

An Examination of Salient Factors Affecting Expatriate Culture Shock

Robert H. Sims, Western Kentucky University
Mike Schraeder, Troy State University - Montgomery

Organizations are faced with numerous challenges as they attempt to remain competitive in an expanding global economy. One of the challenges that these organizations face as they expand into global markets is the successful transfer or placement of U.S. workers (i.e., expatriates) into foreign assignments. Evidence continues to emerge supporting the idea that successful placement depends heavily upon how these individuals react or adjust to the culture and norms of their host country. Often, individuals experience a stress-induced reaction, culture shock, as they are confronted with the realities of their new environment. This article examines salient factors related to culture shock and, consequently, expatriate success. A review of the literature identified five key factors that can affect expatriate culture shock. These factors include: (a) the training the expatriate receives, (b) the demographic characteristics of the expatriate, (c) the dispositional and personality characteristics of the expatriate, (d) the level of organizational support provided to the expatriate, and (e) the level of technical competence of the expatriate. Research propositions were developed relative to how each factor relates to expatriate culture shock. This synthesis of expatriate literature also supports the need for further studies on culture shock in general and the identification of additional factors that affect expatriate culture shock.

Global expansion is occurring at a feverish pace as organizations continue to pursue strategies in an attempt to remain competitive within the shifting dynamics of our world economy. This global expansion has a number of significant implications for U.S. organizations endeavoring to expand into foreign markets. These implications range from major strategic issues such as the location of foreign operations to the placement of U.S. workers (expatriates) into these new foreign operations.

Given the strategic significance and the burgeoning costs of many expatriate assignments, it is important (both to the organization and to the expatriate employee) that the assignment be successful. Unfortunately, however, this is often not the case. It is estimated that 16 to 40 percent of expatriate assignments end in failure (Black & Gregersen, 1999; Black, Gregersen, Mendenhall, & Stroh, 1999; Black, Mendenhall, & Oddou, 1991), with estimates of failure in some host countries reaching as high as 70 percent (Naumman, 1992). The costs associated with expatriate failure are astounding, often reaching \$1 million or more for each individual failure (Shannonhouse, 1996). This translates into total losses for domestic firms in excess of \$2 billion per year (Punnett, 1997).

Due, in large part, to the aforementioned statistics, a considerable body of knowledge has been developed on various facets of expatriate cross-cultural adjustment (CCA). Dozens of academicians and researchers have written about and studied many topics on expatriates and cross-cultural adjustment. Yet, very little attention has been devoted to what is often cited as the primary obstacle to expatriate adjustment—the phenomenon referred to as “culture shock” (Black, 1990; Furnham & Bochner, 1986; Harrison, 1994; Hisam, 1997; Mumford, 1998; Oberg 1960; Winkelman, 1994). In fact, according to Mumford (1998), “... nobody has attempted to measure [culture shock] or even to validate the concept empirically” (p. 149). This dearth of research is surprising since it is estimated that U.S. organizations spend an average of \$80,000 preparing each prospective expatriate for their assignment and the impending culture shock (Harrison, 1994). Prior to discussing factors related to expatriate culture shock, it seems instructive to take a closer look at this troublesome phenomenon.

EXPATRIATE CULTURE SHOCK DEFINED

At the most fundamental level, expatriate culture shock is grounded in uncertainty. When expatriates first enter a new culture, there is uncertainty about behavior that is considered acceptable. Further, as time passes, expatriates may discover that many behaviors considered acceptable in their home country are not acceptable in the host country and that some behaviors considered offensive in their home country may be acceptable in the host country (Black & Gregersen, 1991). This is important to consider since, according to Black et al. (1991), when an individual leaves a familiar setting and enters an unfamiliar one, old routines are disrupted, creating psychological uncertainty. This disruption evokes a desire to reduce the uncertainty inherent in the new setting, especially regarding new behaviors that might be required or expected. To the extent that various factors either increase or decrease uncertainty, they also prompt an increase or decrease in culture shock.

From a theoretical perspective, culture shock has been described as the “stress induced by all the behavioral expectation differences and the accompanying uncertainty with which the individual must cope” (Black & Gregersen, 1991, p. 462). Similarly, Solomon (1994) described culture shock as “An emotional and psychological reaction to the confusion, ambiguity, value conflicts, and hidden clashes that occur as a result of fundamentally different ways of perceiving the world and interacting socially between cultures: Disequilibrium” (p. 58).

In summary, culture shock can be described as the wave of emotions an expatriate employee feels immediately upon entering a foreign country—a country with a different culture and perhaps even a different language. Culture shock can hit immediately and be overwhelming, exhausting, and numbing. Culture shock can also have a creeping effect, evolving slowly as the expatriate experiences more idiosyncrasies of their host country’s culture. As such, culture shock may involve an incremental process where the expatriate experiences various levels of frustration that simply build up until the inevitable occurs—an explosion of anger, frustration, depression, and homesickness (Black et al., 1999; Harrison, 1994; Winkelman, 1994).

While researchers have written about culture shock, most of the body of literature on the topic is anecdotal or descriptive in nature. Furthermore, culture shock is often mentioned tangentially, as part of the broader topic of expatriate cross-cultural adjustment (Mumford,

1998). Taking the implications of culture shock into consideration, it is somewhat surprising that there are so few studies, empirical or otherwise, regarding the nature of culture shock, how it affects expatriates, and particularly, identifying salient factors affecting the culture shock experience (Mumford, 1998). Yet, a successful adaptation and adjustment to a new culture by expatriates is incumbent upon a successful resolution of culture shock (Furnham & Bochner, 1986; Harrison, 1994; Hisam, 1997; Mumford, 1998; Oberg, 1960; Winkelman, 1994). Therefore, the following section summarizes salient factors, identified through an extensive review of the literature, which most affect expatriate culture shock and a research proposition is put forth for each factor regarding the relationships being examined. These factors are depicted in figure 1.

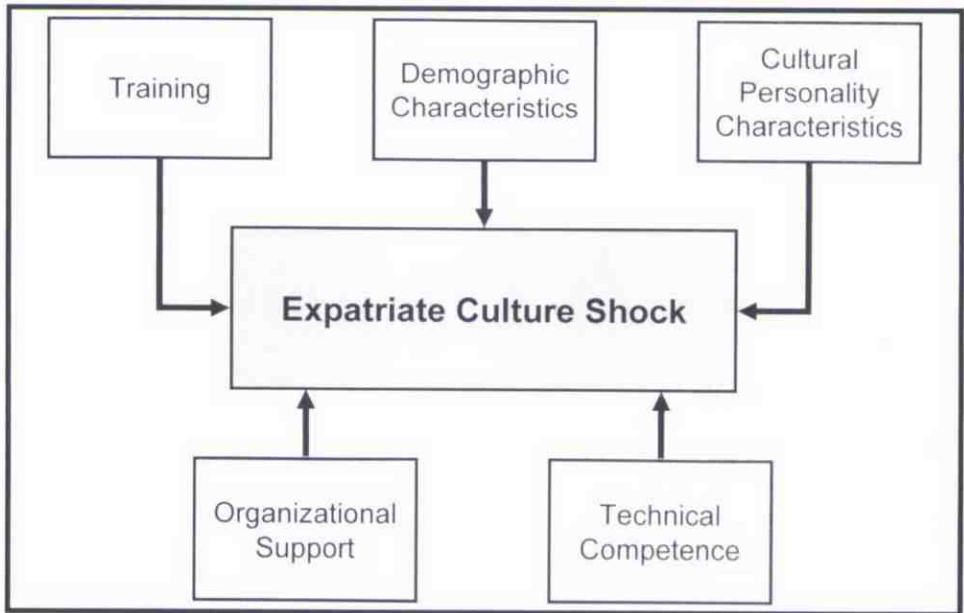


Figure 1. Factors impacting expatriate culture shock.

CRITICAL FACTORS INFLUENCING EXPATRIATE CULTURE SHOCK

The Impact of Training

Typically, every expatriate passes through a period of adjustment as they become familiar with the nuances of their new culture. Most individuals experience what can be called a "honeymoon period" (Solomon, 1994). During this time the expatriate may experience the excitement brought on by being in a new and different country. Following this honeymoon period is often when reality sets in—hence, the emergence of culture shock. During this time period, any training provided by a company may make a significant contribution in helping expatriates overcome culture shock (Harrison, 1994). It is important to note, however, that the content of training or orientation provided to expatriates and their families can vary considerably between organizations.

One common type of orientation activity is the pre-departure visit to the host country. Many firms offer prospective expatriates and their spouses a pre-assignment familiarization trip (Solomon, 1994), allowing potential expatriates to visit the host country. The intent of this "training" is to provide them with first-hand information about the host country and culture. In some respects, this visit could be viewed as a unique version of a realistic job preview.

Importantly, the information obtained during this visit can potentially reduce uncertainties associated with the overseas assignment, thereby reducing culture shock (Black & Gregersen, 1991). However, for such visits to be effective, expatriates must be provided with a realistic preview of what life in the host country will be like. All too often, however, pre-move visits become little more than tourist visits. The expatriates may leave the host country with an unrealistic perspective of what life is really like. These misperceptions tend to intensify culture shock once the expatriates have accepted the assignment, as they quickly discover that their preliminary visit bore little in common with the reality of their daily lives in the host country (Harrison, 1994).

Pre-departure cross-cultural training (CCT) is another type of training designed to reduce the uncertainty associated with a new environment. The intent is to provide information about the general culture as well as information on how to interact with people of that culture (Black & Medenhall, 1990). Depending on the country of assignment, the employee and the family may be confronted with a culture much different from their own. These differences may extend beyond any language barriers, encompassing a variety of aspects of life. These differences in norms may include social differences, differences in the political climate, and religious differences. Without pre-departure cross-cultural training, expatriates and their families may be "in the dark" regarding expected behavior and, consequently, they may react negatively to these differences (Katz & Seifer, 1996).

Yet another form of training, post-arrival orientation, is intended to reduce culture shock and the difficulty of the cross-cultural adjustment process. Encompassed within this approach is the provision of host country social support. This approach to training involves assisting the expatriate with basic necessities. For example, expatriates may be provided with assistance in finding appropriate housing, finding schools for children, dealing with tax issues, setting up a local bank account, and general counseling (particularly from other expatriates with longer tenure in the host country) about the way things work in the host country (Mendenhall & Wiley, 1994; Taboada, 1998).

The jury is still out, for some, as to the effectiveness of cross-cultural training in reducing culture shock. Many top-level managers believe such training is expensive, time consuming, and ineffective. It can cost up to \$80,000 to provide rigorous, in-depth CCT to an expatriate (Harrison, 1994) and while the up-front costs are easily quantifiable, the "return on investment" is less quantifiable. Therefore, some organizational officials perceive a rigorous CCT program as a waste of time and money (Black et al., 1999). In some cases, managers may feel that there is insufficient time to provide the necessary cross-cultural training and simply decide to forego such training. However, in a meta-analytic review of some 50 empirical studies, Black and Mendenhall (1990) found that pre-departure cross-cultural training had a positive impact on cross-cultural adjustment.

Other studies have supported this view (Black et al., 1991; Harrison, 1994; Katz & Seifer, 1996). For example, there are studies suggesting that various forms of pre-departure and post-arrival orientation programs provided by the organization can reduce the impact of culture shock and improve the cross-cultural adjustment process for the expatriate (Harrison, 1994; Katz & Seifer, 1996). Black et al. (1999) indicated that an in-depth CCT program was essential for avoiding potentially debilitating expatriate culture shock. Similarly, a literature review (Black & Mendenhall, 1990) and a meta-analysis (Deshpande & Viswesvaran, 1992) of over 20 empirical studies in the area of organizational training and orientation programs revealed that these programs have a strong positive impact on overcoming culture shock, cross-cultural skills development, and cross-cultural adjustability.

***Hypothesis 1:** Rigorous, intensive, pre-departure cross-cultural training will enhance preparation of prospective expatriates for their new environment, resulting in less uncertainty, less culturally-related stress, and therefore, less culture shock.*

Demographic Factors

Research has demonstrated that various demographic characteristics of the expatriate are also related to the degree of culture shock experienced by these individuals. For example, a review of the literature reveals that the expatriate's family status, amount of previous international experience, age, and gender are demographic factors that can affect expatriate culture shock (Black & Gregersen, 1991; Black et al., 1999; Black et al., 1991; Mendenhall & Oddou, 1985). Each of these demographic factors will be briefly examined in the following subsections.

Family Status. There is widespread acceptance among researchers that family status is arguably the most important demographic variable with regard to expatriate culture shock (Black, 1988; Black & Stephens, 1989; Black & Gregersen, 1991; Harvey, 1985; Shaffer & Harrison, 2001; Takeuchi, Tesluk, & Yun, 2002; Tung, 1981, 1982). It cannot be over-emphasized that the quality of the expatriate's experience functions in tandem with the experience of the expatriate's family. This notion is supported by some of the most recent research regarding the impact of the family on the expatriate (and vice-versa) once on expatriate assignment.

For example, Shaffer and Harrison (2001) found that having younger pre-school aged children appeared to facilitate adjustment while having older children inhibited adjustment, thus increasing the likelihood of culture shock. Takeuchi et al. (2002) found that expatriate adjustment was greatly affected by the family's adjustment (and vice-versa). Takeuchi et al. referred to these effects as "spillover." It does not require much of an inferential leap to suggest that such spillover effects would also apply to the culture shock experience—i.e., that expatriate culture shock would increase the family's culture shock and vice-versa. Naumann (1992) contended that family situation is apparently a critically important moderating variable in the expatriate turnover process. Harvey (1985) further contended that the family might be the most important contributor to expatriate turnover. This contention is supported by Tung's (1982) research indicating that two of the three most frequently cited causes for expatriate failure were family related. Specifically, the inability of the expatriate's family (in

particular, the spouse) to adjust to a different physical or cultural environment and other related family problems received strong support in Tung's study.

Indeed, there is no shortage of research supporting the importance of family when it comes to the success of expatriates. For example, a 1992 survey of 50 *Fortune* 500 companies by International Orientation Resources (IOR), suggested that the majority of expatriate failures, 60 percent in fact, occurred because of family difficulties (Solomon, 1994). Findings of other studies have been equally alarming. A 1994 Foreign Trade Council report found that 80 percent of employees who refused international positions did so for family reasons. Moreover, Weeks (1993) reported that 15 percent of U.S. expatriate candidates rejected foreign assignments because of their spouses' careers. A spouse's career is also recognized as a growing reason for rejection because of women's increased workforce participation (Punnett, 1997). This is important to consider given that 90 percent of all expatriates are male and 78 percent are married (Black et al., 1999). Additionally, 48 percent of female spouses leave a career in the U.S. to accompany the male spouse for an overseas assignment.

Despite the apparent importance of the family, less than half of MNCs interviewed the spouse in the expatriate selection process (Black et al., 1999; Black & Stephens, 1989; Tung, 1981). To the detriment of these expatriates, cross-cultural training for the entire family is also very rare (Black et al., 1999; Black & Stephens, 1989). A survey by the IOR confirmed the lack of attention to spouses, reporting that only 21 percent of companies included spouses in pre-selection interviews (Solomon, 1994), while Black and Gregersen (1991) found that only 10 percent of spouses received pre-departure training from the firm.

In addition to career related issues, the spouse may also experience high levels of stress due to a disruption of childrens' education and a loss of self-worth or identity (particularly if they were previously employed). Additional difficulties in adjusting to the host culture may center on the lack of contact with friends and relatives, as well as social or cultural ostracism in the foreign country (Harvey, 1985). The greatest concern is that the spouse will suffer substantial, debilitating culture shock and will feel, literally, shut away from the world. When this occurs, the expatriate may decide it is better to return home prematurely rather than risk the spouse's emotional, physical, and psychological health, and even possibly their marriage (Punnett, 1997).

This lack of familial preparation has contributed to spouses and families of expatriate employees being unprepared for the impact of culture shock and a resulting lack of ability to make the cross-cultural adjustment. An anonymous American HRM executive summarized the problem this way:

For 24 years I have seen expatriate spouses come and go. Many would fail or be miserable because they didn't have the split-level home on a dead end street, the Jello, the prepared foods, etc.—or many would have the experience of their life. Whether the family's experience is miserable or exciting depends on the spouse. When the spouse adjusts, goes, and does it, everything else follows (Black & Gregersen, 1991, p. 461).

Gender and Age. In contrast to demographic variables such as family status and previous international experience, which have been empirically identified as key demographic factors affecting the culture shock of the expatriate employee, there is less empirical support in the literature concerning the affect of gender and age on expatriate culture shock. With respect to gender, one reason for this scarcity may be that the overwhelming majority of expatriate employees are male. In fact, estimates indicate that 90 percent to 97 percent of expatriate employees are male (Shaffer & Harrison, 2001; Takeuchi et al., 2002).

According to Katz and Seifer (1996), some countries try to maximize the division of the social gender role. Katz and Seifer referred to these countries as “masculine” societies. It is conceivable that female expatriates may experience higher levels of culture shock when sent to such countries. This is supported in previous research by Thai and Cateora (1979) who intimated that female expatriates may have greater adjustment difficulties due to a cultural bias against females in certain countries (i.e., in the Middle East, Latin America, and Japan).

Conversely, research findings by Adler (1984, 1986) as well as Adler and Izraeli (1988) indicated that cultural bias against females was often restricted primarily to women of that country and that female expatriates were predominantly viewed as foreigners, who happened to be women. Adler and Izraeli (1988) noted that the overwhelming conclusion about female expatriates was their scarcity.

Age is another demographic variable that may or may not have an affect on expatriate culture shock. Unfortunately, there appear to be very few studies that have empirically examined the affect of age on expatriate culture shock. In fact, in the international adjustment literature in general, there is little empirical research on the impact of age (Birdseye & Hill, 1995). Birdseye and Hill (1995) attempted to redress these oversights and omissions (at least in part) with an empirical study they hoped would fill some of the gaps in the literature with respect to age and its affect on expatriate adjustment.

Results of Birdseye and Hill’s study provided some valuable insight regarding the affect of age on expatriate adjustment. They found that expatriates over the age of 45 were significantly less likely to leave their international assignments earlier than their younger counterparts. Intuitively, one could speculate that Birdseye and Hill’s results indicate that older expatriates are more likely to successfully resolve their culture shock and make the cross-cultural adjustment. However, this may be an errant speculation in that the aforementioned findings could be a result of any number of factors. For example, it is possible that Birdseye and Hill’s results could be due to the impact of longer tenure with the organization. That is, that expatriates who had been with an organization for a longer period of time may simply be more willing to “stick it out” than younger expatriates with less tenure with the organization – regardless of the severity of their culture shock experience.

Previous International Experience. An additional demographic variable linked to uncertainty reduction is an individual’s previous experience living in a foreign country (Dawis & Lofquist, 1984; Nicholson, 1984; Torbiorn, 1982). According to Black et al. (1999), previous international experience can help expatriate candidates know, generally, what to expect when relocating and adjusting to a new country and culture. As expatriate candidates utilize practices and processes from past international adjustment experiences, they can rely on this information

to reduce uncertainty in the upcoming transition (Louis, 1980). The result may be a more accurate anticipatory adjustment, which may culminate in less uncertainty and, therefore, the culture shock for the expatriate would be expected to be lower and the cross-cultural adjustment process would be expected to be quicker (Black & Gregersen, 1991; Black et al., 1991). Church (1982, p. 549), in his review of the empirical literature, asserted that "empirical findings support the importance of accurate prior cultural experience or prior exposure for sojourner adjustment." Overall, previous international experience does appear to result in less culture shock and may facilitate adjustment for expatriates (Black et al., 1991).

***Hypothesis 2:** Demographic characteristics of the expatriate such as family status, age, gender, and previous international experience will affect the degree to which expatriates experience culture shock.*

Personality Characteristics of the Expatriate

Although research has demonstrated that a high percentage of expatriate failure is due to certain demographic factors—like family status—few organizations recognize the role of core personality traits and the impact of key competencies on expatriate culture shock (Ioannou, 1995). In a study conducted by the National Foreign Trade Council of New York, a non-profit organization formed to promote export expansion and Selection Research International (SRI), a St. Louis-based consulting firm that assists organizations in the selection and training of expatriates, of 52 *Fortune* 500 companies surveyed, only eight had any mechanism in place that in any way considered the core personality traits and competencies that made for successful expatriates. The same survey also revealed that "almost all companies fail to carry out any psychological testing of managers destined for foreign locals" (Ioannou, 1995, p. 55).

Research has demonstrated that certain core personality traits and competencies possessed by individuals can result in an increased or decreased likelihood that individuals will be negatively affected by culture shock (Black, 1990; Black et al., 1999; Harrison, 1994; Mendenhall & Oddou, 1985). Key traits identified in the literature included: cultural flexibility, ethnocentricity, stress reactions, interpersonal and relational skills, and a willingness to communicate. Each of these traits will be briefly examined in the following subsections.

Cultural Flexibility. Cultural flexibility encompasses both openness to new or different behaviors and the flexibility to replace activities enjoyed in one's home country with available, and usually different, activities in the host country (Black, 1990). Cultural flexibility is considered to be critical to expatriate success and overcoming culture shock because it involves an individual's cognitive flexibility. Since the activities once enjoyed in the home culture may not be available in the host culture, it is important that an expatriate possess a willingness to seek out, try, and experiment with new activities. Otherwise, the expatriate may experience feelings of isolation, loneliness, and frustration, which work in tandem to increase culture shock and inhibit adjustment (Black, 1990; Church, 1982). A person who is open to new and different behaviors and is flexible enough to actually attempt new activities can substitute those activities for those enjoyed in the home culture. This is a critical part of overcoming culture shock (Black, 1990; Harrison, 1994; Mendenhall & Oddou, 1985).

Ethnocentricity. Another personality trait that has been identified in the literature as being instrumental in its affect on expatriate culture shock and cross-cultural adjustment is the degree to which an expatriate candidate is ethnocentric. Ethnocentricity embodies the notion that the values and beliefs held in one's own culture are superior to those held by peoples in other cultures (Wortzel & Wortzel, 1985). Research has demonstrated that ethnocentric expatriate candidates are more likely to face severe and debilitating culture shock and are more likely to fail in an expatriate assignment than individuals who exhibit a more tolerant orientation (Caligiuri & Di Santo, 2001; Church, 1982; Furnham & Bochner, 1986; Stening, 1979).

Ethnocentric individuals tend to make little effort to understand or consider the perspectives, ideas, and behaviors of others (Black, 1990). According to Black, since individuals with high levels of ethnocentricity view their own societal behaviors, norms, and values as correct and those of other societies and cultures as incorrect or wrong, they make little effort to understand host country nationals (HCNs) or their culture. Further, ethnocentric individuals make little or no effort to modify their own behavior in order to make it more congruent with the host culture norms.

According to Black, even if ethnocentric individuals view their behavior as correct, if it is perceived as inappropriate or unacceptable in the host culture, these individuals will receive negative feedback and possible negative consequences associated with their culturally inappropriate behavior. This could result in frustration and anxiety which would tend to increase culture shock and therefore inhibit adjustment (Black, 1990).

Stress Reactions. Research has shown that the way an expatriate reacts to stress can be a crucial factor in determining if this individual can successfully resolve their culture shock and make the cross-cultural adjustment. Recall that culture shock is primarily a manifestation of the stress that results from uncertainty, role ambiguity, frustration, and even anger. Therefore, the way in which an individual responds to stress in general, will have a tremendous impact on the expatriate's culture shock experience. Cross-cultural theorists have long believed that entrance into an unfamiliar culture produces stress within the expatriate (Black, 1988, 1990; Byrnes, 1966; Church, 1982; Mendenhall & Oddou, 1985; Oberg, 1960; Tung, 1981, 1982).

A study by Ratiu (1983) reported that expatriates who dealt with their culture shock effectively used what he called "stability zones" to which they would retreat when conditions in the host country became overly stressful to them. Rather than allowing themselves to become isolated, lonely, and fall into depression (key indicators of debilitating culture shock), these expatriates temporarily engaged in meditation, writing, hobbies, religious worship, and other stress-reducing activities. They were then able to "re-emerge" having successfully and productively dealt with their stress. Expatriates who established a pattern of utilizing "stability zones" were more likely to pass through the culture shock experience and eventually make a successful cross-cultural adjustment.

Interpersonal Skills. A further review of the literature (e.g., Hammer, Gudykunst, & Wiseman, 1978; Hammer, 1987; Mendenhall & Oddou, 1985) unveiled that a frequent source of culture shock in expatriate assignments relates to interpersonal conflicts with host country nationals. A 1983 study by Abe & Wiseman analyzed a sample of Japanese students adjusting to life in

the United States. Similarly, a study by Hawes and Kealey (1981) examined a sample of Canadian technical advisors in Africa. Both of these studies revealed that the ability to deal with interpersonal conflicts in a "collaborative manner", with a focus on mutual understanding, was related to decreased culture shock and quicker adjustment and, therefore, contributed to expatriate success.

Intuitively, if a frequent cause of expatriate culture shock is interpersonal conflict with host country nationals, then strong relational skills would be an asset to an expatriate (Mendenhall & Oddou, 1985), resulting in reductions in culture shock. In fact, in their 1985 study, Mendenhall and Oddou intimated that individuals who had strong interpersonal skills in their home culture tended to experience less culture shock and adjusted better as expatriates than their counterparts who had lower levels of interpersonal skills. In particular, they found that the ability to develop long lasting friendships with host country nationals was an important factor in overcoming culture shock and in making a successful overseas adjustment (Mendenhall & Oddou, 1985). Expatriates who developed friendships with nationals were able to overcome many of the cultural barriers as well as avoid cultural mistakes with the assistance of their HCN friends. Avoiding these mistakes, reducing the uncertainty, and having host country nationals as friends to assist in making behavior modifications were key factors in reducing culture shock (Mendenhall & Oddou, 1985).

Willingness to Communicate. Language abilities or even a willingness to attempt communication in the native language of the host country has been identified as a personal characteristic that can affect expatriates' success or failure by way of helping them overcome culture shock—effectively making a successful cross-cultural adjustment (Black, 1990; Katz & Seifer, 1996). Research has demonstrated that proficiency in the language of the host country can reduce culture shock and facilitate adjustment, because inability to effectively communicate with host country nationals would tend to increase culture shock and, therefore, inhibit adjustment (Black, 1990; Church, 1982).

Mendenhall and Oddou (1985) found an individual's willingness to try—to make an effort to use the language—had a greater influence on the expatriate overcoming culture shock than the actual level of fluency in the foreign language. The expatriate's willingness and desire to communicate, in contrast to their ability to communicate, was found to be the more influential factor in overcoming culture shock and making a successful adjustment.

***Hypothesis 3:** Expatriates who demonstrate less cultural flexibility, greater ethnocentrism, have stronger stress reactions, fewer interpersonal skills, and are less willing to attempt to communicate with host nationals are more likely to experience higher levels of culture shock.*

Organizational Support Activities

There is a growing body of literature suggesting that expatriate culture shock is influenced by the degree to which the expatriate perceives and experiences organizational support once in their host country (Eisenberger, Fasolo, & Davis-LaMastro, 1990; Punnett, 1997). Perceived organizational support (POS) embodies employees' beliefs involving the extent to which their organizations care about their well-being. These beliefs are formulated on the basis of actions taken by the organization with regard to the upcoming international assignment.

The dynamics associated with an individual's perception of organizational support might include the subconscious evaluation of the following questions. For example, they might ask if the organization's selection processes and mechanisms for choosing expatriates were fair and equitable. More importantly, were the selection criteria for making the decision appropriate? Does the employee believe that he or she (and the appropriate family members) have received the necessary amount of cross-cultural training? Does the employee believe the organization's relocation compensation package is sufficient? Does the employee believe that the home organization will maintain sufficient contact during the expatriate assignment? Does the employee believe that there will be a suitable and desirable position available upon repatriation?

If the answer to the majority of these questions is yes, it is highly likely that the expatriate employee will perceive that the parent organization is providing a high level of support (Munton & Forster, 1990). According to Black and Gregersen (1992), higher levels of POS contribute to a greater level of affective commitment to making the international assignment successful. Intuitively, it could be argued that a higher affective commitment by the expatriate would increase the likelihood that the expatriate would make the required behavior modifications necessary for a reduced level of culture shock and for a successful cross-cultural adjustment.

Organizational support activities also include the support the expatriate actually receives once in their country of assignment. There is empirical research linking high levels of in-country organizational support with a successful resolution of culture shock by expatriates. Punnett (1997) found that in-country social support was critical once expatriates began to experience culture shock. Specifically, Punnett found that organizational support in the form of assistance with making housing, schooling, and transportation arrangements were critical to overcoming culture shock. Research by Black et al. (1991) tends to support Punnett's contentions. They found that an organizational culture that encouraged strong social support from expatriate co-workers (assuming there are expatriate coworkers—which may not always be the case) in the overseas subsidiary would provide new expatriates with information about what was acceptable and unacceptable in the host culture. This would result in reduced uncertainty and, consequently, culture shock would decrease.

Hypothesis 4: Expatriates that receive higher levels of organizational support from their parent company—both prior to departure and post-arrival—are more likely to exhibit lower levels of culture shock.

Technical Competence of the Expatriate Employee

Although top managers often select expatriates based on job-related knowledge and technical or managerial expertise without considering other critically important factors, it would be a mistake to exclude job-related abilities from the list of factors that impact expatriate culture shock (Baker & Ivancevich, 1971; Black, 1990; Black et al., 1999; Mendenhall & Oddou, 1985; Miller, 1972, 1973; Tung, 1981; Vassel, 1983). Research supports the notion that job-related abilities are one of the key factors affecting the culture shock experienced by the expatriate and their likelihood of success (Black et al., 1999; Downes & Thomas, 1999). According to Mendenhall and Oddou (1985), all expatriates are assigned to their overseas posts to accomplish a task. Possessing the necessary expertise or skills to perform the requisite tasks

has been identified as an important factor in resolving culture shock, promoting successful adjustment, and, therefore, contributing to successful expatriate assignments (Black & Gregersen, 1999; Black et al., 1999).

Black's (1990) study of Japanese expatriate managers in the United States demonstrated that expatriate adjustment is not a unidimensional construct. Black's findings suggested that expatriates must adjust to three facets of the foreign assignment. One of these three facets was the job, including work responsibilities. Black posited that expatriates who possessed strong managerial or technical skills were less likely to suffer adjustment difficulties related to their work and, therefore, less culture shock than expatriates who either did not possess strong job-related skills or who questioned their efficacy with respect to their job-related capabilities. Black's (1990) research is supported in recent findings by Takeuchi et al. (2002). Specifically, Takeuchi et al. found that a lack of work adjustment by the expatriate spilled over and negatively impacted the expatriate's general adjustment which could have the effect of increasing culture shock.

Despite the importance of expatriate skills and abilities, there is ample evidence that choosing expatriates based primarily on their job-related abilities is a fundamental mistake and that technical competence alone is a poor predictor of whether or not an expatriate possesses the ability to overcome culture shock (Shilling, 1993). Since job-related abilities and technical or managerial ability is generally a known factor (having been assessed in performance evaluations and appraisals) it has been suggested that organizations avoid prematurely narrowing the field to "the best" or "the expert." Rather, a better approach might be to determine the minimal level of acceptable job-related abilities so as to cast a wide net. This would maximize the likelihood of finding the expatriate candidate who possesses both the required job-related abilities and the critically important core personality traits and competencies (Shilling, 1993). The combination of the two (job abilities and personality traits) in an expatriate candidate would reduce the likelihood that the expatriate would experience debilitating culture shock. Although finding expatriate candidates who possess both the job-related competencies and the personality-related competencies may be difficult and even expensive to accomplish, research has demonstrated that these are the expatriate candidates most likely to resolve culture shock and make the necessary adjustments to succeed in the foreign assignment (Black, 1990; Caligiuri, 2000; Mendenhall & Oddou, 1985; Shilling, 1993).

Hypothesis 5: Expatriates who demonstrate higher levels of technical or managerial competence are likely to experience lower levels of culture shock.

CONCLUSION

Despite the stated purpose of this manuscript, it would be misleading to imply that all variables or factors conceivably impacting expatriate culture shock have been identified. This study has, however, identified the primary factors affecting expatriate culture shock. The bottom line is this: expatriates do not, cannot, and will not make successful cross-cultural adjustments unless they overcome the potentially debilitating affects of culture shock. Further exploration of the culture shock phenomenon is both warranted and needed.

REFERENCES

- Abe, H. & Wiseman R. L. (1983). A cross-cultural confirmation of intercultural effectiveness. *International Journal of Intercultural Relations*, 7, 53-68.
- Adler, N. J. (1984). Women in international management. *California Management Review*, 26, 78-99.
- Adler, N. J. (1986). *International dimensions of organizational behavior*. Boston: PWS-Kent Publishing Company.
- Adler, N. J., & Izraeli, D. N. (1988). *Women in management*. New York: M. E. Sharp Inc.
- Baker, J.C., & Ivancevich, J. M. (1971). The assignment of American executives abroad: Systematic, haphazard, or chaotic? *California Management Review*, 13, 39-44.
- Birdseye, M. G., & Hill, J. S. (1995). Individual, organizational/work and environmental influences on expatriate turnover tendencies: An empirical study. *Journal of International Business Studies*, Fourth Quarter, 787-813.
- Black, J. S. (1988). Work role transitions: A study of American expatriate managers in Japan. *Journal of International Business Studies*, 19, 277-294.
- Black, J. S. (1990). Personal dimensions and work role transitions. *Management International Review*, 30, 119-134.
- Black, J. S., & Gregersen, H. B. (1991). The other half of the picture: Antecedents of spouse cross-cultural adjustment. *Journal of International Business Studies*, 3, 461-478.
- Black, J.S., & Gregersen, H.B. (1992). Antecedents to commitment to a parent company and a foreign operation. *Academy of Management Journal*, 33, 61-72.
- Black, J. S., & Gregersen, H. B. (1999). The right way to manage expatriates. *Harvard Business Review*, 77, 52-63.
- Black, J. S., Gregersen H. B., Mendenhall M. E., & Stroh, L. K. (1999). *Globalizing People through International Assignments*. Reading: Addison-Wesley.
- Black, J. S., & Mendenhall, M. (1990). Cross-cultural training effectiveness: A review and theoretical framework for future research. *Academy of Management Review*, 15, 113-136.
- Black, J. S., Mendenhall, M., & Oddou, G. (1991). Toward a comprehensive model of international adjustment: An integration of multiple theoretical perspectives. *Academy of Management Review*, 16, 291-317.
- Black, J. S., & Stephens, J. K. (1989). The influence of the spouse on American expatriate adjustment in overseas assignments. *Journal of Management Science*, 15, 529-544.
- Byrnes, F. C. (1966). Role shock: An occupational hazard of American technical assistants abroad. *The Annals*, 368, 95-108.
- Caligiuri, P. M. (2000). The Big Five personality characteristics as predictors of expatriates' desire to terminate the assignment and supervisor-rated performance. *Personnel Psychology*, 53, 67-88.
- Caligiuri, P. M., & Di Santo, V. (2001). Global competence: What is it, and can it be developed through global assignments? *Human Resource Planning*, 24, 27-34.
- Church, A. T. (1982). Sojourner adjustment. *Psychological Bulletin*, 91, 540-572.
- Dawis, R. V. & Lofquist, L. H. (1984). *A psychological theory of work adjustment*. Minneapolis: University of Minnesota Press.
- Deshpande, S. P., & Viswesvaran, C. (1992). Is cross-cultural training of managers effective: A meta-analysis. *International Journal of Intercultural Relations*, 16, 295-310.

- Downes, M. & Thomas, A. S. (1999). Managing Overseas Assignments to Build Organizational Knowledge. *Human Resource Planning*, 22, 33-48.
- Eisenberger, R., Fasolo, P., & Davis-LaMastro, V. (1990). Perceived organizational support and employee diligence, commitment and innovation. *Journal of Applied Psychology*, 75, 51-59.
- Furnham, A., & Bochner, S. (1986). *Culture shock: Psychological reactions to unfamiliar environments*. London: Methuen.
- Hammer, M. R. (1987). Behavioral dimensions of intercultural effectiveness. *International Journal of Intercultural Relations*, 11, 65-88.
- Hammer, M. R., Gudykunst, W. B., & Wiseman, R. L. (1978). Dimensions of intercultural effectiveness: An exploratory study. *International Journal of Intercultural Relations*, 2, 382-393.
- Harrison, J. K. (1994). Developing successful expatriate managers. *Human Resource Planning*, 17, 17-33.
- Harvey, M. G. (1985). The executive family: An overlooked variable in international assignments. *Columbia Journal of World Business* (Spring), 84-92.
- Hawes, F., & Kealey, D. (1981). An empirical study of Canadian technical assistants. *International Journal of Intercultural Relations*, 5, 239-258.
- Hisam, T. G. (1997). Dissertation abstracts: The value of expatriate support programs in reducing susceptibility to culture shock for American expatriated employees working in Germany. *Journal of International Business Studies*, 4, 884-886.
- Ioannou, L. (1995). Unnatural selection. *International Business*, 54-57.
- Katz, J., & Seifer, D. M. (1996). It's a different world out there: Planning for expatriate success through selection, pre-departure training and on-site socialization. *Human Resource Planning*, 19, 32-49.
- Louis, M. R. (1980). Surprise and sensemaking: What newcomers experience in entering unfamiliar organizational settings. *Administrative Science Quarterly*, 25, 226-247.
- Mendenhall, M., & Wiley, C. (1994). Strangers in a strange land. *American Behavioral Scientist*, 5, 605-621.
- Mendenhall, M., & Oddou, G. (1985). The dimensions of expatriate acculturation: A review. *Academy of Management Review*, 10, 39-48.
- Miller, E. L. (1972). The overseas assignment: How managers determine who is to be selected. *Michigan Business Review*, 24(3), 12-19.
- Miller, E. L. (1973). The international selection decision: A study of some dimensions of managerial behavior in the selection process. *Academy of Management Journal*, 16, 239-252.
- Mumford, D. B. (1998). The measurement of culture shock. *Journal of Social Psychiatry & Psychiatric Epidemiology*, 33, 149-154.
- Munton, A. G., & Foster, N. (1990). Job relocation: Stress and the role of the family. *Work and Stress*, 4, 75-81.
- Naumann, E. (1992). A conceptual model of expatriate turnover. *Journal of International Business Studies*, 3, 499-532.
- Nicholson, N. (1984). A theory of work role transitions. *Administrative Science Quarterly*, 29, 172-191.
- Oberg, K. (1960). Culture shock: Adjustment to new cultural environments. *Practical Anthropologist*, 7, 177-182.

- Punnett, B. J. (1997). Towards an effective management of expatriate spouses. *Journal of World Business*, 3, 243-258.
- Ratiu, I. (1983). Thinking internationally: A comparison of how international executives learn. *International Studies of Management and Organization*, 13, 139-150.
- Shaffer, M. A., & Harrison, D. A. (2001). Forgotten partners of international assignments: Development and test of a model of spouse adjustment. *Journal of Applied Psychology*, 86, 238-254.
- Shannonhouse, R. (1996). Overseas-assignment failures. *USA Today/International*, 8A.
- Shilling, M. (1993). Avoid expatriate culture shock. *HRMagazine* (July), 58-63.
- Solomon, C. M. (1994). Success abroad depends on more than job skills. *Personnel Journal*, 4, 51-59.
- Stening, B. W. (1979). Problems of cross-cultural contact: A literature review. *International Journal of Intercultural Relations*, 3, 269-313.
- Taboada, M. B. (1998). Firms try to ease shock of stranger in strange land. *Business First — Columbus*, 33, 43.
- Takeuchi, R., Tesluk, P., & Yun, S. (2002). An examination of crossover and spillover effects of spousal and expatriate cross-cultural adjustment on expatriate outcomes. *Journal of Applied Psychology*, 87, 655-666.
- Thai, N. L., & Cateora, P. R. (1979). Opportunities for women in international business. *Business Horizons*, 22, 21-27.
- Torbiorn, I. (1982). *Living abroad: Personal adjustment and personnel policy in the overseas setting*. New York: Wiley.
- Tung R. L. (1981). Selecting and training personnel for overseas assignments. *Columbia Journal of World Business*, 19, 68-78.
- Tung R. L. (1982). Selection and training procedures of U.S., European, and Japanese multinationals. *California Management Review*, 25, 57-71.
- Vassel, B. (1983). *Ten ways to improve performance in your overseas operation*. Paper presented at the Annual OB Conference, Brigham Young University.
- Weeks, D. A. (1993). Reluctant Expatriates. *Across the Board*, 30, 14.
- Winkelman, M. (1994). Culture shock and adaptation. *Journal of Counseling and Development*, 73, 121-126.
- Wortzel, H., & Wortzel, L. (1985). Corporate culture and human resource management. In H. Wortzel & L. Wortzel (Eds.), *Strategic management of multinational corporations* (pp. 114-137). New York: John Wiley & Sons.