



Is dual language marketing socially responsible?

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Abstract This article helps close two voids in the literature dealing with dual language (bilingual) marketing. First, it adds to the discussion about whether dual language (specifically English/Spanish) marketing that targets Hispanic consumers living in the U.S. is socially responsible. Second, it discusses how U.S. Hispanics feel about learning English and why some react negatively to bilingual marketing efforts. To determine whether dual language marketing is socially responsible, the corporate governance theories of Milton Friedman and R. Edward Freeman are used. The first conclusion is that, from Friedman's shareholder perspective, bilingual marketing may be much less profitable than expected, if at all. From Freeman's stakeholder perspective, dual language marketing is socially responsible if the focus is on perceived short-term needs of Hispanic consumers; however, from a broader, long-term societal approach, it is not. The second conclusion is that non-Hispanic Americans do not favor bilingual marketing. Recommendations for socially responsible ways of targeting this group are discussed.

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1. The conversation about dual language marketing

As America has experienced an influx of immigrants from Spanish-speaking countries, marketers have taken notice. As a result, there is an abundance of Spanish-only billboards as well as TV and radio stations. Marketers target Hispanic consumers in other ways as well. For example, general audience

TV commercials often include “Hablamos Español” while others include Hispanic-looking actors who speak with a slight Spanish accent. Packaging has become dual language (English and Spanish) and customer service hotlines often give callers the choice to continue in Spanish. While much has been written about the positive impact such efforts have on Hispanic consumers, there are two gaps in the literature related to bilingual marketing efforts that we explore in this article. The first and most important is whether those efforts are socially responsible. The second is the possible negative impact of those efforts on both non-Hispanic and Hispanic consumers.

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We start by discussing the corporate governance theories of Friedman and Freeman. Next, we analyze the Hispanic market in the U.S. followed by non-Hispanic reactions to bilingual marketing. We follow this with an analysis, using Friedman's shareholder theory, of the costs and benefits of dual language packaging and customer service hotlines. This is followed by a stakeholder (Freeman) analysis of bilingual marketing in general. Finally, we make recommendations about how to target the Hispanic market in a socially responsible way.

2. What does it mean to be socially responsible?

Corporate social responsibility (CSR) is not a new concept and in practice has existed for some time. While there is no agreement in the literature as to when this concept became mainstream, discussions of social responsibility (under names such as community involvement, corporate citizen, or business ethics) date back to the 1930s and 1940s. Howard Bowen's 1953 book *Social Responsibilities of the Businessman* is generally considered the first attempt at defining CSR (Fifka, 2009; Visser, Matten, Pohl, & Tolhurst, 2010). Bowen discussed the roles of the organization and the manager as they relate to achieving the objectives of society and bringing value to those outside the organization. In the 1950s and 1960s, when federal environmental protection and similar laws did not exist, there began a push for corporations to engage in socially responsible behavior (Marens, 2008). For example, while dumping waste into a river was not illegal, consumers deemed it improper since it harmed the environment.

In the 1970s, new federal agencies such as the Environmental Protection Agency classified many harmful but previously legal activities as illegal. Around the same time as these new government agencies were exercising a greater say-so about how businesses operated, economist Milton Friedman criticized social responsibility as a legitimate business goal, saying it was an unnecessary distraction from the organization's primary purpose: to generate profit and return that profit to the shareholders. Friedman's famed 1970 *New York Times* article "The Social Responsibility of Business is to Increase Its Profits" galvanized his position, called shareholder theory. In his article, he wrote that in a free market economy, as long as an organization stays within the rules of the game (likely referring to laws), anything that generates revenue should be pursued regardless of whether or not it has a social benefit. He

further suggested that since society lacks agreement on what it means to be socially responsible, actions that are detrimental to the interests of some groups are still acceptable as long as those actions generate revenue (Friedman, 1970). More recently, Carroll and Shabana (2010) noted the difficulty of defining the term. They stated that a published study by Dahlsrud (2008) found over 37 definitions of corporate social responsibility and acknowledged that this number underestimates the true number of definitions being used.

In the 1980s, R. Edward Freeman suggested that the shareholder is not the only party with a stake in the firm and that the singular goal of a firm is not simply to generate profit and reward shareholders. Freeman specifically defined stakeholder more broadly to encompass anyone who is affected by the decisions of the firm and therefore has a direct or indirect stake in those same decisions. Calling this stakeholder theory, he posited that the firm must acknowledge its responsibility to all of its stakeholders, including governments, consumers, communities, suppliers, and environments as well as shareholders. He reasoned that these stakeholders can affect every element of the firm's performance and, as such, a firm must consider their interests, too. This broadening expands and re-frames what it means to be socially responsible. Schwartz and Saiia (2012) suggested that because firms now claim to be corporate citizens, they have the same responsibilities as any citizen: to do good and strive to be a role model. Yet, little concrete guidance is provided by the generally agreed upon four-part definition of CSR that includes economic, legal, ethical, and philanthropic expectations of the firm (Carroll & Shabana, 2010). This vague definition makes it difficult to determine whether certain acts such as dual language marketing are socially responsible especially since stakeholder goals are often in conflict (Galuppo, Gorli, Scaratti, & Kaneklin, 2014).

While Freeman (2009) did not specifically state that corporate social responsibility is a firm's primary goal, he posited that the role of the firm is to create value for its stakeholders. He held that one way of adding value for these stakeholders is to be socially responsible. As such, some consider social responsibility as part of a corporate governance model (Petersen & Vredenburg, 2009).

Typically, when discussing social responsibility, Friedman's and Freeman's approaches are used to represent the old and new, the narrow and broad approaches to social responsibility (Arthur, Scott, Cato, Keenoy, & Smith, 2007). In fact, Fifka (2009) suggested they represent the two ends of a continuum. However, there are other viewpoints such as

the enlightened shareholder theory wherein value maximization and shareholder theory coexist with a focus on the firm's long-term market value (Jensen, 2002). This governance structure represents a middle ground where responsible business practices are encouraged. It is also a common ground between shareholders and stakeholders that some believe leads to long-term sustainability (Ho, 2010). A further synthesis of the multitude of definitions suggests the most basic definition of corporate social responsibility involves the consideration of the objectives of society when making a business decision—a value-neutral but informed proposition. Regardless of the governance structure, the current literature suggests that management has a responsibility to (1) maximize sales and profits to ensure the long-term sustainability of the firm and (2) meet the needs of stakeholders. Being socially responsible helps firms achieve these outcomes.

3. Defining the Hispanic market is not as easy as it seems

According to U.S. census data, people of Hispanic origin represent approximately 18% of the U.S. population. Note that Hispanic origin as used by the census to classify someone as Hispanic does not necessarily mean Hispanic identity or Spanish fluency. At first glance, these approximately 57 million consumers represent a significant market. As such, it makes perfect sense that marketers would target them. Yet, these statistics tell only part of a complex story. While firms often talk about the Hispanic market, no single, homogeneous market exists. In fact, according to Hispanic consumers themselves, there is not a single Hispanic market. In a recent survey of Hispanics living in the U.S. (Taylor, Lopez, Martinez, & Velasco, 2013), 69% of the respondents said that Hispanics represent many different cultures. Just over half (51%) use their family's country of origin to identify themselves. Of the remaining 49%, about the same percentage (approximately 25%) identify themselves as much American as they do Hispanic. This represents approximately 12.5% of the total sample.

The preceding identity statistics, especially, the fact that 25% self-identify as American, are a result of the relative size of the first, second, and third generation Hispanic populations. Approximately 51% of Hispanics in the U.S. are first generation, meaning they were born elsewhere. The second and third generations represent 20% and 29% of the Hispanic population, respectively. Of first generation Hispanic immigrants, people born outside of

the U.S., 33% think of themselves as a “typical American.” Of those born in the U.S. to immigrant parents, 61% identify themselves as “typical American” (Pew Research Center, 2013). Further, virtually all (96%) third generation and 89% of second-generation Hispanic youths ages 16–25 describe themselves as American (Pew Research Center, 2009).

With respect to the ability to speak English, 68% of U.S. Hispanics say they are proficient in English (Krogstad, Stepler, & Lopez, 2015). In addition, another approximate 22% say they do speak English, but less than “very well.” Only about 6%, say they do not speak English at all. A 2007 Pew Hispanic Center study (Hakimzadeh & Cohn, 2007) found that (1) nearly all Hispanic adults born in the U.S. of immigrant parents report they are fluent in English, and (2) children of immigrants consider English to be their primary language.

The high levels of English proficiency are not surprising since most Hispanic Americans (approximately 90%) feel they have to learn English. Recent findings by Dowling, Ellison, and Leal (2012) found that both citizen and non-citizen adults of Mexican origin living in Texas believe English proficiency is important. They found that Spanish speakers are actually more likely to stress the importance of knowing English as compared to non-Spanish speakers.

When legal Mexican immigrants were asked why they had not been naturalized, 26% gave lack of English fluency as the reason (Gonzalez-Barrera, Lopez, Passel, & Taylor, 2013). In another survey of Hispanic Americans, when asked why they had not completed their education, 50% said that English proficiency was the problem (Pew Research Center, 2009).

While the Hispanic population realizes the importance of speaking English and while English fluency increases with the generations, this does not mean they have abandoned Spanish. A Pew study (Taylor et al., 2013) found that among all Hispanics, 82% speak Spanish very well/pretty well, while 78% read Spanish very well/pretty well. By the third generation, these statistics are 47% and 41% respectively. In terms of language dominance, among Hispanic first generations, 61% are Spanish dominant, 33% bilingual, and 6% English dominant. By the third generation, these figures are 2%, 29%, and 69% respectively.

To summarize, the above analysis suggests that some firms may be misreading census statistics. While the total number of people of Hispanic origin is 57 million, the number of Hispanics who cannot function in English or whose social identity is Hispanic is smaller. As such, the expected benefits of

targeting this group using bilingual marketing have probably been overestimated.

4. Hispanics do not speak only Spanish

Based on social identity theory (Forehand & Deshpande, 2001) and accommodation theory (Koslow, Shamdasani, & Touchstone, 1994), dual language marketing should have a positive impact on Hispanics since it validates their culture. However, note that 25% of all Hispanics (14.5 million people) consider themselves American; they may not only not respond favorably to bilingual efforts, but they may respond similarly to non-Hispanics. Also, since by the third generation (29% of Hispanics) 69% only speak English, 11.5 million Hispanics cannot benefit from the Spanish marketing. Furthermore, if Spanish is a consumer's second language (i.e., the person is English dominant), these messages may result in lower levels of ad recall (Luna & Peracchio, 2001).

While at first glance bilingual marketing should be a valuable marketing tool for capturing the Hispanic market, further analysis suggests that the actual number of potential customers who might respond favorably is significantly smaller than the number of people of Hispanic origin since, as measured by the census, origin does not equate to Hispanic identity. Furthermore, a number of Hispanics cannot possibly benefit from bilingual efforts since they do not speak Spanish. This plays a role in the shareholder analysis of social responsibility that follows.

5. The Anglo market's reaction

To target the 17% of the U.S. population that self-identifies as being of Hispanic origin, marketers must also reach the majority of the other 83% who are non-Hispanic. It is not surprising that the response to these efforts may not be universally positive. For example, in 1998, California voters supported Proposition 227 that outlawed bilingual education by a 61% to 39% margin. In a 2013 Gallup Poll, 72% said that it is "essential" that immigrants living in the U.S. learn English (Jones, 2013). Finally, a 2008 Rasmussen poll found that 67% felt government documents should be printed in English only (Rasmussen Reports, 2008).

The reason for suggesting that non-Hispanics may react negatively is that Spanish represents a different culture. Therefore, dual language marketing may evoke an ethnocentric response, especially if Spanish is seen as being dominant or as an effort to

pander to the demographic (Little & Singh, 2014). Ethnocentrism is the attitude held by people who see their own culture as being better. As such, they accept those who are culturally similar and reject those who are culturally dissimilar (Booth, 1979; Worchel & Cooper, 1979). Since ethnocentrism causes one to believe that his own culture (the in-group) is superior to other cultures (out-groups) (Adorno, Frenkel-Brunswick, Levinson, & Sanford, 1950; Czinkota & Ronkainen, 1998), culturally dissimilar people are rejected (Netemeyer, Durvasula, & Lichtenstein, 1991; Shimp & Sharma, 1987).

Just as ethnocentrism is related to culture, culture is related to language. Benjamin Lee Whorf and Edward Sapir were the first to popularize the idea that language influences culture. Their approach, linguistic relativism, hypothesized that the perceptions and cognitions of a group, and ultimately its culture, are largely driven by its language habits (Gumperz & Levinson, 1996; Sapir, 1921, 1929; Whorf, 1940, 1956).

Since language helps define culture, for some, bilingual marketing may evoke negative feelings since it appears as though Hispanics and their language are encroaching on America's English-based culture. Some may see bilingual marketing as an attempt by Hispanics to avoid assimilation. Some may fear that bilingual marketing will lead to Spanish having equal status with English, much like French does in Canada.¹ Regardless of their validity, these fears may lead to a negative reaction and the belief that businesses are facilitating cultural encroachment and providing legitimacy to the use of Spanish.

It is not surprising that these fears may cause prejudicial feelings, the negative evaluation of a group or individual on the basis of group membership (Crandall, Eshleman, & O'Brien, 2002) and negative stereotypes concerning the knowledge, beliefs, and expectations associated with those groups (Hamilton & Sherman, 1994; Mackie & Smith, 1998; Sherman, Stroessner, Conrey, & Azam, 2005). In a 2013 Pew study, approximately 20% of first and second generation Hispanics said that being Hispanic is a barrier to getting a promotion at work. Twenty-two percent of first generation Hispanics and 25% of second generation Hispanics say that being Hispanic makes it more difficult to find a job.

¹ In 1969, the Official Languages Act was passed making French and English official languages. In 2003, 88% of French Canadians and 46% of English Canadians were in favor of bilingualism for Canada, percentages that are approximately the same as in 1988, suggesting that experience with bilingualism doesn't necessarily lead to acceptance (Dasko, 2013).

There is empirical support for the belief that consumers react negatively to bilingual marketing. Recent research by [Gopinath and Glassman \(2008\)](#) and [Gopinath, Glassman, and Nyer \(2013\)](#) found that bilingual packaging results in lower package and product evaluations. Their research found that non-Hispanic consumers view Hispanics as being less educated because they do not speak English. This causes non-Hispanics to see Hispanics as having mostly lower-paying jobs and less buying power. With less buying power, they purchase cheaper, lower quality products.

In summary, language is a very powerful driver of people's emotions. Since one's language helps define one's culture, it is not surprising that bilingual marketing may be viewed as an attack on U.S. culture. This perception may result in prejudicial attitudes.

6. Is bilingual marketing socially responsible? It depends

As mentioned earlier, social responsibility involves (1) maximizing sales and profits to ensure the long-term sustainability of the firm (i.e., meeting the needs of shareholders), and (2) meeting the needs of other stakeholders as well. The focus on generating revenue for shareholders is championed by Friedman while the focus on stakeholders is Freeman's. To achieve Friedman's goal of a high return to shareholders, a large target market is helpful. At first glance, the Hispanic target market numbers 57 million. However, the actual number of Hispanics who would buy a product because of bilingual marketing is considerably less. As discussed earlier, acculturation and English fluency account for this lower number.

Bilingual marketing likely helped 'first movers' increase sales to Hispanics. At the same time, since non-Hispanics had more options to purchase English-only products, sales to this group may have suffered because of prejudice or the belief that Hispanics buy lower quality products. However, bilingual marketing is not a unique, sustainable competitive advantage since so many firms now engage in the practice. Therefore, sales should have returned to pre-bilingual marketing levels.

In addition to a smaller target market and negative reactions by non-Hispanics, there are other possible costs related to bilingual marketing. We will explore those costs with respect to packaging and customer service call centers. Bilingual packaging reduces the space available to market the product and explain how to use it. Fewer instructions lead to more user errors and potentially more

calls to customer service. To provide the desired amount of information, smaller and more difficult to read font sizes must be used. Whether bilingual packaging results in less information or smaller fonts, a bilingual package makes a less persuasive 'salesman on the shelf.'

Bilingual marketing can negatively influence customer satisfaction when calling a firm's customer service center. If a recorded greeting is used, it typically begins in English and the caller has the option to continue in Spanish. For many non-Hispanic callers, hearing Spanish may evoke a negative response that may influence attitudes toward the company or the perception of service quality. Less often, the caller must choose to continue in English. That is, both languages are presented as having equal importance. Consumers may feel that having to take action in order to speak to someone in America's de facto language is a cultural affront. These negative feelings may be a barrier to communicating effectively with the service provider.

Often, firms hire bilingual customer service agents to meet the needs of both Spanish and English speaking customers. However, if the agent speaks heavily accented or difficult to understand English and lacks the vocabulary of a native English speaker, communication will likely become more difficult and customer satisfaction may suffer.

In summary, bilingual marketing is not likely to meet Friedman's goal of generating profits for shareholders. The actual market is smaller than raw statistics suggest. In addition, some consumers may avoid products in a bilingual package because of prejudice or because, based on stereotypes, they infer that the product is of lower quality. Furthermore, there is likely to be less customer satisfaction because of reduced product information or more difficult to read information on the package. Less satisfaction may occur when a caller hears Spanish during the greeting or has to deal with a service agent who is not completely fluent in English.

With respect to a Freeman's broader stakeholder analysis of social responsibility, two stakeholders must be considered when deciding whether bilingual marketing is socially responsible: Hispanics themselves and society as a whole. Focusing on a responsibility to Hispanics, some would argue that bilingual marketing is socially responsible because it helps non-English speakers function as consumers in an English-dominated marketplace and demonstrates to Hispanics that their culture is valued. These proponents of bilingual marketing may also argue that prejudicial attitudes toward Hispanics should not prevent this socially responsible action that helps Hispanics function in the marketplace and that shows respect for the Hispanic community.

They perhaps would also argue that prejudice is inconsistent with America's values and it is incumbent upon the prejudiced individual to change. They may also point to high levels of assimilation, identification as an American, and Hispanics' understanding that learning English is important, which may position bilingual marketing as a temporary accommodation.

While such individuals would argue that bilingual marketing is in the best interest of Hispanics, it can also be argued that bilingual marketing is not in Hispanics' best interest or, more importantly, in society's best interest and therefore is not socially responsible. From this viewpoint, society's long-term needs take precedence over the needs of any one group. We might even see bilingual marketing as a form of racial stereotyping through its suggestion that all Hispanics are recent immigrants who do not speak English. In addition, it can be argued that by enabling Hispanics to speak only Spanish, firms are preventing or delaying them from learning English and assimilating more quickly, an argument that can be reinforced with statistics that show that an important reason for not becoming naturalized is a lack of English skills. Lack of assimilation can cause Hispanics to be viewed as an "out group" resulting in prejudicial feelings and discrimination. A recent Gallup poll of Hispanics (McCarthy, 2015) concluded that there was a relationship between language fluency and discrimination. This type of prejudice and discrimination only serves to isolate Hispanics from general American culture and the broader opportunities afforded to those who speak English.

In addition, supporters of this broader social perspective can argue that by not being fluent in English, Hispanics will have limited access to education and the resulting better paying jobs, basing this stance on statistics showing that the main reason Hispanics do not complete their education is lack of English competency (Pew Research Center, 2009). It could also be said that any short-term benefit to Hispanics resulting from bilingual marketing is more than offset by the prejudice and hostility it reveals. Statements made by some of Europe's heads of state—including Merkel, Sarkozy, and Putin—concerning their experiences in Germany, France, and Russia respectively show that multiculturalism does not work (Bolkestein, 2011) and leads to internal strife.

In summary, from a shareholder perspective, the lost sales and reduced customer satisfaction due to bilingual marketing likely negate any benefits from increased sales to Hispanics buying the product because of the presence of Spanish. From a stakeholder perspective, whether bilingual marketing is

socially responsible is more difficult to determine. Some would argue that it is socially responsible because it helps non-English-speaking Hispanics function in the marketplace and shows Hispanics that their culture is respected. However, others would argue that it results in increased prejudice toward Hispanics and delays assimilation, a goal that many believe is crucial.

7. A win-win solution

While some argue that assimilation is not a valid goal, we believe that the experiences in Europe and elsewhere show otherwise. Therefore, to the extent that bilingual marketing fosters multiculturalism, it is not in either Hispanics' or society's long-term best interest and is therefore socially irresponsible. We believe this proposed two-part solution will, in the long term, benefit Hispanics, but more importantly, meet the long-term needs of society.

7.1. Minimize dual language marketing effect

First, firms should reduce or eliminate the use of bilingual marketing whenever possible. For example, "huevos" printed on an egg carton serves no purpose since the item is easily identifiable. Although some will argue that in this case bilingual marketing facilitates learning English, it could be countered that it minimizes the incentive to learn English. Using Spanish should be the result of a conscious decision to meet a specific need, such as safety. When the situation requires bilingual packaging, English should be in a larger font to make it clear that it is the primary language. Also, rather than having separate English and Spanish sides of the package, English and Spanish should be on all sides with English on the top and in a larger font, again making it clear that English is the primary language. In addition, the use of icons and other universal picture symbols may be better since they are language agnostic and would enable anyone who does not speak English to understand the intended message, which is an important point for marketers to consider given the number of non-Hispanic consumers with limited English abilities.² This recommendation would eliminate

² According to census data (Ryan, 2013), approximately 2.8 million people speak Chinese at home; of those, approximately 29% speak English "not well" or "not at all." The figures for Vietnamese are 1.4 million; 33%. Russian is .9 million; 22%. Arabic is .9 million; 15%.

the possibility of an all-Spanish point-of purchase display, such that all facings show the Spanish side of the package, and would make it clear that English is primary, thereby minimizing prejudice.

With respect to customer service, separate phone numbers for English and Spanish-speaking callers should be provided even though the number of people that speak only Spanish may be small. If separate numbers are not possible, English should always be the default language. This eliminates the problem of negative feelings caused by having to choose between English and Spanish.

When bilingual service representatives are hired, they should speak English as well as an English-speaking native to minimize miscommunication and negative feelings when these service representatives talk to native English speakers. This would minimize problems caused by the representative not understanding different slang terms, idioms, or synonyms (e.g., something is busted, fried, messed up, screwed up) or other common English phrases. The ability to understand common English is especially important for service representatives who use a searchable knowledge base that may not cover these terms.

7.2. Invest in assimilation

The second and most important part of the solution is to help Hispanics learn English and assimilate. Sponsoring free English-as-a-second-language classes as well as free classes that deal with American culture and customs helps achieve this goal at little cost while helping to eliminate the shortage of ESL classes (Hu, 2014). This approach may help develop loyal customers, thereby increasing profits. Most importantly, these classes will also help society by reducing prejudice and by helping Hispanics assimilate so that they are in a better position to achieve the American Dream.

8. What it all means

Today, corporations experience significant pressure to be socially responsible. Yet, since stakeholder goals may conflict, it is sometimes difficult to determine what is truly responsible. Using Friedman's approach, determining whether an action is socially responsible is relatively easy since there is only one goal: profits for the shareholder. We have argued that based on Friedman's profit perspective, bilingual marketing is marginally successful at best and could even harm profits. The target market is smaller than it first appears due to high levels of English

fluency among Hispanic consumers as well as high levels of American identification among second and third generation Hispanics. Also, bilingual, English-dominant Hispanics may not respond well to bilingual marketing efforts. Finally, non-Hispanics rate products in bilingual packaging less favorably, possibly harming profits.

From Freeman's perspective, bilingual marketing is socially responsible because it helps non-English-speaking Hispanics function and conveys to all Hispanics a welcoming message that reinforces their social identity. However, we would argue that from society's perspective, dual language marketing is not socially responsible. While in the short term, bilingual marketing may help some Hispanic immigrants, it is ultimately divisive because it stereotypes Hispanics, hampers English acquisition, feeds prejudice, and delays assimilation. We hope we have added to this important discussion.

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