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## **A literature review of empirical studies of philanthropy:**

### **Eight mechanisms that drive charitable giving**

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#### **Keywords**

Philanthropy, literature review, mechanisms, charitable giving, altruism, research

## **A literature review of empirical studies of philanthropy:**

### **Eight mechanisms that drive charitable giving**

#### **Abstract**

We present an overview of the academic literature on charitable giving, based on a literature review of over 500 articles. We structure our review around the central question of why people donate money to charitable organizations. We identify eight mechanisms as the most important forces that drive charitable giving: (1) awareness of need; (2) solicitation; (3) costs and benefits; (4) altruism; (5) reputation; (6) psychological benefits; (7) values; (8) efficacy. These mechanisms can provide a basic theoretical framework for future research explaining charitable giving.

## **A literature review of empirical studies of philanthropy:**

### **Eight mechanisms that drive charitable giving**

An overwhelming body of knowledge is available on philanthropy in the social sciences. Research on philanthropy appears in journals from very different disciplines, including marketing, economics, social psychology, biological psychology, neurology and brain sciences, sociology, political science, anthropology, biology, and evolutionary psychology. Scholars as well as practitioners educated in these disciplines could benefit from a systematic survey of the mechanisms studied in the academic literature. We present an overview of research on determinants of charitable giving from all disciplines.

More than thirty years ago, David Horton Smith wrote that “scholars concerned about voluntary action research should consciously seek out cross-disciplinary inputs” (D. H. Smith, 1975), a call that Payton, Tempel and Rosso (Payton, Tempel, & Rosso, 1991) and Clotfelter (1997) more recently made as well. Since the 1980s, philanthropic studies have emerged as a new, multi-disciplinary field in the social sciences (Katz, 1999). However, a strong tendency in the past 30 years towards specialization among scientists in different disciplines has created the undesirable situation that scholars usually know little about the insights gathered in other disciplines. In addition, few of the insights from the academic literature have found their way in handbooks on fundraising. The assessment by Lindahl and Conley (2002) that fundraising is “a field in need of a greater base of substantive, objective research rather than a casual acceptance of anecdotal evidence” still holds. For instance, Warwick’s (2001) guide to successful fundraising letters contains literally zero references to scientific research. This paper aims to guide scholars as well as practitioners in the third sector through the available knowledge on determinants of charitable giving by individuals and households. We define charitable giving as the donation of money to an organization that benefits others beyond one’s own family.

Previous reviews available to researchers in philanthropy are mostly confined to a specific discipline or a limited period of time. Recently, Sargeant and Woodliffe (2007) reviewed the literature on charitable giving from a marketing perspective. Reviews in the field of social psychology have dealt with helping behaviour in general (Batson, 1998; Piliavin & Charng, 1990; Schroeder, Dovidio, Penner, & Piliavin, 1995; S. H. Schwartz, 1975). Helping behaviour is a very broad category of actions, ranging from assisting a stranger in an emergency (e.g., saving somebody from a fire, (Latané & Darley, 1970) to donating a piece of one's body to a relative (e.g., bone marrow donation; Schwarz and Howard, 1980). Charitable giving is studied as an example of helping behaviour in the social psychological literature. The subject gained popularity in mainstream social psychology towards the end of the 1970s, and continued to be studied in applied social psychology in the 1980s. However, charitable giving is likely to be different from many other forms of helping behaviour. One crucial difference is that the recipient of charitable donations is usually absent from the context in which a donation is made, while the beneficiary is present in the helping situation investigated in most studies conducted in the 1960s and 1970s. Presence of a beneficiary strongly affects the social dynamics and motivations for helping behaviour, but is atypical for many examples of philanthropy. The present review differs from that by Piliavin and Charng (1990) in that we are not concerned primarily with the question to what extent prosocial behavior can be considered altruistic.

Our review also differs from that of the overviews of economic theories of giving by Andreoni (2006), Vesterlund (2006) and Meier (2007b). Economists are increasingly trying to incorporate basic insights from sociology and social psychology into their models. However, many classical studies that provided these insights are unknown or not cited in present day economics. Our review may serve as a reference resource for classical intuitions. In addition, we present studies in disciplines like marketing, geography and biology that are not well known.

To our knowledge, no systematic reviews on philanthropy exist in the fields of sociology or psychology. Sociologist John Wilson (2000) reviewed the literature on volunteering. Because

volunteering like philanthropy is a form of formal prosocial behaviour, there are many striking parallels between their respective determinants.

Our review differs from the reviews by Sargeant (1999), Lindahl and Conley (2002), Havens, O’Herlihy and Schervish (2007) and Sargeant and Woodliffe (2007), by covering a longer period of time, studies from a larger number of sources, and ordering the material in different categories. Many of the categories used in previous reviews are broad groups of predictors. We present predictors of philanthropy in terms of eight mechanisms that explain why these predictors are related to philanthropy.

We hope that our review will not only be useful for an academic audience, but also for practitioners. Experimental studies often shed light upon why some people are more likely to give and some give more generously than others. Fundraisers can take advantage of the insights gained in these studies to increase fundraising effectiveness.

## **METHODS**

This paper is based on an extensive literature search that we conducted using seven types of sources. We searched (1) online full text collections of publishers (Wiley Interscience, Emerald Insight, SpringerLink, Sage Journals Online; Elsevier’s Scirus); (2) academic databases (PsychInfo, Sociological Abstracts, PubMed, EconLit); (3) Google Scholar; (4) the authors’ own literature databases; (5) the references cited in the articles we found; (6) the IUPUI Payton Library Philanthropic Studies Index; (7) Arnova Abstracts. We used the following keywords: donations, philanthropy, charitable giving, charitable behavio(u)r, altruism, helping, prosocial behavior. We concluded our search in August 2007. The results of this search formed the basis for this paper. References to articles that have been published since we concluded our search have been updated.

Then we refined our search to include only papers that contained empirical analyses of charitable giving by adult individuals or households. Theoretical papers (not reporting empirical

data), studies using children as participants, and studies on charitable behaviour of organizations are not reviewed. Studies on contributions to public goods in experiments are included only when such contributions involve real monetary donations to real charitable organizations. Studies identifying individuals as beneficiaries (e.g., ‘dictator games’ in experimental economics) are included only when beneficiaries are strangers, and when participants consider the outcome of their decisions to be charitable donations. Studies in languages other than English are disregarded, although they were used to retrieve references to other studies with characteristics that fit our restrictions. Our search yielded only a few publications in languages other than English, notably Dutch, German, Italian, Spanish, and Polish. Most of the studies were conducted in the United States, followed by the United Kingdom, the Netherlands, and Canada. This may be a source of bias; although it is unclear to what extent the bias is systematic.

Unless otherwise noted, ‘giving’ refers to voluntary charitable donations by households or individuals to nonprofit organizations as reported in questionnaires or observed in experiments. Studies on donations to specific types of charitable organizations (e.g., religion, health, alumni donations) are included, but denoted as such. Unless otherwise noted, all studies are published in academic (but not necessarily peer-reviewed) journals, books or edited volumes. References to unpublished research were included only if the research was publicly available.

In a literature survey like this, space constraints prohibit us to do justice to all the arguments, findings and methods of the studies reviewed. Also the reader should make her own judgement on the quality of the papers we reviewed. We have refrained from judgements on the quality of individual publications. In order to facilitate the reader’s own judgement on the quality of the work cited, we have constructed a database containing valuable information on the individual publications. Among others, this database includes the exact citation, the mechanism investigated, the discipline of publication (based on the journal and/or first author’s affiliation), and the methodology used (survey, experiment). Two criteria we believe increase research quality



are (1) when the research aims to explicitly test or measures mechanisms that can explain charitable giving, and (2) when more adequate statistical models are used.

## **WHY DO PEOPLE GIVE? EIGHT MECHANISMS THAT DRIVE CHARITABLE GIVING**

Experiments in economics, sociology, social psychology, biology and marketing have shown how situations can be created that encourage giving. The situations in these experiments are created by researchers, which allows for causal inferences about determinants of giving. From these experiments, conclusions can be drawn about why people give. We reviewed this literature and identify eight mechanisms as the key mechanisms that have been studied as determinants of philanthropy. They are: (1) awareness of need; (2) solicitation; (3) costs and benefits; (4) altruism; (5) reputation; (6) psychological benefits; (7) values; (8) efficacy.

Our categorization is a refinement and extension of previous categorizations that distinguished types of ‘costs and benefits’ associated with participation in voluntary organizations (Chinman, Wandersman, & Goodman, 2005; P. B. Clark & Wilson, 1961). In their theory of incentive systems in organizations, Clark and Wilson (1961) distinguished material benefits, solidary benefits and purposive benefits associated with participation in organizations. Charitable giving is a form of participation. Therefore the incentive theory should be applicable. Material benefits are tangible rewards that can be assigned a monetary value; solidary benefits are intangible social rewards, and purposive benefits are intangible benefits associated with the goals of an organization (Chinman, et al., 2005). However, the incentive theory also seems incomplete when applied to philanthropy. We have refined this typology to repair two specific drawbacks.

The first drawback is that previous categorizations assume purposive actors who make deliberate choices if and to what extent they will participate, depending on the consequences of their participation actions. In this perspective, the actions of charitable organizations and beneficiaries are ignored. In many cases donors do not actively seek opportunities to donate, but

simply respond to the needs of beneficiaries and solicitations from charitable organizations. We distinguish these influences in separate mechanisms.

The second drawback is that the types of categories are rather broad and multidimensional, covering qualitatively different processes that affect charitable giving. Purposive benefits, for instance, cover such different mechanisms such as altruism (benefits for beneficiaries), values (endorsement of the charity's goals), personal satisfaction from contributing, and efficacy of contributions. We argue that it is more informative to distinguish these influences in separate mechanisms.

Our categorization of mechanisms is based on differences in four dimensions (see table 1), that can be captured by the questions 'What?', 'Where?' and 'Who?'. The first dimension is the 'what', or the physical form of the mechanism. Is it a tangible object that can be touched? The second dimension is the 'where', or the location of the mechanism. Is it located within, outside, or between individuals? The third and fourth dimension constitute the 'who', or the parties involved. The third dimension is the actor in the mechanism. We distinguish beneficiaries, (charitable, nonprofit) organizations, donors, and alters (people in the social environments of donors). The fourth dimension is the target of the cause (who is affected). Targets may be donors or beneficiaries.

[Insert table 1 about here]

Each of the mechanisms is a different combination of values on the four dimensions. Table 1 is not exhaustive because not all combinations occurred in the literature. The order in which the eight mechanisms are presented below does not reflect the importance or causal strength of the mechanisms. Rather, the order corresponds to the chronological order in which they affect giving in the typical act of donation. In doing so, we follow previous reviews of related literatures (Schroeder, et al., 1995; S. H. Schwartz, 1975; S. H. Schwartz & Howard,

1984), in which prosocial behavior and helping others are conceptualized as a series of consecutive decisions. For each mechanism, we present the main effect. In many cases, these main effects can be moderated (or sometimes mediated) by other factors. Moderating factors are factors that weaken or strengthen the effect of the mechanism: Conditions or personal characteristics that interact with the main effect. More information on factors moderating the mechanisms can be found in an appendix to this paper, available online.

### **MECHANISM 1: AWARENESS OF NEED**

Awareness of need is a first prerequisite for philanthropy. People have to become aware of a need for support. In terms of the four dimensions in table 1, needs may be tangible as well as intangible (dimension 1: the ‘what’); needs reside within, between and outside people (dimension 2: the ‘where’); needs originate from beneficiaries and organizations and target donors (dimensions 3 and 4: the ‘who’). People may have material needs for tangible objects outside themselves (e.g., food, shelter, security, medication, treatment), social needs (e.g., a need for company, which is something intangible that happens between people) or psychological needs (intangible phenomena within themselves: e.g., consolation). Awareness of need is a mechanism is largely beyond the control of donors, preceding the conscious deliberation of costs and benefits of donating. It is the result of actions of beneficiaries (who seek help) and charitable organizations (who communicate needs to potential donors).

The effects of need have been documented mostly in social psychology, beginning with a series of field experiments from the mid 1960s onwards (Berkowitz, 1968; Berkowitz & Daniels, 1964; S. H. Schwartz, 1975). In these experiments a variety of helping behaviors were studied, including practical assistance, blood donation, organ donation, as well as donating money. Generally speaking, the degree of need for help is positively related to the likelihood that help will be given (Levitt & Kornhaber, 1977; S. H. Schwartz, 1974; Staub & Baer, 1974). One study specifically tested for effects of need on donations (Wagner & Wheeler, 1969) and revealed that

not objective need but subjective perceptions of need are crucial. An experimental study tested for effects of watching a telethon and found a positive effect on attitudes toward disabled people, but not on donations (D. Feldman & Feldman, 1985). Survey studies reveal that more generous alumni perceive a higher need for contributions to their alma mater (W. D. Diamond & Kashyap, 1997; Weerts & Ronca, 2007) and that volunteers perceive a higher need for volunteers in their community (Unger, 1991). A survey study on intentions to donate to international relief organizations also reveals a positive effect of need (Cheung & Chan, 2000). A survey study on donations to panhandlers shows that perceived need is positively related to donations (B. A. Lee & Farrell, 2003).

Experiments usually manipulate need by exposing participants to needy victims. Knowing a victim, however, also promotes giving to other victims to whom the individual is not exposed directly (Small & Simonsohn, 2006). In focus groups, donors cite knowing a (potential) beneficiary as a motive for charitable contributions (Polonsky, Shelley, & Voola, 2002; Radley & Kennedy, 1995). Survey studies also suggest that awareness of need is increased when people know potential beneficiaries of a charitable organization. People who have relatives suffering from a specific illness are more likely to give to charities fighting those illnesses (Bekkers, 2008; Burgoyne, Young, & Walker, 2005), though they may not give more on average (V. H. Smith, Kehoe, & Cremer, 1995). A study in Norway showed that health charities fighting more common illnesses had higher numbers of members, and therefore received higher private contributions (Olsen & Eidem, 2003). People knowing a beneficiary of United Way funds are more likely to donate to United Way (Pitts & Skelly, 1984). People who have (had) ‘a deeply loved pet animal’ are more likely to prefer giving to animal welfare rather than other charitable causes (Bennett, 2003).

Awareness of need may also be increased by solicitors for charitable contributions informing potential donors about the needs of victims. One experimental study found that this

technique increases the likelihood of making donations, but yields lower contributions among those making a donation (Dolinski, Grzyb, Olejnik, Prusakowski, & Urban, 2005).

Awareness of need is facilitated by the (mass) media. Simon (1997) shows that more extended media coverage of an earthquake has a strong positive relationship with private contributions supporting those affected. In turn, the amount of attention the media pays attention to beneficiaries' needs depends on, among others, the number of beneficiaries (or those affected in the case of disasters), and the demographic and psychological distance between potential donors and beneficiaries (Adams, 1986; Simon, 1997). A survey study of donations to relief appeals – often advertised on television – reveals that the amount of time spent watching television is positively related to relief donations (Bennett & Kottasz, 2000).

Early analyses of charitable donations reported on tax returns reveals that donations are higher in time periods (R. A. Schwartz, 1970) and states with more poverty (Abrams & Schmitz, 1984; Amos, 1982), which suggests that donors respond to need with increased contributions. Recent studies (Bielefeld, Rooney, & Steinberg, 2005; Gittell & Tebaldi, 2006) do not uniformly support this conclusion. Schiff (1990) found that individuals in states with higher proportions of poor households give less to higher education and combined appeals, but more to lower education. Bielefeld, Rooney, & Steinberg (2005) found that donations to causes other than religion were higher in areas with higher levels of income inequality, allegedly because of a higher need for charitable contributions in these areas.

It is likely that the awareness of need for support for a specific cause among the general public increases over time as charities working for the cause continue to exist. In a study of Spanish development aid organizations, it was found that older charities in the sector attracted more donations, because these organizations have a larger pool of volunteers available to them (Marcuello & Salas, 2000, 2001). A study from the U.K., however, found no effect of organizational age on private contributions to overseas charities (Khanna, Posnett, & Sandler, 1995) though an effect of age on contributions to health, religion and social welfare organizations

was found. A later study, found no effect of organizational age (Khanna & Sandler, 2000). A first study in the U.S. found significant age effects on contributions received by organizations in the arts and culture sector, hospitals, and nonprofit organizations sponsoring scientific research (Weisbrod & Dominguez, 1986). A later study, however, found negative effects of organizational age for higher education institutions and scientific research (Okten & Weisbrod, 2000). While a study from Canada found no effect of organizational age on contributions received by organizations (Callen, 1994), both a study from Singapore (Wong, Chua, & Vasoo, 1998), as well as a study from Norway found positive organizational age effects (Olsen & Eidem, 2003).

## **MECHANISM 2: SOLICITATION**

A second mechanism that precedes the conscious deliberation of various types of costs and benefits of donating is solicitation. Solicitation refers to the mere act of being solicited to donate. The way potential donors are solicited determines the effectiveness of solicitations. The effects of different methods are captured by the other mechanisms. In terms of the four dimensions in table 1, solicitations (1) may be tangible (e.g., a fundraising letter) or intangible (a personal request); (2) are interactions between people; (3) originate from beneficiaries or charitable organizations; (4) target potential donors. Studies on solicitation have appeared in journals from a variety of disciplines, including marketing, psychology and economics.

A large majority of all donation acts occurs in response to a solicitation. Bryant, Slaughter, Kang and Tax (2003) find that 85% of donation acts among respondents in the 1996 Independent Sector survey on Giving and Volunteering in the preceding year are following a solicitation for a contribution. Bekkers (2005a) finds that 86% of the donation acts in two weeks preceding the 2002 Giving in the Netherlands Panel Survey are following a solicitation. The evidence from these cross-sectional studies that solicitations greatly enhance the likelihood of donations is complemented by the earlier experimental finding showing that actively soliciting contributions rather than passively presenting an opportunity to give increases the likelihood that

people donate (Lindskold, Forte, Haake, & Schmidt, 1977). The implication is that the more opportunities to give people encounter, the more likely they are to give. Survey studies in marketing and sociology usually find that receiving a higher number of solicitations for charitable contributions is associated with increased philanthropic activity (Bekkers, 2005a; B. A. Lee & Farrell, 2003; Schlegelmilch, Love, & Diamantopoulos, 1997; Simmons & Emanuele, 2004; Tiehen, 2001; Wiepking & Maas, 2009), although two studies did not find such an association (Marx, 2000; Sokolowski, 1996).

This does not imply that fundraising organizations should mindlessly increase the number of individuals receiving their appeals. A survey study of alumni donations revealed that higher education institutions soliciting contributions from a larger proportion of their alumni receive lower average contributions (Leslie & Ramey, 1988). This finding may reflect strongly decreasing marginal utility of the number of persons solicited. In addition, charitable organizations should take care not to overburden their donors with solicitations. Increasing the number of solicitations may produce ‘donor fatigue’ and may lower the average contribution (Van Diepen, Donkers, & Franses, 2009; Wiepking, 2008b). Taking a life time value perspective, the number of solicitations may even be reduced by optimizing the search for more responsive targets (Piersma & Jonker, 2004).

It is not surprising that larger donors receive more solicitations per year for charitable contributions (Bekkers, 2005a; Van Diepen, et al., 2009). This is not only because solicitations yield contributions, but also because responding to solicitations for contributions attracts new solicitations: ‘Once on the list of usual suspects, I’m likely to stay there’ (Putnam, 2000; Van Diepen, et al., 2009). Due to increasing numbers of solicitations for charitable contributions, the standard response is to reject an appeal, except for older people who tend to take appeal letters more serious and hence more often respond to them (W. D. Diamond & Noble, 2001). As a result, it is not surprising that small modifications of direct mail appeals do not easily affect giving (Katzev, 1995). Even in single encounters that are unlikely to result in a long term

involvement with a charity, people try to avoid being solicited for contributions (Pancer, McMullen, Kabatoff, Johnson, & Pond, 1979).

### **MECHANISM 3: COSTS AND BENEFITS**

The third mechanism covers the material costs and benefits associated with donating. Adapting a definition from Clark & Wilson (1961) and Chinman, Wandersman & Goodman (2005), we define material costs and benefits as ‘tangible consequences that are associated with a monetary value’. In terms of the four dimensions in table 1, costs and benefits (1) are tangible objects; (2) reside outside donors; (3) originate from organizations; and (4) affect donors. Effects of costs and benefits are most often documented in studies in economics.

#### **COSTS**

It is clear that giving money costs money. When the costs of a donation are lowered, giving increases (Bekkers, 2005c; C. C. Eckel & Grossman, 2004; C. C. Eckel & Grossman, 2003; Karlan & List, 2006). This is not only true for the absolute costs, but also for the perception of the costs of a donation (Wiepking & Breeze, 2009). This is not to say that philanthropy is motivated by material self-gain: because “donors will always be better off not making a donation” (Sargeant & Jay, 2004: 100). Studies of hypothetical giving also show that requests for larger donations are less likely to be honoured (Andreoni & Miller, 2002; Bekkers, 2004).

Economists have studied the empirical effects of the price of giving on philanthropy using survey data and tax files in many papers since the 1970s. A large number of studies have estimated the effects of tax price on philanthropy.<sup>1</sup> Reviews of these studies are given in Steinberg (1990), Simmons & Emanuele (2004), and Pelozo and Steel (2005). The latter paper provides a meta-analysis, showing that estimates of the price effect are generally negative, but vary widely between studies, depending on the scope of the sample and the statistical methods used. More recent estimates of price effects, based on econometric models developed for the



analysis of panel data, tend to be lower than estimates from earlier studies (McClelland, 2002). The most recent study reached the conclusion that changes in the tax deduction for charitable contributions have a large, persistent price effect between -0.79 and -1.26 and a smaller transitory price effect between -0.40 and -0.61 (Auten, Sieg, & Clotfelter, 2002). The price effects appear to be larger for religious donations (Wiepking, 2007). Tax benefits seem the most important motive for payroll giving in the UK (Romney-Alexander, 2002). When employers match charitable contributions of their employees, they give more (Okunade & Berl, 1997).

However, when the costs of donating are increased by increasing the amount requested, the amount donated may actually increase if the amount requested is not perceived as excessive (Doob & McLaughlin, 1989). However, one study found that a request for a 'generous contribution' rather than a specific amount decreases the likelihood that a gift will be made in door-to-door solicitations (Weyant & Smith, 1987). Desmet (1999) found a positive effect of asking for more on average donations in a direct mail campaign among irregular donors, but not among regular donors. In addition, higher donations were offset by a lower response rate. Similar findings are reported by Fraser, Hite and Sauer (1988). In another study, a higher reference point contribution increased the amount donated, but did not decrease the likelihood of making a contribution (Alpizar, Carlsson, & Johansson-Stenman, 2007).

The costs of a donation sometimes involve more than just money. A survey study found that people who perceive fewer obstacles to give are more likely to give (J. R. Smith & McSweeney, 2007). Physical discomfort also discourages philanthropy. People are more likely to donate money to a charity when weather conditions are better. One study found a sizeable positive effect of temperature on giving to the Salvation Army in the period between Thanksgiving and Christmas (Jiobu & Knowles, 1974). However, an experimental study of donations in church found no effect of sunshine (Soetevent, 2005). Survey studies of the timing of donations in the United Kingdom (Banks & Tanner, 1999; Pharoah & Tanner, 1997) and Ireland (Carroll, McCarthy, & Newman, 2006) reveal that December is by far the most generous

month of the year. In the second quarter of the year U.K. households are more likely to give but do not give higher amounts (Pharoah & Tanner, 1997).

## BENEFITS

Occasionally, donations to charitable organizations buy services or other ‘selective incentives’ (Olson, 1965). For instance, when donors to universities, museums or symphony orchestras get access to exclusive dinners, meetings or special concerts. These donations may be characterized as exchange, when they are rooted in part in consumption motives. Offering access to exclusive services in exchange for contributions brings giving closer to buying. The benefits mechanism is mostly studied by economists and marketing scientists. Studies on alumni giving show that alumni are more generous after graduation if their university spent more on them (Baade & Sundberg, 1996a, 1996b; Harrison, Mitchell, & Peterson, 1995). A study of donations to the opera found that fringe benefits increase contributions (Buraschi & Cornelli, 2002). When these fringe benefits are matched to selected categories of gifts, giving is pushed up even more (Andreoni & Petrie, 2004). Lotteries constitute another type of material benefits for donations, which increase the number of donors (but not the amount donated per donor) in fundraising campaigns (Landry, Lange, List, Price, & Rupp, 2006). Offering material benefits may also provide donors with an excuse for a donation in cases where they are otherwise withheld by a norm of self-interest (Miller, 1999). A survey study of charitable gifts and lotteries in Canada reveals that the two behaviors are complements, not substitutes (Apinunmahakul & Devlin, 2004). Analysis of donations as reported on tax forms suggests that on the whole, philanthropic contributions seem to depend less strongly on direct benefits than on indirect benefits and value orientations (Amos, 1982).

A popular belief among fundraisers is that including a gift in a direct-mail package increases donations. However, there is no strong foundation for this belief in the empirical studies we reviewed. We found four papers testing whether a gift increases donations (Alpizar, et al.,

2007; Chen, Li, & MacKie-Mason, 2006; Edlund, Sagarin, & Johnson, 2007; Harris, Liguori, & Stack, 1973), with different results. Alpizar et al. (2007) find that gifts increase the likelihood of contributions to a natural park in Costa Rica. However, the gift reduced the amount contributed among donors. Edlund, Sagarin and Johnson (2007) found that participants who were offered a bottle of water purchased more raffle tickets for an alumni association, especially those who had a stonger 'belief in a just world'. Harris et al. (1973) conducted a series of three experiments offering a cookie to prospective donors, and found a positive effect of a gift in only one experiment. Chen et al. (2006) conducted an online fundraising campaign offering premiums (mouse pads, book lights and CD cases) but found no effect.

Having profited personally from services from a nonprofit organization seems to enhance the probability of subsequent donations, although the evidence is rather thin (Marr, Mullin, & Siegfried, 2005; Schervish & Havens, 2002).

The effect of benefits may partly explain why congregational giving declines when congregation size increases. In larger congregations the likelihood of having direct personal access to clergy is much lower (Davidson & Pyle, 1994; D. V. A. Olson & Caddell, 1994; Stonebraker, 2003; Sullivan, 1985; Zaleski & Zech, 1992, 1994; Zaleski, Zech, & Hoge, 1994). However, giving may also be lower in larger groups because of free rider-effects (Kropf & Knack, 2003; D. V. A. Olson & Caddell, 1994; M. Olson, 1965), because of a lower level of commitment to the group (Finke, Bahr, & Scheitle, 2006; Knoke, 1981), or because of a lower level of social pressure (see below). In Presbyterian churches, however, giving increases with congregation size (Lunn, Klay, & Douglass, 2001). Interestingly, the authors explained this finding as the result of 'increased ministerial services'.

There is a danger in offering material benefits for charitable contributions. When people receive material benefits for helpfulness, they tend to undermine self-attributions of helpfulness (Zuckerman, Lazzaro, & Waldgeir, 1979), which reduces the effect of prosocial self-attributions on future helpfulness. Fringe benefits change the decision into an exchange (do I get value for

money?). Gruber (2004) finds that subsidies for religious contributions reduce church attendance. Eckel and Grossman (2000) find that participants in a dictator game experiment who are recruited through flyers telling they could earn money are less generous and less strongly motivated by non-monetary factors than participants recruited in class. Meier (2007a) found that removing a subsidy for private contributions to a Swiss university fund reduced such contributions in consecutive years. This may be taken as evidence of a ‘crowding out’ effect of subsidies on intrinsic motivation. Not only the donor’s self-image may be affected by entering the domain of exchange, also the nonprofit organization’s image. Charities offering products for sale in catalogues face lower contributions (Desmet, 1998).

In many cases, charitable donations do not provide immediate material benefits to oneself, but do provide benefits to individuals known to the donor or a group of which the donor is a member (Sargeant & Woodliffe, 2005; Schervish & Havens, 2002; Tam Cho, 2002). Examples are donations to the local hospital and one’s church. Such contributions can be explained as a form of generalized exchange. In addition, if the contributions are made (in) public, they will be recognized by fellow community members, and may be explained by reference to the mechanism of reputation discussed below. Finally, individuals may perceive their donations as fair contributions that will maintain services that they may use at some later point in time. For instance, donors may perceive donations to medical research as a means of relieving their own future health needs (Burgoyne, et al., 2005).

#### **MECHANISM 4: ALTRUISM**

An obvious reason why individuals may contribute money to charities is because they care about the organization’s output, or the consequences of donations for beneficiaries. Economists, who dominate the study of this mechanism, have labelled this motive ‘altruism’ (Andreoni, 2006). In terms of the four dimensions in table 1, (1) altruism yields consequences

that are tangible; (2) that reside outside individuals; (3) that originate from donors, are often channelled through charitable organizations; and (4) accrue solely to beneficiaries.

Purely altruistic motivation (in the economic sense) would lead individuals who learn about an increase in contributions by others with \$1 to reduce their own contribution with \$1. This is called a ‘crowding out’ effect. Numerous studies in economics have sought to estimate the magnitude of crowding out; a landmark study is that of Kingma (1989). Results of empirical studies testing for crowding out effects show that crowding out may exist, but is often less than perfect: a \$1 dollar increase in governmental spending decreases private giving with less than \$1. Some studies find no crowding out effect at all (Brooks, 1999; Kropf & Knack, 2003; Marcuello & Salas, 2001; Reece, 1979) and some studies even find crowding in-effects (Brooks, 2003b; A. M. Diamond, 1999; Hughes & Luksetich, 1999; Khanna, et al., 1995; Khanna & Sandler, 2000; Okten & Weisbrod, 2000; Schiff, 1985, 1990). One study found that increased government support was correlated with a higher number of donors but with lower average private contributions (Brooks, 2003a).

Theoretically, the often less than perfect crowding out implies that other and perhaps more powerful things besides altruism motivate donations. From the behaviour of donors we can infer that they do not care so much about the public benefits generated by that their contributions. The private benefits, or selective incentives (M. Olson, 1965) for contributions dominate altruistic motives. Hence, donors may be called ‘impure altruists’ (Andreoni, 1989, 1990; Kingma, 1989). In practice, the findings imply that “a severe cut in government funding to non-profit organizations is not likely, on average, to be made up by donations from private donors” (Payne, 1998: 338).

## **MECHANISM 5: REPUTATION**

The mechanism of reputation refers to the social consequences of donations for the donor. In terms of table 1, these consequences are intangible phenomena that happen between

individuals: people in the social environment of donors verbally or non-verbally reward donors for giving, or punish them for not giving. Reputation is studied most often in psychology and economics, together accounting for about two thirds of the studies on this mechanism.

Giving is usually viewed as a positive thing to do (CAF, 2005; Horne, 2003; Muehleman, Bruker, & Ingram, 1976), especially when giving reduces inequality (Brickman & Bryan, 1975), and when giving is less costly, beneficiaries are not to blame, and is more effective (Horne, 2003). Thus, people who give to charitable causes are held in high regard by their peers (Muehleman, et al., 1976; Wiepking, 2008a). They receive recognition and approval from others. Laboratory experiments with abstract public goods games by economists and social-psychologists reveal that individuals are willing to incur costs to recognize generous contributions (J. Clark, 2002). Conversely, not giving damages ones reputation. This is especially true when donations are announced in public or when they are directly observable (Alpizar, et al., 2007; Barclay, 2004; Bateson, Nettle, & Roberts, 2006; Berezkei, Birkas, & Kerekes, 2007; Harris, Benson, & Hall, 1975; Hoffman, McCabe, & Smith, 1996; S. H. Long, 1976; Satow, 1975; Soetevent, 2005). When given the choice, people generally prefer their donations to be known by others (Andreoni & Petrie, 2004). Thus, face-to-face solicitations are more effective than solicitations made over the telephone (Brockner, Guzzi, Kane, Levine, & Shaplen, 1984), and giving people the option of donating money in an envelope rather than having them hand over the money reduces donations (Hoffman, et al., 1996; Thornton, Kirchner, & Jacobs, 1991). Gaining reputation for donations has been facilitated recently with the advent of ribbons (e.g., pink) and wristbands (e.g., yellow); a practice conceptualised as ‘conspicuous compassion’ (Grace & Griffin, 2006; West, 2004) with an eye to the classic study of Veblen (1899).

To some extent, the effect of being watched may be physical in nature. One study found that solicitors in a door-to-door fundraising campaign who looked potential donors in the eye raised more money than solicitors who looked at the collecting tin (Bull & Gibson-Robinson,

1981). Cues of being watched need not even be consciously perceived: stylized eyes spots also have a positive effect on donations (Haley & Fessler, 2005).

Recognition may be given by persons who are not physically present. Merely knowing that one's contribution is perceived by others may be enough to motivate people to give. In a study determining factors that influence giving during a telethon, Silverman et al. (1984) found that viewers were most likely to give at the times when the names of pledging donors were shown on the screen. Because larger groups are often more anonymous, it may be that incidence and level of donations decrease when group sizes increases in bars and school classes (Wiesenthal, Austrom, & Silverman, 1983). Survey studies by sociologists and scholars studying religion have consistently found a negative relation between the size of congregations and religious contributions (Davidson & Pyle, 1994; Hungerman, 2005; D. V. A. Olson & Caddell, 1994; Stonebraker, 2003; Zaleski & Zech, 1994; Zaleski, et al., 1994). While donors often deny the importance of social pressure (Polonsky, et al., 2002), survey studies have found that donations are rather strongly related to measures of social pressure (Bekkers & Schuyt, 2008; Mathur, 1996; Pitts & Skelly, 1984; J. R. Smith & McSweeney, 2007). Also the finding by Clotfelter (2003) that those who are still related to former alumni tend to give more to private colleges and universities may be explained by the mechanism of reputation.

## **MECHANISM 6: PSYCHOLOGICAL BENEFITS**

Giving not only yields social benefits, but also psychological benefits for the donor. In terms of table 1, the mechanism of psychological benefits refers to the intangible benefits that donors bestow upon themselves as a result of donating, and to the intangible costs that donors avoid by donating. A large majority of all studies on this mechanism is conducted by (social) psychologists, who have shown that giving may contribute to one's self-image as an altruistic, empathic, socially responsible, agreeable, or influential person. In addition, giving is in many cases an almost automatic emotional response, producing a positive mood, alleviating feelings of

guilt, reducing aversive arousal, satisfying a desire to show gratitude, or to be a morally just person.

## THE 'JOY OF GIVING'

There is ample evidence from studies on helping behaviour that helping others produces positive psychological consequences for the helper, sometimes labelled 'empathic joy' (Batson & Shaw, 1991). In economic models of philanthropy, this category of motives is labelled 'warm glow' or 'joy of giving' (Andreoni, 1989). Recent evidence from neuropsychological studies suggests that donations to charity "elicit neural activity in areas linked to reward processing" (Harbaugh, Mayr, & Burghart, 2007) and "anterior sectors of the prefrontal cortex are distinctively recruited when altruistic choices prevail over selfish material interests" (Moll et al., 2006). There are several reasons why humans may have pleasurable psychological experiences upon giving: people may alleviate feelings of guilt (avoid punishment), feel good for acting in line with a social norm, or feel good for acting in line with a specific (prosocial, altruistic) self-image. Behavioral brain studies suggest these experiences require a relatively low level of perceptual processing (Tankersley, Stowe, & Huettel, 2007).

The joy of giving (relative to keeping money for oneself) can be manipulated by benign thoughts. People are more generous after they have spent some time thinking about their own death (Jonas, Schimel, Greenberg, & Pyszczynski, 2002), about an act of forgiveness (Karremans, Lange, & Holland, 2005), or about things in life for which they are grateful (Soetevent, 2005).

Positive moods in general may motivate giving. Strahilevitz and Myers (1998) found that people are more likely to choose a charity donation over a discount when buying frivolous products (e.g., Sundae, frozen yoghurt) rather than functional products (e.g. backpack, toothpaste). A positive mood may also be induced by the question 'how do you feel today?'. Most people answer positively to this question ('I'm fine, thank you') and are subsequently more



likely to comply with a request for a donation. This is called the ‘foot-in-the-mouth effect’ (Aune & Basil, 1994; Dolinski, et al., 2005; Howard, 1990). It may also be that the ‘foot-in-the-mouth effect’ works not so much because it brings about a positive mood but because it creates relational obligations (Dolinski, et al., 2005).

The advice to fundraisers is to test fundraising materials for their mood effects, and to avoid the use of materials that bring about a negative mood. Simply telling prospective donors that donating will bring them in a good mood increases giving, especially when victims are depicted as innocent (Benson & Catt, 1978). Donors also self-report ‘feeling good’ as a motive for donating to charitable causes (57% of a sample of Dutch citizens in Wunderink, 2000).

In specific circumstances, negative moods can also encourage giving. Cunningham et al. (1980) show that people in a good mood respond better to rewards associated with giving (a warm-glow feeling, or a present), and that people in a bad mood are more responsive towards avoiding punishments that come with not giving (for example the phrase: “Image how you would feel not helping”).

## SELF-IMAGE

When giving entails positive psychological benefits, people are said to have positive personal norms (R. A. Schwartz, 1970). Personal norms strengthen the effect of social norms. When the social norm is to give, those who feel bad about themselves for violating the norm are more likely to give. Not giving would entail feelings of guilt, shame, or dissonance with one’s self-image. Experiments on helping behavior show that assisting others may be an effective way of repairing one’s self-image after one has harmed another (Carlsmith & Gross, 1969; Freedman, Wallington, & Bless, 1967; Konečki, 1972; Regan, Williams, & Sparling, 1972).

One study tested the guilt hypothesis by comparing donations among people entering a church during confession hours and people leaving church after confession, when their guilt had been reduced (Harris, Benson, and Hall, 1975). Consistent with the guilt hypothesis, the former

group donated more often than the latter. While the higher likelihood of obtaining social approval among coreligionists for donations may also explain this difference, another more recent study confirms that feelings of guilt promote donations (Basil, Ridgway, & Basil, 2006). The study also showed that feelings of guilt lead to giving by enhancing feelings of responsibility.

Survey studies have also provided evidence of a link between an altruistic self-image and philanthropy. Many studies find that dispositional empathy (measured with items like “I am a soft-hearted person”) is positively related to charitable giving (Bekkers, 2006b; Bennett, 2003; Davis, 1983; Piferi, Jobe, & Jones, 2006; Wilhelm & Bekkers, 2010). One study that asked individuals whether they would be more or less generous than average found that donors considered themselves more generous than non-donors (Schlegelmilch, Diamantopoulos, & Love, 1997). However, giving is not only the result of an altruistic self-image, but also reinforces such an image. Piliavin and Callero (1991) found that blood donors develop an altruistic self-identity as a result of continued blood donation. A similar process is likely to exist for the donation of money to charitable causes (L. Lee, Piliavin, & Call, 1999). It is likely that such a reciprocal relationship between giving and altruistic self-image also exists for traditional philanthropy, although Sokolowski (1996) did not find evidence for this assumption using cross-sectional data. Twenge, Baumeister, DeWall, Ciarocco, and Bartels (2007) find that empathy mediates a negative effect of social exclusion on charitable giving. People feeling socially excluded temporarily lack the ability to experience empathic concern, decreasing the incidence and level of charitable giving.

The self-image mechanism can be used by charities in fundraising campaigns. Experimental field studies with adults have found that labelling potential helpers as ‘helpers’ promotes helping behaviour. Kraut (1973) found that if a canvasser labelled donors to one charity as “charitable” but did not make such a comment to other donors, a consecutive fundraising campaign was more successful among those who had been labelled charitable. Swinyard and Ray (1979) also found a positive labelling effect. A self-image of being helpful can also be created by

the ‘foot-in-the-door technique’. The technique includes making a small request before a larger request is made. Compliance with the first request makes people feel helpful, which creates a pressure to comply with the second, larger request (Freedman & Fraser, 1996; Rittle, 1981).

The promise elicitation technique (Cialdini, 2001, p. 62) is another method to take advantage of the desire of people to behave in a manner consistent with their self-image. People tend to regard themselves as more generous than their peers (Muehleman, et al., 1976; Pronin, Lin, & Ross, 2002) and tend to overestimate their generosity in hypothetical (Bekkers, 2006a) and real life situations (Komter, 1996). When they are first asked their intentions to give, they are more likely to give in real life because people want to live up to their self-image.

Kerr et al. (1997) found that commitment to a promise made to unknown others motivated contributions in an experimental game situation. Not contributing would create cognitive dissonance, feelings of guilt. Donors anticipate feelings of guilt upon reducing their current level of giving. Sargeant and Woodliffe (2005) found that committed donors perceived that ‘there would be a consequence for the beneficiary group of their withdrawing their support’. Another survey study found that respondents who anticipated feeling guilty for not giving were more likely to give (J. R. Smith & McSweeney, 2007).

While the majority of studies on self-image have focused on altruism or helpfulness, other types of self-images may promote giving as well. For instance, giving enhances one’s self esteem (Ickes, Kidd, & Berkowitz, 1976). People may be motivated to give to enhance their self esteem. A survey study in the U.K. found that individuals who report a stronger sense of accomplishment are more likely to donate (Sargeant, Ford, & West, 2000). A survey study in New Zealand found that individuals with a more active orientation to life are more likely to donate (Todd & Lawson, 1999). A similar finding emerges from a survey study in the Netherlands, in which more extraverted individuals – commonly described as more active and outgoing – are more likely to give and give higher amounts (Bekkers, 2006b). One study did not find an association between ‘empowerment’ and giving to human services (Marx, 2000). Another survey study found that

esteem-enhancing motivations among older adults were negatively correlated with giving (Mathur, 1996).

## **MECHANISM 7: VALUES**

In the eyes of donors, the works of nonprofit organizations may make the world a better place. Attitudes and values endorsed by donors make charitable giving more or less attractive to donors. Donations can also be instrumental to exemplifying one's endorsement of specific values to others, but this is captured by the mechanism of reputation. In terms of table 1, values are intangible phenomena located within individuals, originating from donors, and targeted at themselves as well as beneficiaries. Studies on the effects of values are most often published by journals in sociology, psychology and philanthropic studies.

Endorsement of prosocial values generally has a positive association with charitable giving. Because values are difficult if not impossible to manipulate, experimental studies on the effects of social values on philanthropy are non-existent. Some experimental studies link survey measures of attitudes and values to donations: humanitarianism and egalitarianism (Fong, 2007); and prosocial value orientations (Van Lange, Van Vugt, Bekkers, & Schuyt, 2007). Survey studies, mostly conducted by sociologists and marketing scientists, show that people who have altruistic values (Bekkers & Schuyt, 2008; Farmer & Fedor, 2001), who have prosocial values (Bekkers, 2006b, 2007; Van Lange, et al., 2007), who are less materialistic in general (Sargeant, et al., 2000), who endorse postmaterialistic goals in politics (Bekkers & Wiepking, 2006), who value being devout and spiritual (Todd & Lawson, 1999), who endorse a moral principle of care (Schervish & Havens, 2002; Wilhelm & Bekkers, 2010), who care about social order, consensus, and social justice in society (Todd & Lawson, 1999), who feel socially responsible for the recipient organization (Weerts & Ronca, 2007) and society as a whole (Amato, 1985; Reed & Selbee, 2002; Schuyt, Smit, & Bekkers, 2010) are more likely to give because they are motivated to make the world a better place.

Not only do some social values promote donations in general, but also do specific social values promote donations to particular charities (Wiepking, 2009). Philanthropy is a means to reach a desired state of affairs that is closer to one's view of the 'ideal' world. What that ideal world looks like depends on one's value system. Through giving, donors may wish to make the distribution of wealth and health more equal; they may wish to reduce poverty, empower women, safeguard human rights, to protect animals, wildlife, or the ozone layer. Donors may also have objectives that are partisan or even terrorist. Supporting a cause that changes the world in a desired direction is a key motive for giving that has received very little attention in the literature. The desire for social justice is most often studied in relation to philanthropy (Furnham, 1995; Todd & Lawson, 1999). Bennett (2003) studied the relationship between personal values and the choice of charitable organizations and found that a similarity between personal values and organizational values increases the probability that a donation to that particular organization is made. Keyt, Yavas and Riecken (2002) found that donors to the American Lung Association are more concerned about health issues than non-donors. In addition, donors to political parties endorse values central to the ideology of those parties (Francia, Green, Herrnson, Powell, & Wilcox, 2005).

### **MECHANISM 8: EFFICACY**

Efficacy refers to the perception of donors that their contribution makes a difference to the cause they are supporting. In terms of the four dimensions in table 1, efficacy perceptions are intangible (psychological) consequences of donations for donors, generated by charitable organizations. Efficacy is most often studied in philanthropic studies, economics, and psychology, respectively.

Survey studies reveal that when people perceive that their contribution will not make a difference, they are less likely to give (Arumi et al., 2005; W. D. Diamond & Kashyap, 1997; Duncan, 2004; Mathur, 1996; Radley & Kennedy, 1992; J. R. Smith & McSweeney, 2007) or

leave a charitable bequest (Wiepking, Madden, & McDonald, 2010). These findings may be the result of reverse causality and/or justification.

While efficacy has been studied extensively in the helping behaviour literature, we have been unable to locate any experimental studies on philanthropy that manipulated efficacy. Experiments with public goods games have found that contributions to public goods increase with the perceived efficacy of contributions (Sweeney, 1973). Three experimental studies tested the effect of providing donors with information about the effectiveness of contributions and found positive effects on philanthropy (N. C. Jackson & Mathews, 1995; Parsons, 2003, 2007). It appears that financial information is especially influential among committed donors (Parsons, 2007). Studies of aggregate donations at the state level, however, do not find a consistently positive effect of the level of accountability of charitable organizations required in a state (Berman & Davidson, 2003; Irvin, 2005). Studies of private contributions received by nonprofit organizations in Canada and the U.S. find that organizational efficiency are positively related to private donations (Callen, 1994; Trussell & Parsons, 2007).

People generally overestimate the effectiveness of their own contributions (Kerr, 1989). In their study of opera donations, Buraschi and Cornelli (2002) found that this holds especially for low-income donors. There appear to be individual differences in the tendency to view contributing to public goods in a rational manner. People who do so follow the free rider-reasoning (Olson, 1965): an additional dollar does not solve the problem; not giving does not make things worse. Survey studies reveal that a more coldly rational approach to life reduces giving (Bekkers, 2006b; Todd & Lawson, 1999) and is related to a lower level of volunteering (Bekkers, 2005b; Unger, 1991).

Perceived efficacy is a likely explanation for the effects of leadership donations and seed money that have been studied extensively by economists (Andreoni & Petrie, 2004; Bac & Bag, 2003; Chen, et al., 2006; Landry, et al., 2006; List & Lucking-Reiley, 2002; List & Rondeau, 2003; Potters, Sefton, & Vesterlund, 2005). When people see that others give to a charity, they

can take this as a signal that others have confidence in the organization. The leadership effect was described earlier by social psychologists as a ‘modeling effect’ (Bryan & Test, 1967; Lincoln, 1977; Reingen, 1982). Lincoln (1977) found that observing another person make a donation increased subsequent donations, especially if the model was a male. Jiobu and Knowles (1974) however, found no modelling effect. A matching offer by a third party (e.g., one’s employer) can also have a legitimizing effect: people will think that the third party had enough confidence in the organization to offer the matching contribution. Endorsement of a charity by a high status person is also likely to generate higher donations through a legitimisation effect. One field experiment with a health charity (Vriens, Scheer, Hoekstra, & Bult, 1998) found that a signature by a professor in health care research raised donations with 2.4%. A lab experiment found that observing high status individuals making donations lead others to increase their donations, while the leadership effect was not found when low status individuals were observed making contributions (Kumru & Vesterlund, 2005).

Surveys reveal that donors have an aversion against expensive fundraising methods (Arumi, et al., 2005; Sargeant & Woodliffe, 2005; Schervish & Havens, 2002). Evidence from the U.K. (Sargeant, et al., 2000) and the Netherlands (Bekkers, 2003) suggests that donors overestimate fundraising costs of charitable organizations. An experiment revealed that donors react less positively to ‘flashy’ fundraising materials (Bekkers & Crutzen, 2007). Low perceived efficacy decreases giving more strongly among altruistically motivated donors (Bekkers, 2006a).

Perceptions of efficacy are related to charitable confidence and perceptions of overhead and fundraising costs. Donors who have more confidence in charitable organizations think their contributions are less likely to be spent on fundraising costs and overhead (Bekkers, 2006a; Sargeant, Ford, & West, 2006). Such beliefs about the efficacy of charitable organizations are likely to promote giving (Bekkers, 2006a; Bennett, 2003; Bennett & Gabriel, 2003; Bowman, 2006; Keyt, et al., 2002; Parsons, 2003; Sargeant, et al., 2006; Schervish & Havens, 2002; Schlegelmilch, Diamantopoulos, et al., 1997; Yavas, Riecken, & Parameswaran, 1981). Wiepking

(2009) finds that confidence in charitable organizations specifically increases the likelihood of giving to organizations with an international focus, she finds no relationship between confidence and making donations to other types of organizations. Survey studies by Sargeant and colleagues reveal that the relationship of confidence with giving is mediated by relationship commitment (Sargeant, et al., 2006; Sargeant & Lee, 2004).

While attractive design of fundraising materials is often believed to attract the attention of donors (W. D. Diamond & Gooding-Williams, 2002), field experiments tell a different story. Warwick (2001) reports 23 tests of design elements on outer envelopes used in donor acquisition mailings, and found no effect in 19 cases, a negative effect in three cases, and a positive effect in only one case. In a field experiment with direct-mail letters for a health charity, the optimal fundraising letter was found to contain no ‘amplifiers’ (like bold printing), and no illustration (Vriens, et al., 1998). In a field experiment with donations in a campaign for refugees in Ruanda, Bekkers and Crutzen (2007) found that a plain envelope raised more money than an envelope including a picture of the beneficiaries.

## **HOW DO THE MECHANISMS RELATE TO EACH OTHER?**

The relative influence of each of the eight mechanisms – whether donations are primarily made in response to awareness of need, solicitation, costs and benefits, altruism, reputation concerns, psychological rewards, or efficacy – is unclear. Multiple motives are likely to operate simultaneously (Batson & Shaw, 1991; Clotfelter, 1997) and the mix of these motives differs over time, place, organizations, and donors. It is also likely that the eight mechanisms have interactive effects (e.g., that awareness of need may promote giving more strongly when efficacy is high). We think that identifying systematic patterns in the mix of the mechanisms and interactions among them are important tasks for future research.

Throughout our review, we have distinguished experimental from survey studies. Each of these methods has its own advantages and disadvantages. Experiments typically test for short-



term effects of manipulations, create artificial conditions, and rely on small groups of participants (university students). Strictly speaking, results cannot be generalized to the general population. The advantage of experimental control is the potential to draw causal inferences. Survey studies typically investigate donations over a longer period to real organizations among population samples, but cannot be used to infer causation.

Much would be gained by combining the strengths of the two methods. However, due to specialization of scholars in disciplines with different methodological preferences, there are virtually no studies combining survey and experimental methods (an exception is Bekkers, 2007). We hope that with this review researchers using either method will become more aware of the insights gained in studies using the other method. In particular, insights from experimental studies illuminate results from survey studies. We illustrate this with a discussion of the influence of religion on philanthropy. What mechanisms may explain this relation? Scholars often distinguish ‘conviction’ and ‘community’ or ‘norms’ and ‘networks’ as two broad explanations (Bekkers & Schuyt, 2008; E. F. Jackson, Bachmeier, Wood, & Craft, 1995; Wuthnow, 1991). ‘Conviction’ refers to (religious) beliefs, values and attitudes that encourage altruism; ‘community’ refers to identification with the religious community, social pressure, and solicitations for contributions. The ‘conviction’ explanation pulls together three mechanisms: altruism (a real concern for others), psychological benefits (earning one’s place in heaven), and values (the importance of helping others). ‘Community’ pulls together solicitation (receiving requests for contributions), reputation (recognition from others) and psychological benefits (feeling part of a community).

## **A CASE FOR PROGRESS?**

If the studies discussed above are viewed in a chronological order, do we then see any evidence for theoretical progress in the study of philanthropy? Taken together, theoretical progress in the literature on philanthropy is limited. The majority of papers we reviewed are not

based on solid theoretical foundations. This is not to say that there is no progress at all; subsequent studies may build on theoretical arguments without making them explicit. If the implicit hypotheses are reconstructed, we may detect progress. We do not make this exercise here because it is not the purpose of the present paper. Instead, we will indicate groups of studies in which we discern theoretical progress.

A set of papers published in social psychology from the 1970s to mid 1980s, may be characterized as applied research testing for boundary conditions of fundamental mechanisms. While the insights from these studies may be reconstructed as refinements of general hypotheses, the studies themselves often do not state these hypotheses explicitly.

Another set of papers, published in economics, does have more solid theoretical foundations. Model building in economics started with the public good model, but when no or little crowding out was observed in empirical studies, the model was found too crude. Subsequently, impure altruism models were proposed (Andreoni, 1989, 1990), collapsing all non-altruistic motives in one parameter. The revision of the model in subsequent studies as a result of empirical disconfirmation is a clear example of theoretical progress.

Other formal models of philanthropy deal with only one mechanism. Glazer and Konrad (1986) have modelled the reputation mechanism in a mathematical form. They call their model a signalling explanation for charity. By giving, people signal to others that they are concerned about others and/or that they have wealth (Frank, Gilovich, & Regan, 1996). Both signals buy prestige (Harbaugh, 1998). Duncan's model of impact philanthropy focuses on the desire of donors to have impact on beneficiaries (Duncan, 2004). The model accurately describes one specific ingredient of the 'warm glow'. As far as we know, there are no theoretical models describing the mechanisms of solicitation, psychological rewards, values, and efficacy.

Philanthropic acts are commonly the result of multiple mechanisms working at once. However, formal models of philanthropy (e.g., Ribar & Wilhelm, 2002) have focussed on only one or sometimes two motives. More than ten years ago, Brown (1997, 183) described the state

of affairs with regard to theory as follows: “No single model captures all the motivations that underlie charitable action”. While it is probably impossible to capture all mechanisms in one elegant formal model, Brown’s assessment still holds and provides a challenge for model builders.

There is a large potential for theoretical progress in the literature on philanthropy. The challenge for all scholars, model builders and other scientists alike, is to test competing alternative explanations – potentially from different disciplines – against each other. Scholars trying to prove their pet theories do not add much to our understanding of philanthropy. Progress is hindered by the lack of awareness of research in distant times and disciplines. Hopefully this review reduces some of the barriers to progress.

## NOTE

<sup>1</sup> See (Abrams & Schmitz, 1978, 1984; Andreoni, 1993; Andreoni & Payne, 2003; Auten, Cilke, & Randolph, 1992; Auten, et al., 2002; Barrett, 1991; Barrett, McGuirk, & Steinberg, 1997; Boskin & Feldstein, 1977; Brooks, 2003b; Brown, 1997; Brown & Lankford, 1992; Choe & Jeong, 1993; Chua & Wong, 1999; Daneshvary & Luksetich, 1997; Duncan, 2004; Eaton, 2001; Feenberg, 1987; N. E. Feldman, 2007; Feldstein, 1975a, 1975b; Feldstein & Taylor, 1976; Glenday, Gupta, & Pawlak, 1986; Greenwood, 1993; Hood, Martin, & Osberg, 1977; Jones & Posnett, 1991a, 1991b; Khanna, et al., 1995; Khanna & Sandler, 2000; Kingma, 1989; Lankford & Wyckoff, 1991; J. E. Long, 2000; McClelland & Kokoski, 1994; O'Neill, Steinberg, & Thompson, 1996; Park & Park, 2004; Randolph, 1995; Reece, 1979; Reece & Zieschang, 1985, 1989; Ricketts & Westfall, 1993; Robinson, 1990; Schiff, 1985, 1990; Simmons & Emanuele, 2004; Slemrod, 1989; Richard S. Steinberg, 1985, 1991; Taussig, 1967).

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*Table 1. Overview of mechanisms*

<i>Mechanism</i>	<i>What?</i>	<i>Where?</i>	<i>Who?</i>	
	<i>Tangible or intangible</i>	<i>Within, outside or between people</i>	<i>Actors</i>	<i>Targets</i>
1. Need	Tangible and intangible	Within, outside and between	Beneficiaries and organizations	Donors
2. Solicitation	Tangible and intangible	Between	Beneficiaries and organizations	Donors
3. Costs/benefits	Tangible	Outside	Organizations	Donors
4. Altruism	Tangible	Outside	Donors and Organizations	Beneficiaries
5. Reputation	Intangible	Between	Alters	Donors
6. Psychological costs and benefits	Intangible	Within	Donors	Donors
7. Values	Intangible	Within	Donors	Donors and beneficiaries
8. Efficacy	Intangible	Within	Organizations	Donors

## **APPENDIX: MODERATING FACTORS**

In the literature review we have described eight mechanisms that drive charitable giving. This appendix describes factors moderating the effects of the mechanisms. Moderators are factors that weaken the effect of the mechanism (negative moderators) or strengthen the effect (positive moderator). Moderators may be other mechanisms, situational conditions or personal characteristics.

### **Mechanism 1: Awareness of need**

Moderators of the effect of need include other mechanisms: costs, reputation, psychological benefits and efficacy; situational conditions: dependence of the beneficiary on the donor; and personal characteristics: perceptions of deservingness; acceptance (vs. denial) of responsibility, mood religiosity, and political orientation.

*Costs.* Material costs moderate the effect of need. When a larger need implies a higher cost, it does not increase helping behaviour (Piliavin & Piliavin, 1972).

*Reputation.* An experiment on volunteering revealed that the opportunity to gain social approval for helping promotes the effect of need (Fisher & Ackerman, 1998).

*Psychological benefits.* Awareness of need has little effect if potential donors face psychological costs when confronted with the need. In an early study, a picture of a needy, handicapped child was found to depress giving in a door-to-door fundraising campaign presumably because it depressed the mood of potential donors (Isen & Noonberg, 1979). Dyck and Coldevin (1992) came to the same conclusion in an experiment testing the effect of no photo, a positive and a negative photograph in appeal letters. The picture with “a less pleasant, needy ‘negative’ photograph” yielded lowest response rates and contributions.

*Efficacy.* The display of need may backfire when the need is perceived as impossible to solve (Small, Loewenstein, & Slovic, 2007; for further evidence on the interaction with efficacy, see below; Warren & Walker, 1991) or when a picture displaying needy recipients depresses the potential helper (Isen & Noonberg, 1979). In face-to-face solicitations, a picture to illustrate need may make no difference at all (Thornton, Kirchner, & Jacobs, 1991). Finally, West and Brown (1975) found in an experiment with helping behaviour that severity of need did result in more giving when the victim was more attractive.

*Dependence.* Berkowitz (1968) found that need produces helping only when the beneficiary is dependent on help from the donor. In addition, social class differences were found. Working class boys tended to react to need only when they had received help earlier, especially from the same person. Middle class boys were not affected by help received. Thus, when victims are dependent upon potential helpers and these helpers adhere to a moral principle of care, need produces helping.

*Perceptions of deservingness and acceptance of responsibility.* Whether beneficiaries are perceived as deserving also moderates the effect of need (Miller, 1977). When victims are perceived as causes of their own misfortune, potential donors may deny their responsibility for relieving the needs of the victim (Furnham, 1995). E.g., people are less prepared to sponsor welfare recipients when they know the recipients are unwilling to engage in paid work (Fong, 2007). Refusals to give to the homeless are often explained in these terms (Radley & Kennedy, 1992), as are refusals to give to poverty relief in developing countries (Bennett & Kottasz, 2000; Taormina, Messick, Iwawaki, & Wilke, 1988). Denial of responsibility is less likely to occur when the fate of victims is perceived as beyond people's control (Lerner & Simmons, 1966), at least among politically liberal individuals (Skitka, Mullen, Griffin, Hutchinson, & Chamberlin, 2002). Survey data reveal that awareness of need

is not associated with giving when potential donors attribute responsibility to government (Eschholz & Van Slyke, 2002; Polonsky, Shelley, & Voola, 2002; Radley & Kennedy, 1992).

It should be noted that denial of responsibility is sometimes a consequence of not helping, rather than a cause. People are creative in finding post hoc excuses for not giving (Hibbert, Chatzidakis, & Smith, 2005). Ascription of responsibility is also a dispositional variable that determines people's motivation to engage in helping behaviour (Bennett, 2003; Furnham, 1995; Schwartz, 1973, 1974). Denial of responsibility is related to the belief in a just world, the belief that people get what they deserve and deserve what they get (Appelbaum, 2002; Furnham, 1995; Lerner & Simmons, 1966). Econometric studies suggest that donors weigh the needs of distant others against the future needs of their own children. Parents give more to charities when their children are economically better off (G.E. Auten & Joulfaian, 1996; Joulfaian, 2004). They reduce giving to charities and increase bequests when their children's income is lower.

*Identification of a specific victim.* Solicitations for contributions that identify a specific victim are more likely to result in willingness to contribute (Kogut & Ritov, 2005a, 2005b) and actual donations than solicitations that provide statistical information on the number of victims (Small & Loewenstein, 2003; Small, et al., 2007). Information about single victims is more vivid and more emotionally distressing than information about multiple unidentified victims (Kogut & Ritov, 2005a, 2005b).

*Religious and political preferences.* Finally, what constitutes need or whether a (group of) needy person(s) is also deserving of assistance is controversial. A participant in an Australian focus group study (Polonsky, et al., 2002) said: "What constitutes a need to one person is not to another." Persons from different religious backgrounds (Will & Cochran, 1995) and with different political preferences (Skitka, et al., 2002) may evaluate the same objective situation differently.

*Overall strength of effect.* The result of these moderating factors is that the overall effect of need on giving is small. It may well be that instead of the most needy, those with the best marketers receive the highest contributions (Polonsky, et al., 2002). Thus, it is the awareness of need that is related to giving rather than the objective need. As Milofsky and Blades (1991) point out, the largest health charities in the US include organizations for rare diseases like muscular dystrophy (affecting only 6 children in 100,000) and cystic fibrosis (affecting 20 in 100,000).

### **Mechanism 2: Solicitation**

Obviously, not all types of solicitations are equally effective. Ingredients of the most effective solicitations are discussed in the literature review under the other mechanisms. For instance, a solicitation for a contribution is likely to be more effective if giving in response to the solicitation provides an opportunity to acquire, maintain or strengthen a positive social reputation. In addition, some types of people may be more compliant with requests for charitable contributions than others. The analyses reported in Bryant et al. (2003) suggest this; however, because this study is based on survey data it may also reflect self-selection of these respondents. Finally, one remarkable study tested whether monetary compensation paid to solicitors for successful solicitations affects the likelihood of success (Gneezy & List, 2006). One group of solicitors were paid 100% more for going door to door than another group. The result was that an initially positive effect of overpayment waned after a few hours.

### **Mechanism 3: Costs and benefits**

While we have found no studies that investigated moderators of the effects of material benefits of donations, many studies have examined moderators of the material costs of giving.

Price effects depend on the psychological benefits of donations, national context, characteristics of recipient organizations, and personal characteristics of donors.

*Psychological benefits.* It makes a difference how price reductions are framed: when price reductions are presented as rebates - 'when you give €1, you pay only €0.50' - they are less effective than when presented as matches - 'when you give €1, we'll add another €1'; (Bekkers, 2005; Eckel & Grossman, 2003, 2004). It is believed that framing price reductions as rebates yields a perceptual focus on the material costs of donating. Framing price reductions as matches, in contrast, yields a perceptual focus on the benefits for beneficiaries of donations. However, other studies cast doubt on the generality (Fraser & Hite, 1989) and validity (Davis, Millner, & Reilly, 2005) of the framing effect.

That the subjective perception of costs is important also becomes apparent from the 'low ball-effect'. The low ball technique refers to the practice of revealing hidden costs after people have expressed willingness to comply with a request (Cialdini, Cacioppo, Bassett, & Miller, 1978). For instance, people are first asked to donate a small amount (they are thrown the low ball), for example a donation to a museum of \$0.75. After they have agreed to do so, an additional amount is requested, for example \$0.25 for the museum's children's program (Brownstein & Katzev, 1985). Another set of findings illustrating that it matters how costs are perceived concern the 'door-in-the-face effect'. This effect refers to the observation that people are more likely to comply with a request after they received a more sizeable request that they find unacceptable. Compared to the first, excessive request, the second appears as a small concession (Abrahams & Bell, 1994; Cialdini et al., 1975; Reingen, 1978). In a study by Brownstein and Katzev (1985), visitors to a museum were asked to donate \$1 'to cover reduced funding'. In a control group, 73% did so; in an experimental group that first received a request to donate \$5, 87% did so (though this difference is not statistically significant, pp. 570-571). Fundraisers who want to use this technique should be aware that the first request

should be perceived as legitimate. If not, a boomerang effect may occur (Schwarzwald, Raz, & Zvibel, 1979). The Door-in-the-face effect can be enhanced by having a person make the request whose approval the potential donor finds more important (Williams & Williams, 1989).

*National context.* There are substantial differences between countries in the price of giving as well as in the price effect. Wong, Chua and Vassoo (1998) find much stronger price effects for donations in Singapore (varying from -2.0 to -5.5) than commonly found in U.S. studies; Wu, Huang and Kao (2004) find price effects ranging from -2.2 to -3.3 in Taiwan. However, UK residents seem to be less responsive to tax incentives (A. Jones & J. Posnett, 1991; A. M. Jones & J. W. Posnett, 1991). In addition, there are also large differences in the extent that people choose to itemize their gifts. For example, in the Netherlands, religious groups use tax deductions extensively (Wiepking, 2007). But those religiously affiliated in Canada itemize rarely (Kitchen, 1992). Non-itemizers are less sensitive to changes in tax price (Duquette, 1999; Eaton, 2001). One reason may be that they don't know about the deduction (McGregor-Lowndes, Newton, & Marsden, 2006). Obviously, if households do not know about the possibility of deducting donations from their tax income, they are unlikely to respond to tax incentives. In such cases, publicizing favourable tax treatment of charitable contributions is likely to increase the donor pool and/or the amount contributed (Boatright, Green, & Malbin, 2006).

*Subsector.* Different studies find different price effects for different types of organizations. Widely different estimates are reported by Schiff (1990). Religious donations appear less price sensitive than donations to non-religious organizations in three studies (Feldstein, 1975b; McClelland & Kokoski, 1994; Taussig, 1967) but more price sensitive in another (Reece, 1979). Price effects on donations to international relief and development



organizations appear to be larger than on donations to other organizations (Ribar & Wilhelm, 1995).

*Personal characteristics.* Personal characteristics moderating the price effect include marriage and income. Married males are found to be more sensitive to the price of giving than married females (Andreoni & Payne, 2003). Price effects usually increase with income (G. E. Auten, Cilke, & Randolph, 1992; Duquette, 1999; Feldstein & Taylor, 1976; O'Neill, Steinberg, & Thompson, 1996; Robinson, 1990); some studies find that among the highest income groups price effects decline again (Boskin & Feldstein, 1977; Feldstein, 1975a; Taussig, 1967). A study of philanthropy in Singapore found that the tax price effect declined with education (Chua & Wong, 1999).

#### **Mechanism 4: Altruism**

Effects of altruism vary with the awareness of need and the efficacy of donations, the information about donations of others provided to potential donors, beliefs about changes in contributions by others; the size of contributions of others; fundraising activities by nonprofit organizations. Also, altruism effects differ between sectors receiving donations and between donors with different levels of income.

*Awareness of need and efficacy.* If the nonprofit organization publicizes donations received, donors may react in several ways. If the need for contributions is perceived as lower because of the increase in contributions by others, donors may lower their own contribution. This tendency, however, may be offset by the quality signal sent out by the donations of others. If high status individuals made a contribution, donors may take that contribution as a signal that the charity is of a good quality, enhancing the organizations' perceived trustworthiness and efficacy.

*Amount contributed by others.* Contributions by others may have decreasing marginal utility: studies of American theatres (Borgonovi, 2006) and symphony orchestras (Brooks, 2000b) reveal that small increases in public funding have a stronger crowding-in effect than large increases.

*Subsector.* Crowding out estimates appear to be stronger in the human services sector with a number of studies finding considerable crowding out (Amos, 1982; Ferris & West, 2003; Hungerman, 2005; Payne, 1998; Schiff, 1990), while other studies find smaller or no crowding out effects (Brooks, 2002; Lindsey & Steinberg, 1990; Long, 2000; Reece, 1979; Steinberg, 1985). One study from the U.K. found slight crowding in (Posnett & Sandler, 1989). Bielefeld, Rooney & Steinberg (2005) find that higher state social service spending is associated with a lower likelihood of households donating, but find no link with the amount contributed. For organizations in the health sector several studies find some crowding out (Brooks, 2000a; Khanna, Posnett, & Sandler, 1995). State funding for research has been found to crowd in private contributions (Connolly, 1997). Results for nonprofit organizations in the arts and culture sector have been mixed (Brooks, 1999, 2000a; Hughes & Luksetich, 1999).

Obviously, the effect of a third party contribution depends on the information about the third party contribution given to other potential donors. In many cases, donors do not know about changes in the contributions of others (Horne, Johnson, & Van Slyke, 2005). In most cases when government grants are announced, it is unclear to individuals that the grants are financed with taxes ultimately paid by citizens themselves. When this is made clear to individuals, third party contributions crowd out individual contributions (Eckel, Grossman, & Johnston, 2005). In 'crowding out' experiments, information about the behaviour of others is explicitly provided to participants. Hence, it should come as no surprise that laboratory

experiments usually find larger crowd-out estimates than studies using survey or tax data (Andreoni, 1993; Vesterlund, 2006).

*Fundraising activities.* The net effect of a change in contributions from third parties depends on the reaction by the nonprofit organization. One potential reaction is to reduce fundraising efforts (Andreoni & Payne, 2003). Another potential reaction is to increase the number or quality of services rendered to donors. A study of American theatres revealed that government funding at both the state and federal level had a crowding in-effect on private contributions (Borgonovi, 2006), a finding potentially caused by the provision of more or better services paid for by government grants.

*Group size.* The weight of altruistic concerns decreases with group size. In a large economy, individual contributions have little impact on the provision of public goods. Because most philanthropic organizations raise funds from a large audience, altruism is likely to be only a minor force (Ribar & Wilhelm, 2002).

*Income.* One characteristic of donors examined as a moderator of crowding out effects is income. Altruism seems to decrease with income until \$100,000, after which it increases (Andreoni, 1990).

### **Mechanism 5. Reputation**

The effect of reputation on giving increases with the value of approval received by donors. The value of approval depends on the strength of ties with persons who may observe donation acts, liking of the solicitor, group size, social norms and social status of the donor and solicitor.

*Strong ties.* Approval has a more pronounced effect when third parties with whom the potential donor has a stronger social bond (a ‘strong tie’) are able to observe the act of giving. In this condition, a mix of social and psychological benefits enhances the effect of reputation.

When a complete stranger can observe giving, there is less social pressure than when a friend or family member is present. Social pressure is especially strong when a strong tie makes a request for a donation. A survey study on giving intentions showed that solicitations by persons at a closer social distance are more likely to be honoured (Bekkers, 2004). Evidence on the impact of relationship strength on donations from surveys is mixed. While Sokolowski (1996) found that being asked to contribute by a significant other does not increase the total amount donated, Schervish and Havens (1997) find that people who are asked to give by a relative or a friend donate a larger percentage of their income. Booth, Higgins and Cornelius (Booth, Higgins, & Cornelius, 1989) find that per capita United Way contributions are higher in communities with stable populations and higher voter turnout. Not giving in social contexts where peers value giving and are important in daily life would not only endanger one's reputation, but also the relationship with these peers.

*Psychological benefits: liking of solicitor.* The value of approval increases with liking of the solicitor, which increases the psychological benefits of donating. One way to increase liking is through similarity (Byrne, 1971). Requests by similar persons are more likely to be honoured because we like them better. Field experiments on helping behaviour have found similarity effects for religion (Yinon & Sharon, 1985), race (Bryan & Test, 1967; Gaertner & Dovidio, 1977), gender (Bryan & Test, 1967; Lindsfold, Forte, Haake, & Schmidt, 1977), social attitudes (Sole, Marton, & Hornstein, 1975), educational institution (Aune & Basil, 1994; Howard, Gengler, & Jain, 1995), and personal characteristics such as sharing a birthday or name (Burger, Messian, Patel, del Prado, & Anderson, 2004).

Even when total strangers solicit contributions, familiarity with these strangers created by a brief unrelated dialogue increases the likelihood of contributions, possibly because familiarity increases liking (Dolinski, Grzyb, Olejnik, Prusakowski, & Urban, 2005; Dolinski, Nawrat, & Rudak, 2001; Macaulay, 1975). Increased liking is also a likely explanation for the

finding that students tend to give more to professors who remember their name (Howard, et al., 1995).

Another mundane factor that promotes liking is beauty. A few studies have found that people are more likely to give to physically attractive people (Landry, Lange, List, Price, & Rupp, 2006; West & Brown, 1975; Wiesenthal, Austrom, & Silverman, 1983). One study found this to be the case more strongly for males answering the door (Landry, et al., 2006). This may be a reason why female solicitors are sometimes more successful than male solicitors (Lindskold, et al., 1977). One survey study on alumni giving found an opposite sex-effect (Belfield & Beney, 2000), but an experimental study did not (Bekkers, 2007).

Attire may also moderate the effect of approval. Well-dressed solicitors raised more money in two studies, (Levine, Bluni, & Hochman, 1998; Williams & Williams, 1989), but not in two others (Bull & Gibson-Robinson, 1981; McElroy & Morrow, 1994).

*Group size.* The value of approval increases with the number of persons recognizing the gift. One study found that people give more when accompanied by others, especially by females (Jiobu & Knowles, 1974). Another study we found tested the effect of multiple solicitors. When requests for donations are made by two solicitors, people are more likely to give – though less than twice (Jackson & Latané, 1981).

*Social norms.* The value of approval also increases with the perceived desirability of giving among one's peers. Religious persons are expected to be more generous than the non-religious (Bekkers & Schuyt, 2008). A failure to give has a more negative effect on the reputation of religious persons than on that of non-religious persons (Bailey & Young, 1986).

*Social status.* Social status of both the donor and the solicitor enhance the value of approval. When people are solicited for a donation by a person of higher social status, they are more likely to give (Jackson & Latané, 1981; Pandey, 1979; Vriens, Scheer, Hoekstra, & Bult, 1998). One study found that Baptists in the Netherlands donated more when ministers

recommend an offering (Soetevent, 2005). Also when the potential donor has a higher social status she is more likely to give, probably because the norm to give is stronger. The expression ‘noblesse oblige’ represents this observation. The elite is given a special obligation to look after those lower on the status rank of society. Not giving would endanger one’s elite position (Odendahl, 1990; Ostrower, 1997).

*Need for social approval.* Some individuals may be more sensitive to social approval for helping, and react more strongly to the observability of a donation (Satow, 1975). Such individuals are likely to have an altruistic self-image, which will be discussed below (mechanism 6).

*Overall strength of effect.* Reputation has a strong effect on giving. It may easily overpower effects by other mechanisms. This holds for the costs mechanism, for instance. When asked for a contribution to a charitable cause by one’s spouse, the amount requested does not matter (Bekkers, 2004). Spouses also draw each other into volunteering (Rotolo & Wilson, 2006). One study found reputation to have a stronger effect than awareness of need. In this study, the effect of reputation in face-to-face solicitations, even by unknown solicitors, was so strong that it took away the effect of a picture of beneficiaries. In a direct-mail campaign for the same cause, the picture increased donations (Thornton, et al., 1991).

### **Mechanism 6. Psychological benefits**

In the discussion of moderators of the other mechanisms, we have included psychological benefits. From the perspective of the other mechanisms, psychological benefits enhance the effects of these mechanisms. Viewed from the perspective of the psychological benefits, one could also say that the other mechanisms enhance the effects of psychological benefits.

We have not yet discussed the interaction between psychological benefits and solicitation. Such an interaction occurs in the foot-in-the-door effect (DeJong, 1981; Gueguen & Fischer-Lokou, 1999; Pliner, Hart, Kohl, & Saari, 1974; Reingen, 1978; Rittle, 1981; Seligman, Bush, & Kirsch, 1976; Williams & Williams, 1989). It is believed that the initial small request creates or activates a self-image of helpfulness, which creates pressure to behave in a helpful manner on a subsequent occasion. In line with the self-image explanation, the effect of an initial request is reduced when pay is offered in return for compliance with the initial request (Zuckerman, Lazzaro, & Waldgeir, 1979). Another study found that when the first request is too small to activate a helpful self-image, it does not increase compliance with the second request (Seligman, et al., 1976). However, it should be noted that alternative explanations for the Foot-in-the-door effect are possible (Kilbourne & Kilbourne, 1984). One alternative explanation is that the first request heightens awareness of need.

However, the foot in the door-technique does not always work. Brownstein and Katzev (1985) found that first asking to sign a petition in support of an art institution did not increase compliance with a subsequent request for a donation for this art institution. Allison, Messick and Samuelson (1985) found that sending a flyer with a questionnaire actually reduced the amount contributed subsequently. Weyant (1996) found a negative effect of the foot-in-the-door technique in a door-to-door collection for the American Cancer Society.

### **Mechanism 7. Values**

Very few studies have tested for moderators in relationships of values with philanthropy. An exception is Fong (2007), showing that humanitarianism/egalitarianism is only positively related to donations to welfare recipients when the recipients appeared more worthy of support. Another exception is a recent study of guilt appeals, showing that feelings of responsibility are increased by the presence of others who may approve of donations (Basil,

Ridgway, & Basil, 2006). Also, a survey study revealed that contributions to religion are less strongly related to social values than contributions to other organizations (Bekkers & Schuyt, 2008).

### **Mechanism 8. Efficacy**

We have not found any experimental studies showing how effects of efficacy are moderated by other factors. One survey study shows that perceived efficacy is more strongly related to donations to religious causes, international relief, and domestic public benefit organizations among people with stronger altruistic values (Bekkers, 2006).



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