

The Global Mobility Language Survey

Supporting Language
Learning in Global Mobility



Business

Introduction

In collaboration with the Forum for Expatriate Management, a news and information portal for the global workforce community, Rosetta Stone conducted a survey with over 100 senior and mid-management business professionals in the global workforce mobility industry at international organisations.

The Global Mobility Language Survey set out to assess key trends in three main areas of workforce mobility:

- Geographical areas of expansion
- Challenges of expat assignments
- Role of language training

All survey respondents actively work in the mobility industry, thus the survey results provide great insight into current trends, challenges, and opportunities within global workforce mobility. This research summary provides an overview of the key findings.

Contents

Growth regions	4
Preparation time	5
Biggest challenges	6
Importance of language training	7
Reasons for not offering language learning	8
Business impact of not offering language learning	9
Language training for the expat family	10
Frequently requested languages	11

Which of the specified regions are likely to experience growth over the next 5 years?

Trends in hiring, staffing, and expat assignments largely reflect growth projections for developed and emerging economies. Survey respondents expect to see the most significant growth in rapidly developing regions like, Asia-Pacific and South America, while staffing levels in continental Europe and North America will remain largely static.

According to a study by Ernst & Young, companies are sending more employees on expat assignments to India than any other country, closely followed by China and Brazil.

(Source: Global Mobility Effectiveness Survey 2011)

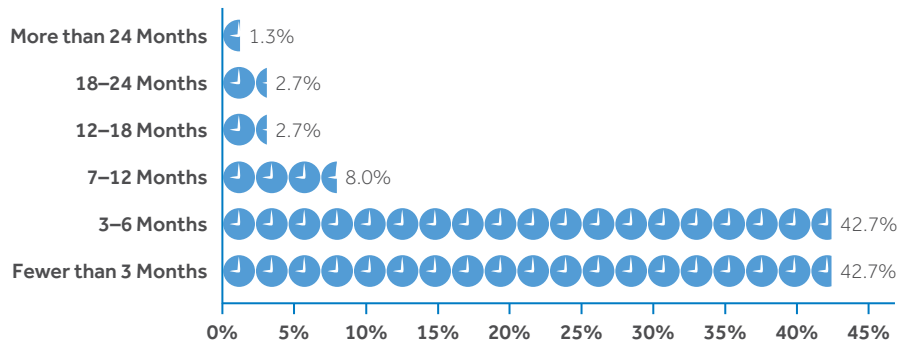
Region	Average % of the geographic split of workforce	Likely to shrink	Likely to remain the same	Likely to grow	Likely to grow significantly
UK	24%	9%	59%	19%	3%
Continental Europe	30%	17%	47%	21%	4%
Asia-Pacific	23%	3%	9%	39%	39%
Africa	14%	5%	39%	20%	13%
Middle East	12%	3%	39%	27%	13%
North America	38%	5%	52%	27%	1%
South America	9%	3%	29%	33%	16%

Strong growth

Static

What's the approximate time given to future expats to prepare for their assignment?

As global mobility professionals know, overseas projects and assignments are often the result of an urgent, critical business need. This is reflected in the minimal time most expats are given to prepare for assignments, with 86% of respondents stating that future expats usually have fewer than six months notice before moving abroad. Conversely, 6.7% of companies are able to offer employees more than 12 months to prepare for their assignment in a foreign country.



Of the companies with 1,000 or more employees, **25 in 1,000** employees are relocated internationally each year.

What are the biggest challenges future expats face?

Challenge	% of responses
Knowledge of the local language	61.3%
Family relocation challenges	61.3%
Housing challenges	60.0%
Tax issues	60.0%
Education for children	57.3%
Visa/immigration problems	46.7%
Cultural fit and religious issues	38.7%
High level of bureaucracy in target country	25.3%
Shipping of belongings	20.0%
Healthcare	18.7%
Inclusion in local community	17.3%
Legal challenges	14.7%
Insurance and pension	10.7%
Gender Issues in expatriation	10.7%
Personal finances	9.3%
Homesickness	9.3%
Transportation	5.3%
Adjustment to local climate	4.0%
Food adjustment	1.3%
Other	10.7%

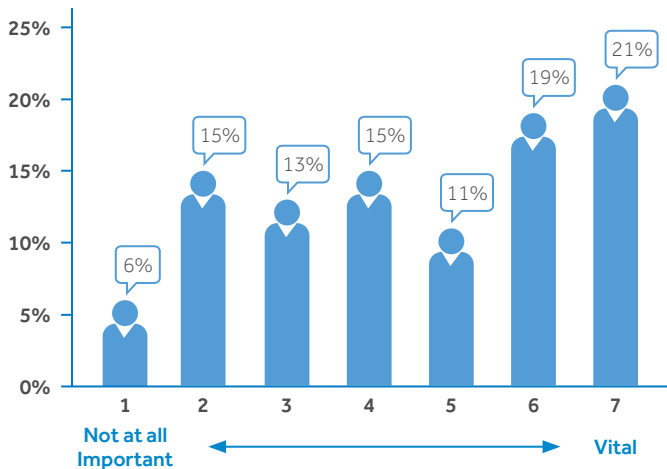
(Multiple answers were possible)

Each year, approximately 75%* of international assignments end in failure. Over 60% of global mobility professionals indicated that the two biggest obstacles expats face are knowledge of the local language and family relocation challenges. Several other key issues that impact the success of expat assignments are also related to language and cultural fit—like children's education, inclusion in the local community, and religious issues.

*Source: InterCultural Group

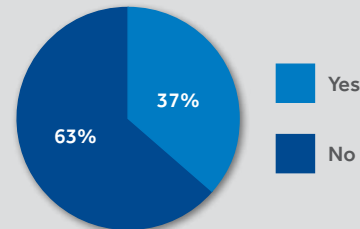
How important is language training for your business?

How important is language learning to the success of expat assignments? According to more than half of respondents, learning a language is an important business tool in addressing a core challenge to expat effectiveness.



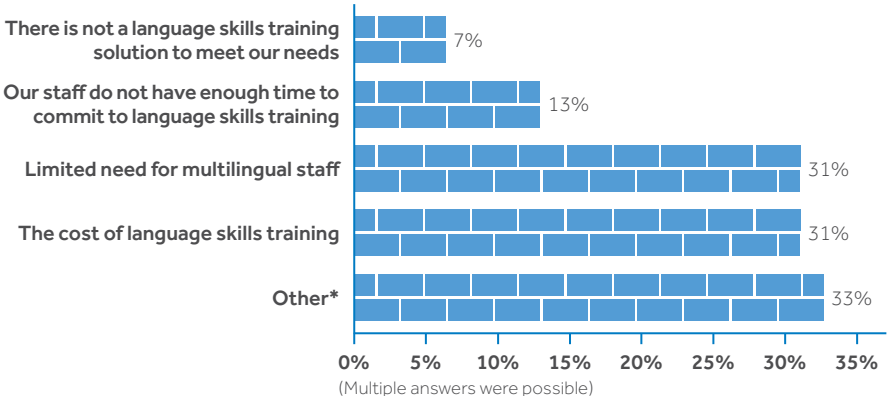
Is language training included in the organisation's basic expat package?

Although linguistic knowledge is considered a major challenge in workforce relocation (over 60% of the survey respondents agreed) and is also rated as highly important to businesses, **only 37% of respondents offer language training as part of their standard expat package.** However, of those who do not offer language learning for business, 12.5% still indicated that linguistic knowledge is one of the biggest challenges expats face.



What are the reasons for not offering language learning?

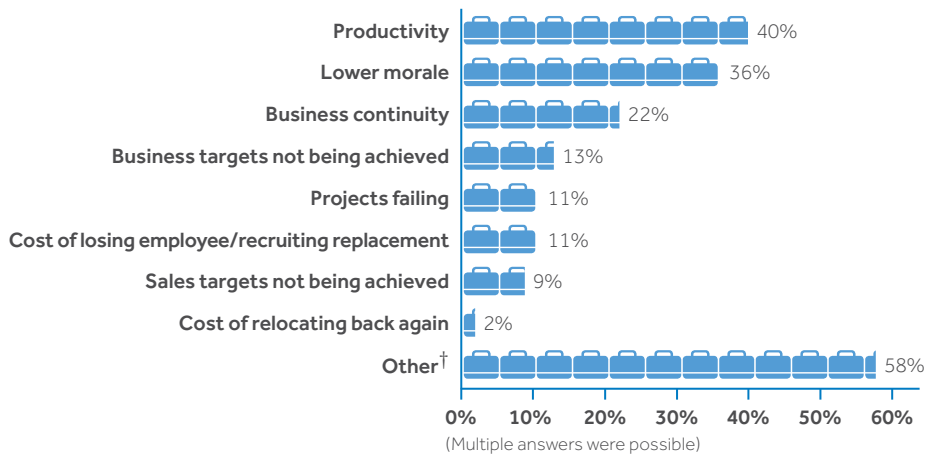
If language is widely recognised as an important tool for business and a primary obstacle to the success of expat assignments, why do some companies decide to not offer language training? Among survey respondents, the two main reasons cited were a limited need for multilingual staff and the actual cost of providing language training.



*"Other" encompasses reasons such as large proportion of staff is already multilingual, need for language skills is negligible, or currently looking for a suitable language learning solution.

How has the lack of language training affected your business?*

When respondents who do not provide language training were asked how this impacts their business, 40% cited lower productivity while 36% have observed a decrease in employee morale. These results are not surprising given how common multicultural and international work environments have become.

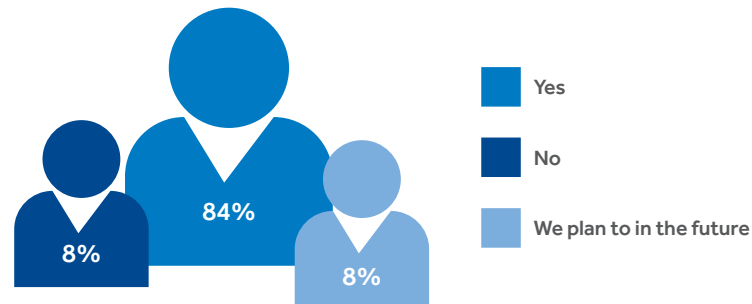


*Only respondents that do not currently offer language training

†The significant percentage of "Other" responses reflect the wide variety of ways language and communication barriers impact businesses, with reasons ranging from "difficulties dealing with clients" to "trouble with basic communication".

Is the same language training offered to the family of the expat?

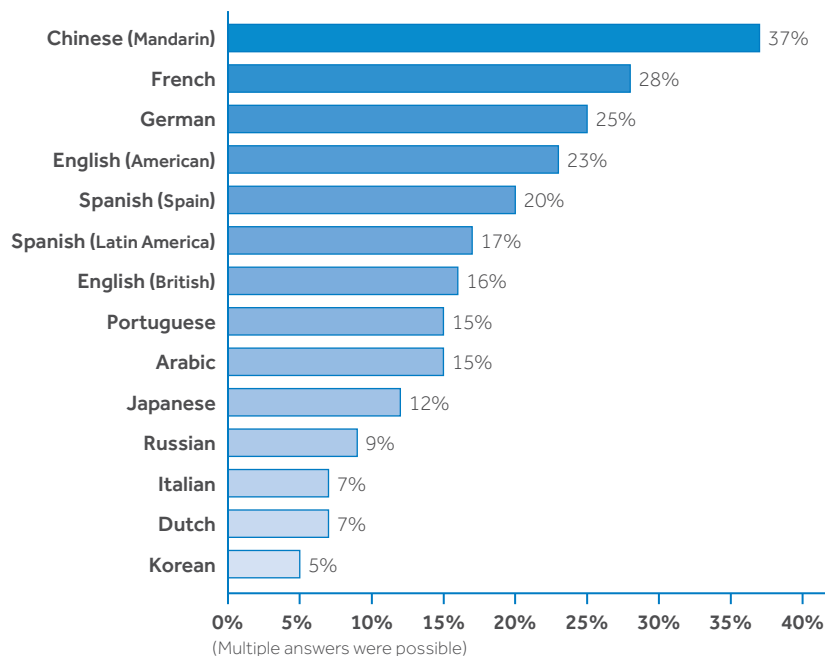
As indicated earlier, one of the biggest obstacles to the success of an expat assignment is the happiness and satisfaction of the expat's family. As a result, a majority of global mobility professionals include support and training to help the expat's family adjust to their new home. More than 90% of survey respondents (of those offering language training to their future expats) indicated that they currently provide language training to the expat's family or plan to do so in the near future.



Which are the most requested languages for workforce training?

Given the explosive growth and tremendous long-term potential of many different developing economies throughout Asia and Latin America, it is unsurprising to see strong demand for languages like Chinese (Mandarin), Spanish, and Portuguese. Other languages viewed as important tools for business include French (28%), German (25%) and English (23%).

English remains a widely requested language due to the continuous importance of incoming assignments in countries like the USA and UK. Also, in many international organisations English is still considered the main language in which to conduct business.



Rosetta Stone® language training for global mobility

At Rosetta Stone we work with mobility professionals every day and have a deep understanding of the challenges they face when training future expats for success in their overseas assignments. We understand that time and costs are only two of the constraints on training staff, and have developed our effective language-learning solution to be flexible, scalable, and accessible even on mobile devices. This allows us to deliver e-learning programmes that fit each organisation's unique needs and ensures future expats can learn whenever and wherever it is most convenient for them.

Speak to our Mobility Team now.

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Methodology – Rosetta Stone, in collaboration with the Forum for Expatriate Management, deployed an eight-minute long online survey to 25,000 members of FEM affiliated with the workforce mobility industry. The results of the survey were compiled throughout December 2011.

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