

Future of Cause Marketing (2022 – 2027)

Executive Summary



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Thank you for cutting off funding to cancer screening programs in order to prove that you are pro-life.



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What is Cause Marketing?

- “A partnership between a nonprofit and a for-profit for mutual profit” (Waters & MacDonald).
- Cause marketing has existed as a marketing practice for ~35 years, with the first recognized instance of modern cause marketing occurring with Marriott and the March of Dimes in 1976.



What's Driving Cause Marketing?

- **Cause Marketing is a Differentiator** -- “79% of Americans indicated likeliness to switch from one brand to another if the other if the other brand is associated with a good cause, all other things being equal. Cause marketing can increase sales of certain consumer product categories by up to 78%.”
- **Demand For Commitment** -- “Globally, 66% of people believe it's no longer enough for corporations to merely give money away, but that they must integrate good causes into their day-to-day business.”
- **Demand For Transparency** -- “93% want to know what companies are doing, but 71% report are confused by what companies say about their efforts.”

Societal Trends

Evolution of values corresponds to rising affluence (Hines).

4 Values Types

A. Hines

An individual view about what is most important in life that in turn guides decision-making and behavior

Traditional

Follow the Rules

Fulfilling one's predetermined role, with an emphasis on their being a "right" way to do things

Modern

Achieve

Driven by growth and progress and the ability to improve one's social and economic status....and show it

Postmodern

What's It All Mean?

A shift away from material concerns to a search for meaning, connection, and greater participation

Integral

Make a Difference

Leading edge of values change emphasizing practical and functional approaches that best fit particular situations

- **“Enoughness”... i.e. Acquiring Less, Experiencing More.**
- **Increasing Affinity for Authenticity.**
- **Increasing Focus on the “Credentials of the Offering.”**

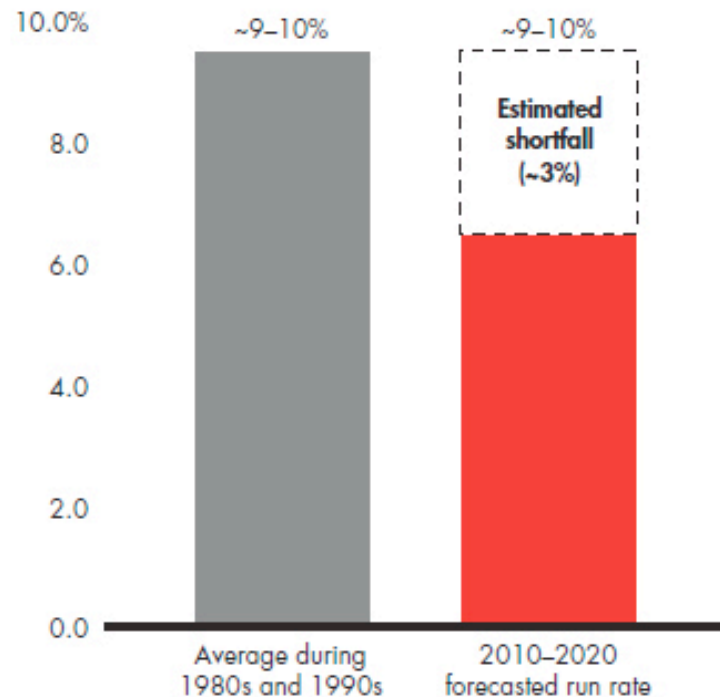
Economic Trends

Budget shortfalls in OECD countries will make alternative business models, such as public-private partnerships, increasingly common

Government shortfalls must be supplemented by private investments

Diversifying and expanding the public sector's traditional sources of revenue

OECD government gross fixed capital formation as percent of total government outlays



Sources: OECD, Infrastructure to 2030 (2006); Bain Macro Trends Group analysis, 2011

- Governments are increasingly **assisting private partners to ensure attractive investments**
 - Long-term contracts
 - Sustainable competitive advantages (barriers to entry)
 - Low variable costs
 - Low demand variability
- However, governments are also **regulating these partnerships**
 - Proceeds from sale should be re-invested in infrastructure
 - Private partner is held accountable for operational externalities
 - Limited increases in pricing (of tolls)

Economic Trends

- In 1990, cause-related sponsorship spending was \$120 million in North America, and has increased to \$1.65 Billion USD in 2011.



Demographic & Environmental Trends

Populations & Generations

- ↑ Global population.
- ↑ Life expectancies.
- ↑ Working lives.
- ↑ Millennial engagement.
- ↑ 65+ population.

Women & Minority Populations

Women

- ↑ Share of the work force.
- ↑ Disposable income.

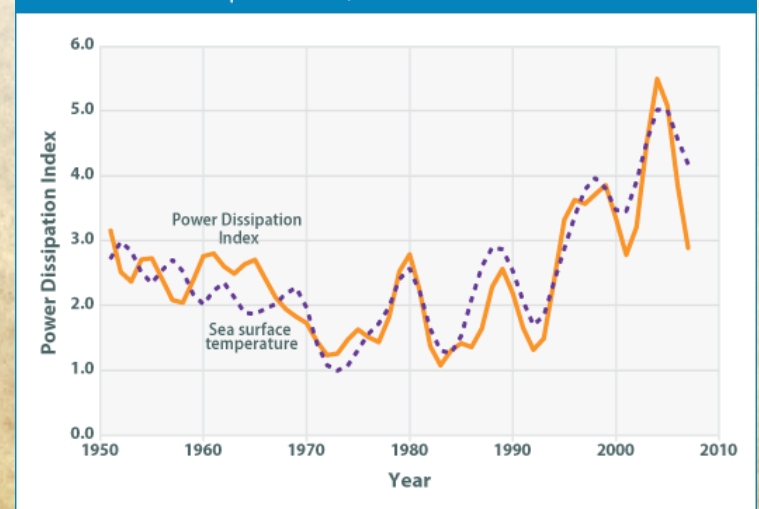
Minority Populations

- ↑ Latino population projected to be 29% of U.S. in 2050.

Environmental

- ↑ Atmospheric carbon dioxide.
- ↑ Surface temperatures.
- ↑ Desertification.
- ↑ Polar ice melt.
- ↑ Extinctions.

Figure 2. North Atlantic Cyclone Intensity According to the Power Dissipation Index, 1949–2009



Big Data / Analytics

- \$100 billion market and growing ~10% per year.

Gamification

- Expected to grow to \$2.8B+ by 2016.
- 70% of Global 2000 managing at least one “gamified” application by 2014.

Mobile Payments

- U.S. Mobile payments 68% CAGR between 2010-2015.

BUY

BUY

BUY



Neuromarketing

- Campbell’s Soup, Frito-Lay, Microsoft, Google, and Daimler using techniques to learn how to better appeal to women, etc.”

Geosocial Web

- By 2017, >2.5 billion mobile AR apps will be downloaded annually (Jupiter Research).

The Evolution of Cause Marketing

1.0 Traditional Corporate Philanthropy

- Brand Selects Causes
- Brand Tells Story
- Low Behavioral Influence



2.0 Participatory Cause Marketing

- Brand Selects Causes, Customer Votes
- Brand Tells Story
- Limited Behavioral Influence



3.0 Democratized Transactional Giving

- Customer Selects Causes
- Customer Advocates for Brand and Cause
- Strong Behavioral Influence



Baseline Future

“The consumer is in the driver’s seat... in addition to the increased power of the consumer, is the way that technology that evolving, the pace at which it evolves, and the implications for how we conduct our lives, do business, and interact with all brands... I think the biggest thing we’re going to see is for many companies, particularly technology companies and financial services, [cause is] going to be more baked into the product itself, which is different than marketing... it’s a much bigger opportunity.

– Katya Andresen, Network for Good



- **Strategic Challenge**

- Will Brands Cede Control?

- **Technological Change**

- Influence on Cause Marketing Methods.

- **Demographics & Values**

- Influence of Women, Millennials, Hispanics, and Aging Populations.

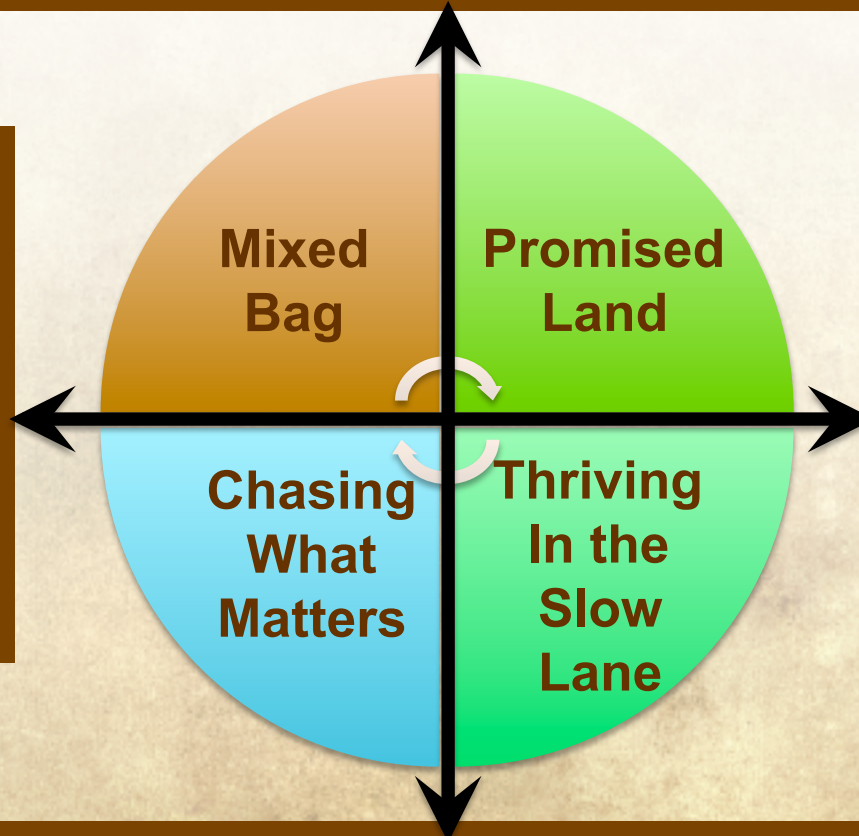
- **Consumer Skepticism**

- Degree of Fatigue and/or Backlash.

Alternative Scenarios

- Corporations and causes have shared vision, mission, strategy.
- Consumers have choice with respect to the causes they support in conjunction with the brands they patronize.

- Technological change doesn't drive significant new developments in cause marketing practices.
- Demographic & values changes play out in unexpected ways.
- Regulation is a key concern.



- Technological change drives new opttys.
- Demographics & values continue in current direction.
- Insignificant regulatory influence.
- Little overall consumer skepticism.

- Low degree of cause and corporate alignment.
- Lack of consumer choice with respect the causes they support related to what they buy.

About Kula Causes

- Founded in 2010 and based in Boulder, Colorado, Kula Causes helps companies create meaningful brand loyalty. Kula's loyalty technology, CLM™, is an innovative business-to-business SaaS application that enables companies to measure, engage, and reward their customers through democratized charitable giving. This puts the power of choice in the hands of customers, creating rich customer engagement and meaningful brand loyalty.
- With over 2.5 million charities in 50+ countries to choose from, CLM™ reaches virtually every customer giving affinity—from local schools and places of worship to international development and aid organizations. CLM calculates and drives the ROI of corporate philanthropy, while increasing the visibility of nonprofits across the world. For more information, please visit www.kulacauses.com.

Appendix

Research Methodology

- Primary and secondary research was conducted to aid the creation of the baseline (expected, extrapolative) forecast and alternative forecasts (weak signals, alternative assumptions and evidence) for this report.
- Primary research was conducted via an online questionnaire and phone interviews with recognized cause marketing experts, as well as a quantitative trend analysis of historical North American cause sponsorship spending, as a proxy for cause marketing spending where that data was not available.
- **Note: The forecasts provided in this presentation are not predictions.** Accurate prediction is currently impossible outside of a narrow range of domains – certainly not the realm of human affairs, complex systems such as corporations, economies, etc. Yet, aspects of the future can be known; assumptions can be explored. The terrain can be mapped (to a certain degree). The value in forecasting alternative futures (scenarios) is not in getting the scenarios right. The value is in the strategic conversation (and subsequent preparation) around the relevant range of possible and plausible futures, and by creating change to enable desired outcomes for the organization.

Research Methodology

Secondary research, including an analysis of relevant books, journals articles, periodicals, and Internet-based sources, enabled the creation of a Research Framework document, which contained a detailed analysis of the following items:

- **CURRENT ASSESSMENT**

- CURRENT CONDITIONS
- STAKEHOLDERS
- PAST EVENTS

- **ERA ANALYSIS**

- PREVIOUS ERA
- CURRENT ERA

- **BASELINE FORECAST**

- CONSTANTS
- TRENDS
- GOALS AND PLANS
- CYCLES
- DOMAIN EXPERT FORECASTS

- **BASELINE SUMMARY**

- BASELINE ANALYSIS
- FINAL CONCLUSION
- DISCLAIMERS
- TREND REVERSALS
- UNFULFILLED PLANS
- POTENTIAL EVENTS & WILDCARDS
- ISSUES, DILEMMAS, AND CHOICES
- NEW IDEAS, PLANS, AND PROPOSALS
- KEY UNCERTAINTIES

- **ALTERNATIVE SCENARIOS**

Primary Stakeholders

For-profit organizations – Historically large corporations / well-established brands.

Examples: Marriott, American Express, Pepsi, General Mills, Procter & Gamble, etc.

Interests: Product and service differentiation, increased customer engagement, brand recognition, market dominance.

Goals: Increased revenue and profitability.

Fears: Decreased customer acquisition and loyalty leading to decreased revenue and profitability. Competition.

Positions: Various. Ranges from the notion that cross-sector (e.g. cause and brand) partnerships are core to the organization's strategy, to cause marketing not being on the radar at all. Predominant position [probably] is that cause marketing is one of many marketing-related tactics in drive customer engagement and ultimately increase the value of the brand.

Values: Achievement, efficiency, action, capitalism. Continued existence and growth.

Non-Profit / NGOs – Historically large national / global orgs.

Examples: Historically large, national non-profit organizations. E.g. American Cancer Society, American Heart Association, United Way, Red Cross, Susan G. Komen For the Cure.

Interests: Donor engagement, non-profit brand recognition, fulfilling the mission of the cause, continued existence of the cause.

Goals: Increased donor engagement and retention (repeat donation) new donor acquisition, increased revenue.

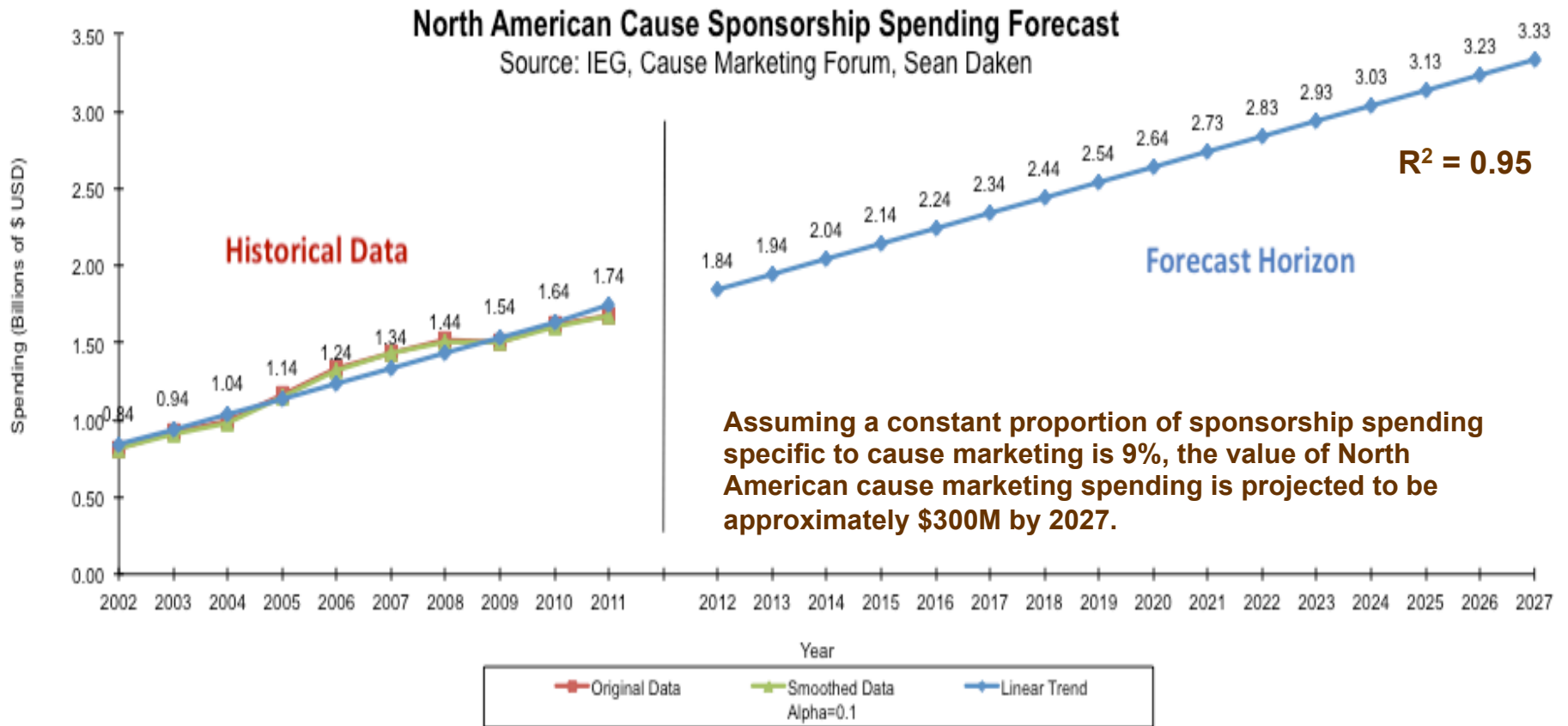
Fears: Decreased donor engagement, donor attrition, decreased revenue, decreased mission efficacy.

Positions: Cause marketing is a win-win relationship. Corporate brands need to benefit as well as non-profits. This is the position of savvy, national / international-scale non-profits. This is not the position shared by most small, local-scale non-profits.

Values: Achievement, efficiency, action. Continued existence and growth. Empowerment.

Baseline Future

By 2027, North American cause sponsorship spending is expected to grow to approximately \$3.33B USD.



Secondary Stakeholders

- **Employees, customers** (particularly those purchasing products/services with a related or embedded cause), and **shareholders** of for-profit organizations.
- **Employees, donors, and directors** of non-profit organizations.
- **The constituents of non-profit / non-governmental organizations**, i.e. those who benefit from NPOs and NGOs).
- **Other “causes”** that may not have official non-profit status and/or that may have characteristics that traditional non-profit organizations do not have (e.g. ad hoc, crowd-funded, temporary, etc.).
- **Product/service providers**, including data and technology platforms, loyalty marketing, etc. and agencies, research orgs, consultancies (including some overlap).
- **Bloggers, speakers, industry experts, and other Influencers** (overlap with agencies and consultants).
- **Government agencies, regulators, etc.**

Alternative Scenario 1

Alternative Scenario 1: “The Promised Land”

It's 2026. The global economy is flying high. Mobile and social networking technologies have given way to embedded systems and sensor networks. Technology is deeply integrated into clothing and beginning to be integrated into human biology. Predictive analytics have advanced to the point where brands can target, with astonishing precision, what individual consumers are likely to purchase at any given time. Augmented reality allows brands to facilitate product/service/cause/consumer interactions in real-time in physical and virtual worlds. Behavioral economics, gamification, and marketing analytics, combined with machine learning and natural language processing have turned marketing from an art to a science. Marketing copy is routinely machine-generated in real-time, tailored to individual preferences.

Due to pressures on brands for corporate transparency and authenticity, and sentiments of ethical consumerism, most brands have embraced a purpose-centric mission and deep strategic alignment with multiple causes. Causes of all sizes and affinities are now deeply embedded into the transactional space, and consumers have a high-degree of choice regarding the causes benefited by their consumption activity.

Brands use consumer affinities and values to incentivize purchase behavior and loyalty in a ways that are aligned to consumer's interests. Because of this, consumers tend to view causes not as separate, but as a part of the transactional space in which they are accustomed to engaging with brands at regular purchase intervals. Because technology has lowered the barriers to giving, cause marketing is now accessible for small for-profits and non-profits.

Calls from anti-corporate groups for increased consumer protections related to cause marketing have largely fallen by on deaf ears by legislators. The vast majority of consumers are content with voluntary corporate transparency practices.

Leading Indicators

- Rise of big data, predictive analytics.
- Increasing ethical standards for corporate behavior and consumerism.
- Reduction of transactional barriers.
- Rise of the practice of gamification, behavioral economics, machine learning.

Alternative Scenario 2

Alternative Scenario 2: “A Mixed Bag”

It's 2025. Cause marketing has become fully embedded with product/service transactions, so it's everywhere, but not always applied consistently and appropriately, at least in the minds of consumers. Although most big brands have integrated purpose-driven decision making into their organizational ethos, there's a mixed bag of well-executed and poorly-executed cause marketing initiatives, and a rising tide of consumer skepticism, bordering on resentment.

Corporations are not as transparent as many consumers would like, and a lack of consumer protection legislation due to a conservative congress has not compelled a change in that direction. As a result, many consumers are turned off by cause marketing.

Millennials have come of age and have families of their own. Gen-Xers are beginning to think about retirement just over the horizon and Boomer's have are now in their final years. The landscape of dominant non-profits has changed due to biotechnological advances and the near eradication of several once-common diseases. HIV/AIDS, and several forms of cancer, including breast cancer, are largely non-existent in the developed world. Because Millennials now have families and most recall being “bitten” at one time or another by their younger-selves' lack of judgment regarding online posting, most consumers are now extremely concerned about how their personal data is used by brands, from everything to how that influences their ability to get a job, purchase a home, and the kinds of products and services that are marketed to them.

A period of prolonged economic uncertainty and the loss of white-collar jobs to machine intelligence lead to conditions which didn't accelerate the transition to post-modern and integral values, as was expected by experts. Gen-Y/Z has much in common with their Joneser/Boomer parents, and their WWII-era grandparents. The Hispanic population in the U.S., which makes up nearly 30% of the population, simultaneously encourages more traditional philanthropy and as well as hyper-local causes and religious campaigns. That has proved fortuitous for small for-profit organizations and their local cause marketing efforts, but has not yielded the results many large brands expected.

Leading Indicators

- Accelerating technological change, e.g. biotech, AI.
- Rise of big data, predictive analytics.
- Reduction of transactional barriers.
- Demographic shifts e.g. Hispanic population.
- Algorithms increasingly replacing white-collar human workers.
- “New normal” of economic uncertainty

Alternative Scenario 3

Alternative Scenario 3: “Thriving in the Slow Lane”

It's 2024. Cause marketing has become democratized due to the elimination of most transactional barriers, but most companies still don't fully engage with their customers on a democratized basis because of the relatively low degree of strategic alignment between causes and corporate boardrooms.

Although most large for-profit companies do execute cause marketing campaigns, the ROI on those campaigns continue to be poorly understood. There is mounting evidence that cause marketing is highly beneficial for the largest for-profit brands and national non-profits, but that consumers perceive big-cause and national brand collaboration as somewhat manipulative. Recently, regulation banning the use of aerosolized oxytocin as a marketing tactic by brands to encourage trust and purchase behavior resulted in the suspension of cause marketing campaigns associated with fashion and fragrances, which routinely utilized oxytocin compounds (clothing, perfumes, etc.).

The millennial generation turned out not to be as generous as once thought. Behavioral economics has shown that consumer participation in cause marketing results in an immediate decrease in individual happiness and less altruistic behavior overall, which has shown to be detrimental to small non-profit organizations. This is especially true during recessions, which in the U.S. and Europe have experienced since 2021. Transactional philanthropy has taken a hit as consumers have turned to more immediate concerns, like the economy, rather than causes they see as puppets for big corporations.

Leading Indicators

- Accelerating technological change, particularly biotechnology.
- Rise of big data, predictive analytics.
- Reduction of transactional barriers.
- Lack of robust ROI measures around cause marketing.
- Demographic and values changes... millennial attitudes.
- “New normal” of economic uncertainty.
- Persistent unemployment in the U.S. above 8%

Alternative Scenario 4

Alternative Scenario 4: “Chasing What Really Matters”

2022. The most damaging hurricane in recorded history hit the mid-Atlantic states and New England in December of 2019, which was preceded by the 6 warmest years on record. This particular nor'easter, Hurricane Xavier, dropped 4 feet of snow on the region, breeched sea walls, and cut power for 3 weeks in New York City. This was a flashback for many east coast residents who live through the devastation of hurricane Tennyson in November 2014, and hurricane Sandy two years before that.

After the cause-related fraud scandal in the wake of hurricane Tennyson, where several big brands raised money for unscrupulous and poorly-vetted “local causes”, brands became increasingly cautious about reactive cause marketing efforts. Big brands tended to steer clear of participating with smaller non-profits. Likewise, state and federal regulators imposed new rules to protect consumers from fly-by-night fundraising initiatives. New regulations necessitated that corporate initiatives raise money for non-profit causes include profuse financial disclosures, advanced registration, independent audits, etc.

Unfortunately, hurricane Xavier was the proverbial straw that broke the camel’s back. In this case, the camel was the U.S. economy, already battling a severe recession, much deeper than the Great Recession of 2008-2012. Personal altruism and charitable giving dropped sharply from 2020 - 2021. As a result of persistent debt issues, congress reluctantly voted to eliminate a significant number of tax deductions for charitable contributions.

As postmodern and integral values took root in the U.S., Millennials increasingly reconciled materialist and anti-materialist sentiments. The value of “enoughness” which began to emerge in the prior two decades, would be in full-bloom by the mid-2020’s. That trend, combined with a severe economic downturn, lead a small majority of consumers to reconsider their once fervent consumerism as an excessive practice of an earlier time, as many of their Northern European counterparts did several years earlier.

Leading Indicators

- Increasing impact of climate change.
- Increased cause marketing skepticism.
- Charitable donations fall during recessions.
- Demographic and values changes.
- Millennial attitudes towards giving.
- “New normal” of economic uncertainty.
- Entering a long-wave cycle of Kondratieff winter?
- Reduction of charitable tax deductions.
- Occupy Movement.

Appendix: Presentation Sources

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