In a post-Bali essay on terrorist threats to the international “backpacker culture”, American journalist Michael Elliott recalls his younger days: “More than 30 years ago, I discovered Europe by hitchhiking around it each summer, sleeping on beaches and in cheap hostels, breezing into Barcelona on the back of a motorbike, watching French kids in Nimes cover the table with the ingredients of a fresh ratatouille, selling my blood in a clinic off Omonia Square in Athens for $8 – enough for a few more days on the islands. I learned more from these trips than from years in school.” (Elliott, 2002, p.27).

So Elliot learned more wandering around Europe in the holidays than he did at...
college, did he? That should put a few professors in their place!

But is it true? Does the kind of freewheeling self-organised travel of Elliott’s type – a huge element, nowadays, of international youth culture, and one that will scarcely be dented by the Bali tragedy – provide more learning than formal education? If so, we New Zealanders should be world champions in international know-how. For, due in part to our isolation, we are travellers. We do more travelling than anyone.

The typical “Kiwi OE” – at least in its popular stereotype – includes the kind of experience related by Elliott, but goes beyond it. OE typically stretches across years of experience rather than summer vacations and involves long periods of improvised employment as well as short episodes of holiday fun.

We take OE for granted, yet older readers of European origin will remember being schooled in a more staid and earnest approach to career development: leave school, get a qualification, find a steady job or a reliable company, ensure your security, advance your status. The contrast could not be more marked.

Interest in OE reflects a wider concern about migration patterns. In recent years, debate in this area has been dominated by concerns about the twin spectres of the “brain drain” of our talented locals and the influx of Asian immigration. We worry about the talent that disappears, yet seem unable to utilise the talent that appears. Our population statisticians have shown, however, that our fears are largely illusory (Bedford, 2001).

Nevertheless, more and more people live international lives, freely crossing our national boundaries in both directions and more and more individuals, as well as corporations, can be said to be “global”. Business people need to become more sophisticated about the shifting labour market. They must be proactive in identifying and utilising the talent that returning New Zealanders and new immigrants bring. Understanding OE is part of that task. Fortunately, many New Zealand managers have at some stage done their own OE and have an appreciation for the effects it has had on their own skills and outlook.

There is, however, a problem of managing OE within a company. When your most promising employees seek to take themselves away to the other side of the world for a period of several years, just as their value to the company is accelerating, what do you do? And what about OE returnees; how can employers and managers judge the value of OE in a candidate’s background? Is it a plus, denoting enterprise, or a minus, denoting flakiness? And how can those who have left exciting opportunities in Europe to “come home” to Godzone be given the opportunity to work in a way that continues to satisfy and stretch them, in what may well be a more restricted local business environment?

Clearly, in a country where OE is as important as it is in New Zealand, we need to understand it better – at individual, organisational and national level.

RESEARCH ON OE

Surprisingly, in view of OE’s potential significance in the Australian, New Zealand and other economies, little is known about it. The study reported in this paper is the first significant research on OE that we are aware of. In Finland, Suutari and Brewster (2000) have compared expatriate Finnish engineers who travel abroad under their own steam with those sent by their companies on “expatriate assignments” and have found some demographic and attitudinal differences. But that is the only other study we can find.

The huge research literature on corporate “expatriate assignment” (e.g. Thomas, 2001, chapter 10) does not count, for company-controlled international assignment is a totally different experience from individually controlled OE, and one which we believe has limited significance for New Zealand (Inkson, Arthur, Pringle and Barry, 1997).

In 1999, in the first issue of University of Auckland Business Review, the second author of this paper and two colleagues presented some ideas...
about “Kiwi OE” and its possible impact on national competitiveness (Inkson, Thomas and Barry, 1999; see also Inkson et al., 1997). We argued that notwithstanding the loss to New Zealand of many talented Kiwis who go overseas and never return, OE might be a means of building national human capital through the increased ability of returnees to contribute to the national economy through expertise and skills learned overseas.

Key to this argument is the view that the self-directed, improvisational character of the typical OE makes it a good analogue and preparation for the flexible, insecure, entrepreneurial character of work and careers in the 21st century and equips New Zealanders to be self-reliant and to cope well in a rapidly changing economic environment.

However, the 1997 and 1999 papers were longer on ideas than on facts: the theory of OE was supported only by a few case studies gathered incidentally as part of a larger study of careers in New Zealand in the 1990s (Inkson, Arthur and Pringle, 1999). Our national understanding of OE comes largely from personal experience, community folklore and a few idiosyncratic anecdotal writings (e.g. McCarter, 2001). There is no systematic information about how OE actually works.

**METHOD OF RESEARCH**

We therefore initiated an interview survey of OE returnees, people who had done an OE of at least six months in the past five years. We used a “snowball” sampling technique, asking each participant to recommend someone they knew who had also done an OE. Between 1998 and 2001, we interviewed 50 of these people in depth about their experiences. When we asked people if we could interview them about their OE, few of them turned us down; it was an experience they enjoyed talking about. From these conversations, conducted in a semi-structured interview format, we gathered a great deal of information. We focused particularly on why people go on OE, where they go, what their priorities are, what they experience overseas, what they learn, how they build their expertise and careers, why they return and how they re-adjust to life and employment in New Zealand.

For those who are interested in the technical detail of what we did, we refer them to a paper on the research that is to be published in an international journal (Inkson and Myers, in press). The data – consisting of 50 individual idiosyncratic “stories”, typically told over a period of an hour to an hour and a half – were highly individualistic, complex and “messy”.

We have tried to impose some order on the chaos by data-handling techniques of categorising and counting (see Inkson and Myers, in press, for detailed tables), but in a sense there is no “pattern” to OE. Every experience is unique.

**WHO DOES OE?**

Of the 50 participants, 24 were university graduates and a further 12 had some tertiary experience. Forty had held administrative, professional, technical, clerical or sales jobs before departure and eight had been full-time students. Only two had been manual workers. Even allowing for possible sample bias, this suggests that OE is primarily a middle-class phenomenon undertaken by educated people.

OE is also undertaken young. The median age of participants on departure for OE was 24, and 90 per cent were in their twenties. Only two had left when under 20 and only three when over 30. Finally, OE appears to be undertaken equally by both male and female young people. Our sample of 50 included 24 men and 26 women.

The self-directed, improvisational character of the typical OE equips New Zealanders to be self-reliant and to cope well in a rapidly changing economic environment.
MOTIVATION FOR OE

OE enables exploration

From answers to our question, “Why did you decide to do OE?”, the key driver of OE is the desire for exploration (“see the world”, “get some adventure in my life”, “experience other cultures”), with a clear emphasis on non-work rather than work experience. Twenty-six travellers gave reasons of this type for their OE, generally in terms not associated with work or career issues. In its genesis, therefore, OE appears to be about the desire to experience novelty and difference. This may tell us something about the psychology of those who undertake it.

OE enables escape

Some travellers wanted to escape. Four specifically wanted to escape from their humdrum jobs in New Zealand and 13 wanted to escape from their humdrum lives in New Zealand. Three wanted to escape from personal relationships in New Zealand and 11 just “wanted a change”.

OE is socially supported

The desire to do OE is reinforced by supportive social attitudes and role models (“my parents had done it”, “my family thought it was a great idea”, “my older brother was already overseas”) and networks (“my grandparents were still living in the UK”, “my friends kept emailing me, inviting me over”). Virtually all our respondents indicated that they had some form of social support to go overseas.

OE is triggered by circumstance

OE is probably deeply embedded in national consciousness, awaiting, in each individual, the right combination of circumstances for him or her to say, “Now is the time!” Asked why they chose to do OE, 16 participants mentioned a long-term predisposition (“I had always intended to go”) and 10 mentioned timing issues, such as the break-up of a relationship or the coming expiry of a visa entitlement.

OE is not work-oriented

People do not do OE so they can help their employing organisation with its international commitments. Despite a huge international interest in the phenomenon of “expatriate assignment”, none of our 50 interviewees was sent overseas by his or her employer. Only a few were given leave by their employers to do OE, or were implicitly promised a job on return.

Nor do New Zealanders generally do OE to improve their career opportunities or to learn work skills or international business. When they were asked why they had decided to go overseas, only six out of 50 interviewees mentioned specific career opportunities (three work opportunities, the other three educational opportunities) and two mentioned the general idea of career development. Nevertheless, the unintentional self-development and work-relevant learning may be considerable.

PLANNING AND OE

In contemporary society, planning is advocated and valued, yet as the environment becomes less predictable, planning becomes ever more difficult. From our evidence, OE is a relatively unplanned experience. When asked what plans they had when setting out on OE, the vast majority of participants said something like:

“Go to London, find somewhere to live, and look for a job.”

Only a few had pre-arranged jobs and a few more had pre-arranged accommodation. Participants’ discourse about OE suggested that planning seldom went beyond the short term. Holidays and other travel opportunities, as well as jobs, were taken on impulse, though once they had “found their feet” overseas, some travellers did come to take a more “planful” approach to their decision-making.

However, 42 participants (84 per cent) had planned to spend a specific length of time overseas – on average two years. Of these, 35 (83 per cent) planned to be home within two years. In the event, only eight of those (23 per cent) were back within that time. Nearly half the total sample stayed out of New Zealand (apart, in some cases, from brief “flying” visits home) for more than four years. Thus,
OE “grows like Topsy”, beyond any loose plans and timetables set for it, as travellers extend it in response to personal whim and the ebb and flow of opportunity.

LOCATION OF OE

Thirty-seven participants (74 per cent) had spent at least half of their time overseas in the UK, the vast majority in London. Many experienced other countries only as holidaymakers or backpackers and gained no experience of working there. Of the other participants, a few had gone to Asian countries to try to fulfil specific cultural agendas and others had deliberately become “rolling stones”, moving on and on without really settling anywhere.

TYPES OF OE

On the one hand, every OE is unique. On the other, we noted patterns in the way people talked about OE. Scanning the results, we developed a typology of OE, focusing particularly on the way in which work and non-work interests were balanced, into which we were able to fit each participant. The types were:

- **Cosmopolitans** (16 cases): these travellers initially or eventually utilise a qualification in a specialist area to find work. While travel is the primary initial reason for their OE, their experience often refines their career aspirations. Employment may eventually become a dominant focus and travel must fit around the job, or the job must be manipulated to produce opportunities for travel. Many in this category have work challenges and opportunities that would not be possible in New Zealand.

- **Returners** (eight cases): these travellers have done more than one OE. Often the first has been exploratory and short, or cut off by circumstance.

The second trip tends to be more focused, with a career orientation similar to that eventually developed by the cosmopolitans.

- **Boundaryless careerists** (six cases): these travellers also develop a career focus, but are less constrained by occupational or professional boundaries. They develop a portfolio of skills, or work their way into a new industry.

- **Alternative tourists** (eight cases): these travellers are primarily motivated by the desire to live in an “authentic” manner in the countries they visit and to meet people outside of the mainstream tourist experience.

- **Stimulation seekers** (seven cases): these seek to experience a variety of countries, locations, people and job types. They believe in seizing the moment, living life to the full and travelling on impulse and through connections rather than as a result of forward planning.

- **Londoners** (five cases): these like the security of being based in London and using it as a focus point from which to find employment and travel. Usually they return to the same accommodation and employment. Travel is carefully planned and tends to be more important than work.

It is apparent that even though OE tends not to be embarked on with work- or career-related objectives in mind, these tend to develop over time. Participants in the first three categories – 60 per cent of the present sample – all came to use OE in a quasi-strategic way to provide themselves with “career capital” (Inkson and Arthur, 2001) which they might be able to use after their OE is over.

Those in the last three groups, in contrast, continued for the duration of the OE to see career as subordinate to other interests. This is not to say that they acquired inferior career-relevant skills to those gained by more career-oriented travellers.
Career development and self-development are often serendipitous.

**INDIVIDUAL OR SOCIAL?**

There is a temptation to see in OE a reprise of the “man alone” theme in New Zealand culture – the solo adventurer making a lonely way in a tough world and becoming hardened and self-sufficient as a result. While there is something in this, OE is, from the evidence of our 50 travellers, a relatively sociable experience. For a start, half of OE travellers are women and women tend to be motivated more by “communion” in their self-development (Marshall, 1989).

We noted that our participants’ stories had very strong social themes. Many travelled with friends and there were strong patterns of flatting with others (often other New Zealanders), taking vacations with others and spending time with family and friends.

Most participants had substantial close, living-with attachments en route and these to some extent constrained their choices of travel, location and work, as well as in some cases preoccupying them for periods of time at the expense of cultural exploration and career development. In other words, OE mirrors the experience of all members of society, including those who remain in New Zealand. The notion that OE in some way “liberates” the traveller to discover his or her true potential is true in a sense, but the process crosses the boundaries into, and interacts with, the person’s personal and social life. As a result, he or she is far from autonomous.

Some participants had had what appeared to be tumultuous personal lives overseas, sometimes involving serial attachments and severances. But, overall, relationships fared well under the stresses of travel. Fourteen of the 50 travellers set out with a partner and 12 returned with the same partner, the relationship still intact.

Further, of the 36 travellers who left New Zealand without a partner, 18 – exactly 50 per cent – had acquired one by the time they returned to New Zealand. Although we were not able to assess how these new Kiwis adjusted to life and work in their country of adoption, it may be that the talents of the immigrants who come to New Zealand with their Kiwi partners counterbalance the talent that is lost in the “brain drain” of OE-ers who never return.

**RETURNING FROM OE**

According to participants, the main reasons for returning from OE are family-related – family illness, worries about ageing parents, seeking to resume or develop a relationship with a partner in New Zealand, or simply wishing for more family contact. Other travellers felt they “had been away too long” or “needed a break”. A few did not wish to return, but were forced to do so by the expiry of their visas. Again, work/career issues were relatively unimportant, with only six participants mentioning a job opportunity or career development as a reason for return.

As to participants’ employment in New Zealand after return, the majority of those who had been in full-time employment before departure resumed a similar kind of work to that which they had done previously, sometimes in the same organisation, although in about half these cases they appear to have gained jobs at a higher level than previously. A significant number of participants, however, had been able to capitalise on their overseas work experience by finding employment in a field in which they had not previously worked in this country, or by starting their own business, based on knowledge acquired abroad. In other cases, participants took up part-time or full-time tertiary study soon after their return and several indicated that this had been directly caused by their reappraisal of their lives during the time overseas.

Lastly, as might be expected, significant numbers of returnees indicated that they had had difficulties readjusting to New Zealand, including difficulties caused by their New Zealand jobs simply not matching up in terms of interest or responsibility. One was concerned to find that:

“I had moved on enormously, but all my friends...
who had stayed here didn’t seem to have changed at all.

OE AND PERSONAL DEVELOPMENT

We asked participants: “What new skills and abilities did you develop when you were away?” and “what existing skills and abilities did you enhance when you were away?” Results are shown in Figure 1.

Two things are immediately apparent. First, participants in general saw substantial learning and a wide variety of learning. Using the above category system, the average number of abilities and skills mentioned spontaneously by participants was more than five per participant. Second, the major areas of learning were on the “soft” side of the spectrum: interpersonal relations, communication skills, self-confidence, autonomy and, of course, a global perspective and cross-cultural skills.

EVALUATION OF OE

When participants described their OE, they told it as a matter-of-fact, “this-is-what-we-did-and-this-is-why-we-did-it” story. When they evaluated their OE, however, the superlatives flowed … “the greatest experience of my life”, “I wouldn’t have missed it”, “completely changed me as a person”, “wonderful”, etc. Some participants were unwilling or unable to name a single overall negative about their experience, even when we pressed them. Among those who did, the most common negative was seeing poverty at first-hand when visiting Third World countries. But this, too, was typically described as an important learning experience.

Some OEs had involved loneliness, homesickness, alienation, unemployment, job dissatisfaction, homelessness, poverty, relationship traumas, even muggings. Yet these were overwhelmed by the positives of OE and were typically described as “growth experiences”. Even the most conservative grouping our typology – the “Londoners” – appeared to have benefited massively from the experience (see sidebar: “Caitlin – a ‘Londoner’ ”).

By and large, we concluded that OE changes young New Zealanders’ lives through the learning that they do. The effect is created by a “king-hit” of

The major areas of learning were on the “soft” side of the spectrum: interpersonal relations, communication skills, self-confidence, autonomy and a global perspective.
novel experience allied to the responsibility for self that OE inevitably carries. Consider, for example, some of the responses to our question: “In what ways has your life changed since your overseas experience?”

“I’m a different person. Before I left I was shy, insecure and lacking in confidence. Now I believe in myself and have strong self-confidence and a good sense of what is right and wrong for me.”

“Greater appreciation of New Zealand life and opportunities … and of the importance of education. I’m able to think globally on personal and work issues. (I) have become very independent.”

“I was able to work at a much higher level than was possible in New Zealand. I have developed close ties with other people. My mind has been broadened far beyond the way it was when I left.”

“OE has made me self-reliant. I have grown up and made the transition from student to professional.”

“I am much stronger and more independent now. I have clarified my personal values.”

“I have become a much more resilient person, both physically and emotionally. I have learned how to make difficult decisions and live with them. I have become much more sociable.”

CONCLUSIONS AND IMPLICATIONS

Our conversations with OE veterans have given us a very positive view of OE and its benefits for those who undertake it, for the organisations that employ them after their return and for New Zealand. While the immediate career effects on returnees were perhaps less substantial than we expected, we found the volume, positivity and passion of their evaluation of the experience and the way in which they appeared to be utilising their new-found confidence and skills very heartening. We were impressed, too, by the wonderful, improvisational, “make do and enjoy” quality of most of the stories and by the thrilling, life-changing adventurism of some of them.

It also seemed, particularly from the emphasis on family, relationships and sociability in their stories that OE is more than a positive self-development experience. It is indeed a national icon, a jewel embedded in our folklore and in the messages our young people learn. Long may we promote it.

One characteristic of Kiwi OE that may limit its value, however, is its continuing Anglo-centrism. The overall focus on London is apparently caused by the colonial history of New Zealand, OE traditions, the British “working visa” system, the cultural and language similarity of the two countries, and the natural tendency of travellers not to change too many parameters of their lives all at once. However, the result may be that OE travellers do not learn to be “citizens of the world”, but instead act as “little Englanders”, though, of course, Britain (and particularly London) is a much more cosmopolitan community than it once was.

A riskier and more eclectic choice of destinations – for example, countries with contrasting cultures where English is not the main language – might provide better preparation for New Zealand’s future global workforce. New Zealand does, after all, have visa arrangements for working holidays in at least 14 other nations.

As to the implications for our business organisations, there is a challenge. OE represents an extreme version of the “boundaryless career” (Arthur and Rousseau, 1996), in which the individual crosses boundaries frequently – in this case international as well as organisational boundaries – and evaluates his or her career in terms of external reputation rather than status in the organisation. OE removes employees temporarily, but it also enhances their self-confidence, independence and skills and puts them firmly in charge of their own lives. How can New Zealand companies manage such human resources?

In a few of our cases, organisations in New Zealand maintained contact with employees who had gone abroad and were able to offer them opportunities on return. For example, from stories told by more than one participant, the New Zealand
SIDEBAR

Caitlin ... a ‘Londoner’

Caitlin was educated in a provincial New Zealand town. She worked there for five years in various administrative roles, but felt something was missing from her life. She was keen to meet her father’s family and join friends already on OE. Finally, she realised she simply had to go. She left behind a boyfriend and headed off to London for what she imagined would be a “one-year visit”.

Caitlin had little planned beyond her one-way ticket. First, she took a two-month tour of Africa. On her return to London she worked a number of “office temp” positions, resulting in one company offering her a great, but very challenging job. The freedom and anonymity of OE encouraged her to push her personal limits.

“I lied through my teeth to get the job, but I knew I could do it. The learning curve was daunting ... but I thought, ‘What the hell?’”

Her new employer offered her new challenges in research, quality management and events management. She travelled on official holidays and long weekends. She had one major adventure with a friend travelling through Egypt and Jordan.

“It was stunning ... we met people who led nomadic lives ... they invited us to stay with them ... and we did ... but we were always aware we were very different ... two blonde women in a totally foreign environment ... it was a bit risky.”

After three years, Caitlin became homesick and returned home. Her English boyfriend then joined her in New Zealand. The lure of OE was too strong, however, and they soon returned to London. On hearing of this, her former employer contacted her to offer a new contract working across a number of projects. The job kept her busy for several years. For travel, package holidays were her favoured option as they provided a safety net for a woman travelling alone.

After a total of six years away, Caitlin and her boyfriend returned to Auckland where many of their OE friends had already relocated. She found a great job with a telecommunication company, but when her boss’ position was “restructured”, she moved on. Unable to find a job that matched the challenge and excitement of her OE, Caitlin began part-time study and settled for a lesser position in the short term.

Caitlin has started a family. She is keen to stay in New Zealand and grow her career and is glowing in her appraisal of her OE. She has been able to take risks, to be challenged, to develop lasting international friendships, to gain new work and personal skills, and a global perspective.

“I know now ... that I can do new things ... that I can do well ... that I can do anything!”
Police encourage would-be recruits to do OE as a means of preparing themselves for the demands that police work entails. We are aware, too, of professional services companies in Auckland that not only work hard to maintain a relationship with their distant protégés, but also use their professional networks overseas to help them to get the right experiences. This kind of human resource management-at-a-distance represents an investment that is no doubt repaid long-term by grateful returnees. Perhaps more organisations should think along the same lines. We plan to do research on “the HRM of OE” in the near future.

The key to the effectiveness of OE is, of course, its self-initiated, self-directed nature. Its implicit philosophy is that people should run their own lives and learn from their own mistakes. That may be the reason that so many returnees have difficulty when they return to jobs in local organisations. Those who have made their way in the big wide world may find the constraints of being over-controlled in an Auckland accounts department just a tad restrictive.

OE is potentially a precious gift not just for the traveller, but for all of us. In its encouragement of initiative, independence, networking, improvisation and intercultural experience, it is surely a telescope focused on our country’s future. Every young New Zealander who has not yet had the experience should ask: “Is there something in this for me? How can I approach this so I have a great time, but also enable myself to build a better future?” Every New Zealand manager needs to ask the questions: “Do I really understand this wonderful resource which is there, in and around my company? What can I do to set it free for my organisation’s benefit?” Many of us know personally the goodies we have gained through our own travel. The trick now is to understand OE as a communal good and to learn how to share it for the benefit of all.

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