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Appendix A:
Notes for issues to be addressed in interviews with 'key players'

1. Introduction

1.1 Current position of interviewee and interest/ role in relocation and geographical mobility issues

1.2 Resumé of previous roles/experience

2. Labour market and family change: impacts

2.1 What do you consider to be the key changes in the *labour market*, both currently and over the last 20 years or so, of relevance to geographical mobility/relocation?
For example:
- sectoral change
- occupational change
- flexible working
- increases in the numbers of women in employment
- regional and sub-regional variations in employment growth and decline (and associated availability of relocation incentives, etc)
- What are the implications of these changes for geographical mobility/relocation?

2.2 What do you consider to be the key changes in the *family*, both currently and over the last 20 years or so, of relevance to geographical mobility/relocation?
For example:
- demise of the nuclear family
- increasing divorce rates
- increase in the number of dual career households
- increasing numbers of elderly people

- What are the implications of these changes for geographical mobility/relocation?

3. Rationale for geographical mobility: changes and implications

3.1 Has the organisational rationale for geographical mobility/relocation changed over time?
- If so, how and why?

3.2 What are the primary strategic reasons for geographical mobility/relocation, and how have they changed over time?
- What reasons are becoming more important?
- What reasons are becoming less important?
- Is geographical mobility/relocation usually part of a long-term, well-considered, business strategy, or is it more a case of 'responding to a crisis' in the short term?

3.3 What do these changes in rationale/strategy imply for the nature, form and coverage of geographical mobility policies implemented by employers?
- Are current policies more formalised/less formalised than previously?
- Are current policies more flexible/less flexible than previously?
- How has the elapsed time between conception and implementation of a move changed over recent years?

3.4 Has awareness and understanding of the economic/social/family implications of geographical mobility/relocation changed?
- If so, how and why?
- Are there aspects where you feel understanding/awareness is generally low and needs to be improved?

4. Geographical mobility: trends and prospects

4.1 What do you consider to be the key changes in geographical mobility patterns, currently and over the last 20 years or so?

4.2 Has the volume of, and balance between, *migration* (ie relocation) and *commuting* changed?
- If so, how and why?
- What are the implications of these changes? – eg growth in long-distance commuting, more flexible working, and so on.

4.3 Have relocation *destinations* changed over time?
- If so, how and why?
- What are the 'new' destinations?
- How important is *international geographical mobility* (both relocations and commuting assignments)?

4.4 Has the profile of relocatees changed over the last 20 years or so?
For example:
- by industry
- by occupation (and by qualification level)
- by age, gender and stage in the life course (eg are more women relocating?)
- by household/family circumstances
- If so, how?
- Which industries/occupations/groups of individuals display greatest propensity to engage in geographical mobility/relocate?
- Which industries/occupations/groups of individuals display least propensity to engage in geographical mobility/relocate?

4.5 How would you expect geographical mobility trends to develop in future?
- Is relocation likely to become more important?
- Will relocation become 'redundant'?

5. Geographical mobility and career development

5.1 Is there a relationship between geographical mobility and career development?
- If so, what is the nature of that relationship?
- Has that relationship changed over time – and, if so, how and why?
- How much relocation/geographical mobility is associated with 'upward' career moves?

5.2 Do you consider that some individuals feel 'obliged' to relocate for career reasons, when they might otherwise prefer not to do so?
- Do you know of any research specifically addressing the implications for the prospective relocatee's career of 'moving', and/or of 'staying'?

5.3 What do you consider to be the implications of increases in partner employment (particularly in dual-career households) for geographical mobility/relocation?
- Is partner employment an important barrier to relocation?
- If it is important, how does it rate alongside other barriers to mobility from an employee perspective? And how have these ratings changed over time?
- How can tensions in maintaining two careers be addressed?
For example:
- provision of help to partner in finding a new job
- use of flexible working patterns so that partner can maintain job in origin location
- establishment of a dual-location household
- Do you think that employers *should* get involved in providing support to partners of relocatees in order that they can maintain/develop their careers? And if so, to what extent, and how?
- Can you identify any examples of good practice to help and support working partners?

6. Geographical mobility: impact on families

6.1 Is it possible to identify the main 'winners'/ 'losers' from relocation?
- Who are the 'winners'?
- Who are the 'losers'?

6.2 How does relocation impact on *children*?

6.3 How does relocation impact on *working partners/non-working partners*? (note that some issues relating to partner employment are covered in section 5 above)

6.4 How does relocation impact on the *extended family*?

6.5 Can you identify 'family-related' issues that are rising up the policy agenda?

6.6 How can adverse consequences of relocation on families be minimised?

6.7 How do the impacts on the family of long-distance commuting/dual-location living arrangements differ from those associated with relocation?

6.8 What role can the employer play in negating negative impacts of geographical mobility/ relocation?
- Can you identify any examples of good practice within organisations to help and support families facing relocation/ geographical mobility?

7. Company relocation policies: content and change

7.1 What do you consider to be the key changes in the content and emphasis of company relocation policies, currently and over the last 20 years or so?
For example, you might wish to comment on:
- degree of formalisation and flexibility of policy
- emphasis on financial issues
- emphasis on family (and social) issues
- levels and types of support offered

7.2 Typically, what do you consider are the strongest/weakest features of relocation policies?
- What are the main ways in which services to relocatees (and their families) could be improved?
- Can you identify any specific examples of innovative/interesting features in relocation policies?

7.3 Is the degree of outsourcing to relocation companies increasing?
- If so, how and why?

8. Assessment

8.1 How can we/do we measure the 'success' or 'failure' of relocation/geographical mobility?

8.2 Do we know how many relocation/commuting assignments 'succeed' and how many 'fail'?
- If so, what is the success rate/failure rate? And how have these rates changed over time?
- Why do some relocation/commuting assignments fail?
- How could such failures be reduced?
- What are the key 'crisis points' in the relocation/mobility process?

8.3 What are the main positive and negative aspects of geographical mobility/relocation?
- To what extent are these positive and negative aspects quantifiable?

9. Final observations/pointers

9.1 Any other comments on issues highlighted above or on related topics

9.2 Suggestions for other 'key players' to be interviewed

9.3 Suggestions/contacts for suggested case study companies

9.4 Key issues/'hot topics' you feel should be addressed in the research

B

Appendix B:
Notes for issues to be addressed in case studies/ employer interviews

1. Introduction

1.1 Current position of interviewee and role in relation to relocation and geographical mobility issues

1.2 Resumé of previous roles/experience

2. Background to organisation and business environment

2.1 Description of the company:
- activities/sector
- current organisational structure
- geographical location (of interview establishment and other sites)
- ownership
- number of employees (at interview establishment and across the company as a whole)
- occupational and gender profile of employees

2.2 Outline of ongoing and recent changes in the business environment of significance to the day-to-day operation and performance of the company
For example:
- nature of local/national/international competition
- cost pressures
- pace of change in the business environment

2.3 Has the organisational structure of the company changed in recent years and are there plans for change in the immediate future?
For example:
- outsourcing of certain functions
- de-layering of certain staff grades
- If so, how and why?

2.4 Have working patterns/practices changed in recent years?
For example:
- growth of flexible working practices
- If so, how and why?

2.5 Does the company face specific recruitment and retention difficulties?
- If so, what is the nature of these difficulties?
- Are difficulties more evident in some locations than in others? If so, where and why?
- Does the company have location-specific skill requirements?
- Is geographical mobility used as a partial solution to these difficulties (eg use of relocation/commuting assignments)?

3. Rationale for geographical mobility: changes and implications

3.1 Has the organisational rationale for geographical mobility/relocation changed over time?
- If so, how and why?

3.2 What are the primary strategic reasons for geographical mobility/relocation of some employees, and how have they changed over time?
- What reasons are becoming more important?
- What reasons are becoming less important?
- Is geographical mobility/relocation usually part of a long-term, well considered, business strategy, or is it more a case of 'responding to a crisis' in the short term?

3.3 Have relocation and other types of geographical mobility (eg commuting) become more or less important within the organisation in recent years, and would you expect them to become more or less important in the future?

3.4 What role do relocation and other types of geographical mobility play within the organisation?
For example:
‣ in corporate development
‣ in employee development

3.5 Has the process of relocation become less or more difficult over time?
- If so, why is this?

3.6 Is there a trend for relocations generally to be seen more as 'temporary' moves than was the case previously?
- If so, why is this?

3.7 How many/what proportion of the total workforce are relocated each year, and how has the volume changed over recent years?

3.8 Are some relocation destinations more popular among employees than others?
- If so, which destinations are 'easy'/ 'difficult'?
- Why? What are the attributes of 'easy' and 'difficult' destinations (eg image, cost of living, quality of life, local service provision, and so on)?

3.9 Do you think geographical mobility will become more or less important in the future, and what role do you think relocation will play in overall geographical mobility?
- Why?

3.10 Is the company involved in international geographical mobility/relocation?
- If so, what form does international mobility take?
- Has international mobility become more/ less important in recent years, and why?

4. Nature of relocation policy and the relocation process

4.1 Does the company have a formalised policy regarding relocation?
‣ obtain a copy of this policy, if possible

4.2 Has the relocation process changed over time? For example, with respect to:
‣ elapsed time between conception and operation of moves (both the 'average' and the 'range')
‣ level and nature of consultation with staff involved
‣ types of financial and other support offered to relocatees and their households – before, during and after relocation
- If so, how and why?
- What is the current situation?
- Please describe the process of a 'typical' relocation – what does it entail?

4.3 What categories of staff are selected for relocation/other types of geographical mobility?
For example:
‣ are all staff categories involved?
‣ are only some categories of staff involved?
- If so, which?
- Is there a mobility clause for all/some staff and/or an expectation of moving?
- Do domestic issues play any role in the selection process?

4.4 What happens if potential relocatees are reluctant to move?
- Is consensus regarding relocation preferred?
- Is the employer willing to be flexible about the timing of the move?
- Are alternative working arrangements (other than relocation) considered for some/all employees?

4.5 What are the key tensions/crisis points in the process of geographical mobility?
- Are these tensions different from employer and employee perspectives? If so, how and why?

4.6 Does the company outsource relocation (either in full or in part) to a specialist company/agent?
- If so, why?
- What does the relocation specialist/agent do?
- How is the relationship between the company and the relocation specialist managed on a day-to-day basis?
- What are the benefits of outsourcing?

4.7 What types of financial support are offered to movers?
For example:
- Guaranteed Sale Price on house
- help with relative house price differences between origin and destination areas
- removal expenses
- disturbance allowances
- temporary accommodation
- travel expenses
- compensation for loss of earnings of partner/other family members?
- Are relocatees now more/less likely to sell their house than used to be the case previously? Why?
- Has the incidence of dual-location households/weekly commuting increased?

4.8 What types of non-financial support are offered to movers?
For example:
- help with home search
- help in finding partner employment
- help in finding care for children/older relatives
- counselling/mentoring
- Has non-financial support become more/ less important over time?

- Are there any 'new' types of non-financial support emerging?
- Is the employee/family provided with a mentor?

5. Employee attitudes to relocation

5.1 What are the main issues relating to geographical mobility that concern staff?
For example:
- career development issues
- financial issues (including housing, preservation of living standards)
- impact on family (partner, children, extended family)
- the destination location (ie where it is, image, and so on)
- Do different groups of staff weigh the issues differently? If so, how?
- by occupation (eg professional/managerial, skilled manual)
- by gender
- by marital status/household composition (eg whether there are dependent children, whether a dual-career household, and so on)
- Have some issues become more important over time, and are others becoming less important over time? If so, which?
- Are there some issues that you think will become increasingly important in the future?

5.2 Has willingness of employees to move changed over time?
- If yes, are employees more or less willing to move? And why?
- Does reluctance/refusal to move impact on employee career prospects? Why?
- In general, do employees feel compelled to move?
- What are the career implications of refusing relocation?

5.3 In general, is geographical mobility/relocation perceived as being related positively to career development?
- By the employee?
- By the employer?

6. Geographical mobility: family issues

6.1 Considering all family members involved, is it possible to identify the main 'winners'/'losers' from relocation?
- Who are the 'winners'?
- Who are the 'losers'?

6.2 What have been the implications of the rise in the number of *dual-earner/dual-career households* for geographical mobility/ relocation?
- How has the company responded – in terms of supporting both employees and partners? And how has the nature of this support changed over time?
- Do male partners of relocatees face any issues/pressures that are different from those faced by their female counterparts?

6.3 What are the main issues faced by the *children* (younger children and older children) of movers, and how does the company ease potential difficulties?
For example:
‣ changing schools
‣ suitable care arrangements

6.4 Have concerns about *elderly parents/relatives* presented barriers to mobility?
- If so, what has been the company response?
- How can such concerns by minimised?

6.5 Do you collect any statistics on levels of satisfaction/dissatisfaction with the move?
- If so, what do the statistics show?
- Have satisfaction levels increased/decreased over time?

6.6 Is it possible to identify employees/families who are likely to face particular difficulties in coping with geographical mobility?
- If so, does the company take this information into account? If so, how?
- What are the key characteristics of those likely to be least able to cope with relocation?
- What are the key characteristics of those likely to be most able to cope with relocation?

7. Assessment

7.1 Do you measure/assess the 'success' or 'failure' of relocation/commuting assignments?
- If so, how?
- What proportions of relocations 'fail'?
- Why do they 'fail'?
- How can 'failure' be minimised?

7.2 What are the main barriers to successful relocation?

7.3 Is it possible to identify groups of employees who have 'most'/'least' to gain from relocation?
- Which groups are these?

7.4 What policies/practices would you identify as being particularly successful?
- What has the company learned about 'good practice' in relocation?

8. Final observations/pointers

8.1 Do you have any other comments on issues highlighted above or on related topics?

9. Access to employees

9.1 Are you willing for the research team to contact employees who have been engaged in relocation?

9.2 Discussion of the selection of employees and logistics of conducting interviews.

C

Appendix C: Employee background information pro forma

Background information for employee interview

Contact details

1. Name:

2. Phone:

3. Email:

Current employment

4. Employer name:

5. Work address:

6. Current job title:

7. Year started working for current employer:

Previous employment (starting with most recent)

8. Please provide details of previous employment *(starting with most recent)*:

Employer name	Workplace address	Job title	Year started
1.			
2.			
3.			
4.			
5.			

Travel-to-work

9. How do you travel to your current job? *(please mark box corresponding to means of transport used for the longest part of the journey)*

Car	
Bus	
Train	
Motorcycle	
Pedal cycle	
On foot	
Other	

10. Average travel-to-work time *(please mark box corresponding to average time taken for outward journey):*

Up to 15 minutes	
15-29 minutes	
30-59 minutes	
60 minutes +	

11. How far is your current residence from your place of work? *(please answer for main residence if you have more than one residence)*

Up to 5 miles	
5-9 miles	
10-19 miles	
20-49 miles	
50 miles +	

Residence

12. Please provide details of your current and previous home locations *(starting with current residence, and then the most recent previous residence)*:

Main residence	Home address *(please include details of town and postcode)*	Year moved in	Reason for moving in
Current			
Previous (1)			
Previous (2)			
Previous (3)			
Previous (4)			
Previous (5)			
Previous (6)			

Household structure

13. Marital status: Single
                            Married/cohabiting
                            Divorced/separated

14. Please list all other individuals living in your household and their relationship to you (eg wife, son, friend, etc), their age, and their economic position (eg part-time employee, in full-time education, etc). If there are no other individuals in your household, please write '*none'*.

Individual	Relationship to you	Age	Economic position
1.			
2.			
3.			
4.			
5.			
6.			

15. Do work-related commitments mean that you live apart from members of your family unit for part of the working week?

No

Yes   If yes, regularly or occasionally

Appendix D:
Employee interview schedule

Issues to be addressed in employee interviews

1. **Career history –** *these questions are to set the context for other parts of the interview*

   1.1 Current and previous positions within the company
   1.2 Length of time with current employer
   1.3 Overview of career history

2. **History of geographical mobility and attitudes to geographical mobility –** *we wish to be able to identify those people who have been more mobile/less mobile*

   2.1 In what locations have you lived (from school age, during further/higher education [if appropriate] and while working)?
   2.2 In general, are you happy to move your residence from one location to another in pursuit of your career?

3. **Reasons for relocation –** *we are trying to ascertain key reasons for relocation*

   3.1 Considering the most recent relocation you have been involved with, what were the reasons prompting relocation?
   3.2 Did you, or did the company, initiate the relocation?
   3.3 Do you think that the relocation has advanced/will advance your career? If so, why? Do you think it is necessary for people to move for career development purposes?
   3.4 Have you been involved in relocation previously? If so, how many times? What were the main reasons for previous relocations?

4. **Experience of relocation –** *we want to find out about what the relocation process was like for you (and for your family)*

   4.1 Length of time from first notification of relocation to undertaking the move
   4.2 How many visits did you make to the new area before the move?
   4.3 Were you (or are you) involved in long-distance commuting before final relocation? If yes, what was your experience of long-distance commuting?

4.4 What support did you receive from your employer in order to help you move? For example:
- information on/visits to the destination area
- help with temporary accommodation
- if you decided to sell your house, did you receive help in selling it (was there a Guaranteed Sale Price?)
- other financial support (eg disturbance allowances, help with legal fees, removal costs, and so on)
- support in finding schools for children/ employment for partner (if appropriate)
- counselling/mentoring during the move

4.5 Reflections on experience of relocation process on a day-to-day and month-by-month basis

5. Family structure – *we are trying to assess the family impacts of geographical mobility, and so we need to know your family/household structure*

5.1 Key details of household members – partner, children (ages), etc
5.2 Activities of other household members (eg whether in employment, at nursery, studying for GCSEs, at university)
5.3 Are there other family members you would need to take into consideration when relocating (eg elderly relatives, children living in another household)?

6. Impacts of geographical mobility on family life

6.1 Do you feel that the family has settled in the new area? If yes, how long did it take to settle? Did 'settling in' take longer for some family members than for others? Can you identify any key 'watershed moments' in the settling in process? What was critical in making you feel you 'belonged'?
(Issues to consider here are whether partner found a new job, how long it took children to settle into new schools, and so on)
6.2 Has the move changed family dynamics? If so, how? What about family and friends left behind?
6.3 What have been the main *benefits* and *costs* of relocation? Have the benefits and costs been

different for different members of the household? Within the household, who has gained most from relocation? For some family members, have the costs of relocation outweighed the benefits? (If so, for whom and why?) How could these negative impacts be reduced?

7. Overall assessment of geographical mobility – *the answers to these questions will help us to assess what worked well, and not so well for you (and for your family)*

7.1 Overall, are you pleased with your new job/ new location?
7.2 What aspects of the relocation process worked well?
7.3 What aspects of the relocation process did you find most difficult? How were those difficulties resolved? (Issues for consideration are childcare and schooling issues [eg difficulties in finding new schools]; partner employment [eg difficulty in finding suitable employment]; living apart from the family before a final move could be made, and so on.)
7.4 Did the 'reality' of relocation match your expectations? If not, what were the mismatches, and how would you account for them?
7.5 Were you satisfied with the help your employer provided in making the move? If not, why not? Which elements of help provided were most beneficial?

Finally, do you think your **partner** would be willing to participate in a partner interview stage of the project – involving a telephone interview with a member of the research team? If yes, please provide name and contact details.

Appendix E:
Partner interview schedule

Issues to be addressed in partner interviews

1. **Economic position/work history –** *these questions are to set the context for other parts of the interview*

   1.1 Current position
   1.2 Overview of work history

2. **History of geographical mobility and attitudes to geographical mobility –** *we wish to be able to identify those people who have been more mobile/less mobile*

   2.1 In what locations have you lived (from school age, during further/higher education [if appropriate] and while working)?
   2.2 In general, are you happy to move your residence from one location to another for job reasons (in pursuit of your partner's career/ your own career [if applicable])?

3. **Reasons for relocation –** *we are trying to ascertain key reasons for relocation*

   3.1 Considering the most recent relocation you have been involved with, what prompted relocation?
   3.2 Do you think it is necessary for people to move for career development purposes?
   3.3 Have you been involved in relocation previously? If so, how many times? What were the main reasons for previous relocations?

4. **Experience of relocation –** *we want to find out about what the relocation process was like for you (and for your family)*

   4.1 Length of time from first notification of relocation to undertaking the move
   4.2 How many visits did you make to the new area before the move?
   4.3 Was there a period of long-distance commuting before final relocation? If yes, what was your experience of the long-distance commuting arrangement?
   4.4 What support did you receive from your partner's employer in order to help you move? For example:
      • information on/visits to the destination area
      • help with temporary accommodation

- if you decided to sell your house, did you receive help in selling it (was there a Guaranteed Sale Price?)
- other financial support (eg disturbance allowances, help with legal fees, removal costs, and so on)
- support in finding schools for children/ employment for partner (if appropriate)
- counselling/mentoring during the move

4.5   Reflections on experience of relocation process on a day-to-day and month-by-month basis

5.   **Family structure –** *we are trying to assess the family impacts of geographical mobility, and so we need to know your family/household structure*

5.1   Key details (and activities) of household members – children (ages), whether in employment, at nursery, studying for GCSEs, at university, and so on)

5.2   Are there other family members you would need to take into consideration when relocating (eg elderly relatives, children living in another household)?

6.   **Impacts of geographical mobility on family life**

6.1   Do you feel that the family has settled in the new area? If yes, how long did it take to settle? Did 'settling in' take longer for some family members than for others? Can you identify any key 'watershed moments' in the settling in process? What was critical in making you feel you 'belonged'? (Issues to consider here are whether partner found a new job, how long it took children to settle into new schools, and so on.)

6.2   Has the move changed family dynamics? If so, how? What about family and friends left behind?

6.3   What have been the main *benefits* and *costs* of relocation? Have the benefits and costs been different for different members of the household? Within the household who has gained most from relocation? For some family members, have the costs of relocation outweighed the benefits? (If so, for whom and why?) How could these negative impacts be reduced?

7.   **Overall assessment of geographical mobility –** *the answers to these questions will help us to assess what worked well, and not so well for you (and for your family)*

7.1   Overall, are you pleased with the move?
7.2   What aspects of the relocation process worked well?
7.3   What aspects of the relocation process did you find most difficult? How were those difficulties resolved? (Issues for consideration are childcare and schooling issues [eg difficulties in finding new schools]; employment [eg difficulty in finding suitable employment]; family living apart before a final move could be made, and so on.)
7.4   Did the 'reality' of relocation match your expectations? If not, what were the mismatches, and how would you account for them?
7.5   Were you satisfied with the help your partner's employer provided in making the move? If not, why not? Which elements of help provided were most beneficial? What more could have been done?