







2020 SURVEY RESULTS

# Key Elements of Best in Class Cause Marketing Campaigns





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# Introduction

What factors make for an outstanding cause marketing campaign? This is the question we set out to answer in our 2020 Key Elements of Best in Class (BIC) Cause Campaigns research. Over the past eight years, For Momentum has conducted surveys of nonprofit and corporate cause partnership professionals to gather data about their experiences and perspectives with the goal of providing useful planning and process-driven data to cause practitioners. This year, we worked with The Paragraph Project, a third-party research firm, to survey staff members of nonprofit organizations with a track record of excellent cause marketing campaigns to participate in our 2020 research.

This year's survey is the first of its kind in many ways, as it delves into the practical details of how these incredible campaigns are planned and executed.

We received insights and perspectives on the elements that go into these BIC Cause Campaigns from a set of seasoned development professionals with deep cause campaign expertise. The data collected provides an industry-wide benchmark resource which establishes best practices and identifies the most effective strategies to create successful cause marketing campaigns.

This report will inform and equip cause practitioners to:

- Set cause campaign expectations with management, partners, boards and other stakeholders
- Recognize and potentially identify the variables that influence your ability to create successful campaigns
- Leverage best practices to guide campaign strategy development
- Develop a deeper understanding of the factors affecting the success of cause campaigns

## Methodology

- Quantitative survey
- Sample size of N = 51
- Online survey conducted February 12–March 13, 2020
- For Momentum distributed the survey to leading nonprofit organizations with established and successful cause marketing campaigns.
- The Paragraph Project, a third-party research firm, tabulated and analyzed the results.

# Executive Summary





# Key Elements of Best in Class (BIC) Cause Campaigns

## Executive Summary



With over 30 pages of research included in the report, this summary highlights the most relevant and impactful factors cause partnership teams should consider when developing their cause campaigns.



### Survey Participants

- Survey respondents are seasoned cause partnership professionals with almost half having worked on 21 or more cause marketing campaigns.
- 80% of survey respondents have primary responsibility for development/funding.
- The majority of survey respondents have been in their current fundraising role for over five years, and 45% have 10+ years of career experience.



### Staffing

- 84% of BIC Cause Campaigns have a dedicated corporate partnership team involved in developing the campaign.
- The top three internal departments that **nonprofit** partners rely heavily on for developing BIC Cause Campaigns are marketing and communications (88%), a dedicated corporate partnership team (84%) and digital/social media (76%).
- The top three departments that **corporate** partners involve in creating BIC Cause Campaigns are marketing and communications (90%), public or media relations (72%) and senior leadership or C-suite (70%).



### Activations

- BIC Cause Campaigns involve multiple activations. At the top of the list are marketing activations including owned, earned and social media, followed by fundraising strategies such as corporate grants, customer donations and commercial co-venture.
- Roughly 50% of BIC Cause Campaigns engage a consumer activation: customer donation, commercial co-venture, point-of-sale donation at register or digital checkout.
- BIC Cause Campaigns are not solely relying on customer participation for fundraising with 61% providing corporate funding, the most commonly cited fundraising activation.

# Executive Summary Continued



## Success Factors

- Investment by both nonprofits and corporations (28%) and authenticity (21%) are the most commonly cited success factors of BIC Cause Campaigns.
- The biggest impact of BIC Cause Campaigns is raising funds for the nonprofit (43%).
  - 60% responded that their BIC Cause Campaign raised \$1 million or more for the nonprofit.
  - The majority ( $\frac{2}{3}$ ) of campaigns that raised \$1 million or more have been in the marketplace for over five years.\*



## Timing

- 64% of BIC Cause Campaigns take four to 12 months to execute.
- The majority (60%) of BIC Cause Campaigns are featured in the marketplace for one to three months, with a quarter (24%) featured year round or always on.



## Planning Tips

- Operational challenges (41%) and managing relationship/expectations of the corporate partner (30%) ranked highest among the challenges of BIC Cause Campaigns.
- Three themes rose to the top when comparing elements of BIC cause campaign strategy:
  - Featured messaging and imagery that are positive and uplifting (98%)
  - Centered on long-standing issues (94%)
  - Centered around safe and/or conventional causes (94%)
- 55% of respondents ranked being able to leverage digital strategies and emerging technologies as important to the future of BIC Cause Campaigns.

\*The amount of time a campaign has been in the marketplace was determined through publicly available data and was not collected from participants.

# About the Participants





# SURVEY PARTICIPANTS

We surveyed **51** corporate partnership professionals at leading nonprofit organizations. The participants represent a wide variety of mission sectors including the environment and animals, health, human services, housing, suicide prevention and public-society benefit. Collectively, the survey participants identified **47** unique, U.S.-based Best in Class Cause Campaigns.

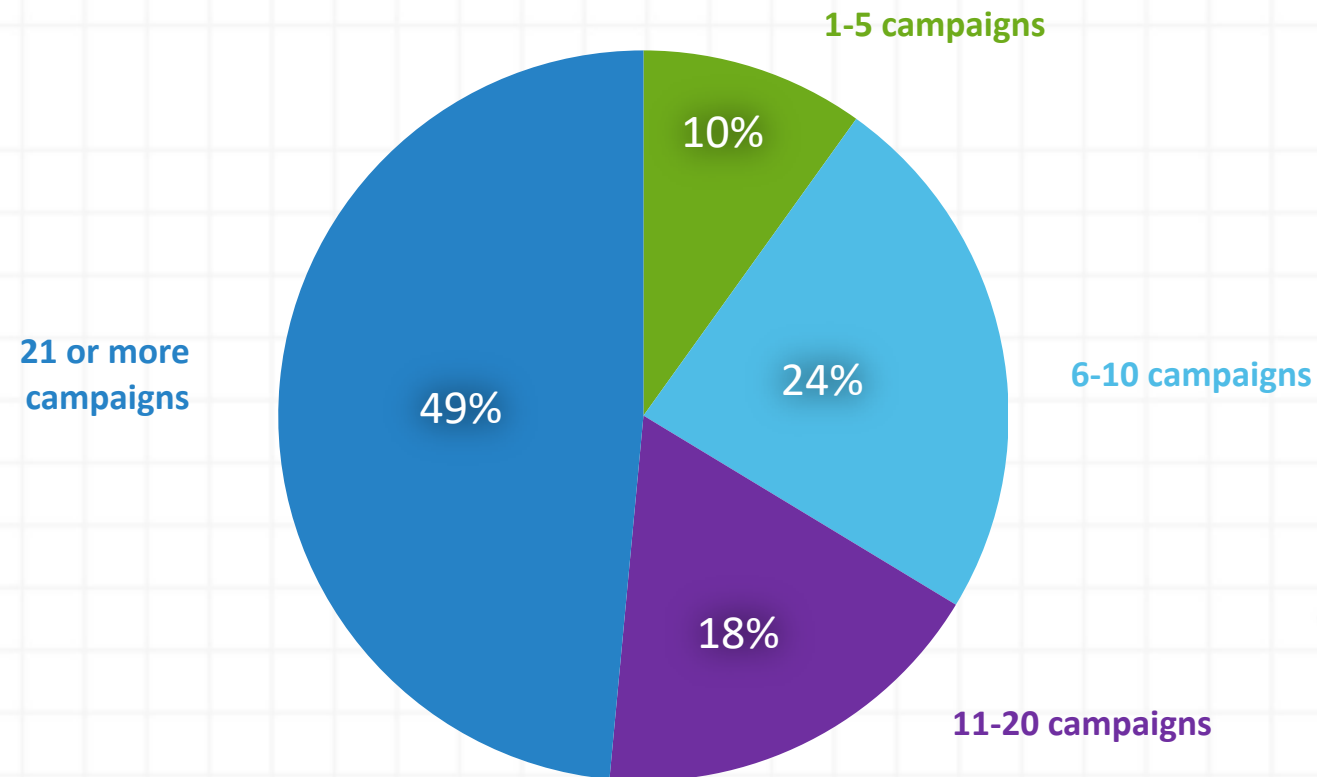




# CAREER EXPERIENCE CAMPAIGNS



Number of Campaigns Worked On



Q: How many cause marketing campaigns have you worked on in your career?

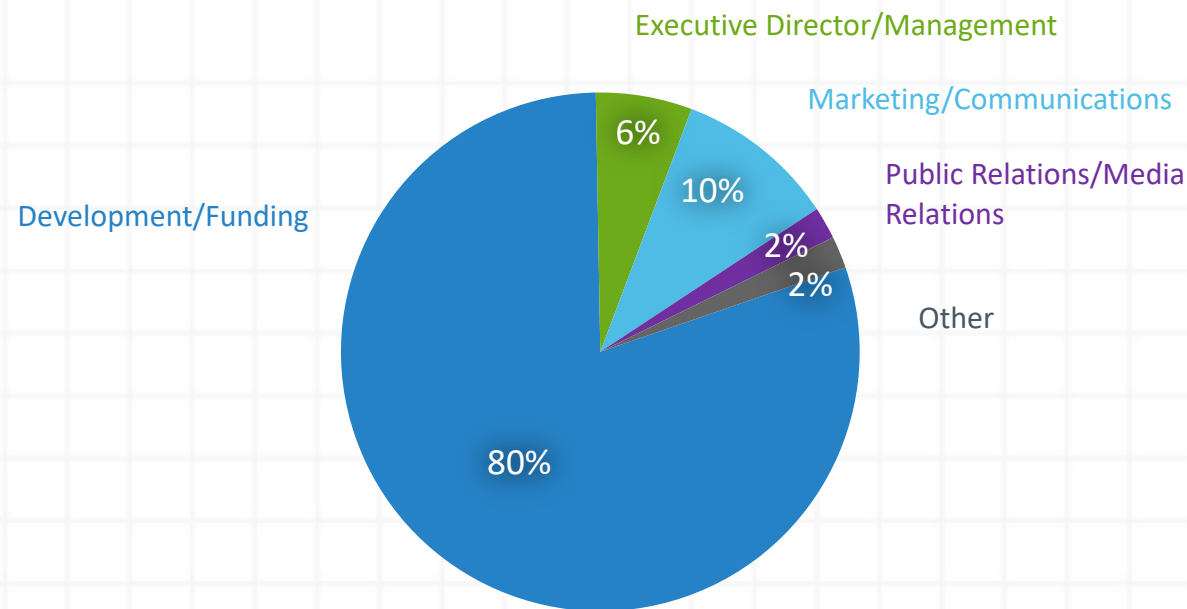
## KEY TAKEAWAYS

- **Survey respondents have deep cause experience.**
- **Almost half have worked on at least 21 campaigns.**
- **67% have worked on 11 or more campaigns.**

# CAREER EXPERIENCE ROLE/TENURE

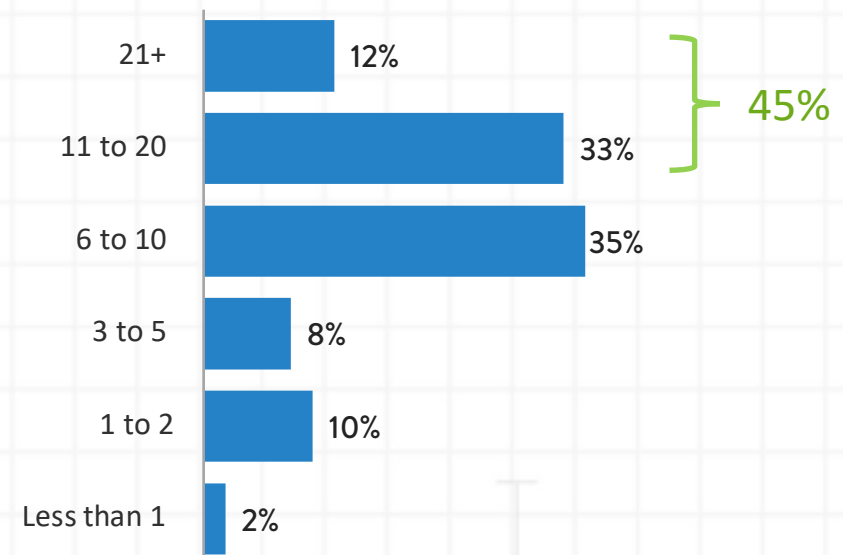


Primary Area of Responsibility



Q: Please select the description that most accurately describes your primary area of responsibility.

Years of Career Experience



Q: How many years of cumulative career experience do you have working on cause marketing campaigns?

## KEY TAKEAWAYS

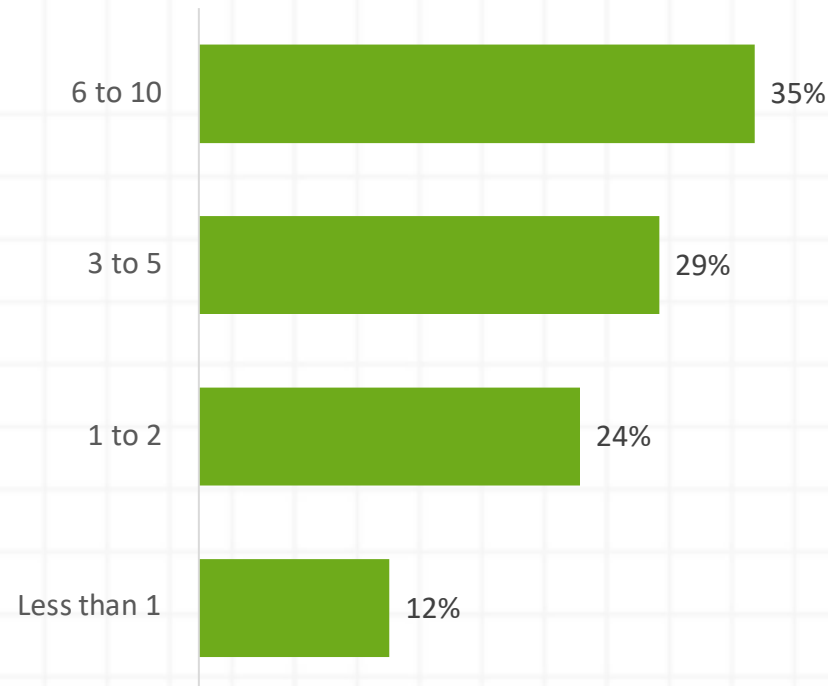
- **80% of respondents have primary responsibility for development/funding.**
- **45% have 10+ years of career experience.**

# CAREER EXPERIENCE

## YEARS IN POSITION

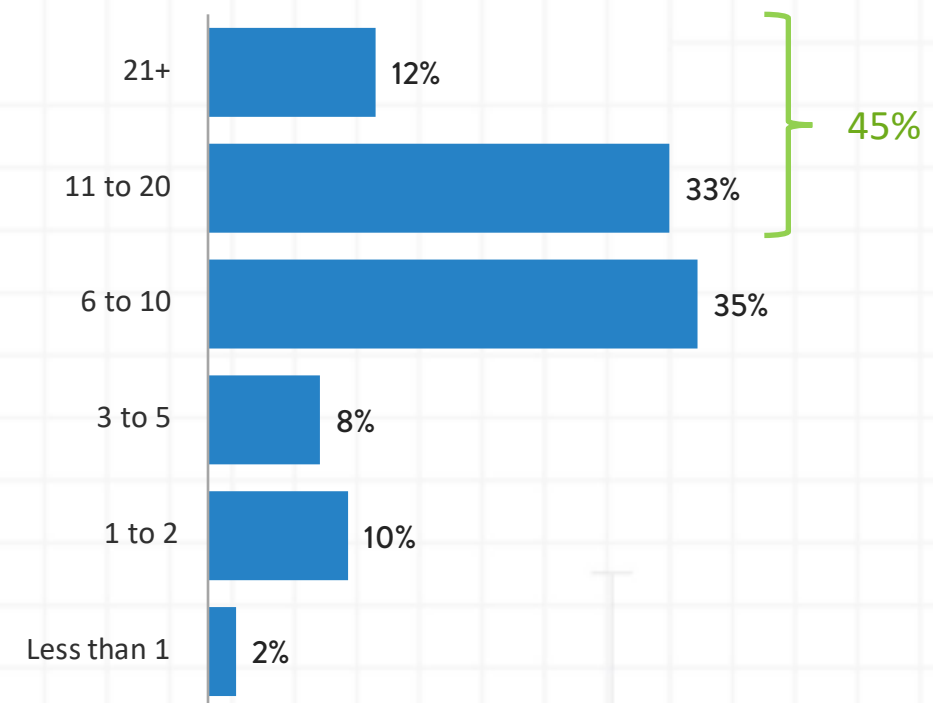


Years in Current Position



Q: How many years have you been in your current position?

Years of Career Experience



Q: How many years of cumulative career experience do you have working on cause marketing campaigns?

### KEY TAKEAWAYS

- Survey respondents are seasoned cause partnership professionals.
- The majority of respondents have been in their current fundraising role for over five years, and 45% have 10+ years of career experience.

# Planning and Execution

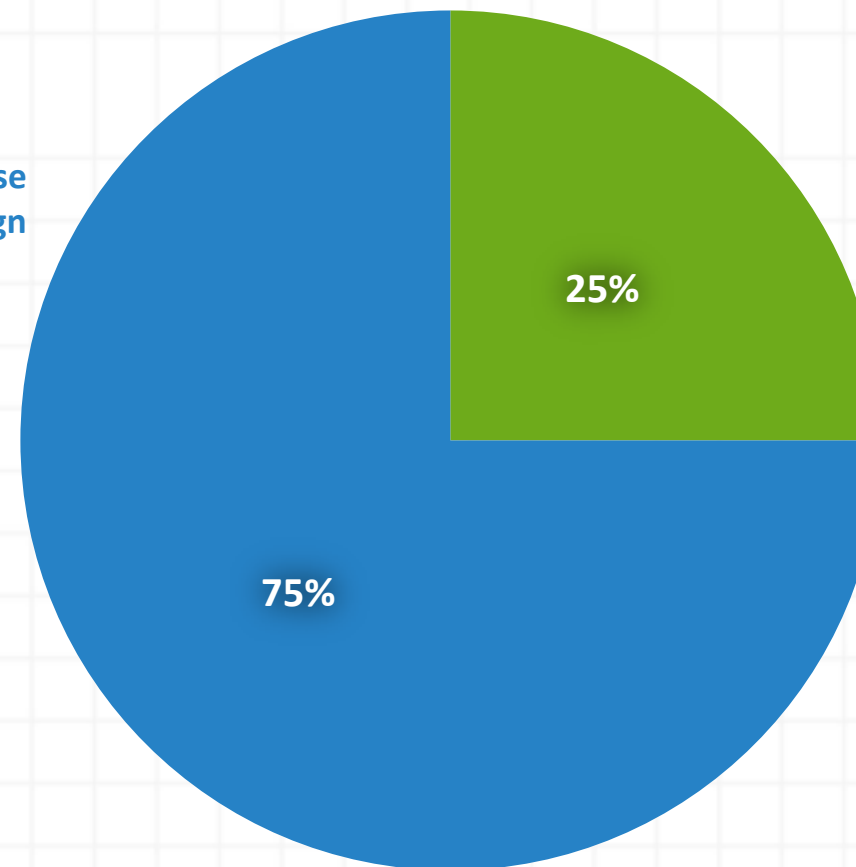




# BEST IN CLASS CAUSE CAMPAIGN TYPE



**Independent Cause Marketing Campaign**  
A campaign that involves one nonprofit and one company with unique, independent communication elements.



## Multi-Partner Cause Marketing Platform

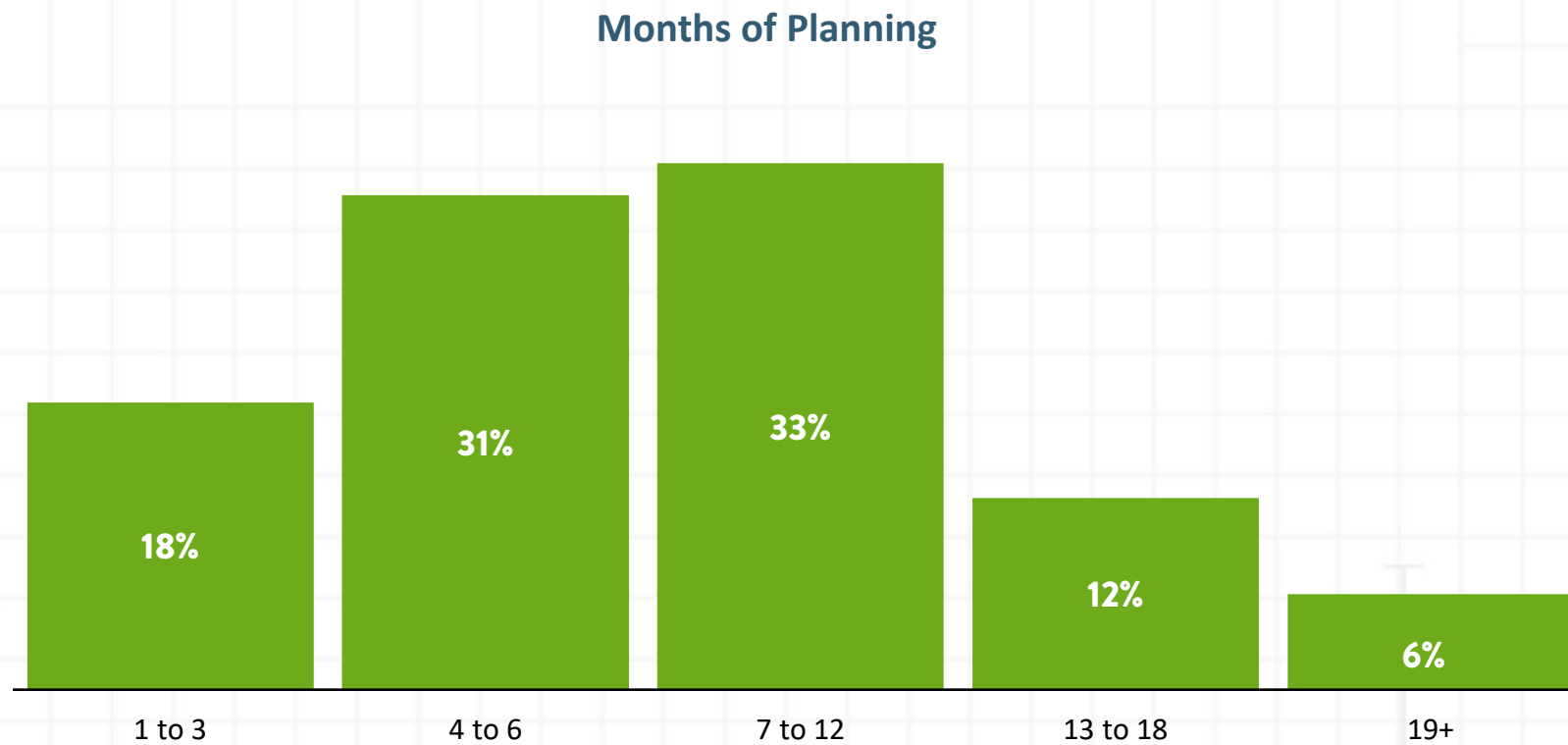
Some cause campaigns involve multiple partners. An example is the annual Thanks & Giving cause marketing platform owned by St. Jude Children's Research Hospital conducted around the year-end holiday giving season. A second example would be when multiple corporate partners execute around a common cause promotion in a way that operationally suits their corporate culture such as the MDA Shamrocks pinup program. A third example is an annual campaign owned by a company that supports multiple nonprofit partners such as Subaru's Share the Love platform.

Q: For the following questions, we would like you to think about one specific cause marketing campaign that you've worked on that you feel was the most successful. Was this campaign an Independent Cause Marketing Campaign or part of a Multi-Partner Cause Marketing Platform?

## KEY TAKEAWAY

- **75% of respondents identified independent cause campaigns as BIC Cause Campaign examples for this survey.**

# TIME NEEDED FOR PLANNING

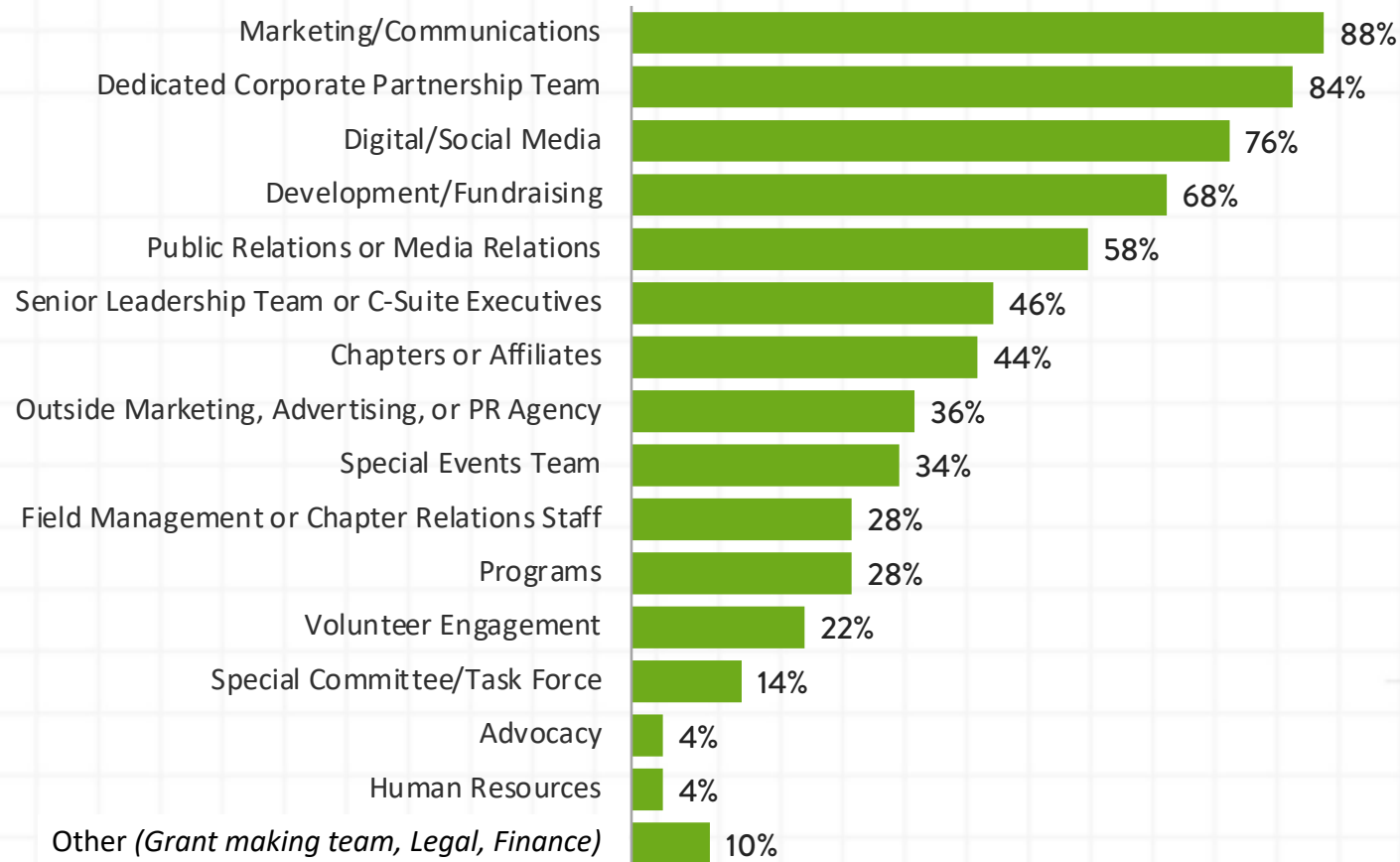


Q: How much time was needed to create an effective strategy and execution plan for the cause marketing campaign?

## KEY TAKEAWAYS

- **64% of survey respondents need four to 12 months to execute a BIC Cause Campaign.**
- **Only 18% need more than 12 months to create an effective strategy and execution plan for their BIC Cause Campaign.**

# NONPROFIT DEPARTMENTS INVOLVED IN CAMPAIGN DEVELOPMENT



Q: From the nonprofit side, which departments were involved in developing the campaign?

## KEY TAKEAWAYS

- The top three internal departments that nonprofit partners rely heavily on for developing BIC Cause Campaigns are marketing and communications (88%), a dedicated corporate partnership team (84%) and digital/social media (76%).
- 84% of BIC Cause Campaigns have a dedicated corporate partnership team.
- Based on the breadth and depth of departments selected, a BIC Cause Campaign best practice is involving multiple departments and areas of expertise in campaign development.

# CORPORATE DEPARTMENTS INVOLVED IN CAMPAIGN DEVELOPMENT



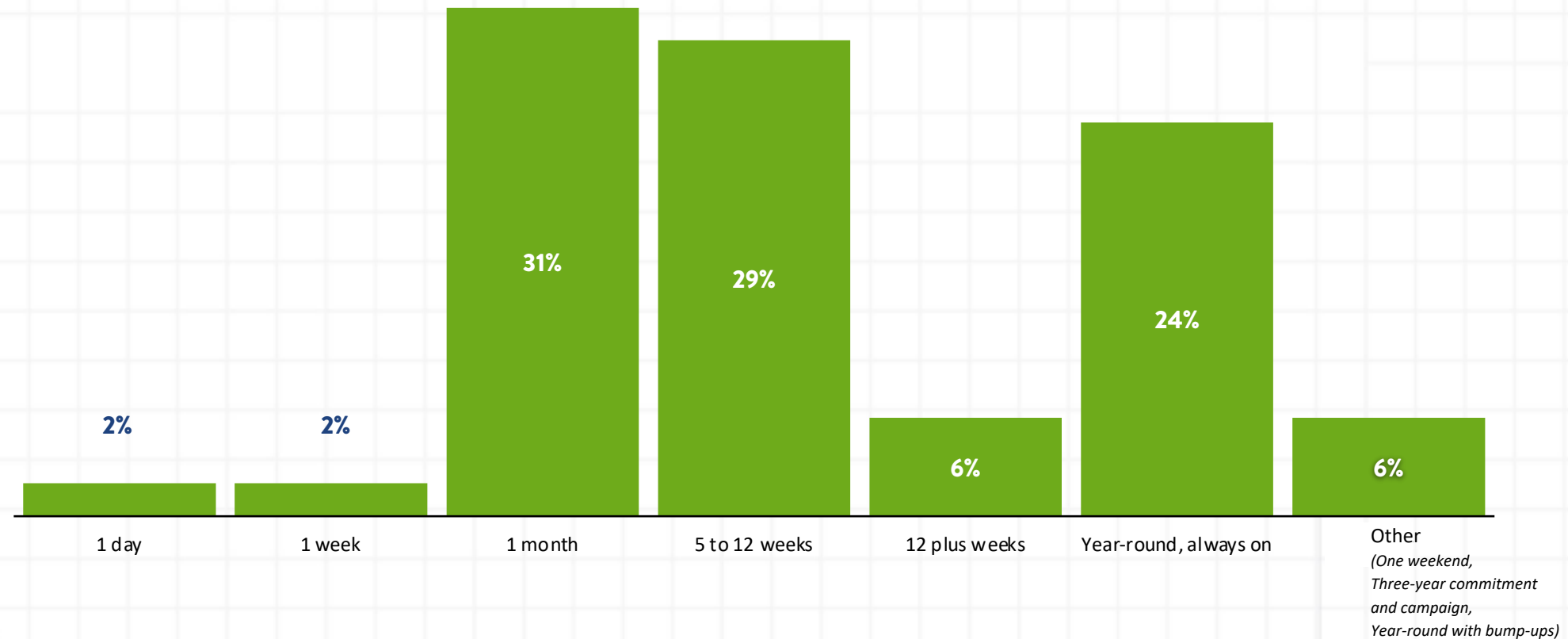
Q: From the corporate side, which departments were involved in creating the campaign?

## KEY TAKEAWAYS

- The top three departments that corporate partners involve in creating BIC Cause Campaigns are marketing and communications (90%), public or media relations (72%) and senior leadership or C-suite (70%).
- Based on the breadth and depth of departments selected, a BIC Cause Campaign best practice is involving multiple departments and areas of expertise in campaign development.



# TIME IN MARKETPLACE



Q: What time period most closely matches the length of time the cause marketing campaign spent in the marketplace?

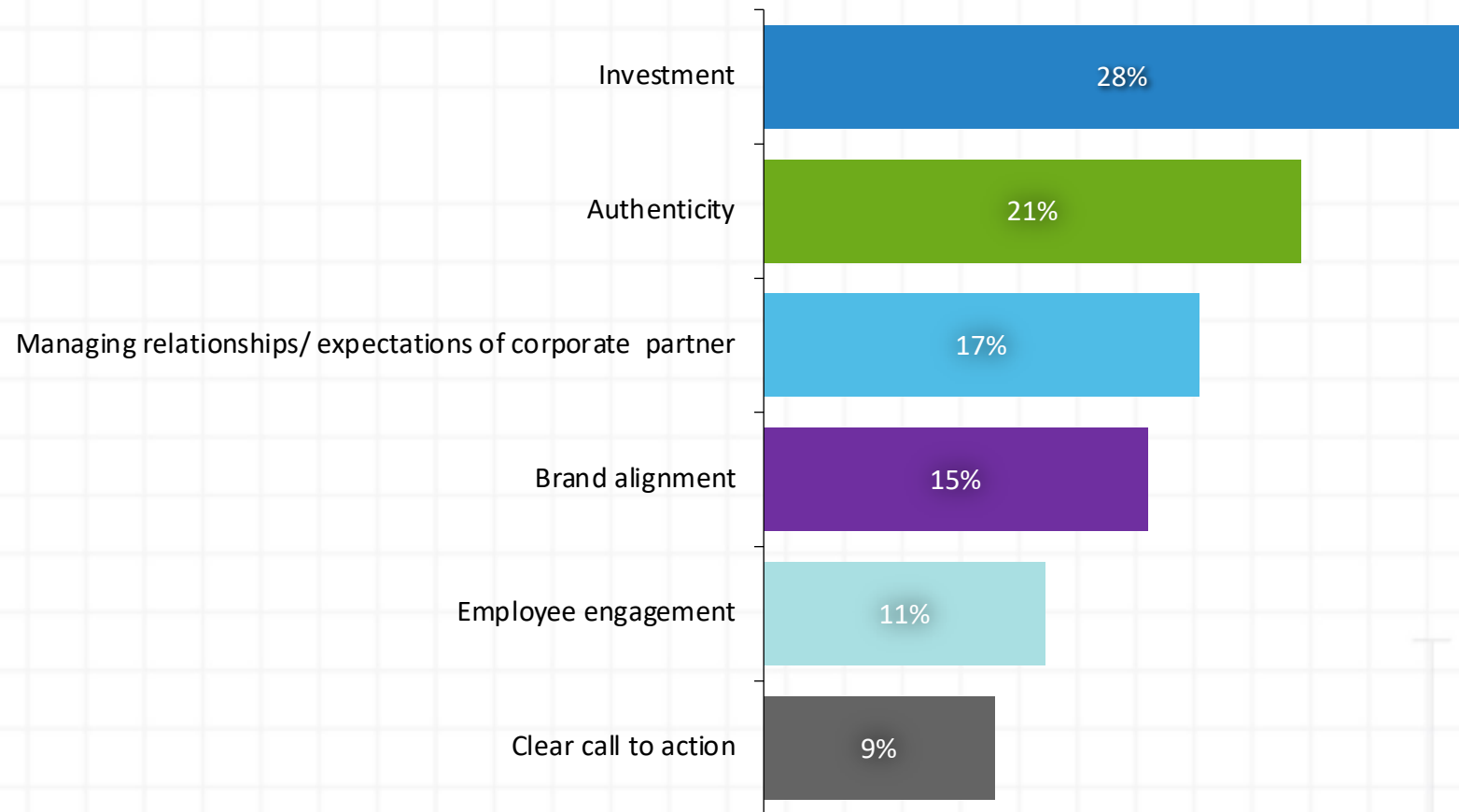
## KEY TAKEAWAYS

- The majority of BIC Cause Campaigns are featured in the marketplace for one to three months.
- Nearly ¼ (24%) of BIC Cause Campaigns are always on.

# Activations, Impact and Challenges



# BEST IN CLASS CAUSE CAMPAIGN SUCCESS FACTORS



Q: What are factors that you feel were the most important in making the campaign a success? (open-end)

## KEY TAKEAWAYS

- There are interdependent factors that lead to a BIC Cause Campaign.
- The most commonly cited success factors of BIC Cause Campaigns are investment (28%) and authenticity (21%).

# BEST IN CLASS CAUSE CAMPAIGN SUCCESS FACTORS



## Managing Relationships/Expectations of Corporate Partner

*"Long-term relationships. Having a champion that is appropriately positioned within the organization."*

*"Corporate partner willing to experiment and try new things."*

## Investment

*"Corporate investment in marketing campaign on air and print to gain consumer support."*

*"Investment by the nonprofit."*

*"[Corporate partner] invested marketing dollars to promote the campaign and consistent messaging for 5 years."*

## Authenticity

*"Staff being able to pitch the cause to the donors in a concise, authentic way."*

*"Authentic story-telling."*

## Brand Alignment

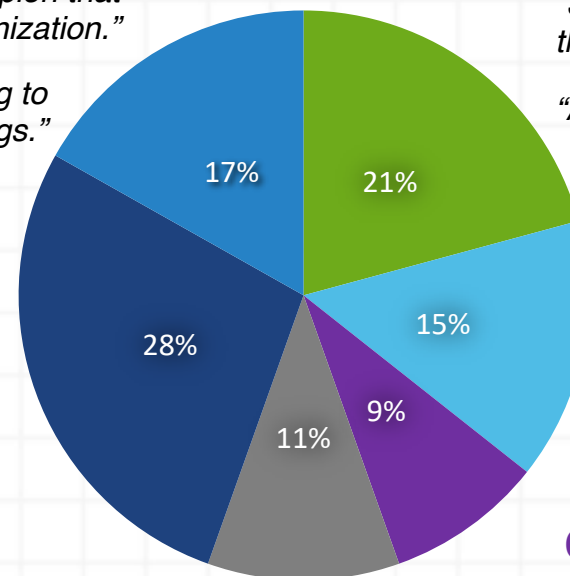
*"There was strong brand alignment with the company and the cause, making it easy for the company to talk about the overall partnership, but also to make store associates familiar with what they were asking customers to support."*

## Clear Call to Action

*"Clear and simple call to action."*

## Employee Engagement

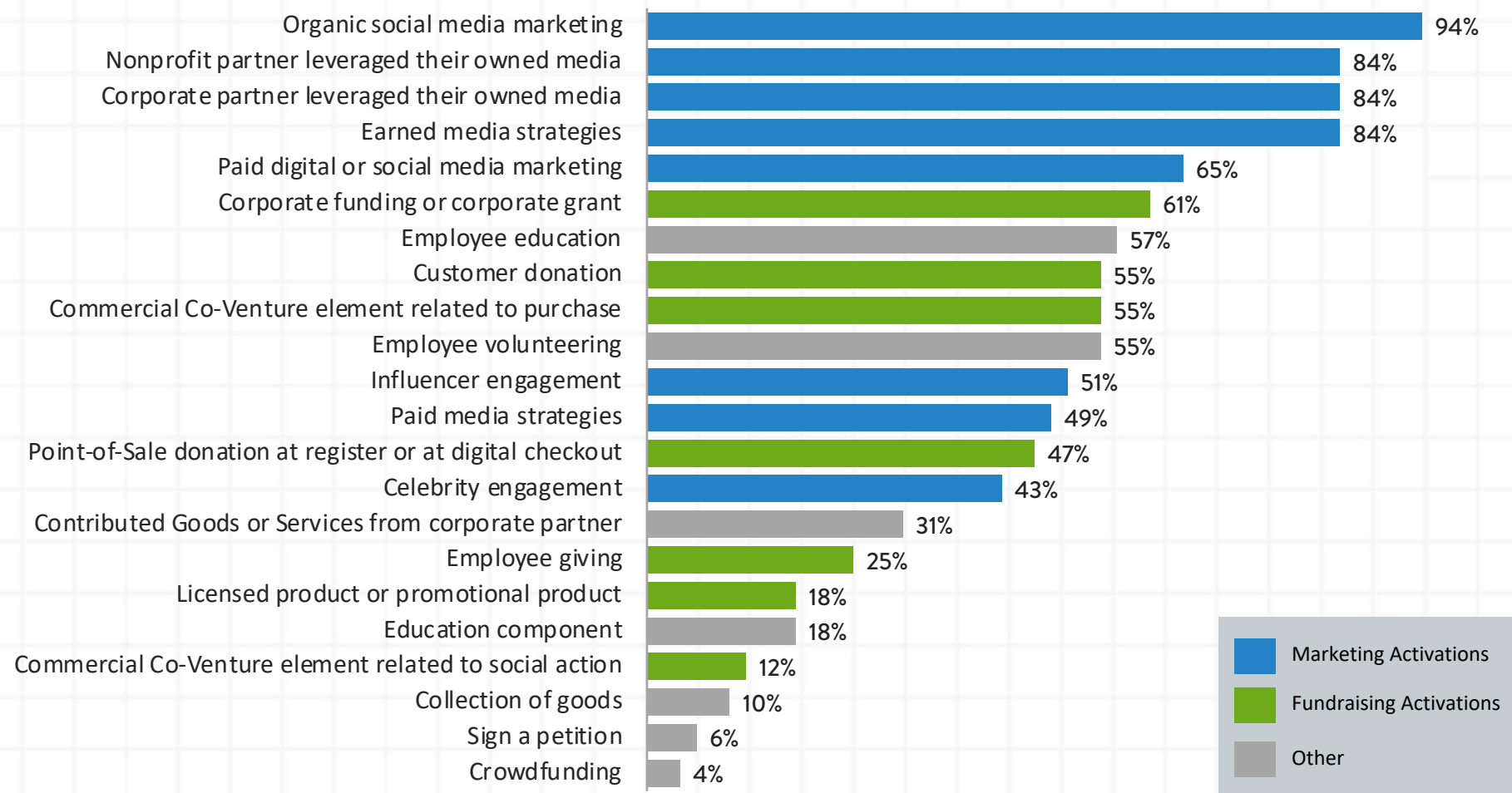
*"Great creative and deep knowledge of the partnership by the in-store employees really made the difference."*



Q: What are the factors that you feel were the most important in making the campaign a success? (open-end)



# BEST IN CLASS CAUSE CAMPAIGN ACTIVATIONS

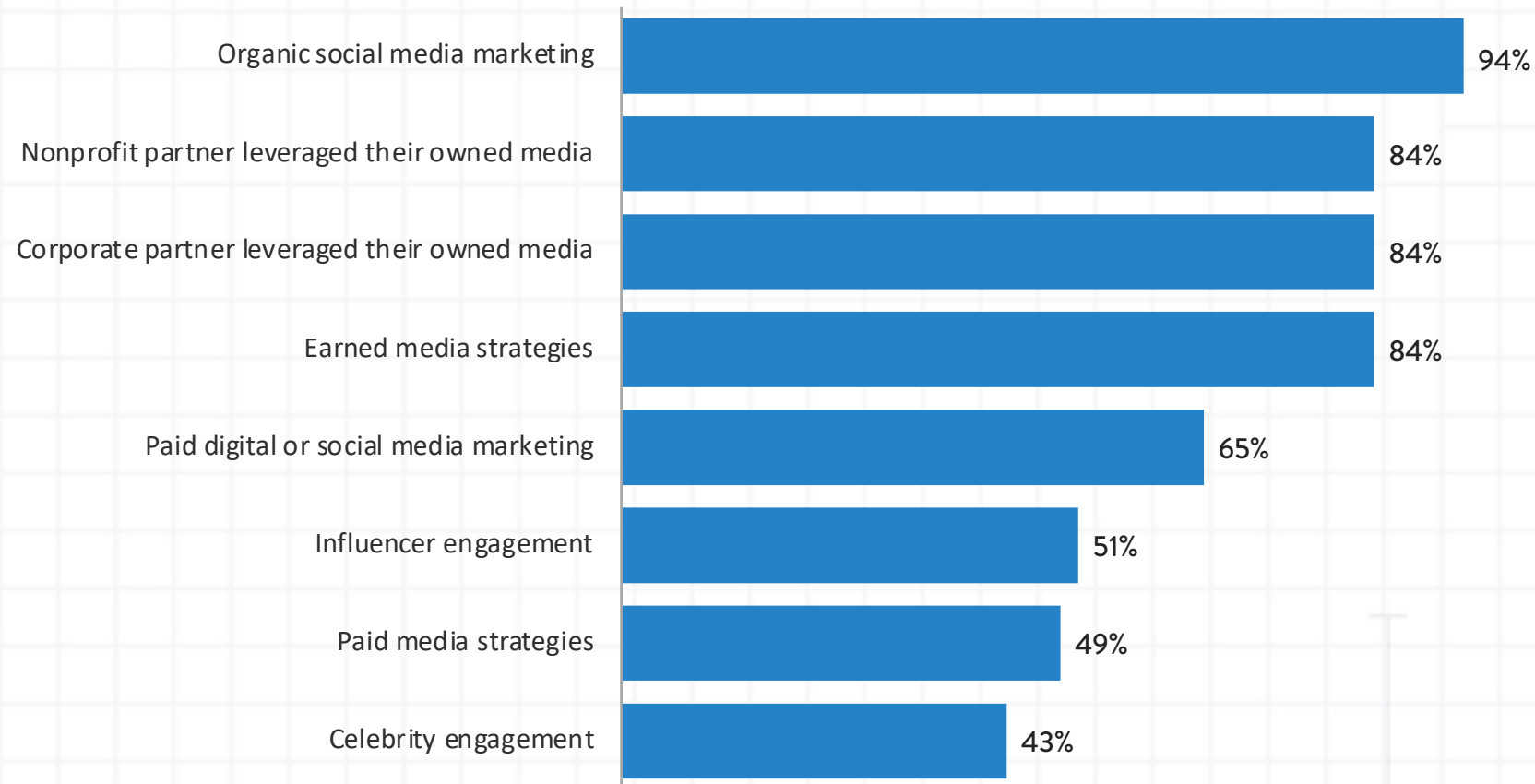


Q: Which of the following activations were a part of the campaign? (select all that apply)

## KEY TAKEAWAYS

- **BIC Cause Campaigns involve multiple activations.**
- **At the top of the list are marketing activations followed by fundraising strategies.**

# BEST IN CLASS CAUSE CAMPAIGN MARKETING ACTIVATIONS

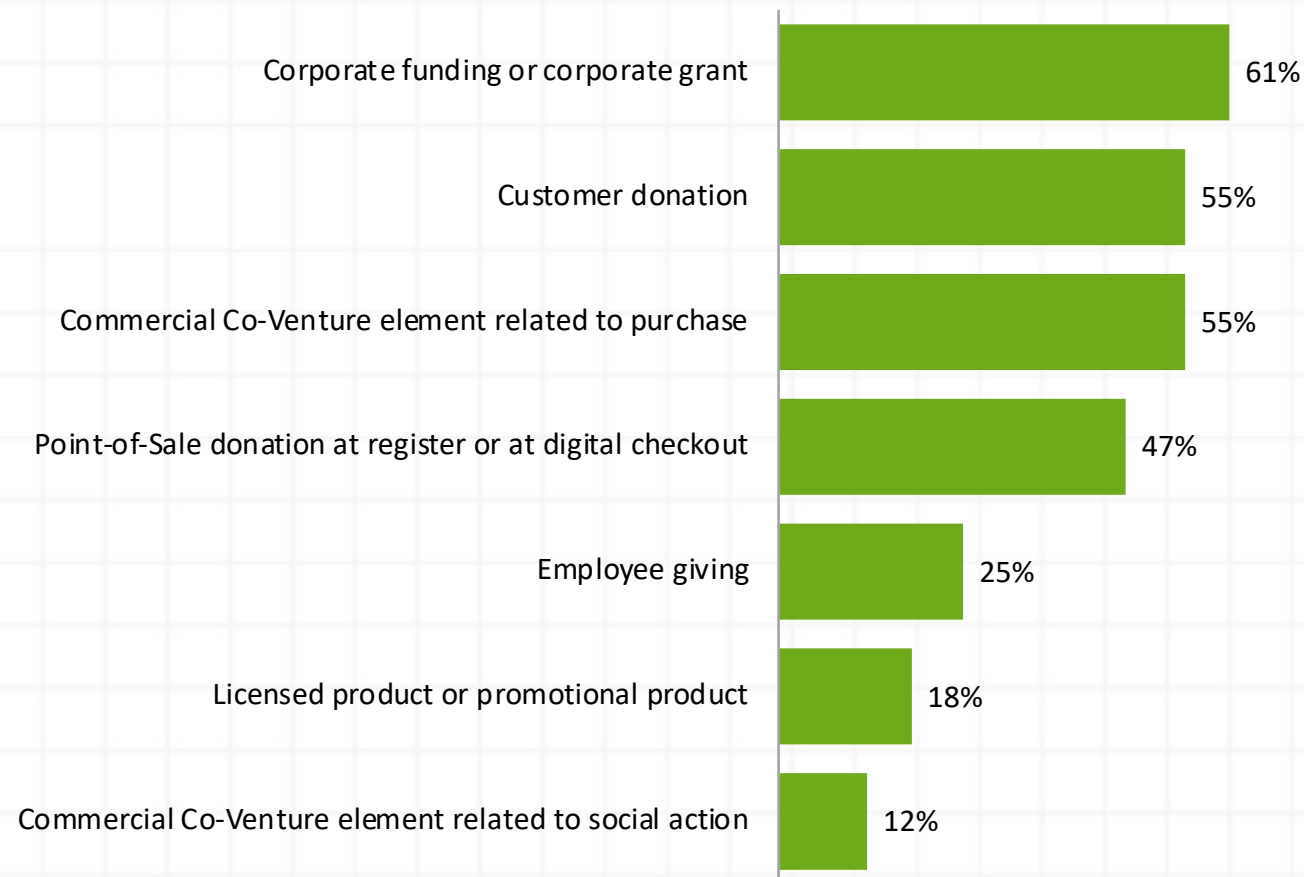


Q: Which of the following activations were a part of the campaign? (select all that apply)

## KEY TAKEAWAYS

- Organic, owned and earned media activations dominated the top marketing-related activations.
- 94% of BIC Cause Campaigns use organic social media.
- In BIC Cause campaigns, both the nonprofit and corporate partner are leveraging their owned media 84% of the time.
- Earned media (84%) is a far more prevalent strategy than paid media (49%) in BIC Cause Campaigns.

# BEST IN CLASS CAUSE CAMPAIGN FUNDRAISING ACTIVATIONS

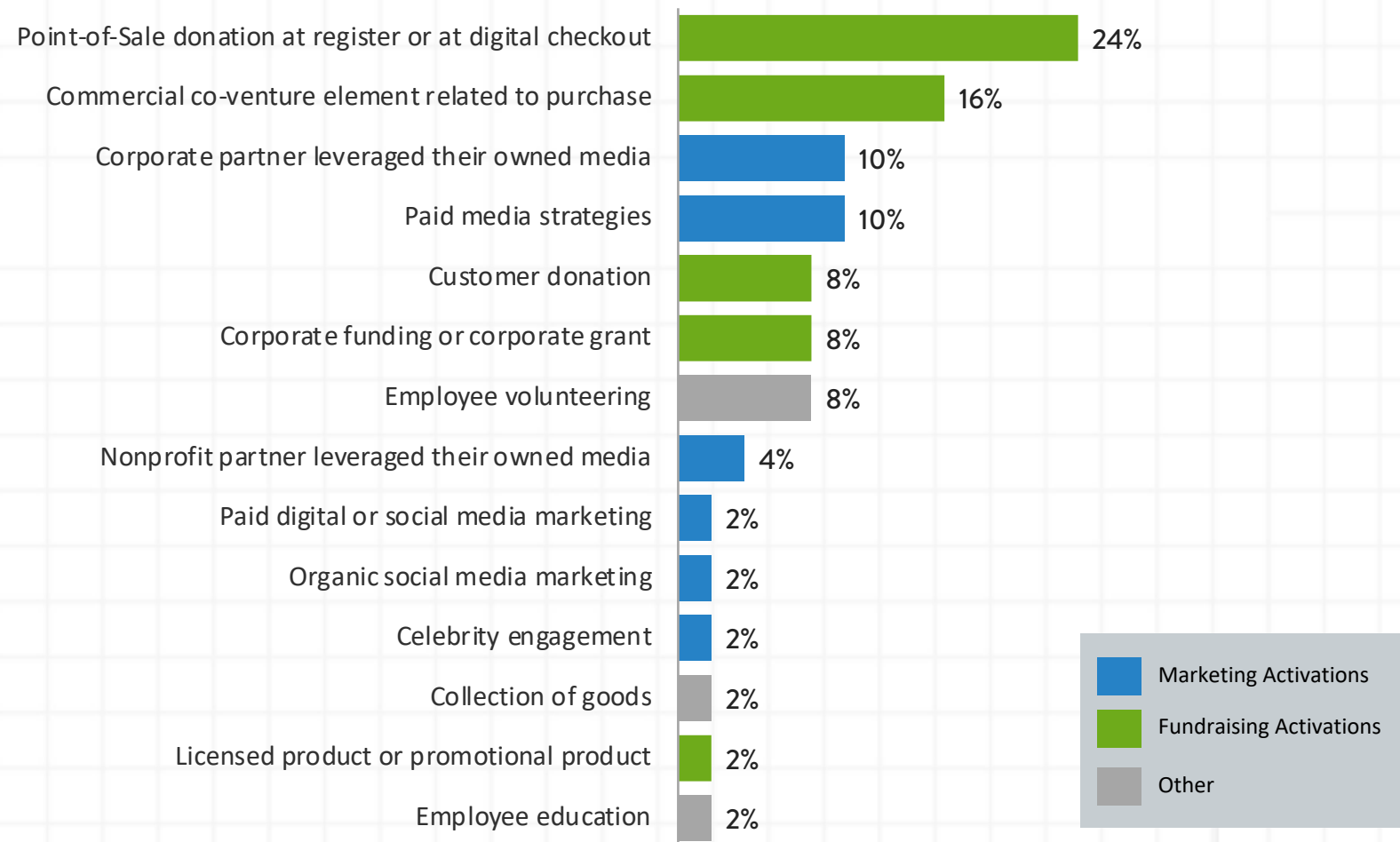


Q: Which of the following activations were a part of the campaign? (select all that apply)

## KEY TAKEAWAYS

- **Roughly half of BIC Cause Campaigns engage a consumer activation: customer donation, commercial co-venture, point-of-sale donation at register or digital checkout.**
- **BIC Cause Campaigns are not solely relying on customer participation for fundraising with 61% providing corporate funding, the most commonly cited fundraising activation.**

# MOST IMPORTANT CAMPAIGN ACTIVATION

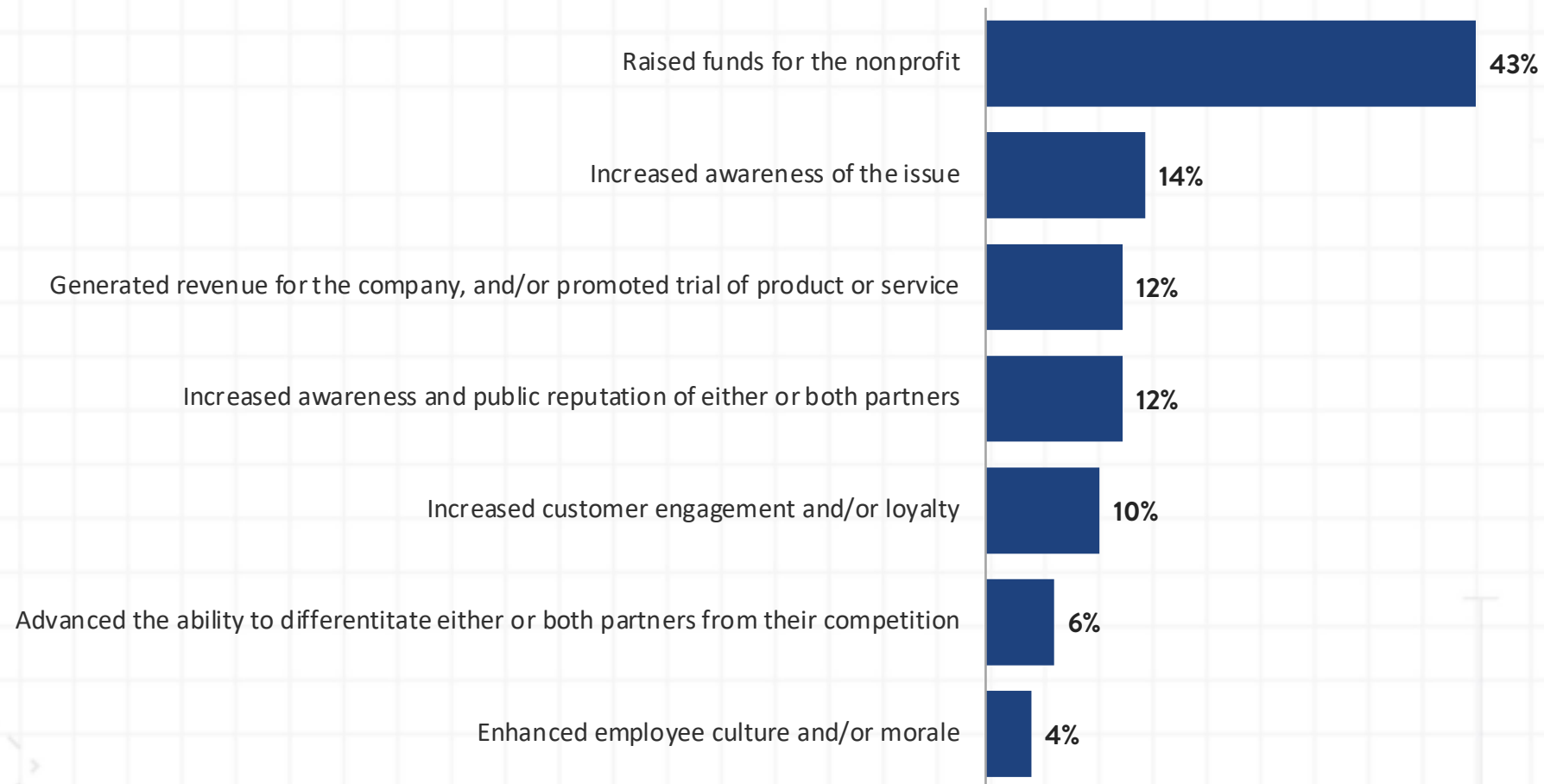


## KEY TAKEAWAYS

- When asked to identify the most important activation in BIC Cause Campaigns: Point-of-Sale (24%) is cited as the most important activation strategy.
- When combined, 48% ranked a customer fundraising strategy as a most important activation (point of sale, commercial co-venture, customer donation).
- Additionally, when combined, 28% rated a marketing activation as most important (corporate partner leveraged media, paid media, nonprofit partner leveraged media, paid digital, organic social media).



# BIGGEST CAMPAIGN IMPACT

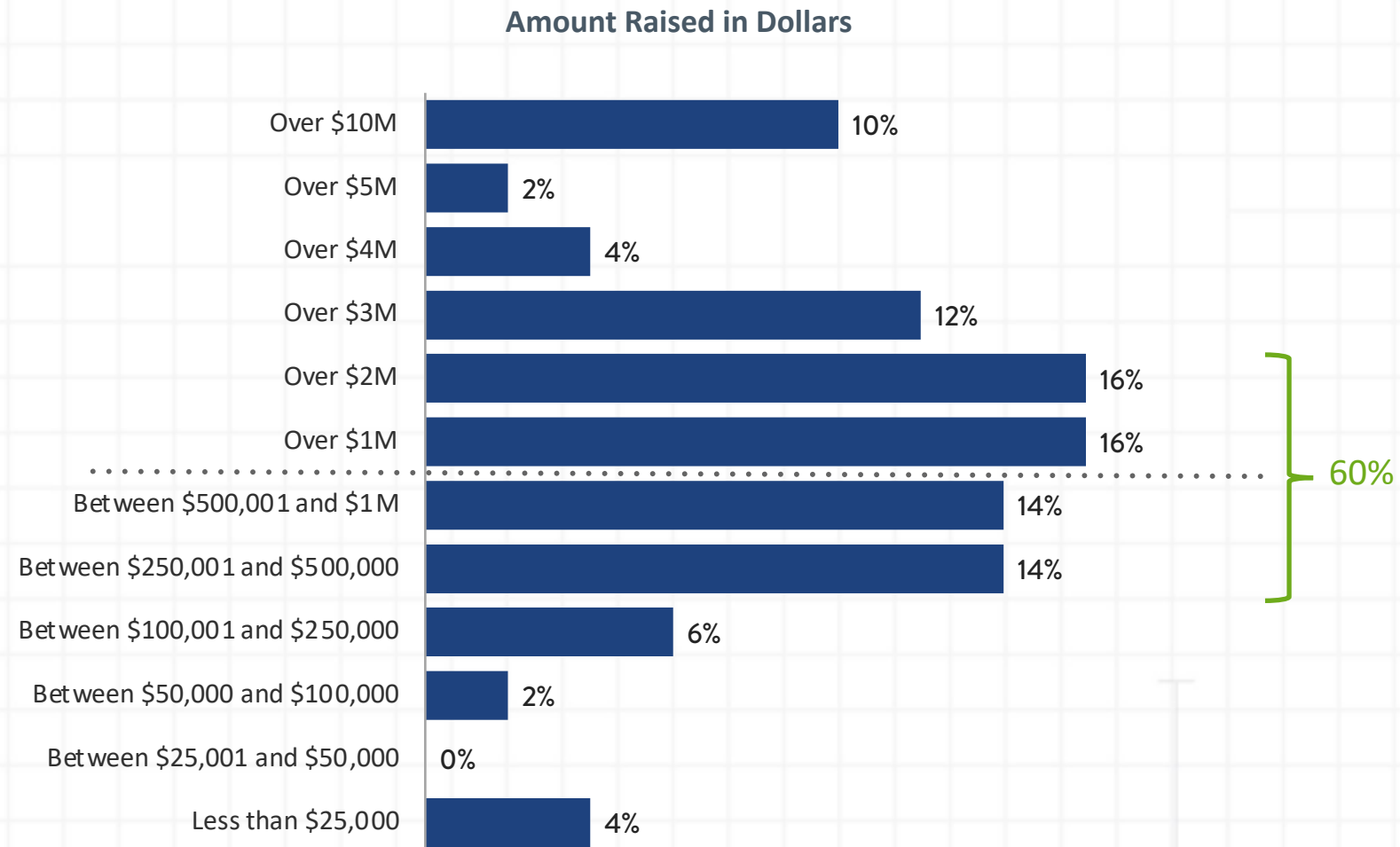


Q: Thinking back on the results, in what ways did [CAMPAIGN] have the biggest impact?

## KEY TAKEAWAY

- **Raising funds (43%) is the biggest impact of BIC Cause Campaigns.**

# AMOUNT CAMPAIGN RAISED

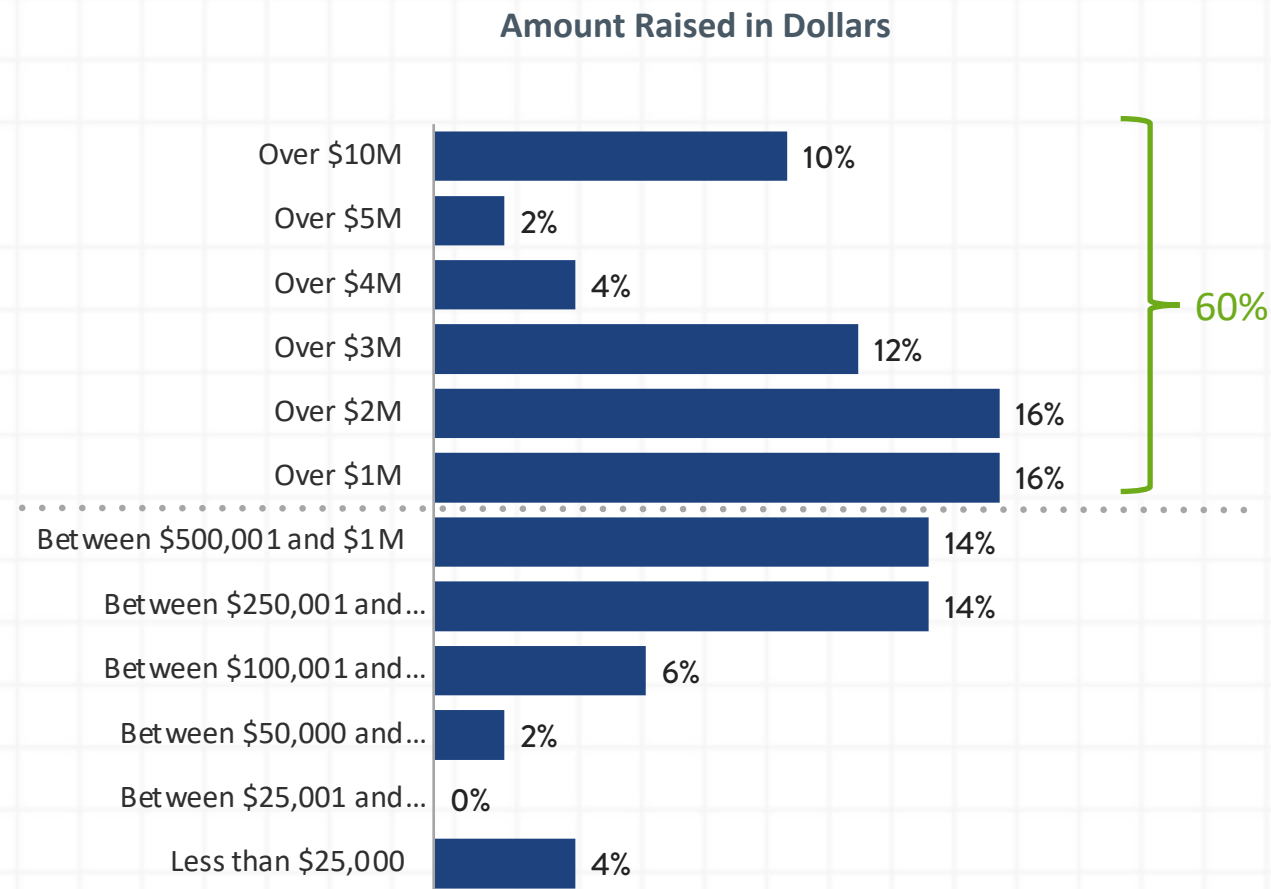


Q: The last time the cause marketing campaign was activated, how much did it raise for the nonprofit?

## KEY TAKEAWAY

- The amount of money raised for nonprofit organizations via BIC Cause Campaigns falls within a broad range, with 60% raising between \$250K and \$2M.

# BEST IN CLASS CAUSE CAMPAIGN FUNDRAISING BENCHMARK



Q: The last time the cause marketing campaign was activated, how much did it raise for the nonprofit?

## KEY TAKEAWAYS

- **Raising at least \$1M for the nonprofit is a standard of successful BIC Cause Campaigns.**
- **60% of respondents report that their BIC Cause Campaign raised \$1M or more for the nonprofit.**
- **The majority ( $\frac{2}{3}$ ) of BIC Cause Campaigns that raised \$1M or more have been in the marketplace for five or more years.\***

\*The amount of time a campaign has been in the marketplace was determined through publicly available data and was not collected from participants.

# BEST IN CLASS CAUSE CAMPAIGN STRATEGY ELEMENTS



|  |     |     |   |
|--|-----|-----|---|
| Created in response to a timely issue                | 6%  | 94% | Focused on a long-standing issue                            |
| Provocative in messaging or creative execution       | 27% | 73% | Approachable in messaging or creative execution             |
| Was aimed at a very specific audience                | 29% | 71% | Was created for a broad audience                            |
| Aimed to generate an emotional response              | 63% | 37% | Aimed to education/inform                                   |
| Centered around radical situation or cause           | 6%  | 94% | Centered around safe/conventional cause                     |
| Prioritized a few activation elements                | 49% | 51% | Involved robust, multiple activations approach              |
| Heavy employee engagement                            | 53% | 47% | Minimal employee engagement                                 |
| Substantial funding                                  | 65% | 35% | Light funding   |
| Company was heavily involved in campaign planning    | 82% | 18% | Company was lightly involved in campaign planning           |
| Nonprofit was heavily involved in campaign planning  | 86% | 14% | Nonprofit was lightly involved in campaign planning         |
| Company was heavily involved in campaign execution   | 86% | 14% | Company was lightly involved in campaign execution          |
| Nonprofit was heavily involved in campaign execution | 73% | 27% | Nonprofit was lightly involved in campaign execution        |
| Messaging and imagery were positive, uplifting       | 98% | 2%  | Messaging and imagery used was intended to shock the viewer |

Q: Thinking about the characteristics of the cause marketing campaign please review the comparative elements below and select an option on either the left or right side that BEST matches the campaign's strategy.

## KEY TAKEAWAY

- When asked about characteristics of BIC Cause Campaigns, it was clear that a wide range of strategies can be successful. A deeper look into strategies is provided on the following pages.

# BEST IN CLASS CAUSE CAMPAIGN PARTNER INVOLVEMENT STRATEGIES



|  |     |     |  |
|--|-----|-----|--|
| Company was heavily involved in campaign planning    | 82% | 18% | Company was lightly involved in campaign planning    |
| Nonprofit was heavily involved in campaign planning  | 86% | 14% | Nonprofit was lightly involved in campaign planning  |
| Company was heavily involved in campaign execution   | 86% | 14% | Company was lightly involved in campaign execution   |
| Nonprofit was heavily involved in campaign execution | 73% | 27% | Nonprofit was lightly involved in campaign execution |

Q: Thinking about the characteristics of the cause marketing campaign please review the comparative elements below and select an option on either the left or right side that BEST matches the campaign's strategy.

## KEY TAKEAWAY

- **There is one strategy component where BIC Cause Campaigns are overwhelmingly consistent. There is heavy involvement in campaign planning and execution by both the nonprofit and corporate partner.**



# BEST IN CLASS CAUSE CAMPAIGN

## MESSAGING, IMAGERY, AUDIENCES, FUNDING STRATEGIES



|  |     |     |   |
|--|-----|-----|---|
| Messaging and imagery were positive, uplifting | 98% | 2%  | Messaging and imagery used was intended to shock the viewer |
| Created in response to a timely issue          | 6%  | 94% | Focused on a long-standing issue                            |
| Centered around radical situation or cause     | 6%  | 94% | Centered around safe/conventional cause                     |
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| Was aimed at a very specific audience          | 29% | 71% | Was created for a broad audience                            |
| Substantial funding                            | 65% | 35% | Light funding   |
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| Heavy employee engagement                      | 53% | 47% | Minimal employee engagement                                 |
| Prioritized a few activation elements          | 49% | 51% | Involved robust, multiple activations approach              |

Q: Thinking about the characteristics of the cause marketing campaign please review the comparative elements below and select an option on either the left or right side that BEST matches the campaign's strategy.

### KEY TAKEAWAYS

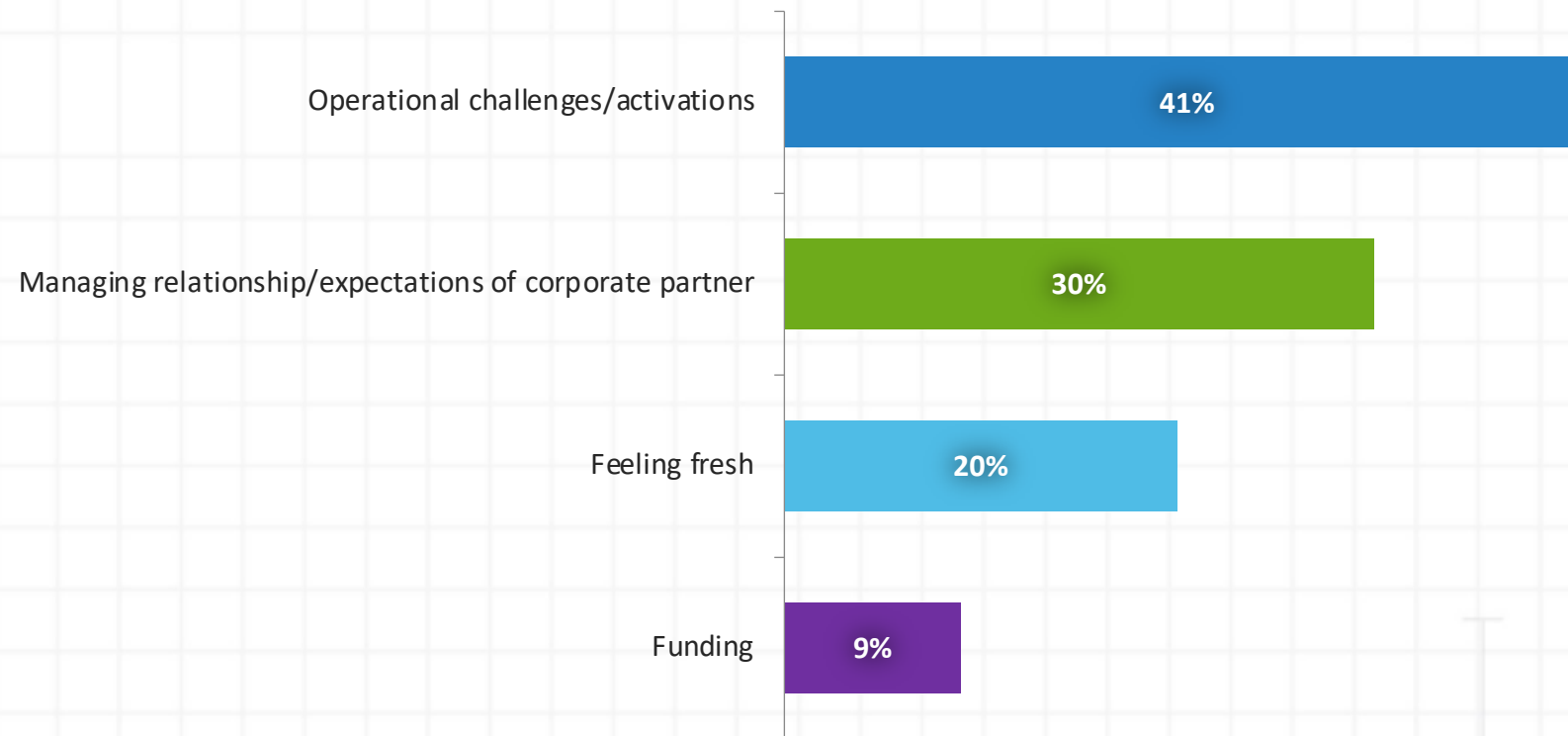
#### More than 90% of BIC Cause Campaigns benchmarked:

- Featured messaging and imagery that are positive and uplifting (98%)
- Centered on long-standing issues (94%)
- Centered around safe and/or conventional causes (94%)

#### More than 50% of BIC Cause Campaigns benchmarked:

- Featured approachable messaging (73%)
- Targeted a broad audience (71%)
- Achieved substantial funding (65%)
- Generated an emotional response (63%)
- Leveraged heavy employee engagement (53%)
- Involved multiple activations (51%)

# BEST IN CLASS CAUSE CAMPAIGN BIGGEST CHALLENGE FACED



Q: What was the biggest challenge you faced with the cause marketing campaign and how did you overcome it?  
(open-end)

## KEY TAKEAWAY

- **Operational challenges (41%) and managing relationship/expectations of corporate partner (30%) ranked highest among campaign challenges of BIC Cause Campaigns.**

# BEST IN CLASS CAUSE CAMPAIGN BIGGEST CHALLENGE FACED



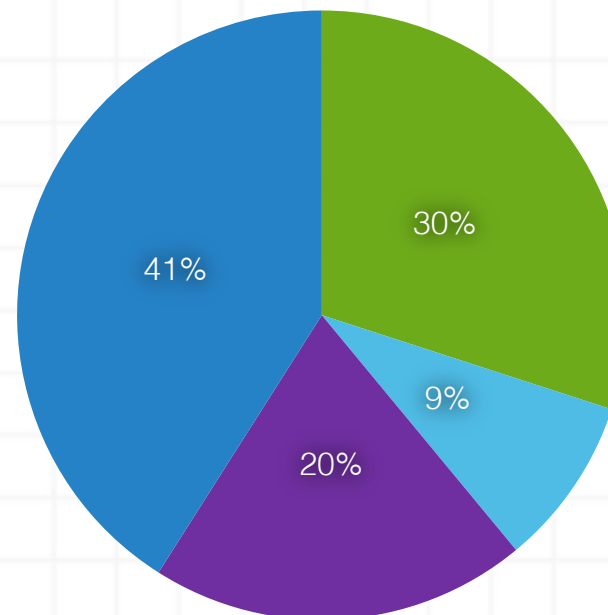
## Operational Challenges/Activations

*"Activation of all [partners] was tough and uneven."*

*"Alignment and coordination between marketing and development - competing priorities and different timelines."*

*"Limitations on how nonprofits are able to promote cause marketing campaigns."*

*"Tremendous amounts of moving parts; some of which didn't contribute greatly to the goal of the campaign but took up tremendous time."*



## Managing Relationship/Expectations of Corporate Partner

*"Our corporate partner expected us to execute and manage much more of the campaign than initially expected - viewed us in part as an agency and an extension of their team."*

*"Brand partner understanding the mission completely."*

## Funding

*"Making the most of a limited budget."*

*"Funding for deployment."*

## Feeling Fresh

*"Developing a unique 'news-worthy' angle that differentiated the campaign from previous years."*

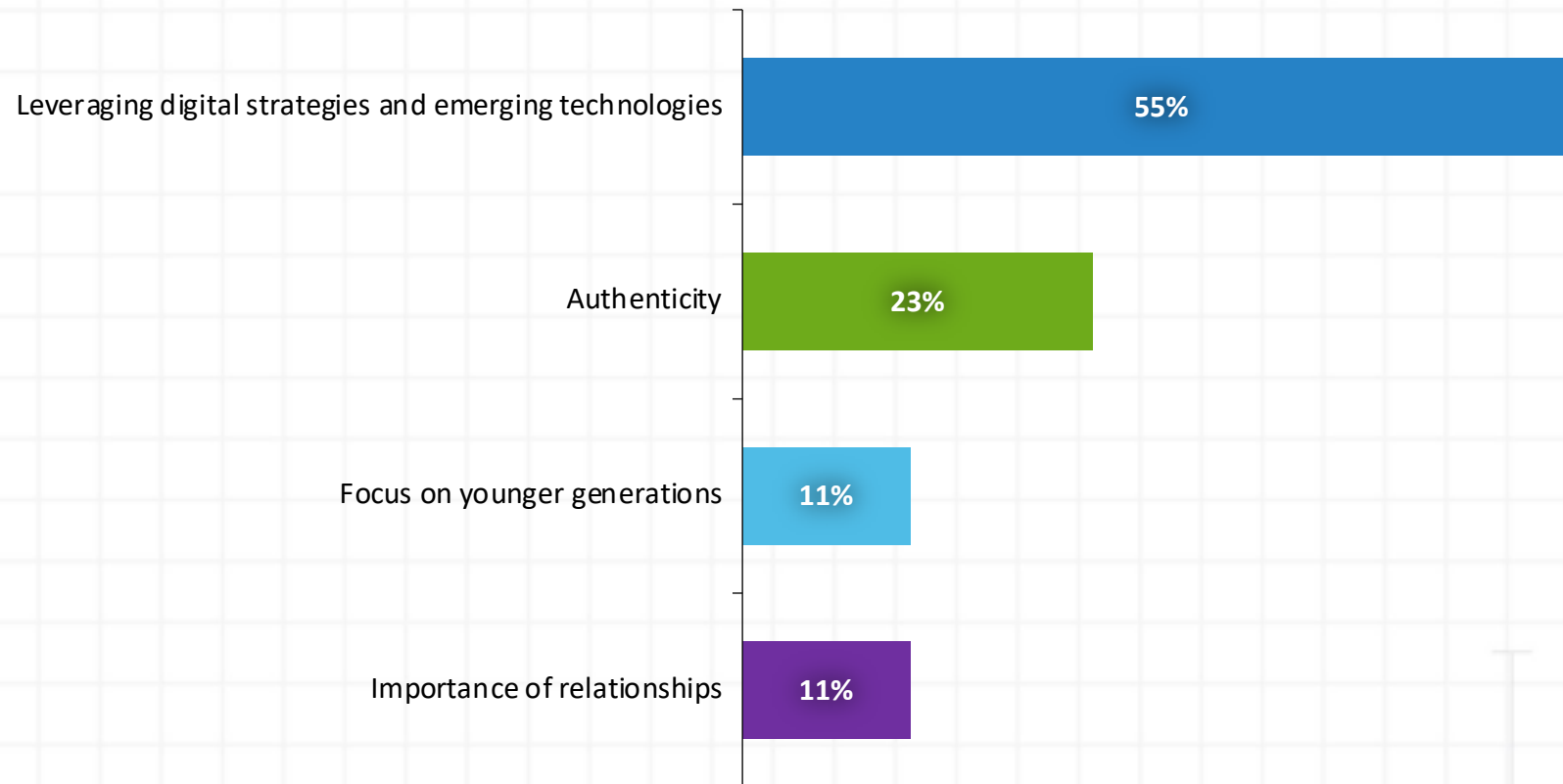
*"Keeping it fresh and interesting each year."*

Q: What was the biggest challenge you faced with the cause marketing campaign and how did you overcome it? (open-end)

# Campaign Evolution: Peer-to-Peer Advice and Predictions



# CAMPAIGN EVOLUTION: ACHIEVING IMPACT IN FUTURE CAMPAIGNS



Q: In your opinion, how might cause marketing campaigns need to evolve in the next 5 years in order to be relevant and have an impact? (open-end)

## KEY TAKEAWAYS

- **Leveraging digital strategies and emerging technologies was ranked by the majority (55%) of survey respondents as important to the evolution of BIC Cause Campaigns.**
- **Authenticity was cited by 23% of respondents as a crucial factor for success in future BIC Cause Campaigns.**



# CAMPAIGN EVOLUTION: ACHIEVING IMPACT IN FUTURE CAMPAIGNS



## Leveraging Digital Strategies and Emerging Technologies

*"As digital and e-commerce retail options increase in adoption and use, so does the need to focus on these areas within the cause space."*

*"Cause campaigns will need to be easily executed digitally and via social media."*

*"We are in a digital transformation, so looking at quick, easy activations as well as different methods of communication- live streaming, virtual reality, texting, etc. will need to be factored in as the landscape changes."*

## Importance of Relationships

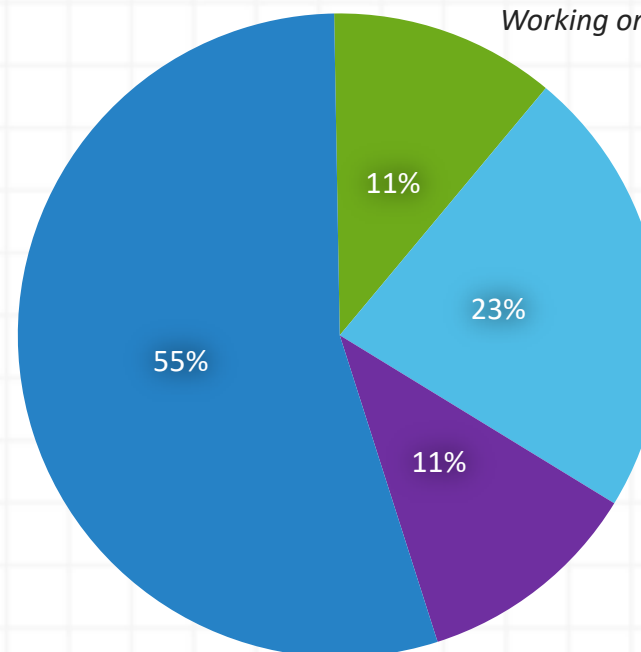
*"I think brands and nonprofits have to work more cohesively together. The general reputation is that brands take the lead and the nonprofits can tend to just work in the background. They may reap the financial benefits but both entities bring an area of expertise. Working on a 50/50 basis could really be beneficial both."*

## Authenticity

*"Much deeper understanding, authenticity and impact on the chosen issue from the company's side. Both for long-term and short-term issues and support. Consumers are much more sophisticated in their understand and experience with cause marketing campaigns."*

## Focus on Younger Generation

*"Younger audiences aren't loyal to brands as much as they care about the work itself. This will require a major shift in marketing strategy and approach."*



Q: In your opinion, how might cause marketing campaigns need to evolve in the next 5 years in order to be relevant and have an impact? (open-end)

# PEER-TO-PEER ADVICE TO ACHIEVE IMPACT IN FUTURE CAMPAIGNS



## Importance of Relationships

“Spend time getting to know your contacts and over communicate with them, especially in the planning phase(s). Understand what success means to them and track against it throughout the campaign, [not only at the end. Having a good relationship and open communication allows you to] **work as true partners and adjust in real time** if something isn't working right. And if all is working well, the open communication highlights your organization as a proactive partner, and one they're more likely to renew with.”

“Buy-in from senior leadership is key on both the company side and the nonprofit side. In order to activate a successful campaign, the nonprofit has to involve many different departments and ensure that everyone understands the important part they play.”

“Ask for what you deserve from your corporate partner. Do not undervalue or undersell yourself. Often companies have a lot more to benefit from working with orgs than the other way around **unless** their contribution matches the effort put in by the nonprofit.”

“Relationship before task. Like the people you work with (internally and partners).”

Q: Based on your experience with cause marketing campaigns, what sort of advice would you give your peers who are looking to develop more successful campaigns? (open-end)

# PEER-TO-PEER ADVICE TO ACHIEVE IMPACT IN FUTURE CAMPAIGNS



## Impact + Alignment

“Storytelling, local impact, data and execution are vital. If there isn't mutual impact and emotion from all stakeholders, a campaign will not drive maximum results.”

“The balance of power in cause marketing campaigns typically tilts heavily toward the for-profit partner. As such, it's important to team up with a for-profit partner that has a CEO or other C-suite leader who is 100% on board with the collaboration because he or she supports the mission, not just because he or she wants to hit some short-term brand/marketing or revenue goal.”

“Consumers are being inundated by how many asks they are receiving from a growing number of causes, especially with Facebook and other social media activations. People can follow causes they support, their friends are asking them to support causes, and GoFundMe campaigns are everywhere. Consider this and think about how to not exhaust the customer [with more asks] and rather help them choose what to support.”

“The way people consume media and connect with brands has completely changed. Brands are no longer what they tell us they are. Brands are now what people say they are. Companies are in a street fight for attention, and their weapon of choice is stories. Think about what stories your organization can help a brand tell. What assets can you bring to the table to help them elevate [their] visibility?”

Q: Based on your experience with cause marketing campaigns, what sort of advice would you give your peers who are looking to develop more successful campaigns? (open-end)

# PEER-TO-PEER ADVICE TO ACHIEVE IMPACT IN FUTURE CAMPAIGNS



## Strategy

“Think from your partner's perspective [and think] of how you can contribute to their success (legally) because their success will lead to renewal and growth. It is easier to keep and grow a partner than it is to find new ones, so focus on stewardship.”

“...Focus on activations that are simple, fun, shareable, participatory and highly relevant to the audience they want to reach.”

“I think more on-pack, smaller and more frequent asks (like round ups), and even more ways to give (like clothing, toy drives, etc.). Assess the value of the partnership/campaign to help make people feel good and want to give.”

“Assess the value of the partnership/campaign to your cause, and don't be afraid to say ‘Yes, with...’ or ‘No’ rather than just ‘Yes’.”

“Educate your organization [internally about how these partnerships can help your organization] and grow the internal support you need. Set yourself up [internally] for success before you get too far ahead.”

Q: Based on your experience with cause marketing campaigns, what sort of advice would you give your peers who are looking to develop more successful campaigns? (open-end)





As one of the first cause marketing agencies in the country solely dedicated to fostering social impact partnerships, For Momentum brings nonprofits and businesses together to collaborate, raise funds and expand awareness for the issues they care about. Driven by both results and relationships, our goal is to see our clients, community and culture thrive.



**To learn more or for help creating your next  
Best In Class Cause Marketing Campaign, contact us:**

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