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Gift giving: an interdisciplinary review

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• *The issue of why individuals choose to support charity has been the focus of considerable research in the disciplines of economics, psychology, social psychology, sociology, anthropology and more recently, management and marketing. This paper draws together extant work, developing a content model of giving behavior that fundraisers may use to inform their professional practice. A number of specific propositions are developed from the literature to assist in this goal. The paper provides summary tables of existing empirical studies categorized by the dimensions of the model, explores ambiguity in research findings, and concludes by highlighting opportunities for further research.*

Introduction

In the US, total giving to the nonprofit sector in 2004 stood at $248.52 billion, representing a 2% increase over the previous year (AAFRC Trust, 2005). A staggering 90% of Americans offer donations to nonprofits with people giving on average 2% of their income and contributing 76% of the total income accruing to the sector (the balance coming from corporations, foundations, and bequests) (AAFRC Trust, 2005).

The issue of why individuals elect to offer this monetary support is a topic that has long been of interest (Wispe, 1978). Over the past 3 centuries several schools of thought have emerged from the economics, clinical psychology, social psychology, anthropology, and sociology literatures. More recently, marketing's contribution to the subject has been recognized and a succession of authors has now demonstrated its utility (c.f. Bendapudi *et al*., 1996). The intention of this paper is to draw together the disparate strands of this literature, highlighting the implications of prior research, and developing a composite model of giving behavior. At each stage, the ways in which nonprofits can manipulate their promotional activity to maximize the likelihood of support are presented.

To set this work in its proper context, it is important to begin by recognizing the contribution of a number of previous models of helping behavior, notably those developed by Burnett and Wood (1988), Guy and Patton (1989), and Bendapudi *et al*. (1996). While this latter paper (in particular) is now rightly regarded as seminal, it is important to recognize a number of key limitations. Notable among these is a failure to consider what could be regarded as 'processing determinants' or the factors that donors use to evaluate *between*

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the charitable alternatives available to them. The model also neglects the role of critical aspects of organizational performance such as service quality in determining whether subsequent donations will be made. Similarly, while the authors consider a variety of donor variables they do not give adequate consideration to the range of individual characteristics that would determine whether or not support would be offered and if so, the value and form this might take. The model may finally be criticized for failing to address the critical topic of feedback from nonprofit to donor and the role that this might play in facilitating further donations.

Furthermore, all these extant studies are now somewhat dated and a variety of new theories have been developed both in relation to giving and the manner in which specific classes of appeal might work. Indeed, there are now a number of specialist journals devoted to this field, the contribution of which now warrants particular review (i.e., Nonprofit and Voluntary Sector Quarterly, Nonprofit Management and Leadership, Journal of Nonprofit and Public Sector Marketing, and the International Journal of Nonprofit and Voluntary Sector Marketing).

This paper intends to address the shortcomings alluded to above in the specific context of monetary donations. While many of the studies cited have broader implications, it is not the intention of this paper to consider other forms of helping behavior, such as gifts of time, blood, or body parts. The model proposed is illustrated in **Figure 1**. In the review that follows, each dimension of the model is considered and justified in turn. A review of all pertinent work is presented and the key findings from empirical studies are summarized in a table accompanying the explanation of each stage of the model. For the sake of brevity, the more intuitive findings are omitted and those most likely to be of

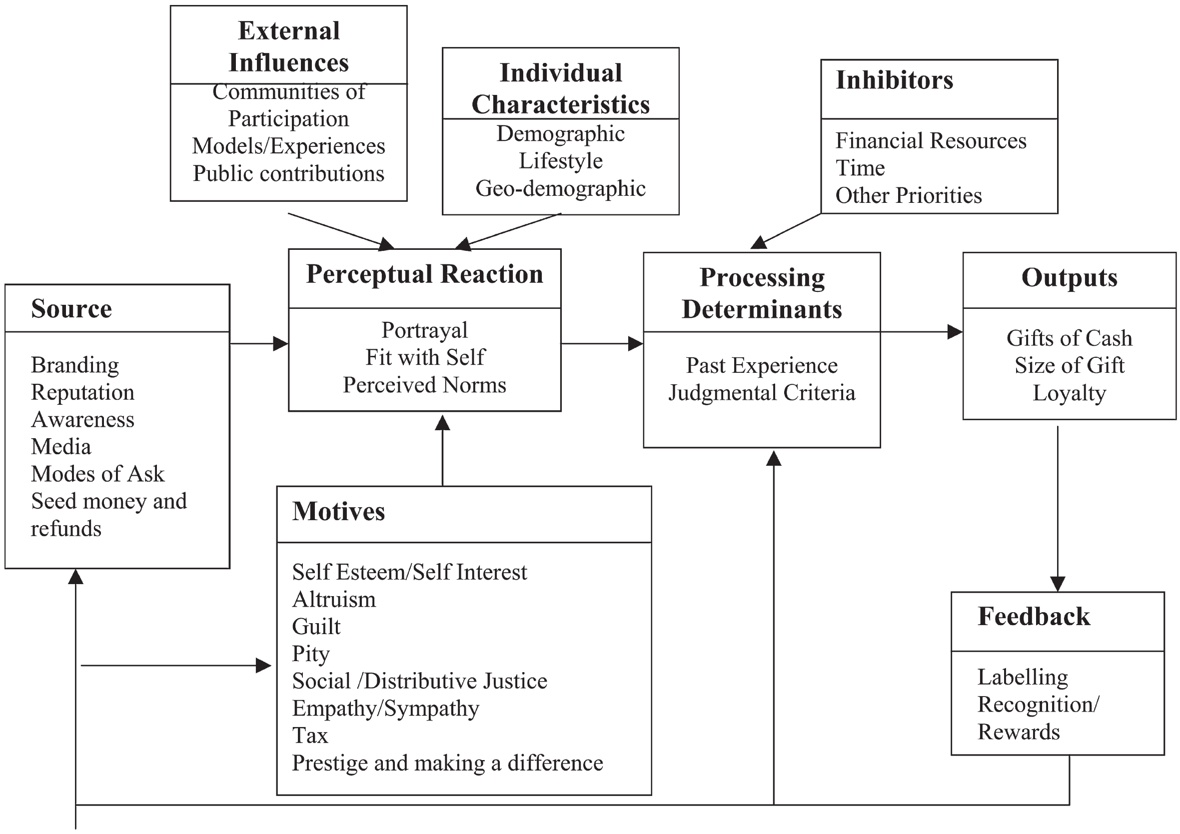

Figure 1. Giving behavior model.

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interest to fundraising practitioners focused on. A series of propositions to guide current fundraising practice at each stage are provided and the paper concludes by exploring the opportunities remaining for further research.

The literature presented was compiled in 2005 by reference to the Proquest, PsychINFO, and Business Source Premier databases. In addition, since a number of the nonprofit journals are not abstracted on these services a manual review was undertaken of all papers published in these sources. Finally, a review was undertaken of books stored in the Indiana University Philanthropic Studies Library. The keywords of donor, donation, fundraising and fundraising were employed for the purposes of each search. While it is impractical here to cite every work identified, the works listed in the review that follows are felt to be representative of the current state of research in this field.

Source

Analysis begins by examining extant work on the 'source' of the fundraising solicitation. Emergent work on nonprofit branding, the impact of awareness, the use of specific media, and the overall approach adopted has developed the authors' understanding of the characteristics of fundraising solicitations that might lead to success.

Branding

As Tapp (1996, p. 335) notes, while 'charities do not describe much of what they do as "branding," organizations have long been concerned with maintaining a consistent style and tone of voice and conducting periodic reviews of both policies and actions to ensure that a consistent personality is projected.' In his view, the clarity with which this 'personality' is projected will have a direct impact on an organization's ability to fundraise (see also Grounds and Harkness, 1998). Venable *et al.* (2005), following Aaker (1997), identify four dimensions to the nonprofit brand personality, namely integrity, nurturance, sophistication, and ruggedness. Sargeant and Hudson (2005) argue that the picture is more complex identifying three facets of charity personality shared by the sector as a whole. In a study of 9000 individual donors the authors find that only values pertaining to the dimensions of 'emotional stimulation,' 'service,' 'voice,' and 'tradition' are capable of distinguishing between organizations. Interestingly, it is only those facets of personality perceived to be distinctive that are linked to donor behavior and in particular to the percentage of an individual's charitable pot that will be directed to the focal organization.

Proposition 1a: *Higher levels of nonprofit brand recognition and understanding are associated with superior performance in fundraising.*

Proposition 1b: *The perceived degree of differentiation of a charity brand is associated with the proportion of a donor's charity 'pot' that will be allocated to the organization in question.*

Reputation and awareness

Work by Kelman (1961) suggested that messages are more likely to be accepted by donors when the organization is already known to them and is perceived as reputable. McNair (2005) demonstrates empirically a link between awareness and donations, while Bendapudi *et al.* (1996) offer a potential explanation, suggesting that if understanding of the nonprofit's image is lacking, donors may either ignore communications or 'distort' them to preclude their support. Stark (1989) highlights the significance of agency theory in relation to this issue, since in making donations donors are in effect requiring nonprofits to act as their agents in disbursing funds. The reputation of a nonprofit will provide numerous clues as to how well a particular nonprofit will perform in this capacity.

Social impact theory (Latane, 1981) also tells us that the role of reputation may vary by con-

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text. In less personal forms of fundraising, for example, direct mail, press, or radio advertising, the donor may be entirely reliant on their perception of the organization in deciding to offer a donation. In face-to-face forms of fundraising the donor will have a number of more immediate cues that may trigger a donation, such as the number, gender, and appearance of solicitors.

Proposition 2a: *Nonprofits perceived by donors as having good or positive reputations will achieve superior performance in fundraising.*

Proposition 2b: *The influence of reputation on fundraising performance will vary by media context. It will be stronger in impersonal fundraising contexts.*

Media

Nonprofits currently engage in a variety of different fundraising techniques employing media, such as direct mail, telemarketing, face-to-face (on-the-street), door-to-door, press advertising, radio advertising, and Direct Response Television (DRTV) (Sargeant and Kaehler, 1998). An emergent body of literature on benchmarking the performance of specific media suggests that both initial returns and the lifetime value of supporters recruited will vary by media employed (Sargeant and McKenzie, 1998; Sargeant *et al*., 2006). Extant work also reports that the profile of the donors recruited by each media may vary in terms of their demographic, lifestyle, and behavioral characteristics (e.g., Jay, 2001; Aldrich, 2004). The use of electronic media for fundraising purposes remains fertile territory for research, with neither the returns accruing from these techniques, nor the concomitant donor profiles or behavior presently explored.

Mode of ask

As Levis (1990) reminds us, to get a donation it is necessary to ask, since few gifts arrive unsolicited. The form of the solicitation, or mode of ask, has received considerable attention. Weyant and Smith (1987), for example, found that lowering the sums requested in direct mail greatly increased the donor compliance rate. Other writers have concentrated on the manner in which the ask is framed. Authors such as Reingen (1978), Weyant (1984), Reeves *et al*. (1987), and Fraser *et al*. (1988), identified that legitimizing low value contributions (i.e., with a phrase such as 'every penny will help') can greatly improve compliance in face-to-face forms of solicitation. Brockner *et al*. (1984), Reeves *et al*. (1987), and Weyant and Smith (1987) conclude that this approach is less effective in other less personal forms of fundraising such as direct mail (see also Weyant, 1996). The appeals scale (i.e., the discrete menu of amounts from which a potential donor chooses the level of their donation, for example, $2, $10, $25, $50, etc.) used by the fundraiser has also been shown to influence donor behavior, notably the distribution of donations received (Desmet and Feinberg, 2003). This suggests that fundraisers should use appeals scales as a way to optimize, rather than facilitate donations, by considering whether the scale is in line with donor expectations and reference systems.

Work by Wang *et al*. (1989, p. 181) notes the impact of 'reciprocal concession' on fundraising. Individuals, they note 'are obliged to respond with a favor after other individuals have made a concession to them.' Thus in personal forms of solicitation, the authors argue it is better to begin by asking for a high sum and then if the donation is refused at that level to offer a concession (see also Cann *et al*., 1975; Cialdini and Ascani, 1976; Mowen and Cialdini, 1980). It is interesting to note, however, that other studies have found that multiple asks will also be effective where the initial request is *lower* than the target (Freedman and Fraser, 1966; Cann *et al*., 1975), so it could perhaps be concluded only that multiple asks are more effective in generating compliance than solus asks.

Freedman and Fraser (1966) argue that charities should solicit new donors by begin-

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ning with requests for small sums and then building these up over time. This is echoed in modern fundraising practice where many UK charities solicit gifts of as little as $5 per month (Pidgeon, 2001). Zuckerman *et al.* (1979) suggest that this process works well since a low value ask eliminates many potential barriers to giving. Where donors cannot post-rationalize their giving as a response to social or other pressures they are significantly more likely to attribute their first donation to caring about the cause and hence to continue to support the organization.

Brownstein and Katzev (1985) identify the utility of employing a 'low ball' technique in on-the-street fundraising. In soliciting gifts from passers by, individuals could, for example, be asked for 75c for one cause and while they are seeking the appropriate change, asked for a further 25c for another cause. Compliance rates were found to be higher using this technique than in the case of asking for a high initial contribution or using so-called 'foot-in- the-door' techniques, such as asking for a signature on a petition, before asking for money.

The utilization of techniques that engender a stronger sense of relationship has also been found to increase compliance (Roloff, 1987; Roloff *et al.*, 1988; Aune and Basil, 1994), with a number of writers now noting the 'foot-in-the-mouth' effect. In essence, there is strong evidence to suggest that on commencing a solicitation, asking people how they feel, then acknowledging their response, and then asking for a donation greatly enhances compliance. Howard (1990) argues that people will behave in a manner consistent with the state they have described themselves as feeling. If prospects reply that they 'feel great' they will strive to maintain a consistency in what Osgood and Tannenbaum (1955) refer to as their 'general affective state.' It is therefore much less likely that a donation will be refused (see also Bem, 1965; Cialdini and Schroeder, 1976; Howard, 1990). It is interesting to note that the gender of the asker would also appear to have an impact (Lindskold *et al.*, 1977), as would the level of familiarity the prospect has with the individual making the request (Macaulay, 1975).

Proposition 3a: *Lowering the sum requested in a fundraising solicitation will tend to increase donor compliance.*

Proposition 3b: *Multiple asks in a fundraising solicitation will generate higher degrees of compliance than solus asks.*

Proposition 3c: *The characteristics of the fundraiser are associated with the level and nature of donor compliance. In face-to-face contexts female fundraisers generate higher levels of compliance than males. In addition the degree of familiarity an individual has with a fundraiser will also positively impact on compliance and giving.*

Empirical studies pertaining to mode of ask are summarized in **Table 1**.

Seed money and refunds

Some professional fundraisers believe that a substantial amount (40–50%) of the total fundraising goal should be pledged as seed money before starting a public campaign (Fundraising School, 1999). This is in keeping with Andreoni's (1998) positive theory of capital campaigns for threshold public goods. List and Lucking-Reiley (2002) were the first to provide quantitative empirical support for this model of charitable giving, finding that increasing seed money from 10% to 67% of the campaign goal produced a nearly sixfold increase in contributions, both through more individuals contributing, and larger sizes of gifts. Potters *et al.* (2005) also found that where the order of contributions is set exogenously by a third party, such as a fundraiser, announcing initial contributions (i.e., the seed money) helps to maximize the level of contributions, rather than allowing donors to set the sequence of moves themselves. Another approach when raising money for a threshold public good is offering refunds to contributors should the threshold not be

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Table 1. Empirical studies pertaining to mode of ask

Author(s)	Method	*N*	Key findings
Aune and Basil (1994)	Field experiment—face-to-face solicitations	153 (Students)	Foot in the Mouth (FITM) approaches generate positive relational perceptions, but relational obligations approaches produce more positive relational perceptions than the FITM approach
Brockner *et al*. (1984)	Field experiment telephone and face-to-face solicitation	90	Requests for smaller sums increase compliance without lowering the value of the mean contribution. Compliance greater in face-to-face context
Brownstein and Katzev (1985)	Experiment	89	Low ball technique was more effective than door-in-the-face and foot-in-the-door
Cann *et al*. (1975)	Field experiment	60	In face-to-face contexts it is optimal to ask for a high sum and then offer a concession on refusal
Cialdini and Ascani (1976)	Experiment	189	Rejection then retreat procedures are superior to techniques that do not involve the offering of a concession
Cialdini and Schroeder (1976)	Two field experiments—door-to-door solicitations	84 + 169	Utilizing the phrase 'even a penny will help' enhances compliance without lowering the mean contribution—hence maximizing donated funds
Desmet and Feinberg (2003)	Experiment	'Large-scale'	Both the appeals scale used and the values on the scale influence the distribution of donations received. Three reference systems (points on the appeals scale, values of common denominations, and intended or anticipated amount) should be taken into account when designing the appeals scale, to avoid donors 'resisting' the options on the scale and engaging in habitual behavior
Fraser *et al*. (1988)	Field experiment house-to-house solicitation	640	Utilizing the phrase 'even a penny will help' enhances compliance without lowering the mean contribution—hence maximizing donated funds
Freedman and Fraser (1966)	Two field experiments telephone solicitation	156 + 127	Multiple asks effective where initial request is lower than the target. Finding holds even where second ask is unrelated and carried out by a different person
Howard (1990)	Multiple field experiments—telephone solicitations	80, 120, 160	Asking someone how they feel, and then acknowledging that response facilitates compliance with a charitable request
Lindskold *et al*. (1977)	Field experiment face-to-face solicitations	3000 (Students)	Female solicitors generate more compliance in personal asks
Macaulay (1975)	Experiment	131	Increase in familiarity leads to increased positive action irrespective of the attractiveness of the requester

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Mowen and Cialdini (1980)	Two field experiments—face-to-face solicitation	192 + 216	By making a second request for a reduced proportion of the original the researcher can increase a targets' perception of a concession which invokes the norm that concessions should be reciprocated
Reeves *et al.* (1987)	Field experiment house-to-house solicitation	240	Requests for smaller sums increase compliance without lowering the mean value of the contribution
Reingen (1978)	Field experiment face-to-face solicitation	224 (Student sample)	Utilizing the phrase 'even a penny will help' enhances compliance without lowering the mean contribution—hence maximizing donated funds
Roloff *et al.* (1988)	Questionnaire	60 (Students)	Increasing intimacy with a potential helper increased obligations to grant requests for resources
Staub and Baer (1974)	Field experiment	58	Individuals more likely to help when 'escape' is hindered, or subject is in their path
Wang *et al.* (1989)	Field experiment house-to-house solicitation	409	In face-to-face contexts it is optimal to ask for a high sum and then offer a concession on refusal
Weyant (1984)	Field experiment house-to-house solicitation	359	Requests for smaller sums increase compliance without lowering the value of the mean contribution
Weyant and Smith (1987)	Field experiment postal solicitation	6000	Requests for smaller sums increase compliance without lowering the mean value of the contribution
Zuckerman *et al.* (1979)	Experiment—telephone solicitation	127	Foot in the door technique increased the likelihood of compliance with a relatively large demand

met (Bagnoli and Lipman, 1989). List and Lucking-Reiley's (2002) research showed that while refunds do not appear to affect donor participation rates they do produce significantly larger gift sizes.

Proposition 4a: *Increasing the proportion of seed fund money will increase both compliance and the level of giving.*

Proposition 4b: *Offering contributor refunds will increase the level of the average donation offered.*

Perceptual reaction

Whatever form the ask might eventually take, there are a number of variables which the literature suggests will tend to impact on a potential donor's perceptual reaction to the message being conveyed. In particular donors receiving positively framed messages, designed to make them feel good, are statistically more likely to respond than those donors offered primarily negative messages, designed to make them feel bad (Benson and Catt, 1978). The key variables impacting on perceptual reaction would appear, however, to be the portrayal of the individual(s) in need, the fit of the charity with a given donor's self-image, and the existence of perceived norms of behavior. Each of these variables will now be considered in turn.

Portrayal

The manner in which charitable beneficiaries should be depicted in fundraising communications has received considerable attention in the literature. As Batson (1987) notes, donors will only give when there is an identifiable gap between what the donor believes should be the situation of a particular group and what is actually the case.

The portrayal of the charitable 'product' can also have an impact on recall, attitudes toward support, and actual giving behavior. Donors will tend to support those charities that represent the needy in an acceptable way

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(Eayrs and Ellis, 1990). Pictures of, for example, an overtly handicapped child, have been shown to actually decrease the response to door-to-door giving solicitations. Similarly Isen and Noonberg (1979) report that a picture of a starving child in door-to-door solicitations reduced compliance. Brehm (1966) argues from reactance theory that people possess a number of behavioral and attitudinal freedoms. Distressing photographs act to reduce a prospective donor's perceived ability to be able to spend their monies elsewhere and hence, ironically, create barriers to the gift being made (see also Brehm and Brehm, 1981). It has also been argued that donors perceive depictions of 'excessive' need as manipulative and, hence, compliance falls (Moore *et al*., 1985). The balance of evidence thus suggests that the strength of need depicted should be strong enough to indicate the worthiness of the case, but not so strong that it is seen as a 'hard sell.'

Appeals for charities concerned with disability often emphasize the dependence of those individuals with the respective disability. There is now considerable evidence that such appeals are successful in engendering feelings of sympathy (Roehler, 1961; Lattin, 1977; Feldman and Feldman, 1985; Jones, 1985; Brolley and Anderson, 1986) and feelings of guilt and pity (Krebs and Whitten, 1972; Pieper, 1975; Feldman and Feldman, 1985). The literature is less united, however, in respect of the degree to which dependency should be exhibited. Writers such as Berkowitz and Daniels (1962) and Midlarsky (1971) conclude that greater degrees of perceived dependency are related to greater degrees of help. Wagner and Wheeler (1969) meanwhile conclude that when the level of dependency is perceived as permanent, the level of dependency has no effect on the amount likely to be given. Using different terminology, Adler *et al*. (1991) identify that portraying recipients as succumbing to their condition (in contrast to coping) has no impact on the pattern of donations. They do, however, identify a strong impact on the subsequent attitudes of the donor toward the recipient group.

This latter point is of particular interest since many authors argue that portraying people with disabilities as dependent may well harm the long term interests of the beneficiary group by reinforcing negative stereotypes and attitudes (Harris and Harris, 1977; Elliot and Byrd, 1982). Positive portrayals on the other hand, seem to engender positive attitudes (Harris, 1975; Shurka *et al*., 1982). On a related theme, there is evidence that attractive people are perceived as more worthy than unattractive people (Latane and Nida, 1981) and that female subjects would appear to engender greater rates of compliance than male subjects (Gruder and Cook, 1971; Feinman, 1978). The portrayal of the responsibility of recipients for their own condition can also impact on compliance. Piliavin *et al*. (1975) identified that the extent to which an individual could be blamed for his/her needy condition would directly impact on both the degree of compliance and the levels of support proffered.

Proposition 5a: *The manner in which beneficiaries of charity are depicted in charity solicitations impacts on the level of compliance achieved. Depictions of 'excessive' need decrease compliance.*

Proposition 5b: *Increasing the perceived dependency of beneficiaries increases compliance and giving only where the need is not perceived as permanent. Where the need is perceived as permanent, increasing the perception of dependency will have no impact on donor behavior.*

Proposition 5c: *Positive portrayals of beneficiaries engender positive attitudes on the part of donors.*

Proposition 5d: *Beneficiaries who may be blamed for their own condition attract lower rates of compliance on the part of potential donors.*

Empirical studies pertaining to portrayal are summarized in **Table 2**.

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Table 2. Empirical studies pertaining to portrayal

Author(s)	Method	N	Key findings
Adler *et al*. (1991)	Experiment	148 (Students)	Coping portrayals lead to more positive attitudes toward people with disabilities than subjects in a succumbing condition. No differences were found between the two conditions in respect of the sums donated
Berkowitz and Daniels (1962)	Experiment	32 (Students)	Significantly greater levels of performance are associated with a high dependency condition
Brolley and Anderson (1986)	Experiment and questionnaire	91 (students)	Positive advertisements do not foster more positive attitudes toward disabled persons than negative advertisements
Eayrs and Ellis (1990)	Experiment	100	Commitment to give money is most closely associated with feelings, such as guilt, sympathy, and pity and was negatively associated with posters which illustrate people with a mental handicap as having the same rights, value, and capability as non-handicapped persons
Feinman (1978)	Experiment	156	Female subjects receive more help than male subjects
Feldman and Feldman (1985)	Experiment	60 (Students)	Telephones have a strong positive influence on viewing public's perception of disabled persons. They do not impact significantly on donation behavior
Gruder and Cook (1971)	Experiment	113 (Students)	Dependency made no difference to the help given to males, but females who were dependent received significantly more help than females who were not dependent. They also received marginally more help than males who were dependent
Midlarsky (1971)	Experiment	80 (Students)	Greater degrees of perceived dependency are related to greater degrees of help
Milgram (1970)	Experiment	160	Female subjects receive more help than male subjects
Moore *et al*. (1985)	Panel	360 (198 of which present in all time periods)	A significant direct relationship was found between labeling conditions and attitudes toward giving and perceptions of the nonprofit organization
Piliavin *et al*. (1975)	Field experiment	166 trials	The natural appearance of a victim impacts on the rendering of help. Attractive subjects generate more help than unattractive subjects. The extent to which a subject could be blamed for its own condition also impacts on helping behavior
Shurka *et al*. (1982)	Four experiments	Four groups of 24 (Students)	The order of favorability for portrayals is 'coping not responsible,' 'coping responsible,' 'succumbing not responsible,' and 'succumbing responsible'
Wagner and Wheeler (1969)	Experiment	144	Need as defined by the solicitor had no impact on helping, but adjunctive analyses suggested that models could influence need as perceived by the prospective donor, which in turn could affect helping

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Fit with self

In respect of the second variable, fit with desired self-image, Coliazzi *et al*. (1984) noted that individuals are more likely to help those that are perceived as being similar to themselves. They will thus tend to filter those messages from charities existing to support disparate segments of society. The extremely wealthy, for example, tend to avoid causes involving the overtly poor (such as homelessness) and are much more likely to patronize organizations from which they, or members of their social class can draw benefit. As Ostrower (1996, p. 133) notes, they carve out a separate and exclusive arena for themselves quite distinct from the 'philanthropic arena of the economically disadvantaged,' supporting causes, such as the arts, education, and healthcare. Similarly, Millet and Crosz (2001) identify that those from ethnic minorities are significantly more likely to filter out messages from nonprofits not serving members of their community. Similarity may also take the form of similarity of values, which as Heider (1958) notes, may be just as powerful as physical similarity. Interestingly, differences in response to perceived similarity have been reported between individuals of different personality types. Individuals with authoritarian personalities are much more likely to be motivated by perceived similarity than those with egalitarian personalities (Mitchell and Byrne, 1973).

Proposition 6a: *There is a relationship between giving behavior and the extent to which the donor perceives the beneficiary to be similar to themselves. As the perceived similarity increases, so too does compliance with fundraising requests.*

Proposition 6b: *Fundraising solicitations that portray donors as generous and loving will tend to generate higher levels of compliance.*

Perceived norms

A factor closely related to the above is the issue of perceived norms. Donors will be motivated to filter messages on the basis of normative concerns (Morgan *et al*., 1979). People appear to pay considerable attention to what others contribute within their respective societal group. According to Rege (2004), the social approval a person gets from adhering to the norm is positively correlated with the population share adhering to this norm. Thus not only will donors tend to support individuals perceived as similar to themselves, the pattern of that response (or lack thereof) will be made in terms of beliefs about what is normative for the group (Blake *et al*., 1955; Macaulay, 1970).

Cialdini (1984), for example, notes that the knowledge that others are contributing legitimizes contribution and Reingen (1978) identified that showing prospective donors a fictitious list of previous donors led to higher donations and increased compliance. It is interesting to note that the length of the list of previous contributors also appeared to be an issue with longer lists outperforming shorter ones. More recently, Jones and McKee (2004) demonstrate that feedback information on relative sizes of received contributions during a fundraising campaign impacted positively on individual and total contributions, although Andreoni and Petrie (2004) found that revealing the identity of the donor, as well as the contribution amounts was necessary for giving to significantly increase. Experimental research by Gächter and Fehr (1999) reveals that social approval incentives (revealing the identity and contributions of each subject and making subjects discuss the contributions) have a significant effect on giving behavior, but only on those who know each other. However, Rege and Telle (2001) found that this effect extended to strangers too—the social approval incentive of writing contributions on a blackboard in front of subjects unknown to each other increased contributions by as much as 100%.

Proposition 7: *There is a relationship between individual giving and what is perceived normative for a donor's social group(s). Individuals will tend to exhibit what they regard to be normative behavior for groups they perceive themselves as*

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belonging to. They may also exhibit behavior associated with groups they aspire to join.

Empirical studies pertaining to 'fit with self' and 'perceived norms' are summarized in **Table 3**.

Processing determinants

Two key categories of variable appear to impact on the manner in which the giving decision is processed, namely the donor's past experience with a given charity (and with charitable giving in general), and the criteria that he/she might use to evaluate potential organizations for support. Each of these dimensions will now be considered in turn.

Judgmental criteria

Economists have long argued that donors make decisions in respect of their giving by reference to the degree of utility they will attain (Collard, 1978). While historically it was argued that this would take material form, it has recently been accepted that utility may also derive from the emotions evoked from giving (Arrow, 1972). Under this view donors will select charities to support on the basis of whether they have benefited in the past or believe that they will in the future (Krebs, 1970; Frisch and Gerrard, 1981; Amos, 1982). Individuals could, for example, give to those organizations that will do them political good and/or serve to enhance their career, perhaps through the networking opportunities that will be accorded (Frisch and Gerrard, 1981; Amos, 1982). Donors may also evaluate potential recipient organizations against the extent to which their support will be visible, or noticeable by others within their social group, thereby enhancing the donor's standing therein (Stroebe and Frey, 1982; Cnaan and Goldberg-Glen, 1991).

Individuals will also evaluate potential recipient organizations on the basis of the extent to which their performance is viewed as acceptable (Cutlip, 1980). Glaser (1994, p. 178) found that the variable 'an adequate amount spent per program' was the most important factor in the decision to contribute to charitable organizations. Donors appear to have a clear idea of what represents an acceptable percentage of income that may be applied to both administration and fundraising costs. Warwick (1994) identified that donors expect that the ratio between administration/fundraising costs and so-called charitable expenditure would be 20:80. It is interesting to note that despite this expectation most donors believe that the actual ratio is closer to 50:50. For example, Bennett and Savani's (2003) research shows that respondents perceived that only 46% of the focal charities' expenditures reached beneficiaries, when in reality the average figure was 82%. Harvey and McCrohan (1988) found that 60% was a significant threshold, with charities spending at least 60% of their donations on charitable programs achieving significantly higher levels of donation. Steinberg (1986) suggests that this is something of an anomaly since fundraising costs in particular are sunk, and should therefore not enter into a donor's decision to support a given charity.

On a related theme, perceived effectiveness is also an issue. Sargeant *et al*. (2001) identify that the degree to which the organization is seen to achieve its stated goals impacts on compliance, the total amount donated, and the lifetime value of individual donors. This is a view supported by Baily and Bruce (1992) who identified that perceived mismanagement by charity administrators and trustees can impact negatively on donations, although it remains unclear how donors actually draw such conclusions. To help individuals rate charity performance more accurately, it has been shown that charitable organizations simply need to provide relevant information in the public domain (e.g., the ratio of salary costs to total income and the rate of change in charity income for each $1 spent on marketing) (Bennett and Savani, 2003).

The extent to which an organization is regarded as being professionally run has also received attention in the literature. In two

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Table 3. Empirical studies pertaining to fit with self and perceived norms

Author(s)	Method	*N*	Key findings
Blake *et al.* (1955)	Experiment	50 (Students)	Size of a donation is governed by the size of gift presumed to be 'standard' by the group as a whole
Bryan and Test (1967)	Four field experiments	4000 + 730 + 140 + 3703	Presence of a helping model significantly increased helping behavior. Interpersonal attraction is a relevant variable in affecting donations
Callero *et al.* (1987)	Postal questionnaire	685	Role-person merger is strongly associated with a history of helping. Role-person merger predicts helping behavior
Cialdini *et al.* (1990)	Multiple experiments	139 + 358 + 484 + 127 + 87	If other members of a particular group are contributing, then the pressure to comply to social norms mounts
Coliazzi *et al.* (1984)	Experiment	128	Factors which facilitated altruism include amount of need, similarity to the person in need, and cost to the helper
Gächter and Fehr (1999)	Experiment		Social approval incentives have a significant effect on people who have some knowledge of each other, but no effect among subjects who are strangers
Keating *et al.* (1981)	Telephone Interviews	1000	Rates of giving are positively related to social pressure and income. More personal forms of solicitation are more effective
List and Lucking-Reiley (2002)	Experiment	3000	Increasing seed money from 10% to 67% of a campaign total increased contributions by a factor of six
Macaulay (1970)	Experiment	131	Increase in familiarity leads to increased positive action irrespective of the attractiveness of the requester
Mitchell and Byrne (1973)	Experiment	139	Individuals with authoritarian personalities are much more likely to be motivated by perceived similarity than those with egalitarian personalities
Radley and Kennedy (1995)	Semi structured interview	49	Charitable giving reflects variations in the relationship of the individual to the community of which they are a part
Yavas *et al.* (1980)	Self-administered questionnaire	100	Donors appear to be more sympathetic, generous, loving, and helpful than non-donors

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separate studies, Sargeant *et al*. (2001) and Sargeant *et al*. (2003a) conclude that the extent to which an organization's management may be regarded as professional impacts on the value of gifts, the lifetime value of donors, and their loyalty to the organization. It is interesting to note that in the US the relationship is positive; while in the UK the relationship is negative, implying that an increase in perceived professionalism would lower donations. It appears as though the British public regards amateurism as a virtue (see also Nightingale, 1973).

Proposition 8a: *Nonprofits perceived as offering higher levels of material or emotional utility will tend to stimulate higher levels of both compliance and support.*

Proposition 8b: *Nonprofits perceived as efficient, effective, and professional will tend to stimulate higher levels of both compliance and support in the US. Perceptions of professionalism in the UK will tend to depress compliance and support.*

Past experience

A variety of authors have argued that once recruited to support a charity, a given donor will be significantly more likely to give again in the future (see, e.g., Kaehler and Sargeant, 1998). This may be because donors begin to build trust with the organization, which in turn fosters commitment and higher levels of support over time. Indeed, these relationships were tested empirically by Sargeant and Lee (2004) who were able to explain 20% of the variation in giving by reference to their model.

The issue of donor loyalty has received comparatively little attention, although empirical work by Sargeant (2001) identified that the perceived quality of service provided by the fundraising department to the donor, the perceived impact of previous donations, and the extent to which the donor felt that they had been able to exert influence and control over their relationship with the nonprofit were all positively correlated with retention and lifetime value (see also Burnett, 2002). Donors indicating they were 'very satisfied' with the quality of service provided were twice as likely to offer a second or subsequent gift than those who identified themselves as merely 'satisfied.' More empirical work (albeit based on a relatively small sample) by Bennett and Barkensjo (2005) also provides support that there is a significant and positive relationship between a donor's perceived quality of marketing activity (in this case, relationship marketing) and his or her future intentions and behavior, particularly the relationship duration and level of donation.

Proposition 9a: *Higher levels of donor trust in the organization are associated with higher levels of donor retention and giving.*

Proposition 9b: *Higher levels of satisfaction in the quality of service provided by the fundraising department are associated with higher levels of donor retention and giving.*

Empirical studies pertaining to 'judgemental criteria' and 'past experience' are summarized in **Table 4**.

External influences

Models/experiences

Schervish and Havens (1997) argue that models and experiences from one's youth will shape future adult giving behavior. Thus those growing up in a family with a strong tradition of charitable support will be significantly more likely to exhibit such behaviors themselves. Sociologists have also argued that the provision of 'models' (e.g., a celebrity seen to be offering support) can influence contributory behavior. This occurs through the creation of social norms, thereby legitimizing and encouraging the giving behavior (Krebs, 1970; Wilson and Petruska, 1984; Krebs and Miller, 1985). Role models are regarded as particularly effective in

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Table 4. Summary of empirical studies pertaining to judgemental criteria and past experience

Author(s)	Method	*N*	Key findings
Amos (1982)	Analysis of secondary data including income tax returns	N/A	Both indirect and Kantian motives for support of voluntary organizations can be identified
Bennett and Barkensjo (2005)	Face-to-face survey	141	Donors' perceptions of a charity's relationship marketing activities are strongly associated with perceptions of the organization's advertising (presenting personally relevant messages, generating feelings of trust in and commitment to charity, and convince donor of charity's desire to interact with them), and with two-way personal contact methods such as special events and PR. Direct marketing has the lowest, although still significant impact on perceptions of relationship marketing activities
Bennett and Savani (2003)	Survey	286	The provision of small amounts of relevant information about a charity improves the accuracy of a person's ratings of the charity across a range of disparate attributes, such as level of efficiency. An individual's general knowledge and familiarity with the charity sector is a significant determinant of how he/she feels about charities, and his/her ability to accurately rate their performance attributes
Frisch and Gerrard (1981)	Postal survey	195	Younger individuals place greater emphasis on self-serving motives for volunteering
Frumkin and Kim (2001)	Panel	2359 nonprofits	Nonprofits with low administrative to total expense ratios perform no better in fundraising from individuals, trusts, and corporations than those with higher expense ratios
Harvey and McCrohan (1988)	Self-administered questionnaire	5000	Perceived organizational efficiency is positively correlated with level of giving
Sargeant *et al*. (2003a)	Postal survey	10 000	Factors including the demonstrable/familial utility deriving from the gift, organizational effectiveness, and the perceived professionalism of an organization, together with the quality of service supplied, all have the capacity to influence gift levels, lifetime value, and the longevity of the donor-nonprofit relationship (UK sample)
Sargeant *et al*. (2003b)	Postal survey	10 000	Factors including the demonstrable utility deriving from the gift, organizational effectiveness, and the perceived professionalism of an organization, together with the quality of service supplied, all have the capacity to influence gift levels and the value of particular donors (US sample)

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situations of social ambiguity, where the behavior is rare or unusual (Festinger, 1954). Sargeant *et al*. (2003b) thus argue that it is particularly effective in bequest solicitations where an individual will often be considering such a gift for the first time and may be unaware of the behavior of others.

> **Proposition 10:** *Giving behavior will be influenced by individual role models perceived as being relevant by the donor. The impact of role models will be enhanced in circumstances involving social ambiguity, or where the solicited behavior is considered rare.*

Communities of participation

Communities of participation are networks of formal and informal relationships entered into either by choice or by circumstance (e.g., schools, soup kitchens, and soccer groups) that bring an individual into contact with need. Authors such as Schervish (1993, 1997) argue that a basic connection to a cause (e.g., being a graduate of a school) is not enough in itself to prompt subsequent donations to that school and that some degree of socialization is required. This, the author argues, is experienced through communities of participation and thus donors will be predisposed to give to causes connected in some way with these communities. Schervish and Havens (1997) found empirical support for this proposition.

Similarly Conley (1999) in a study of the predictors of alumni giving found that involvement in school activities and involvement in alumni activities were both primary indicators of whether an individual would give. Lohmann (1992) also found that giving frequently related to personal membership of networks, societies, political groups, social movements or religious, artistic, or scientific communities. This reflects many of the themes developed in the psychology and sociological literatures where the concept of 'we-ness' is seen as a spur to caring (e.g., Piliavin *et al*., 1981; Coleman, 1990; Jenks, 1990). Indeed Brady *et al*. (2002) in a study of University giving, focus on organizational identification or 'oneness' toward the organization. They find that the construct is a key determinant of 'intent to give.'

It is important, however, for a nonprofit not to over-emphasize the role of communities of participation. Self-perception theory (Bem, 1972) tells us that external triggers for giving can cause a donor to discount any intrinsic motives they might have had (Scott, 1977) making it difficult to sustain that giving in the longer term, particularly when contact with that community comes to an end.

> **Proposition 11:** *Giving behavior will be influenced by communities of participation perceived as being relevant by the donor. It is likely that giving stimulated in this way will be difficult to sustain when contact with the community in question is brought to an end.*

Empirical studies pertaining to 'models/experiences' are summarized in **Table 5**.

Public policy contributions and crowding out

The majority of studies on this topic suggest that government contributions discourage or crowd out private contributions, but that the crowding out is incomplete. However, the extent of the crowding-out effect varies from under 30% (Abrams and Schmitz, 1978; Clotfelter, 1985; Kingma, 1989; Andreoni, 1993; Ribar and Wilhelm, 2002), to approximately 70% (Andreoni, 1993; Bolton and Katok, 1998). Simmons and Emanuele (2004) found that crowding out takes place for both donations of money and time. The accepted explanation for crowding out has been that givers treat government contributions as imperfect substitutes for private giving. According to Andreoni and Payne (2003), it may also occur as a result of a charity's behavioral response to receiving a government grant — reducing fundraising efforts. Research is not conclusive, however, Nyborg and Rege (2003) acknowl-

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edge that whether public policy contributions crowd out or, indeed, crowd in (see, e.g., Khanna and Sandler, 2000) private contributions, and the extent of this effect depends largely on which model of moral-based motivation (altruism, norm, fairness, commitment, and cognitive evaluation) is adopted. They also suggest that the policy implications of each model are likely to be quite different. For dual provision (i.e., public and voluntary private financing) to take place in a large economy, Epple and Romano (2003) identify that excludability (i.e., that any provider of the public good can prevent consumption of, for example, health care, medical research, or an art collection) is necessary.

Proposition 12: *The nature of donor motivation will determine whether public policy contributions crowd in or crowd out donations. Cognitive evaluation, for example, will tend to crowd out individual donations.*

Individual characteristics

Demographics

A variety of demographic factors can influence giving. Variables, such as age (Halfpenny, 1990; Nichols, 1992; Pharoah and Tanner, 1997), gender (Mesch *et al*., 2002; Hall, 2004), social class (Jones and Posnett, 1991; Bryant *et al*., 2003; McClelland and Brooks, 2004), social norms (Morgan *et al*., 1979; Piliavin and Chang, 1990; Radley and Kennedy, 1995), and the degree of religious conviction (Halfpenny, 1990; Pharoah and Tanner, 1997; Jackson, 2001), have all been shown to impact on giving behavior.

The variable 'gender' warrants some elaboration. Marx (2000) identified that women are more likely to support human services organizations and to be committed to the organization. In the US, the Council of Economic Advisors determined that women tended to give more frequently than men, although they donate very similar amounts in aggregate. Further attitudinal and behavioral differences

Table 5. Summary of empirical studies pertaining to models/experiences

Author(s)	Method	*N*	Key findings
Sargeant *et al.* (2003b)	Postal survey	5000	Factors determining bequest giving include—role models, family connections to the cause, perceptions of efficiency, and impact on cause
Brady *et al.* (2002)	Postal survey	595 (Students)	Organizational identification, philanthropic predisposition, and perceived need influences intention to give
Schervish and Havens (1997)	Secondary analysis of survey of giving and volunteering in the United States	2671	Variables/constructs associated with giving behavior include participation and commitment to religious institutions, household income, retirement status, invitation to participate, and communities of participation
Scott (1977)	Field experiment	315	Compliance with a small initial request under conditions of no incentive enhances the likelihood of positive behavioral intentions for subsequent moderate and large requests
Wilson and Petruska (1984)	Experiment	112 (Students)	Esteem oriented individuals were more likely to initiate helping behavior and were more strongly influenced by competence models

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have been identified. Braus (1994), for example, identified that women tend to want more information about how the money is actually going to be used, prefer one-off donations as opposed to regular (or committed) giving and to give more 'from the heart than the head' (p. 48).

How potential gender differences are resolved within a marriage may also impact on giving behavior. Andreoni *et al.* (2003) found that when bargaining over charitable giving takes place within a marriage (rather than one spouse taking charge), household giving is reduced by at least 6%. Joint decisions are, however, more likely to reflect the husband's, rather than the wife's tastes, and the husband is more likely to become the chief decision-maker if he earns more, or is more highly educated than the wife. These findings suggest that there are complex interrelationships between the variables of gender, marital status, education, and income in the context of charitable giving.

Not surprisingly, the variable social class/income has also received considerable attention. Writers such as Jones and Posnett (1991) and Mears (1992) see giving as income elastic, although it is important to note that not only the amounts given will vary as one moves up the social strata, but also the rationale for support. Radley and Kennedy (1992, 1995) identified that the lower socio-economic groups tend to see the needy as a group to be pitied because of their treatment at the hand of fate. Promotional messages stressing the ability of even a small gift to alleviate pain and suffering are therefore likely to be most effective. The higher socio-economic groups by contrast, particularly those from the professions, give not only for the amelioration of suffering but also for the longer term change in their situation. Authors such as Amato (1985) add that professional people tend to become more involved in their charitable giving, while preliminary evidence provided by Kottasz (2004) suggests that the profession itself may be associated with giving behavior. In her study of high-earning male professionals, lawyers tended to donate larger amounts of money to charity and on a more regular basis than respondents working in financial services, possibly because the former were significantly more empathetic than the latter, an empathetic disposition being positively associated with giving.

This theme of involvement would also seem to be of importance to particularly high net worth individuals (Prince and File, 1994). Boris (1987, p. 239), in a study involving interviews with 100 wealthy philanthropists, identified that 'virtually every major philosophical current is reflected in the motives of donors,' including feelings of civic responsibility, egoism, progressivism, and scientific problem solving. In a similar study, Schervish and Herman (1988) conducted interviews with individuals whose net worth was in excess of $1 million dollars which helped them to identify nine 'logics' of philanthropy, each implying a high degree of involvement with the causes selected for support.

Interestingly, in the US the poor and extremely wealthy give a much higher proportion of their income than the middle class (Silver, 1980) and those living in small town/rural settings are more willing to exhibit helping behaviors than city dwellers (Latane and Nida, 1981).

> **Proposition 13:** *Giving behavior varies by age, gender, and socio-economic group. Demographic variables may be used to predict the nature and value of support offered. They may also explain a number of the motives donors may have for support.*

Lifestyle/geo-demographic

The personality of a given individual does not in general appear to be a good indicator of charity support (Penrod, 1983) although there is some evidence that intrinsically motivated people do more for charity than self-centered, external reward seekers (Reykowski, 1982).

Authors have since moved beyond this early approach and have utilized lifestyle and/or geo-demographic data to predict participation in giving. Schlegelmilch (1988) shows that

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attitudinal and lifestyle variables improve the prediction of whether an individual will give versus chance by 32% and Yankelovich (1985) reported that the most important characteristics of the generous giver are all related to the donor's perceptions and values. Perceptions of financial security, discretionary funds, attendance at religious services, and whether an individual volunteers time for charity were all shown to be good indicators of a propensity to give. Hansler and Riggin (1989) also report success using the geo-demographic system VISION to segment potential support for the Arthritis Foundation.

In addition to this work, a small number of authors have explored the potential for such variables to be used in predicting *which* nonprofit organizations might be supported. Schlegelmilch and Tynan (1989) for example, identified that no significant differences could be found between the donors to a number of different charities in respect of lifestyle. However, the authors defined lifestyle somewhat narrowly as what people like to do in their spare time. Other authors such as Sargeant (1996) and Bennett (2003) have found lifestyle and values offer significant utility in distinguishing donors from one category of cause to another.

Proposition 14a: *Lifestyle and geo-demographic variables may be used to distinguish givers from non-givers and high value givers from low value givers.*

Proposition 14b: *Lifestyle variables may be used to distinguish donors from one category of cause from another.*

Empirical studies pertaining to individual characteristics are summarized in **Table 6**.

Motives

There are a variety of intrinsic motives for charitable support. Motives can assist donors in filtering out those charity appeals that are likely to be of most relevance and can help in structuring the evaluation process that will subsequently be conducted to ultimately define the pattern of support exhibited. Each major category is now reviewed in turn.

Altruism and self-interest

As discussed above, authors such as Collard (1978) argue that all giving can be explained by reference to the benefits that will accrue to the donor as a consequence of their gift. In this sense the process is rational and the donor simply evaluates the costs and benefits of engaging in a particular donation. However, this fails to explain a large proportion of gifts where no direct benefit accrues to the individual and where perhaps the gift may be made anonymously (Walker and Pharoah, 2002). Economists such as Andreoni (1989, 1990, 2001) have recently argued that the utility deriving from a gift can take a variety of different forms and have explained giving by reference to public good theory, exchange theory, and the so-called 'warm-glow-effect' where the benefits of giving are purely psychological in nature. Other such benefits are considered in the discussion below.

Proposition 15: *Individual giving behavior can be motivated by a need for emotional or material utility and/or pure altruism. Those individuals motivated by altruism are more likely to exhibit loyalty to the organizations they support.*

Empathy

Empathy may be defined as an individual's emotional arousal elicited by the expression of emotion in another (Berger, 1962; Aronfeed, 1968; Shelton and Rogers, 1981). While intuitively sound, the concept of empathy suffers from a lack of construct validity and a lack of clear measurement and manipulation techniques (Wispe, 1986). Despite the difficulties of definition a number of studies have explicitly addressed the impact of empathy on giving behavior and found a strong association between the level of empathy attained and the

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Table 6. Summary of empirical studies pertaining to individual characteristics

Author(s)	Method	*N*	Key findings
Amato (1985)	Diary and self-administered questionnaire	97 (Students)	People in helping professions have higher levels of involvement in everyday planned helping than do people in non-helping professions. Attitudinal and demographic variables predict participation in formal helping situations
Andreoni *et al.* (2003)	Secondary analysis of Gallup surveys	4180 households	Women give to more charities than men, but offer lower amounts. In marriage, bargaining over giving preferences appears to reduce giving by at least 6%
Bennett (2003)	Interviews	250	Possession of certain personal values correlated significantly with specific organizational values that the respondents most admired
Boris (1987)	Interviews	100	Giving among the wealthy motivated by civic responsibility, egoism, progressivism, and scientific problem solving
Graney and Graney (1974)	Panel study	60 + 46	Giving to charity may be viewed as a form of pseudo-social interaction among the wealthy
Hansler and Riggin (1989)	Database analysis	N/A	Giving to the Arthritis Foundation is related to membership of VISION (geo-demographic) categories
Jones and Posnett (1991)	Secondary analysis of family expenditure survey	7000	Participation in giving is sensitive to income, the tax-price of income, and demographic variables and the level of giving varies primarily with income
Kottasz (2004)	Survey (E-mail and face-to-face)	158	High-earning professional males represent a distinct market segment, attracted to giving to arts and cultural charities, well-established organizations with a good reputation and image, and enjoying invitations to special events. Profession may have a bearing on giving behavior which suggests that occupationally differentially marketing strategies and communications may be a useful approach for charitable organizations
Mears (1992)	In home interviews	239	Strong donors had higher educations, higher incomes, and higher general awareness of charities
Midlarsky and Hannah (1989)	Two experiments	2715 + 2735	Linear increase with age in numbers of people donating. When controlled for financial costs, elderly persons proved to be the most generous
Radley and Kennedy (1992)	Interviews	49	Motives for giving vary between socio-economic groups
Radley and Kennedy (1995)	Interviews	49	Charitable giving reflects variations in the relationship of individuals to the community of which they are a part
Sargeant (1996)	Postal survey	3000	Donors to three distinct categories of cause differ significantly in psychographic/lifestyle characteristics

(*Continues*)

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Table 6. (Continued)

Author(s)	Method	*N*	Key findings
Schlegelmilch (1979)	Postal survey	800	Attitude and lifestyle variables improve prediction of giving versus non-giving by 32% over chance
Schlegelmilch and Tynan (1989)	Postal survey	800	Different fundraising strategies appeal to segments with particular demographic and psychographic profiles. Segmentation by activity and lifestyle profiles is possible for some specific fundraising strategies, but not for others
Yavas *et al.* (1980)	Self-administered questionnaire	100	Donors appear to be more sympathetic, generous, loving, and helpful than non-donors

likelihood of providing help (e.g., Mount and Quirion, 1988). To be effective, the psychology literature suggests manipulations must be powerful enough to arouse empathy, but not so powerful that they become personally distressing to the donor (Fultz *et al*., 1986).

Davis (1983) and Hoffman (1984) identified that a person is more likely to experience empathy when he/she has a high empathic ability, prior experience with the need, and emotional attachment to the cause. Work by Davis *et al*. (1987) also established that in seeking to build empathy in fundraising communications, nonprofits should ask prospective donors to imagine how the beneficiary must feel, rather than asking the donor to imagine how they would feel in their place.

Proposition 16: *Individual giving behavior can be motivated by empathy for the beneficiary group. While higher levels of compliance and giving are associated with higher levels of empathy there is a reversal of this effect when the degree of empathy experienced becomes personally distressing for the donor.*

Sympathy

The motive 'sympathy' has also received attention in the literature, largely being viewed as a value expressive function, aiding individuals to conform to personally held norms (Schwartz, 1977; Clary and Snyder, 1991). Again, there would appear to be a relationship between the degree of sympathy engendered and both the propensity to donate and the chosen level of support (Batson, 1990).

Proposition 17: *There is a relationship between the degree of sympathy engendered in fundraising appeals and both compliance and the value of support.*

Fear/pity/guilt

A variety of other potential motives for giving have been identified including fear, guilt, and

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pity. These have been found to impact positively both on compliance and the extent thereof (Krebs and Whitten, 1972; Pieper, 1975). In general, the findings are similar to those reported above in the sense that the development of each motive in fundraising communications should be strong enough to demand action, but not so strong that it becomes personally distressing to the donor.

Proposition 18: *Individual giving behavior can be motivated by feelings of fear, pity, or guilt. While higher levels of compliance and giving are associated with higher levels of these factors there is a reversal of this effect when the degree of each factor experienced becomes personally distressing for the donor.*

Social justice

Miller (1977) argued from social justice motivation theory (Lerner, 1975) that if people witness undue suffering their belief in a just world will be threatened—consequently they will be motivated to respond to restore their faith in a just world. Thus as Bendapudi *et al.* (1996) note, donors motivated by social justice would be more likely to support breast cancer than lung cancer, since rightly or wrongly they might blame smokers for causing their own condition (see also Griffin *et al.*, 1993). The organizational justice literature lends support for this proposition since it suggests that people asked to allocate resources will be concerned about the fairness of the allocation. Donors acknowledge injustice and act to reduce it (Bies, 1987; Greenberg, 1987; Tyler, 1994).

Miller (1977) also identified that helping behavior would be increased when the need is not widespread and the duration of the need (persistence) is short. It is interesting to note that most charity communications appear to be based on the exact opposite of this position. Appeals tend to stress the ongoing nature of the need for support and make much of the number of individuals currently being impacted with the affliction or cause for concern.

Proposition 19: *Individual giving behavior can be motivated by a need for social justice. The influence of this motive increases where the persistence of the need is likely to be short and where the beneficiary cannot be blamed for the origin of their need.*

Prestige and 'making a difference'

Two newer and related motives for philanthropy have been identified as prestige (donors being motivated by the public recognition their contributions bring) and the desire to make a difference, known as impact philanthropy. These have not yet been empirically tested, but do suggest that certain fundraising techniques are better suited to each of these motivations, as will be discussed.

The prestige-based model proposed by Harbaugh (1998) is closely linked to the 'warm glow' effect referred to earlier in this section, but rather than being about the internal satisfaction derived from charitable giving, prestige is the utility that comes from having the amount of a donation made publicly known. Being seen to give may enhance a donor's social status, or serve as a sign of wealth or reliability. Donors may wish to access a particular group, and thus desire to be defined by their philanthropic activity (Ostrower, 1996). Prestige is clearly about recognition and is therefore also relevant to the feedback aspect of the giving behavior model presented in this paper. To respond to the motive of prestige, charities can create gift categories and then publicly disclose donors who contribute to various categories. Categories may carry certain titles, such as 'patron' or 'founder', depending on the size of the gift. This type of motivation is more relevant to educational and local cultural organizations, rather than national charities. It may also be more relevant when addressing younger givers since Mathur (1996) identified

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that for older adults, esteem enhancement motivations were negatively related to gift giving.

Impact philanthropy, posited by Duncan (2004) is based on a donor's desire to personally make a difference. The defining assumption of this model is that donors give because they enjoy personally increasing the output of a good. For example, some donors prefer to give directly to a homeless person, rather than give to a charity for the homeless where their donation is distributed over a large number of recipients. An impact philanthropist prefers to target his or her gift as this increases the perceived impact on the cause or recipient. Sponsorship offers are therefore likely to attract individuals who value making a difference.

Proposition 20a: *Organization's perceived as offering higher prestige to younger donors will tend to attract higher levels of compliance and giving.*

Proposition 20b: *Organization's perceived as having the greatest impact on the cause will tend to attract higher levels of compliance and giving.*

Tax

A number of studies have examined the relationship between income tax rates and charitable support and although findings vary, the responsiveness of individual giving to changes in taxation appears relatively great (Clotfelter, 1985). Okten and Weisbrod (2000), for example, calculate that a change in the price of donating of a given percentage results in a 24% greater percentage change in donations. Similarly, although working on estate taxes, Auten and Joulfaian (1996) used matched income tax records of older and wealthy parents and their children to analyze the effects of US bequest taxes and the children's income on the parents' lifetime charitable giving and bequests. Their results indicate that the higher the children's income, the more the parents donate to charity and that a 1% decrease in the tax rate on a taxable estate will reduce bequest donations by 2.5% (see also Brunetti, 2005). Tax relief is therefore considered by many to be an important motive for charitable support (Ostrower, 1996) although perhaps as Sargeant and Jay (2004, p. 100) note 'it is important not to overstate the influence of taxation...donors will always be better off not making a donation.'

Proposition 21: *Individual giving is price elastic: a change in the level of taxation resulting in a proportionately higher change in the level of giving.*

Empirical studies pertaining to motives are summarized in **Table 7**.

Inhibitors

A number of factors have been shown to inhibit individual giving. Riecken *et al*. (1994) contend that a lack of money, time, or ego risks are the most notable of these. In respect of the latter Steffey and Jones (1988) concur that some donors may experience anxiety over ridicule that may result from the support of unpopular or 'fringe' causes (see also Yavas and Riecken, 1985). A further notable barrier to giving has been shown to be doubts over the worthiness of the cause (Wagner and Wheeler, 1969; Ford, 1976; Mahatoo and Banting, 1988) and in particular concerns in respect of how the donated resources will actually be used (Shuptrine and Moore, 1980).

Proposition 22: *A lack of money, time, risk to an individual's ego, and doubts over the worthiness of a cause can all serve to inhibit donor behavior.*

Feedback

Having decided to offer a donation to a nonprofit, donors will typically be thanked by the respective organization in the hope that this will be the first stage in building an

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Table 7. Summary of empirical studies pertaining to motives

Author(s)	Method	*N*	Key findings
Batson *et al*. (1988)	Five experiments	80 + 120 + 88 + 60 + 48 (Students)	Empathic emotion evokes altruistic motivation
Coke *et al*. (1978)	Two experiments	44 (Students)	Those subjects who experienced the most empathic emotion offered the most help
Davis (1983)	Multiple questionnaires	1354 (Students)	A person is more likely to experience empathy when he/she scores highly on emotionality, shyness and a non-selfish concern for others
Davis *et al*. (1987)	Experiment	144 (Students)	Positive emotional reactions were affected primarily by cognitive empathy and negative emotional reactions were most heavily influenced by emotional empathy
Eisenberg and Miller (1987)	Meta analysis	N/A	Low to moderate relationships were found between empathy and pro-social behavior
Feldman and Feldman (1985)	Experiment	60 (Students)	Telephones have a strong positive influence on viewing public's perception of disabled persons. They do not impact significantly on donation behavior
Fultz *et al*. (1986)	Two experiments	22 + 32 (Students)	Empathy evokes altruistic motivation to reduce victim's need
Griffin *et al*. (1993)	Self-administered questionnaire	468	Causal attributions assigned to a victim lead to lower levels of empathy, personal distress, and intentions to give
Griffin *et al*. (1993)	Questionnaires	468	Under conditions where an audience is not captive, appeals should be designed to evoke maximum levels of empathy and minimum levels of distress
Shelton and Rogers (1981)	Experiment	118 (Students)	Empathy arousing appeals facilitate attitudinal change. Fear appeals can persuade individuals to protect themselves even through the mediation of social organizations
Tyler (1994)	Two sets of telephone interviews	652 + 409	Distributive justice judgments are shaped by both resource and relational judgments. Procedural justice judgments are shaped by relational concerns

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ongoing relationship with the individual concerned. The literature suggests that there are two significant components of the feedback process that fundraisers should seek to address.

Labeling

In thanking donors for their gift organizations often append labels to the donor, such as kind, generous, and/or helpful. Work by authors such as Swinyard and Ray (1977) has implied that this elicits a greater motivation to help and fosters favorable attitudes on the part of the donor (Moore *et al*., 1985). The impact of labels will be particularly potent when there are concrete prior behaviors to be labeled and when the label stresses the uniqueness of the donor's behavior (McGuire and Padawer-Singer, 1976). Consolidating donor self-perceptions via labeling thus furnishes an intrinsic motive to sustain behavior (Kraut, 1973). Repetitive labeling has been found to enhance efficacy (Tybout and Yalch, 1980) and labels have been found to work only where the donor accepts the label (Allen, 1982), emphasizing the need for the label to be credible and be supplied by a credible source.

> **Proposition 23:** *Positive labeling is positively associated with donor loyalty and subsequent donations. Effective labels are credible, effective, and reflect a donor's desired self-image.*

Recognition/rewards

The fundraising literature is replete with references to the need for adequate donor recognition (e.g., McKinnon, 1999; Warwick and Hitchcock, 2001; Irwin-Wells, 2002). Failure to provide adequate and appropriate recognition, it has been argued, will lead either to a lowering of future support or its complete termination (Boulding, 1973). Sargeant *et al.* (2001) provide the first empirical support for this proposition indicating a link between the perception of adequate recognition and the level of gifts/lifetime value.

> **Proposition 24:** *Donor perceptions of the adequacy of the recognition they receive are positively related to loyalty and subsequent giving behavior.*

Conclusions

As the reader will by now appreciate there have been a plethora of different studies conducted in the realm of individual giving (albeit in many cases with student samples) in the disciplines of marketing, economics, clinical psychology, social psychology, anthropology, and sociology. Academic interest in the marketing discipline has tended to focus on the characteristics of givers, distinguishing donors from non-donors and latterly in distinguishing high value givers from low value givers. There has also been considerable interest across the whole range of disciplines in the motives for the support of nonprofits and the links (if any) between these and different facets of giving and helping behavior.

Other facets of giving behavior have received less attention. There has been little interest, for example, in the use of particular fundraising techniques (with the notable exception of personal solicitations). There therefore remains a need to understand the factors that might drive giving in each key media (e.g., direct mail, DRTV, door-to-door, face-to-face, etc.). Many of the studies cited in this review talk of giving in general and fail to offer insight into how their findings might differ by the media employed. It would be particularly instructive to conduct work looking at the profiles of individuals who give through each fundraising medium and the promotional messages that might work best with each of these groups. An examination of demographic, lifestyle, and geo-demographic characteristics would be warranted.

Allied to this there is a need for research to explore how new fundraising audiences could be identified and targeted. Some authors, such

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as Pharoah and Tanner (1997) have posited that the percentage of households electing to support nonprofits (and in particular younger households) may be in decline. Further empirical work is warranted to both test this assertion and identify how nonprofits can tailor their message to become more appealing to a broader percentage of society. Little work has been attempted with non-givers.

It would also be instructive to examine key 'output' variables such as lifetime value and donor loyalty. While a handful of studies have been conducted in this realm there remains a significant opportunity to learn much more about the factors that drive donor loyalty and conversely give rise to attrition. Since many nonprofits now report attrition rates in the year immediately following acquisition of over 50% (Sargeant and Jay, 2004) this is becoming a major issue that nonprofits must address. It is interesting to note that academic interest has tended to focus around recruitment issues to date, rather than considering in detail how best to retain and develop individuals over time.

A further significant gap in the extant research pertains to the issue of cross-cultural comparisons. Individuals in the US for example give approximately 2% per annum of their household income to good causes (AAFRC Trust for Philanthropy, 2005). In the UK it is less than 1% (Walker and Pharoah, 2002). Thus any attempt to understand why people give and how individuals might be encouraged to offer higher levels of support to the voluntary sector could be greatly informed through developing an understanding of why national differences in generosity might exist. The implications for public policy would be profound.

There is also a need for research around the issue of fundraising products. These have recently become popular in the UK and have been shown to be an aid to donor loyalty and retention. Fundraising products (e.g., Sponsor a Dog) have also been created with success in the US, yet academic interest has been scant. While some research has been conducted into issues such as the portrayal of beneficiaries (particularly in the discipline of psychology), only Harvey (1990) has really addressed the components of the fundraising product and no researchers have to date explored issues pertaining to product design, portfolio management, or the relationship between donor needs and the pattern of nonprofit responses.

Finally and allied to this there is a need to examine the take-up and perceptions of new or developing forms of giving, such as planned giving, committed or monthly giving, and venture philanthropy. All three methods of giving have proved increasingly popular in recent years, yet the broad base of research continues to focus on the solicitation of one-off or cash gifts. This is particularly disappointing in relation to planned and legacy giving, which collectively is estimated to account for over 40% of the voluntary income accruing to nonprofits in the US (AAFRC, 2005). Presently very little is understood about the motives for selecting such mechanisms for giving, perceptions of the fundraising communications designed to solicit these gifts and indeed most other dimensions of the model presented in this paper as they apply to this context.

In the course of conducting this review it has been encouraging to note that there appears to be increasing interest in giving and fundraising on the part of marketing academicians. The emergence and success of two dedicated scholarly nonprofit journals has undoubtedly increased participation in the field but there nevertheless remain a number of highly significant gaps which need to be addressed. The authors consider this to be important not only for the sake of expanding knowledge, but also because unlike organizations in other sectors, nonprofits frequently do not have the resources to undertake detailed research of their own. Thus the view of the authors of this paper is that the academic community has much to offer this increasingly hungry audience as they seek to inform and develop their professional practice.

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