Best of Breed
When it comes to gaining a market edge while supporting a social cause, ‘corporate social marketing’ leads the pack

By Philip Kotler and Nancy Lee

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WHAT DO WILDFIRES, DROUGHT, AND TOOTH decay have in common?

Certainly, at any given moment, they may threaten the health and well-being of individuals or communities throughout the country.

But also consider this: Companies are fighting all three, as well as many other scourges, through “corporate social marketing” (CSM) – a powerful, if often misunderstood, strategy that uses marketing principles and techniques to foster behavior change in a target population, improving society while at the same time building markets for products or services.

Behavior change – generally for the sake of improving health, safety, or the environment – is always the aim of corporate social marketing. It’s what sets CSM apart from other more familiar corporate social initiatives, such as corporate philanthropy and community volunteering, which mainly endeavor to raise money, goodwill, and awareness of a cause and a brand, but not to change
people’s individual behavior. We believe that because corporate social marketing influences behavior, it is “best of breed” among alternative corporate social initiatives in terms of support for marketing goals and objectives, including brand positioning and preference, market development, and increased sales.

Our conclusion is grounded in our combined 40 years researching and consulting in social marketing; it crystallized during the research of our forthcoming book, “Corporate Social Responsibility: Best Practices for Doing the Most Good.” For the book, we surveyed 23 companies and reviewed 36 corporate social initiatives in six categories: corporate social marketing; cause promotion (sometimes called “cause marketing,” supporting social causes through paid sponsorships or promotions); cause-related marketing (donating a percentage of revenue from the sale of specific items during an announced period of support); corporate philanthropy (including direct cash grants to a charity or cause); community volunteering (wherein employees are encouraged to volunteer in the local community); and socially responsible business practices (discretionary activities, such as the use of recycled and reduced packaging, intended to align a corporation’s conduct with a generally perceived social good). (For examples of each, see chart, p. 18.) When it comes to marketing benefits, CSM outshines the rest.

The reason, in brief, is that a change in personal behavior stands a good chance of effecting change in consumer behavior. When people change the way they act, and then personally benefit from those actions, they are likely to have a strong positive association with the company that spurred the change. As we shall see, the company could derive tangible marketing benefits from the change in consumer behavior, assuming the company has chosen a cause that fits its core markets, goods, and services.

CSM is also more likely to be embraced by government and nonprofit organizations charged with making measurable progress in areas such as conservation and disease prevention. Indeed, of the 10 CSM campaigns we analyzed in the book, three involved partnerships with public agencies and nonprofits; four were partnerships with public agencies alone; and three were partnerships with nonprofits alone. A public or nonprofit partner adds value to the corporate effort in terms of endorsements, expertise, networks, and shared distribution channels. And as two of the following case histories illustrate, a public partner may also provide the opportunity for a company to leverage considerable tax dollars that are already being spent to address a social issue. Of all its benefits, however, perhaps the most important is that, over time, CSM is one of the surest ways to have a measurable impact on a social issue, because it actually increases the number of people who act in a way that benefits society.

And yet, our experience is that CSM is not only misunderstood, it is not even on most corporate radar screens. The use of marketing techniques to change behavior, aka social marketing, came into being as a distinct marketing discipline in the 1970s. Early behavioral change efforts were gen-

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**PHILIP KOTLER** is the S.C. Johnson and Son Distinguished Professor of International Marketing at the Kellogg School of Management, Northwestern University. He recently published the 11th edition of “Marketing Management” (Prentice Hall, 2002), the world’s leading MBA textbook on marketing. He has also published “Kotler on Marketing” (Free Press, 1999), “Lateral Marketing” (John Wiley & Sons, 2003), and 35 other books. His research covers strategic marketing, innovation, consumer marketing, business marketing, services marketing, e-marketing, and social marketing. Kotler has been a consultant to Bank of America, General Electric, IBM, Honeywell, and Merck. He can be reached at pkotler@aol.com.

**NANCY LEE** is president of Social Marketing Services, Inc., a Seattle-based consulting firm. She has consulted on more than 50 social marketing campaigns with more than 100 public agencies and nonprofit organizations. Her past clients include Safeco Insurance, one of the firms covered in this article. She served as director of marketing in the 1990s for Rainer Bank and for Children’s Hospital and Regional Medical Center in Seattle. Lee is an adjunct faculty member teaching social and nonprofit marketing at the University of Washington and Seattle University, and the co-author with Philip Kotler of “Social Marketing: Improving the Quality of Life” (Sage Publications, 2002). She can be reached at nancyrlee@msn.com.
erally the purview of government agencies and nonprofit groups that wanted people to immunize their children, wear seat belts, use baby car seats, recycle, and adopt other environmentally or health-conscious habits (think of the Ad Council’s “Friends Don’t Let Friends Drive Drunk” campaign, which debuted in 1990).

In contrast, corporations were relatively slow to embark on public behavioral change campaigns. Before the 1990s, many corporate social initiatives reflected emerging pressures for “doing good to look good,” which led, not surprisingly, to avoidance of major social issues and reluctance to commit corporate resources beyond writing a check. By the mid-1990s, a shift had occurred, and most corporations have since undertaken social initiatives out of desire for “doing well and doing good.” Social initiatives are now expected to relate to issues that communities, customers, and employees care about most and to the company’s core business. CSM is simply one of many competing approaches to corporate social action to emerge of late.

But fundamental misunderstanding about the goals and challenges of CSM has impeded the design and skillful execution of corporate behavioral change campaigns. Even some companies that are engaged in corporate social marketing actually label their efforts something else: “cause marketing” or, more generally, “corporate social responsibility.” Sometimes, companies aren’t aware that their CSM activities actually fall into a distinct bucket. This is not a mere semantic difference. It’s important for a company to clearly differentiate between raising awareness – the goal of many corporate social initiatives – and behavioral change for a company to reap the full benefits of corporate social marketing.

In the following three case histories, we recount the development of effective CSM campaigns. We go on to illustrate the marketing advantages of the CSM approach by comparing them to other corporate social initiatives that the company considered, enacted, or could hypothetically have undertaken. We conclude by looking strategically at when a corporation should consider a social marketing campaign – and when it shouldn’t.

**Safeco: Changing Values for ‘Generations to Come’**

In the aftermath of a 1996 wildfire that destroyed 19 homes and 17,000 acres near Bend, Ore., Gordon Hamilton, vice president of public relations for Safeco Insurance, called Bend’s fire marshal, Gary Marshall, offering to contribute $40,000 toward the purchase of new firefighting equipment. Marshall had been fielding offers of assistance from insurers nationwide, but, he recalled, “Most were offering to pay for coffee and doughnuts if the fire department decided to hold a community meeting.”
When he heard what Safeco had in mind, he remembered thinking, “Wow, they want to invest some real money.”

Then, ever so gently, he rejected the offer.

Instead of buying new equipment, Marshall wanted Safeco, a Seattle-based Fortune 500 company that sells personal and business insurance in 44 states, to pay for a comprehensive public-education program on fire safety. “A new piece of equipment might save one more home,” he said, “but to really save homes, individuals have to take personal responsibility for their property before a fire.” His immediate aim, Marshall said, was “to market fire safety like Coca-Cola markets Coke.” His ultimate aim was “to change the values and behavior of citizens for generations to come.”

Getting Safeco on board took some persuading, since the company’s previous experience with a broad-based social initiative had been disappointing. “There was a strong need for positive outcomes,” said Rose Lincoln, Safeco’s director of community relations. Swayed by the passion and determination of the Bend Fire Department, Safeco executives agreed to consider a proposal. When they saw the various campaign models – designed by a local Bend marketing firm and ranging in price from $50,000 to $150,000 – they opted for the most expensive one. “Writing a check for a cause is great, but we could see that we’d get much more by leveraging a partnership,” said Lincoln.

Launched in Bend in 1997, the Safeco-funded campaign, named FireFree, promotes 10 steps that a homeowner can take to prevent or mitigate fire damage. Developed in consultation with community focus groups and local and federal fire organizations, the 10 steps were disseminated via billboards and posters that firefighters and volunteers put up throughout the community, and through a video and brochures that were created for fire officials to use during presentations at homeowners’ meetings and other community venues. In addition, 35 local video stores stocked two or three videos apiece and used

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**Corporate Social Initiatives***

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<th>Corporate Social Marketing</th>
<th>Cause Promotion</th>
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<td>Supporting behavior change campaigns</td>
<td>Supporting social causes through paid sponsorships of promotional efforts</td>
<td>Donating a percentage of revenues to a specific cause based on product sales during an announced period of time</td>
<td>Making direct contributions to a charity or cause, usually in the form of grants or donations</td>
<td>Providing volunteer services in the community</td>
<td>Adopting discretionary business practices and investments that support social causes</td>
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*Safeco launches FireFree, a campaign to help people create “noncombustible zones” around their homes to protect against wildfires. Safeco sponsors public service announcements honoring the local fire department. Safeco makes a donation to the American Red Cross with the sale of every new fire insurance policy. Safeco provides a grant to the fire department to purchase new equipment. Safeco encourages its employees to participate in a cleanup weekend. Safeco takes steps to ensure its facilities are surrounded by noncombustible zones, and promotes wildfire prevention among employees.

*Safeco, a Seattle-based company that sells personal and business insurance in 44 states, ran a corporate social marketing campaign (first column); the others are hypothetical initiatives that the firm could have undertaken instead. By teaching people how to protect their houses from wildfires, Safeco’s campaign benefited the community. And if fewer homeowners file claims, it benefits the firm’s bottom line as well.
in-store signs and point-of-purchase displays to advertise that the videos could be borrowed free of charge.

The No. 1 FireFree tip — and the main focus of the behavioral change campaign — is to establish “defensible space,” a 30-foot non-combustible zone around a house that can be created in one weekend of diligent yardwork, and maintained by spending one weekend a year thereafter on upkeep. To persuade homeowners to act, a paid part-time project coordinator (supported by volunteers and print, radio, and television advertising) promoted a cleanup weekend in Bend and surrounding suburbs during which homeowners created defensible space. On the first weekend, in the spring of 1998, 9,102 cubic yards of debris were delivered to the local landfill. Imagine a football field piled six feet high. Since then, the cleanup weekend has become an annual event in the Bend area, supported largely by local government and volunteer organizations. In 2003, the homeowners disposed of 15,387 cubic yards of debris — think of a football field piled nine feet high.

In the meantime, Safeco has continued to spend about $20,000 a year to produce and distribute FireFree videos and brochures free of charge to fire officials and Safeco agents across the country for use in mobilizing their own communities. Thus far, the company has distributed 163,000 brochures and 760 videos to 490 cities in 36 states. In addition to the local press and public relations that FireFree generates, Safeco benefits from having various communities’ most trusted leaders — fire officials — use and praise their materials. In 1999, Safeco’s FireFree program received a Golden Smokey Award from the U.S. Department of Agriculture Forest Service, the National Association of State Foresters, and the Advertising Council.

Shortly thereafter, without Safeco having to spend more of its own money, FireFree took off on its own. In 2001, the Oregon Department of Forestry allocated $120,000 to help distribute FireFree materials statewide, while the Federal Emergency Management Agency (FEMA), motivated largely by Bend’s success in partnering with Safeco, has contributed grants totaling $350,000 to Deschutes County (where Bend is located) toward wildfire mitigation efforts in central Oregon. Fire officials in central Oregon are using much of the FEMA money to sustain the FireFree program for the next few years, while a portion was used to do the necessary mapping work to get the county designated a “wildfire hazard zone.” That designation invokes a state law authorizing local building officials to require noncombustible roofs on all new construction in the area. Citing a recent finding from the National Fire Protection Association, Marshall points out that with defensible space and a noncombustible roof, a structure has an 80 percent chance of surviving a wildfire. That’s good for homeowners, good for communities, and good for Safeco.

Behavior change can yield a direct financial benefit to Safeco: FireFree has the potential to increase Safeco’s profitability through reduced claims for loss.

‘Good for Them, Good for Us’

If Safeco had engaged in corporate philanthropy, providing a $40,000 grant to the fire department in 1997, the company would clearly have demonstrated good corporate citizenship. But it’s doubtful that a one-time display of largess would have had any significant marketing impact. “There’s not nearly as much recognition when you just write checks,” said Lincoln. “Developing FireFree and having our name on the program materials has had brand equity and brand preference benefits.”

Lincoln believes people increasingly prefer to buy products from companies that care. In the 2002 Cone Corporate Citizenship Study, she noted that 84 percent of Americans said they would be likely to switch brands to one associated with a good cause, if price and quality were similar, compared to only 54 percent in its March 2001 survey. Of course, a company’s challenge is to tap into that well-intentioned 84 percent of consumers by making sure they’re aware of its support for a good cause. If Safeco had engaged in a cause promotion, such as sponsoring public service announcements honoring the local fire departments, or cause-related marketing, such as making a donation to the American Red Cross with the sale of every new fire insurance policy, they would not have changed behavior at the individual homeowner level. Through CSM, however, a homeowner’s exposure to the cause — creating defensible space through FireFree — is exposure to Safeco, allowing the consumer to more readily create rich associations with the brand by connecting it with the cause. In addition, independent insurance agents have told company officials that they are more likely to recommend Safeco to their clients because of the company’s leadership in fire safety.

And of course, the behavior change can yield a direct financial benefit to Safeco: FireFree, and the other fire prevention efforts that grew out of its success, have the potential to increase Safeco’s profitability through reduced claims for loss due to wild-
fire. Said Lincoln, ”If homeowners don’t suffer a loss, that’s good for them and good for us.”

Home Depot: Supporting Behavioral Change

Even before the drought in the American Southwest, currently in its sixth year, water conservation was a major policy goal of city governments in Arizona. Without conservation, rapidly growing consumer demand could overwhelm the water supply infrastructure, leading to increased taxes or water prices, or both. People in Tucson already pay twice as much for water as people in Phoenix, due to disparities in delivery capability and water resources. Now, the drought has intensified the need to foster a universal ethic of water conservation.

Enter Home Depot.

In September 2003, all 40 of Home Depot’s Arizona stores participated in a collaborative effort with Water – Use It Wisely, a $1.8 million water conservation campaign founded in 1999 by the Arizona Department of Water Resources and the cities of Phoenix, Mesa, and Scottsdale. (Water – Use It Wisely now includes 143 public and corporate partners throughout North America.) ”Use It Wisely approached us because they needed a product and knowledge partner,” said Stephanie Martin, Home Depot’s manager of external affairs. ”We have the products that enable water conservation and we can teach people how to use them.”

The issue of water conservation dovetailed well with Home Depot’s longstanding commitment to its communities and the environment, store officials said. Decision makers at Home Depot were also motivated by the visual quality and overall intelligence of the Water – Use It Wisely materials. Developed pro bono at an estimated cost of $300,000 by Park&Co, a Phoenix marketing firm that specializes in environmental issues, the multimedia package – including print, radio, and television ads; brochures; Web-based presentations; and accouterments such as logo-emblazoned T-shirts, decals, and baseball caps – is centered around ”100 Ways in 30 Days to Save Water.” Especially important, said Martin, is that the tips, such as sweeping the driveway rather than hosing it down and installing low-flow showerheads, are easy to remember and implement.

They’re easy to market, too: For each of the 100 tips, Home Depot uses in-store signs to advertise a relevant product. For example, to be a water-conscious gardener, Home Depot recommends Western Organics mulch, which reduces watering needs by 25 percent. ”Most environmental messages appeal to broad themes, rather than the individual,” said Martin, ”but to change behavior, you have to engage a person.”

To that end, Home Depot ran hourlong in-store workshops on water conservation every Saturday and Sunday this past September (dubbed ”Water – Use it Wisely” month) featuring the ”100 Ways in 30 Days to Save Water” promotion. To promote the event, Home Depot invested $100,000, mainly for public relations – including arranging television appearances by its
employees to demonstrate water conservation – and in-store signage. The retailer also benefited from television and print ads sponsored by the Water – Use It Wisely partners, which featured Home Depot’s logo.

Each weekend workshop was devoted to a different topic: water conservation basics, repairs and retrofits, drought-resistant gardening, and irrigation. In total, 3,120 consumers attended. One aim of the workshop format was face-to-face contact with customers, including children for whom special activities were planned during the first workshop. Another aim was to provide basic hands-on training, which general awareness campaigns lack. On another tack, Home Depot also incorporated its traditional emphasis on community service into its water conservation efforts by supporting employee volunteers who used water-saving products to retrofit and relandscape a housing complex for low-income seniors in South Phoenix.

All told, the month’s activities resulted in 12.5 million impressions from television and print ads, 4.5 million impressions from signage, and the distribution of 40,000 Water – Use It Wisely guides to Home Depot customers. Surveys conducted by Home Depot after September 2003 showed a marked shift in customer attitudes toward the importance of water conservation. “You can’t do behavior change in a second,” said Martin, “but we’ve had a great beginning.”

When the Cause Needs the Product

Importantly, Home Depot’s various water conservation activities show that social marketing can coexist with other types of social initiatives, such as volunteering. But in so doing, they also highlight the superior marketing power of CSM.

Home Depot’s social marketing is likely more effective than volunteering in terms of brand preference – a consumer’s predilection for choosing specific products from a lineup of similar ones. After all, when Home Depot not only teaches the consumer into someone who voluntarily – even instinctively – saves water, with all of the potential product and service needs such behavior implies.

Home Depot’s experience demonstrates that retailers can leverage the behaviors they are seeking to influence into increased traffic in their stores, which can in turn lead to increased sales. After the workshops in September, Home Depot tallied the sales of its water conservation products and showed an increase over previous months. The specific results are proprietary, but the company is considering plans to repeat the effort in Arizona in April 2004, followed by water conservation social marketing programs in other markets. As Park Howell, president of the firm that created the Water – Use It Wisely campaign, said: “This cause needs their products. What better marketing is there?”

Crest: Cavity-Free Zones for the Poor

In 2000, Diane Dietz, the North American marketing director for Procter & Gamble’s Crest toothpaste brand, called Kurt Aschermann, the senior vice president of marketing and resource development at the Boys & Girls Clubs of America. Dietz had recently read a report by then Surgeon General Dr. David Satcher detailing a “silent epidemic” of oral disease in America, especially among low-income children. Among the findings: Poor children have twice as many cavities as other children; miss more than 51 million hours of school each year because of dental-related diseases; and are at higher risk for gum disease. Dr. Satcher challenged the private and public sectors to work together to end the disparity in oral care by 2010. “This is a call to action,” Dietz said to Aschermann.

Since 2001, Crest has invested $1 million a year to create “cavity-free zones” at each of the nation’s 3,300 Boys & Girls Clubs, a national network of neighborhood-based facilities serving 3.6 million economically disadvantaged young people. As a key component of Crest’s Healthy Smiles 2010 program, a multifaceted effort to provide oral health education, tools, and access to underserved families nationwide, the partnership is a natural fit. Crest has the will, resources, and reputation to assume leadership on the issue. The Boys & Girls Clubs, for their part, are already serving Crest’s target population with programs that emphasize values Crest supports, such as learning, health, character, and leadership.

Working with dentists on Crest’s advisory board, the Boys & Girls Clubs developed two curricula that use videos, audi-tapes, and an interactive lesson plan to teach about good oral...
health. One of the curricula, for children age 6 to 12, includes eight hourlong sessions; the other, for teenagers, contains four hourlong sessions. Thus far, 3,000 teachers and volunteers have undergone three hours of teacher training by the World Health Organization, and 2,640 clubs have implemented the courses.

In addition, to date, Crest has donated 1.6 million tubes of toothpaste and 2.2 million toothbrushes to club members and their families; donations are made on an ongoing basis. Crest has also provided support to identify local resources for low-income people seeking affordable dental care. Perhaps most ambitious, Crest has funded the construction of five full-service in-club dental clinics in New York City, Los Angeles, Chicago, Houston, and Cincinnati, where volunteer dental professionals from the community will provide affordable care to club members and their families. (A clinic is under construction in the Miami area, and pre-existing dental clinics have been converted for this purpose in Phoenix and St. Louis.)

Finally, Crest has launched a major print and television advertising campaign, funded separately from the Boys & Girls Club program (though Crest won’t say how much, citing competitive concerns), to raise public awareness of the oral health crisis and to highlight Crest’s role in combating it. “It’s all about making a difference by being a catalyst for real change,” said Bryan McCleary, a brand manager for Crest.

The Next Generation of Crest Kids

Market development is not the main thrust of Crest’s work with the Boys & Girls Clubs. But the program does provide a powerful assist to the company in reaching and developing a new market for its products, namely, future buyers who without Crest’s current intervention might never become habitual users of its products. “It’s tough for companies to think super long term,” said McCleary, “but this could be the next generation of Crest kids.”

Still, not all of the cavity-free zones’ marketing benefits lie in the future.

Ever since Crest’s fluoride toothpaste became the first to win the American Dental Association’s seal of approval over 40 years ago, Crest has understood that being a leader means more than selling the most toothpaste. Cavity-free zones protect and reinforce Crest’s brand position as a leader in oral care.

And when today’s Boys & Girls Clubs kids are asking their parents to buy products, or reach an age where they’re buying products on their own, it’s hard to imagine a richer set of associations than the ones they’re creating today for Crest. McCleary refers to the budding relationships as ones of “brand loyalty, a personal connection between the brand and the consumer.”

Moreover, among consumers who are aware of the program, the company’s market research shows an increase in purchase intent. And Crest has already achieved what McCleary describes as an “incremental” increase in sales through a partnership with Walgreens, in which in-store signs advertised Crest’s work with the Boys & Girls Clubs.

Such CSM benefits will very likely exceed those that could have been derived from alternative social initiatives. Suppose, for
example, that Crest had responded to the surgeon general’s report only by sponsoring infomercials on oral health, a cause promotion campaign. Or suppose the company had opted for cause-related marketing, making a contribution to the American Academy of Pediatric Dentistry Foundation with every sale of a tube of children’s toothpaste, for instance. The efforts, laudable though they are, would be at least one step removed from reaching the children whose health is at risk. As such, they would not directly foster good oral health habits in children, which is key to combating the epidemic and to developing a deep affinity for Crest among current and future consumers.

The beauty of CSM is that the social good does not come at the expense of company objectives, or vice versa. Rather, CSM does the greatest good it can possibly do for the cause while doing the most good for the company. As Barbara LeNoble, vice president of relationship marketing for the Boys & Girls Clubs, put it, “By what we’re doing today, we’ll change behaviors for generations to come – and that means a better world for everyone.”

When Should a Company Do It?

Successful corporate social marketing efforts, such as those described above, exemplify the general contexts and conditions under which a corporation should – or should not – consider a CSM approach. For instance, in a well-crafted CSM campaign, the social problem that a corporation chooses to address must be one whose solution, at least in part, requires people to change their individual behavior. Fire mitigation requires homeowners to create and maintain safe zones around their houses; water conservation requires consumers to use less water; and reducing the disparity in oral health between rich and poor requires at-risk children to learn and practice good dental-care habits. In contrast, a goal to increase art and music education does not require people to become artists and musicians and so might best be achieved through a corporate philanthropic effort to fund arts programs or a cause-related program, say, in which a record company donates a percentage of CD sales to elementary school music programs.

Also, to garner the full marketing benefits, a CSM campaign should target behaviors that directly relate to one or more of the company’s products or services. Home Depot achieves this by linking the importance of water conservation with water-saving products. Many firms, however, have social objectives that are not directly linked to their product lines, and thus are not as well suited for corporate social marketing campaigns. For instance, a food producer might be interested in helping more children finish high school and go to college. But since this objective is not related to selling food, it might best be achieved through a corporate volunteer program – for instance, one that gives employees time off to mentor and tutor disadvantaged teens – rather than a CSM campaign. A volunteer effort would help society and could also yield marketing benefits for the company, such as building brand preference among consumers who are aware and supportive of the company’s efforts. But the lack of connection between selling food and supporting education indicates that a CSM approach may not be the most effective way to reach the social goal and to realize marketing benefits for the company.

CSM campaigns are best when they’re based on a healthy dovetailing of interests between what society needs and a company’s goals and objectives. For example, people need to protect their homes from wildfires, and Safeco needs to reduce fire claims. There is no conflict, only an overlap of interests. To legitimately and usefully exploit this merging of interests, it is crucial that a company’s CSM efforts avoid any appearance of inauthenticity or hidden agendas. Consider, for example, a tobacco company promoting parent-teen dialogue on the dangers of smoking, as part of an anti-teen smoking initiative. Whether or not the company’s motives are pure, the likelihood exists that people would view the campaign with cynicism, and therefore it would not make a strong CSM initiative. If there’s the potential for even the appearance of a conflict of interest on a given topic, companies should choose a different issue.

As successful CSM campaigns increasingly leave their mark on corporations and society, the lingering background issue of whether it’s somehow wrong to derive a competitive edge from a social issue will give way to a new perspective: When there’s a social and marketing advantage to be gained by engaging an issue, a company would be irresponsible not to pursue it.

The beauty of corporate social marketing is that the social good does not come at the expense of company objectives, or vice versa. Rather, it does the greatest good it can possibly do for the cause while doing the most good for the company.

3 This development is also detailed in Chapter 1 of our forthcoming book. 2002 Cone Corporate Citizenship Study: The Role of Cause Branding Executive Summary” (Boston, 2002). The telephone survey of a national cross section of 1,040 adults was commissioned by Cone, a strategy firm that links companies and social issues, and conducted by Opinion Research Corporation. The survey has an error margin of +/- 3 percentage points.