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## Dimensionalizing Cultures: The Hofstede Model in Context

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# Dimensionalizing Cultures: The Hofstede Model in Context

## Abstract

This article describes briefly the Hofstede model of six dimensions of national cultures: Power Distance, Uncertainty Avoidance, Individualism/Collectivism, Masculinity/Femininity, Long/Short Term Orientation, and Indulgence/Restraint. It shows the conceptual and research efforts that preceded it and led up to it, and once it had become a paradigm for comparing cultures, research efforts that followed and built on it. The article stresses that dimensions depend on the level of aggregation; it describes the six entirely different dimensions found in the Hofstede et al. (2010) research into organizational cultures. It warns against confusion with value differences at the individual level. It concludes with a look ahead in what the study of dimensions of national cultures and the position of countries on them may still bring.

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## Introduction

Culture has been defined in many ways; this author's shorthand definition is: "*Culture is the collective programming of the mind that distinguishes the members of one group or category of people from others*". It is always a collective phenomenon, but it can be connected to different collectives. Within each collective there is a variety of individuals. If characteristics of individuals are imagined as varying according to some bell curve; the variation between cultures is the shift of the bell curve when one moves from one society to the other. Most commonly the term culture is used for tribes or ethnic groups (in anthropology), for nations (in political science, sociology and management), and for organizations (in sociology and management). A relatively unexplored field is the culture of occupations (for instance, of engineers versus accountants, or of academics from different disciplines). The term can also be applied to the genders, to generations, or to social classes. However, changing the level of aggregation studied changes the nature of the concept of 'culture'. Societal, national and gender cultures, which children acquire from their earliest youth onwards, are much deeper rooted in the human mind than occupational cultures acquired at school, or than organizational cultures acquired on the job. The latter are exchangeable when people take a new job. Societal cultures reside in (often unconscious) values, in the sense of *broad tendencies to prefer certain states of affairs over others* (Hofstede, 2001, p. 5). Organizational cultures reside rather in (visible and conscious) practices: the way people perceive what goes on in their organizational environment.

## Classifying Cultures: Conceptual Dimensions

In an article first published in 1952, U.S. anthropologist Clyde Kluckhohn (1962) argued that there should be universal categories of culture:

In principle ... there is a generalized framework that underlies the more apparent and striking facts of cultural relativity. All cultures constitute so many somewhat distinct answers to essentially the same questions posed by human biology and by the generalities of the human situation. ... Every society's patterns for living must provide approved and sanctioned ways for dealing with such universal circumstances as the existence of two sexes; the helplessness of infants; the need for satisfaction of the elementary biological requirements such as food, warmth, and sex; the presence of individuals of different ages and of differing physical and other capacities. (pp. 317-18).

Many authors in the second half of the twentieth century have speculated about the nature of the basic problems of societies that would present distinct dimensions of culture (for a review see Hofstede, 2001, pp. 29-31). The most common dimension used for ordering societies is their degree of economic evolution or modernity. A one-dimensional ordering of societies from traditional to modern fitted well with the nineteenth- and twentieth-century

belief in progress. Economic evolution is bound to be reflected in people's collective mental programming, but there is no reason why economic and technological evolution should suppress other cultural variety. There exist dimensions of culture unrelated to economic evolution.

U.S. anthropologist Edward T. Hall (1976) divided cultures according to their ways of communicating, into high-context (much of the information is implicit) and low-context cultures (nearly everything is explicit). In practice this distinction overlaps largely with the traditional versus modern distinction.

U.S. sociologists Talcott Parsons and Edward Shils (1951, p. 77) suggested that all human action is determined by five *pattern variables*, choices between pairs of alternatives:

1. *Affectivity* (need gratification) versus *affective neutrality* (restraint of impulses);
2. *Self-orientation* versus *collectivity-orientation*;
3. *Universalism* (applying general standards) versus *particularism* (taking particular relationships into account);
4. *Ascription* (judging others by who they are) versus *achievement* (judging them by what they do);
5. *Specificity* (limiting relations to others to specific spheres) versus *diffuseness* (no prior limitations to nature of relations).

Parsons and Shils (1951) claimed that these choices are present at the individual (personality) level, at the social system (group or organization) level, and at the cultural (normative) level. They did not take into account that different variables could operate at different aggregation levels.

U.S. anthropologists Florence Kluckhohn and Fred Strodtbeck (1961, p. 12) ran a field study in five geographically close, small communities in the Southwestern United States: Mormons, Spanish Americans, Texans, Navaho Indians, and Zuni Indians. They distinguished these communities on the following value orientations:

1. An evaluation of *human nature* (evil - mixed - good);
2. The relationship of man to the surrounding *natural environment* (subjugation - harmony - mastery);
3. The orientation in *time* (toward past - present - future);
4. The orientation toward *activity* (being - being in becoming - doing); and
5. *Relationships among people* (linearity, i.e., hierarchically ordered positions – collaterality, i.e., group relationships – individualism).

Others have extrapolated Kluckhohn and Strodtbeck's (1961) classification to all kind of social comparisons, without concern for their geographic limitations without considering the effect of levels of aggregation, and without empirical support.

British anthropologist Mary Douglas (1973) proposed a two-dimensional ordering of ways of looking at the world:

1. 'Group' or inclusion - the claim of groups over members, and
2. 'Grid' or classification - the degree to which interaction is subject to rules.

Douglas saw these categories as relating to a wide variety of beliefs and social actions: Views of nature, traveling, spatial arrangements, gardening, cookery, medicine, the meaning of time, age, history, sickness, and justice. She seemed to imply that these dimensions are applicable to any level of aggregation.

The one- or more-dimensional classifications above represent subjective reflective attempts to order a complex reality. Each of them is strongly colored by the subjective choices of its author(s). They show some overlap, but their lack of clarity about and mixing of levels of analysis (individual-group-culture) are severe methodological weaknesses.

These weaknesses were avoided in an extensive review article by U.S. sociologist Alex Inkeles and psychologist Daniel Levinson (1969, first published 1954). The authors limited themselves to culture at the level of nations, and they summarized all available sociological and anthropological studies dealing with what was then called *national character*, which they interpreted as a kind of modal (most common) personality type in a national society. What I have labelled *dimensions* they called *standard analytic issues*. From their survey of the literature Inkeles and Levinson (1969) distilled three standard analytic issues that met these criteria:

1. Relation to authority;
2. Conception of self, including the individual's concepts of masculinity and femininity;
3. Primary dilemmas or conflicts, and ways of dealing with them, including the control of aggression and the expression versus inhibition of affect.

As will be shown below, Inkeles and Levinson's (1969) standard analytic issues were empirically supported in a study by this author more than 20 years later.

## **Empirical Approaches and the Hofstede Dimensions**

In 1949 U.S. psychologist Raymond Cattell published an application of the new statistical technique of factor analysis to the comparison of nations. Cattell had earlier used factor analysis for studying aspects of intelligence from test scores of individual students. This time he took a matrix of nation-level variables for a large number of countries, borrowing from geography, demographics, history, politics, economics, sociology, law, religion and medicine. The resulting factors were difficult to interpret, except for the important role of economic development. Replications of his method by others produced trivial results (for a review see Hofstede, 2001, pp. 32-33). More meaningful were applications to restricted facets of societies. U.S. political scientists Phillip Gregg and Arthur Banks (1965) studied aspects of political systems; U.S. economists Irma Adelman and Cynthia Taft Morris

(1967) studied factors influencing the development of poor countries, and Irish psychologist Richard Lynn (1971; Lynn & Hampson, 1975) studied aspects of mental health.

In the 1970s this author – more or less by accident – got access to a large survey database about values and related sentiments of people in over 50 countries around the world (Hofstede, 1980). These people worked in the local subsidiaries of one large multinational corporation: IBM. Most parts of the organization had been surveyed twice over a four-year interval, and the database contained more than 100,000 questionnaires. Initial analyses of the database at the level of individual respondents proved confusing, but a breakthrough occurred when the focus was directed at correlations between mean scores of survey items at the level of countries. Patterns of correlation at the country level could be strikingly different from what was found at the individual level, and needed an entirely different interpretation. One of the weaknesses of much cross-cultural research is not recognizing the difference between analysis at the societal level and at the individual level; this amounts to confusing anthropology and psychology. From 180 studies using my work reviewed by Kirkman, Lowe, and Gibson (2006), more than half failed to distinguish between societal culture level and individual level differences, which led to numerous errors of interpretation and application.

My hunch that the IBM data might have implications beyond this particular corporation was supported when I got the opportunity to administer a number of the same questions to nearly 400 management trainees from some 30 countries in an international program unrelated to IBM. Their mean scores by country correlated significantly with the country scores obtained from the IBM database. So it seemed that employees of this multinational enterprises – a very special kind of people – could serve for identifying differences in *national* value systems. The reason is that from one country to another they represented almost perfectly matched samples: they were similar in all respects except nationality, which made the effect of national differences in their answers stand out unusually clearly.

Encouraged by the results of the country-level correlation analysis I then tried country-level factor analysis. The latter was similar to the approach used earlier by Cattell and others, except that now the variables in the matrix were not indices for the country as a whole, but mean scores and sometimes percentages of survey answers collected from individuals in those countries. Analyses of data at higher levels of aggregation are called *ecological*. Ecological factor analysis differs from the factor analysis of individual scores in that a usual caution no longer applies: the number of cases does not need to be (much) larger than the number of variables. The stability of the results of an ecological factor analysis does not depend on the number of cases, but on the number of individuals whose scores were aggregated into these cases. Ecological factor analysis may even be performed on matrices with fewer cases than variables.

Factor analyzing a matrix of 32 values questions for initially 40 countries, I found these values to cluster very differently from what was found at the individual level. The new factors revealed common problems with which IBM employees in all these societies

had to cope, but for which their upbringing in their country presented its own profile of solutions. These problems were:

1. Dependence on superiors;
2. Need for rules and predictability, also associated with nervous stress;
3. The balance between individual goals and dependence on the company;
4. The balance between ego values (like the need for money and careers) and social values (like cooperation and a good living environment); the former were more frequently chosen by men, the latter by women, but there were also country differences.

These empirical results were strikingly similar to the *standard analytical issues* described in Inkeles and Levinson's 1969 article. Dependence on superiors relates to the first, need for predictability to the third, the balance between the individual and the company to the conception of self, and the balance between ego and social values to concepts of masculinity and femininity, which were also classified under the second standard analytic issue.

The four basic problem areas defined by Inkeles and Levinson (1969) and empirically supported in the IBM data represent dimensions of national cultures. A dimension is an aspect of a culture that can be measured relative to other cultures. The four dimensions formed the basis for my book *Culture's Consequences* (Hofstede, 1980).

The main message of the 1980 book was that scores on the dimensions correlated significantly with conceptually related external data. Thus Power Distance scores correlated with a dimension from Gregg and Banks' (1965) analysis of political systems and also with a dimension from Adelman and Morris' (1967) study of economic development; Uncertainty Avoidance correlated with a dimension from Lynn and Hampson's (1975) study of mental health; Individualism correlated strongly with national wealth (Gross National Product per capita) and Femininity with the percentage of national income spent on development aid. The number of external validations kept expanding, and the second edition of *Culture's Consequences* (Hofstede, 2001, Appendix 6, pp. 503-520) lists more than 400 significant correlations between the IBM-based scores and results of other studies. Recent validations show no loss of validity, indicating that the country differences these dimensions describe are, indeed, basic and enduring.

In the 1980s, on the basis of research by Canadian psychologist Michael Harris Bond centered in the Far East, a fifth dimension 'Long-Term versus Short-Term Orientation' was added (Hofstede & Bond, 1988; see also Hofstede, 1991; Hofstede, 2001).

In the 2000s, research by Bulgarian scholar Michael Minkov using data from the World Values Survey (Minkov, 2007) allowed a new calculation of the fifth, and the addition of a sixth dimension (Hofstede, Hofstede & Minkov, 2010). The six dimensions are labelled:

1. *Power Distance*, related to the different solutions to the basic problem of human inequality;
2. *Uncertainty Avoidance*, related to the level of stress in a society in the face of an unknown future;
3. *Individualism* versus *Collectivism*, related to the integration of individuals into primary groups;
4. *Masculinity* versus *Femininity*, related to the division of emotional roles between women and men;
5. *Long Term* versus *Short Term Orientation*, related to the choice of focus for people's efforts: the future or the present and past.
6. *Indulgence* versus *Restraint*, related to the gratification versus control of basic human desires related to enjoying life.

Each country has been positioned relative to other countries through a score on each dimension. The dimensions are statistically distinct and do occur in all possible combinations, although some combinations are more frequent than others.

After the initial confirmation of the country differences in IBM in data from management trainees elsewhere, the Hofstede dimensions and country scores were validated through replications by others, using the same or similar questions with other cross-national populations. Between 1990 and 2002 six major replications (14 or more countries) used populations of country elites, employees and managers of other corporations and organizations, airline pilots, consumers and civil servants (see Hofstede et al., 2010, p. 35).

In correlating the dimensions with other data, the influence of national wealth (Gross National Product per capita) should always be taken into account. Two of the dimensions, Individualism and small Power Distance, are significantly correlated with wealth. This means that all wealth-related phenomena tend to correlate with both these dimensions. Differences in national wealth can be considered a more parsimonious explanation of these other phenomena than differences in culture. In correlating with the culture dimensions, it is therefore advisable to always include the wealth variable. After controlling for national wealth correlations with culture usually disappear.

Of particular interest is a link that was found between culture according to the Hofstede dimensions and personality dimensions according to the empirically based Big Five personality test (Costa & McCrae, 1992). After this test had been used in over 30 countries, significant correlations were found between country norms on the five personality dimensions (Neuroticism, Extraversion, Openness to experience, Agreeableness and Conscientiousness) and national culture dimension scores. For example, 55% of country differences on Neuroticism can be explained by a combination of Uncertainty Avoidance and Masculinity, and 39% of country differences on Extraversion by Individualism alone (Hofstede & McCrae, 2004). So culture and personality are linked but the link is statistical; there is a wide variety of individual personalities within each national culture, and national culture scores should not be used for stereotyping individuals.