



SCIENCE *of* GENEROSITY

GENEROSITY AND PHILANTHROPY: A LITERATURE REVIEW

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Abstract

We present an overview of the academic literature on philanthropy, divided in two parts. In part one, we discuss the question of who gives how much; in part two, we discuss the question of why people give. In part one, we survey the literature on characteristics of individuals and households that are related to giving. In part two, we identify eight mechanisms as the most important forces that drive giving: (1) awareness of need; (2) solicitation; (3) costs and benefits; (4) altruism; (5) reputation; (6) psychological benefits; (7) values; (8) efficacy. We evaluate the progress in the almost 500 studies we reviewed and suggest directions for future research on philanthropy.

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This is work in progress. The current version refers to almost 500 publications. We welcome any comments at r.bekkers@uu.nl, including suggestions on papers not mentioned yet. An updated version of this paper can be found at:

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Introduction

An overwhelming body of knowledge is available on philanthropy in the social sciences. Research on philanthropy appears in journals of 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” (Smith 1975), a call that Payton, Tempel and Rosso (Payton *et al* 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 in social psychology have dealt with helping behaviour in general (Batson 1998; Piliavin & Charng 1990; Schroeder *et al* 1995; 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 also 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. 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 called altruistic. We will return to this issue in the discussion section.

Our review also differs from that of the overviews of economic theories of giving by Andreoni (2006b), Vesterlund (2006) and Meier (2007). 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. When such parallels are instructive for understanding philanthropy we mention them.

Finally, our review also 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. The categories used in previous reviews are broad groups of predictors. We present predictors of philanthropy in terms of the 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. We translate the knowledge gained in experimental studies and survey studies into practical advice for fundraisers. 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 because the position of the experimenter is similar to the position of the fundraiser. Within certain limits, fundraisers can change the situations in which people decide about giving to nonprofit organizations, like academics conducting experiments. Based on the experiments that we review below, we suggest practical implications for the design of fundraising campaigns.

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 behavior, altruism, helping, prosocial behavior. This search yielded thousands of hits.

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 money to real charitable organizations. Studies identifying individuals as recipients (e.g., “dictator games” in experimental economics) are included only when recipients are strangers and when it is clear to the participants of the study that decisions are 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, 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 we cannot 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. If the findings in particular papers diverged from the typical finding in other papers on the topic, we have sought explanations for such discrepancies.

Who tells us what?

To bring order to the enormous number of studies that give insight into determinants of philanthropy, we distinguish two types of knowledge on giving, denoted as type one and type two knowledge. In part one of this review, we present type one knowledge: knowledge on “who gives what.” What are the characteristics of individuals and households that engage in philanthropy, and which characteristics are related to the amount of money donated? Most of the literature in the field of philanthropic studies falls in this category and is conducted by scholars trained as sociologists and economists. The second type of knowledge is presented in part two of this review. Type two knowledge is knowledge on “why people give.” For what reasons do people engage in philanthropy? Which types of cues, situations and circumstances motivate people to give? Most of the studies categorized as type two knowledge are experimental, and are conducted in psychology, economics, marketing and sociology.

Part 1. Who gives what?

Studies in sociology and economics that rely on archival data and survey questionnaires have provided detailed knowledge on who gives what. Knowledge on who gives what is useful for fundraising professionals and policy makers, and is often considered more useful than knowledge on why people give (Srnka *et al* 2003). Fundraisers can use this type of knowledge to identify the profile of their donors, in order to target their fundraising campaigns at those who are most likely to give and will be most generous. It should be noted that the majority of type one studies analyze donations without conditioning on or controlling for the number of solicitations received. Fundraisers and policy makers can also use this type of knowledge to understand trends and predict future changes in the size and nature of philanthropy.

Religion

Religion has received ample attention in philanthropic studies (Hodgkinson & Weitzman 1996). There is a rich literature in the sociology of religion on the relationship between religious involvement and giving (e.g., Wuthnow (1991); the December 1994 volume of the *Review of Religious Research*). Positive relations between church membership and/or the frequency of church attendance with both secular and religious philanthropy appear in almost any article in which this relation was studied (Bekkers 2003; Bekkers & Schuyt 2005; Bennett & Kottasz 2000; Bielefeld *et al* 2005; Brooks 2003b; 2004; Brown & Ferris 2007; Bryant *et al* 2003; Chang 2005a; Chaves 2002; Davidson & Pyle 1994; Eckel & Grossman 2003; Eschholz & Van Slyke 2002; Feldman 2007; Forbes & Zampelli 1997; Hoge & Yang 1994; Hunter *et al* 1999; Jackson *et al* 1995; Lee & Farrell 2003; Lunn *et al* 2001; Lyons & Nivison-Smith 2006; Lyons & Passey 2005; Olson & Caddell 1994; Park & Park 2004; Reed & Selbee 2001; 2002; Regnerus *et al* 1998; Schiff 1990; Schlegelmilch *et al* 1997a; Sokolowski 1996; Sullivan 1985; Tiehen 2001; Van Slyke & Brooks 2005; Zaleski & Zech 1992; 1994). In Australia, religious involvement and secular giving appear not to be related or even inversely related (Lyons & Nivison-Smith 2006; Lyons & Passey 2005). A similar finding is reported in two U.S. studies (Schiff 1990; Wilhelm *et al* 2006). Brooks (2004) found no relationship between self-identifying as Christian and secular philanthropy; in a later study the relationship between more than weekly church attendance and secular philanthropy was negative (Brooks 2005), while rarely/never attending church was negatively related with both religious and secular philanthropy. A study of giving to human services found no relationship with religious affiliation (Marx 2000).

Exceptions to the regularity that religious involvement is positively related to philanthropy are often reported in experiments, in which the participants had an opportunity to donate in a non-religious context (Bekkers 2006c; 2007b; Eckel & Grossman 2004). The fact that no relationship between giving and religiosity was found in these studies may indicate that either the religious context is crucial, or that the higher likelihood of being asked is the reason for heightened generosity of the religious, or both. Bekkers and Schuyt (2005) find that both explanations are true to some extent.

Church attendance is a choice that may also depend on the willingness to contribute to charities. Adequate models of the effect of church attendance on giving should control for this self-selection (Lunn *et al* 2001; Sullivan 1985). At the aggregate level, there appears to be a negative effect of active involvement on monetary donations (Gruber 2004). However, Heller-Clain and Zech (1999) find no such trade off between individual attendance and religious or secular giving. Using a two stage least squares regression model, two studies still find a positive association between church attendance and giving (Lunn *et al* 2001; Sullivan 1985).

Bekkers (2006b) found that empathy and verbal proficiency affects giving partly through church attendance.

With respect to religious denomination, Protestants are often found to give more than Catholics in the US, Canada, and the Netherlands (Bekkers & Schuyt 2005; Chaves 2002; Forbes & Zampelli 1997; Hoge & Yang 1994; Reed & Selbee 2001; Zaleski & Zech 1992; 1994). Only a few studies considered donations by other religious groups. Hoge and Yang (2006) found that Jews donated higher amounts than Catholics and Protestants, but not as a proportion of income. In Canada, Jews are found to donate amounts similar to mainline protestants but lower proportions of income (Berger 2006). In South Africa, Christians are more likely to engage in philanthropy than non-Christians or the non-religious (Everatt *et al* 2005).

Simmons and Emanuele (2004) find that people brought up in a religious household are larger donors, though this study did not contain a measure of current religiosity. Regnerus, Smith and Sikkink (1998) find that the importance of religion in one's family of origin is not positively related to donating to organizations that help the poor and the needy once current church attendance and importance of religious faith are controlled. Hoge and Yang (1994) find that having attended Sunday school is associated with higher religious giving among Catholics, but not among Protestants.

Religious beliefs have rarely been analyzed in relation to philanthropy. Davidson and Pyle (1994) find that more orthodox and stronger religious beliefs are positively related to religious contributions, but this relationship is mediated by church attendance. A more recent study among Presbyterians found that orthodox beliefs were negatively related to denominational contributions and donations to non-religious charities, but positively related to congregational and other giving, controlling for church attendance (Lunn *et al* 2001). Similar findings are reported in a national U.S. study (Brooks 2004). Olson and Caddell (1994) and Bekkers and Schuyt (2005) find that salience of religion is positively related to religious giving mainly through church attendance.

Survey studies reveal that differences in solicitation methods may account for differences in levels of religious giving between denominations. Protestant congregations more often use tithing and annual pledges, whereas Catholics mainly use the collection basket in church to collect donations (Hoge & Yang 1994; Zaleski & Zech 1994; Zaleski *et al* 1994). The annual pledge may be viewed as an application of the promise elicitation technique.

Examining the influence of religious affiliation on philanthropy in Canada, Berger (2006) finds that Protestants are more generous largely because of stronger social norms and their higher level of church attendance. This finding is in line with the finding of a US study that "public profession of faith is more strongly related to religious contributions than private devotional activities" (Davidson & Pyle 1994). A survey study in the Netherlands found that the higher level of religious giving among Protestants in the Netherlands is due to a higher number of solicitations for contributions and a higher level of social pressure to conform to group standards (Bekkers & Schuyt 2005). Brown and Ferris (2007) find that controlling for membership of organizations and trust an initially positive relationship between "religiosity" and secular giving is actually reversed to a significantly negative relationship.

Education

Positive relations between philanthropy and level of education are found in most empirical studies that include education (Apinunmahakul & Devlin 2004; Banks & Tanner 1999; Bekkers 2003; 2006b; Bekkers & De Graaf 2006; Bielefeld *et al* 2005; Brooks 2004; Brown 2005; Brown & Ferris 2007; Brown & Lankford 1992; Carroll *et al* 2006; Chang 2005a; Chua & Wong 1999; Duncan 1999; Eschholz & Van Slyke 2002; Feldman 2007; Gruber 2004; Houston 2006; Jones & Posnett 1991a; Kingma 1989; Lyons & Nivison-Smith

2006; Lyons & Passey 2005; Matsunaga 2006; McClelland & Kokoski 1994; Mesch *et al* 2006; Olson & Caddell 1994; Pharoah & Tanner 1997; Reece & Zieschang 1985; Reed & Selbee 2002; Rooney *et al* 2001; Schiff 1990; Schlegelmilch *et al* 1997a; Sokolowski 1996; Tiehen 2001; Todd & Lawson 1999; Van Slyke & Brooks 2005; Wiepking & Maas 2006; Wilhelm *et al* 2006; Yamauchi & Yokoyama 2005; Yavas *et al* 1981). Higher levels of education are also associated with giving a higher proportion of income (Schervish & Havens 1997).

Yen (2002) finds a positive relationship between education and secular giving, but no relationship between education and religious giving. Hoge and Yang (1994) find a positive relationship between education and religious giving for Protestants, but not for Catholics. Education did not correlate with the likelihood of giving in a study of giving to the poor by Regnerus, Smith and Sikkink (1998) and in a study of human services (Marx 2000). Bryant *et al* (2003) find no relationship between education and the likelihood of giving in an analysis including education squared and a number of other variables. Brooks (2002) finds no relationship between education and the amount donated to charities in a tobit regression of data from the Consumer Expenditure Survey, controlling for income, wealth, age and welfare income. Wu, Huang and Kao (2004) found no effect of education on the likelihood of giving in Taiwan, though the amount donated was positively related to education. Park and Park (2004) found no relationship between education and donations in Korea. Feldstein and Clotfelter (1976) find no difference between college graduates and those with lower education, controlling for wealth, income and tax price. In Austria, education is positively related to donations to environment and animal protection, development aid, and human rights but negatively related to donations to health care and emergency aid (Srnska *et al* 2003). Case studies of donations to the American Lung Association (Keyt *et al* 2002) and the Dutch Heart Association (Bekkers & Meijer 2008) also found negative relationships between the level of education and giving to health. Knoke (1990) found a negative relationship between the level of education and annual donations to 35 professional societies, recreational organizations and women's associations, controlling for income and occupational prestige. Gimpel, Lee and Kaminski (2006) found that contributions to the Republican party were higher in areas with higher average levels of education, but contributions to the Democratic party actually decreased with average education. A field experiment with mail solicitations to fund a new center for environmental policy analysis in the U.S. found no effect of education (List 2004).

Many studies report differences in donations between graduates in specific fields of education. Bekkers and De Graaf (2006) find that graduates in social work and the social sciences, in agriculture and security are more generous, controlling for a large number of variables. The finding on social sciences is in line with Hillygus' (2005) finding that graduates in the social sciences are more likely to volunteer than other graduates and results of a study of alumni giving to a small liberal arts college, reported by Wunnava and Lauze (2001), who find that majors in social sciences give more. However, a study of alumni donations in the United Kingdom found that law graduates donated the highest amounts, and social science graduates belonged to the least generous group, along with graduates in education, medicine, and commerce (Belfield & Beney 2000).

University students and professors in economics are often found to be more self-interested than students in other social sciences (Eckel *et al* 2005; Frank & Schulze 2000; Frank *et al* 1993; 1996; Frey & Meier 2004a; Frey & Meier 2005) Smith and Eherenberg, (2003). However, Bekkers and De Graaf (2006) find that economics graduates do not differ from other graduates in their donations to charities. Blumenfeld and Sartain (1974) even find that business school students and economics graduates are more likely to donate to their alma mater than other students, though this result may reflect the better income position of economics and business school graduates as the study did not include a measure of income.

Another study lacking an income measure also found higher giving by business and economics alumni (Okunade *et al* 1994). In a study of alumni at Vanderbilt University, Marr, Mullin and Siegfried (2005) find that alumni with economics, mathematics and social science majors are more likely to contribute to their alma mater, while performing arts and science majors have a lower likelihood to make donations, controlling for income. In a study among young graduates of a selective group of private universities in the USA, Monks (2003) finds that graduates with an MBA or law degree gave more to their alma mater than those without an advanced degree, controlling for income. Monks also found that graduates with a major in fine arts or nursing give significantly less, while history majors give significantly more than humanities majors. Graduates with other majors (including business and management and social sciences) did not differ from humanities majors. In a study of giving to social funds of the University of Zurich, Switzerland, Frey and Meier (Frey & Meier 2004a; 2004b) find lower giving among current students in economics, computer science, theology, law and natural science than among students in arts and medicine.

Why education matters for philanthropy is far from settled. To some extent, the relationship is an artefact of imperfect methods: less well-educated persons are more likely to misunderstand survey questionnaires, and are more likely to forget about donations they have made in the past year (Bekkers & Wiepking 2006). Brown (2005) finds that higher education increases donations because it draws people into memberships. This finding raises the question why education promotes memberships. Brown and Ferris (2007) find that education and giving are related through memberships and generalized social trust. Bekkers (2006a) finds that higher education is related to giving through generalized social trust, verbal intelligence and enhanced confidence in charitable organizations.

Income

Obviously, higher income households donate higher amounts than lower income households (Abrams & Schmitz 1978; 1984; Andreoni 1988; Andreoni & Miller 2002; Apinunmahakul & Devlin 2004; Auten *et al* 1992; Auten & Rudney 1990; Banks & Tanner 1999; Barrett 1991; Bekkers 2003; 2006b; 2007b; Bekkers & Schuyt 2005; Bekkers & Wiepking 2006; Belfield & Beney 2000; Bielefeld *et al* 2005; Brooks 2002; Brooks 2005; Brown & Lankford 1992; Carman 2006; Chang 2005a; Choe & Jeong 1993; Chua & Wong 1999; Clotfelter 1980; Daneshvary & Luksetich 1997; Eaton 2001; Farmer & Fedor 2001; Feenberg 1987; Feldstein 1975a; 1975b; Feldstein & Clotfelter 1976; Feldstein & Taylor 1976; Glenday *et al* 1986; Greenwood 1993; Gruber 2004; Havens *et al* 2007; Hood *et al* 1977; Houston 2006; Hrung 2004; James & Sharpe 2007; Jones & Posnett 1991a; 1991b; Kingma 1989; Knoke 1990; Lankford & Wyckoff 1991; Long 2000; Lunn *et al* 2001; Lyons & Nivison-Smith 2006; Lyons & Passey 2005; Marx 2000; Matsunaga 2006; McClelland & Kokoski 1994; Mesch *et al* 2006; O'Neill *et al* 1996; Okten & Osili 2004; Okunade & Berl 1997; Olson & Caddell 1994; Pharoah & Tanner 1997; Reece 1979; Reece & Zieschang 1985; 1989; Reed & Selbee 2002; Regnerus *et al* 1998; Ricketts & Westfall 1993; Robinson 1990; Rooney *et al* 2005; Schervish & Havens 1995a; 1995b; Schervish & Havens 1998b; Schervish & Havens 2003; Schiff 1990; Schlegelmilch *et al* 1997a; Schwartz 1970; Slemrod 1989; Sokolowski 1996; Srnka *et al* 2003; Sullivan 1985; Tiehen 2001; Todd & Lawson 1999; Van Slyke & Brooks 2005; Wilhelm *et al* 2006; Wu *et al* 2004; Yamauchi & Yokoyama 2005; Yen 2002). The only two U.S. studies that we found that did not find a significant income effect are a field experiment with mail solicitations in central Florida (List 2004) and a study of donations to panhandlers (Lee & Farrell 2003).

Wealth income has a weak but significantly positive relationship with the amount donated in the United States (Brooks 2002; Feldstein & Clotfelter 1976; Havens *et al* 2007; O'Neill *et al* 1996), Canada (Hood *et al* 1977) and the Netherlands (Bekkers 2006b).

In the USA, the effect of income appears to be stronger than in the Netherlands. Steinberg (1990) reviewed the literature and found that the income elasticity of philanthropy in the USA ranges between 0.60 and 0.80. Using a more advanced specification, Auten, Sieg and Clotfelter (2002) find persistent income effects between 0.40 and 0.87, and transitory income effects between 0.29 and 0.45. Bekkers (2004) finds an elasticity of .19 for the Netherlands.

Three studies in the U.S. found that income elasticities were higher for contributions to charities, education, and political organizations than for contributions to religious organizations (Brooks 2005; Feldstein 1975b; Reece 1979). One study (Reece 1979) found that income elasticities increase with income itself. Bryant *et al* (2003), Carman (2006) and Feldman (2007), however, find that the effect of income on the likelihood of giving decreased at higher income levels. Carman (2006) also finds a decreasing income effect on the amount donated in her study of workplace giving to the United Way. One study found that the income effect increased with age (Glenday *et al* 1986).

In Taiwan, religious giving is not related to income (Chang 2005a). Hoge and Yang (1994) find that the relationship between income and religious giving is weakest among Catholics, somewhat stronger among mainline protestants, and strongest among “other” protestants.

The source of income also matters. Brooks (2002) finds that the level of income received from welfare has a negative effect on the level of charitable giving. One study found that “the higher the share of wages and dividends out of the total disposable income, the higher the amount of giving” (Daneshvary & Luksetich 1997), but another found that giving declined with the proportion of income from earnings (Lunn *et al* 2001).

However, an increase in discretionary income does not necessarily increase the proportion of income donated (McClelland & Brooks 2004; Schervish & Havens 1995a; Wiepking 2004). Some studies found a U-shaped curve, such that giving as a share of income was highest among the poor and the very rich (Hodgkinson & Weitzman 1996; James & Sharpe 2007; Schervish & Havens 1995b). However, other studies show that there is a linear downward trend for proportion of income donated for the US, the UK and the Netherlands (Breeze 2004; Hoge & Yang 1994; McClelland & Brooks 2004; Wiepking 2004; Wilhelm *et al* 2007).

Why income has a positive relationship with the amount donated is unclear. An obvious explanation of the positive effect on the amount donated is that costs decrease as income increases when donations are tax deductible, especially in countries with progressive tax systems. However, including tax price usually leaves a positive income effect. A negative effect of income on the proportion of income donated can be explained by a “giving standard”: norms people in all income groups have about the level of donations in specific situations, leading those in lower income groups to donate a higher proportion of the income (Wiepking forthcoming).

Home ownership

Owning one’s home is an indicator of wealth. Most of the studies that have looked at home ownership have found this variable to be strongly correlated with giving (Banks & Tanner 1999; Bekkers & Wiepking 2006; Carroll *et al* 2006; Feldman 2007; Jones & Posnett 1991a; Tiehen 2001; Todd & Lawson 1999; Yamauchi & Yokoyama 2005; Yavas *et al* 1981), though one study does not find a relationship with the likelihood of giving (Bryant *et al* 2003) and two other studies do not find a relationship with the amount donated (Feldstein & Clotfelter 1976; Lunn *et al* 2001). Occupying public housing was not related to the amount donated in one study (Brooks 2002).

Perceived financial position

In bivariate analyses, those who perceive their financial situation as more positive are more generous donors (Havens *et al* 2007). One study that included several background characteristics but not actual income found that those who consider themselves “financially better off than most other people” report higher donations to relief appeals (Bennett & Kottasz 2000). A study of graduate school alumni donations which also lacked an income measure found that alumni giving was higher among those who had more confidence in the economy (Okunade 1996). Another study did include actual income and found a better financial position perceived by individuals to be associated with a higher likelihood of sponsorship, attending charitable events, and donation in shops (Schlegelmilch *et al* 1997b).

Age

The typical finding on the relationship between age and philanthropy in the literature is that it is positive (Alpizar *et al* 2007; Apinunmahakul & Devlin 2004; Auten *et al* 1992; Auten & Rudney 1990; Banks & Tanner 1999; Bekkers 2003; 2006b; Bekkers & Schuyt 2005; Bekkers & Wiepking 2006; Belfield & Beney 2000; Boskin & Feldstein 1977; Bristol 1990; Brooks 2002; Brown & Lankford 1992; Bryant *et al* 2003; Carman 2006; Carroll *et al* 2006; Chang 2005a; Choe & Jeong 1993; Chua & Wong 1999; Clotfelter 1980; Duquette 1999; Eaton 2001; Eckel & Grossman 2003; Eckel *et al* 2005; Eschholz & Van Slyke 2002; Farmer & Fedor 2001; Feenberg 1987; Feldstein & Taylor 1976; Frey & Meier 2004a; Frey & Meier 2005; Greenwood 1993; Hoge & Yang 1994; Houston 2006; Jones & Posnett 1991a; 1991b; Kingma 1989; Lankford & Wyckoff 1991; List 2004; Long 2000; Lunn *et al* 2001; Lyons & Nivison-Smith 2006; Lyons & Passey 2005; Matsunaga 2006; McClelland & Kokoski 1994; Mesch *et al* 2006; Midlarsky & Hannah 1989; Okunade *et al* 1994; Pharoah & Tanner 1997; Reece & Zieschang 1985; Reed & Selbee 2002; Regnerus *et al* 1998; Rooney *et al* 2005; Tiehen 2001; Todd & Lawson 1999; Weerts & Ronca 2007; Wunnava & Lauze 2001; Yamauchi & Yokoyama 2005; Yavas *et al* 1981).

Some studies find that the age relationship decreasing at higher age (Auten *et al* 1992; Belfield & Beney 2000; Brown & Lankford 1992; Bryant *et al* 2003; Chang 2005a; Clotfelter 1980; Glenday *et al* 1986; Lunn *et al* 2001; Lyons & Nivison-Smith 2006; Okunade *et al* 1994; Putnam 2000; Simmons & Emanuele 2004; Tiehen 2001; Wunnava & Lauze 2001; Zech 2000). Auten and Joulfaian (1996) find that donations are higher among those aged 40-84 than among those younger or older. Andreoni (2001) and Hodgkinson and Weitzman (1996) find a positive relationship until age 75, after which a decrease is observed. Belfield & Beney (2000), Danesvary and Luksetich (1997), Landry, Lange, Price and Rupp (2006), Midlarsky and Hannah (1989) and Wu, Huang and Kao (2004) find a decrease in giving after the age of 65. In a study with a large proportion of respondents over 65, Schlegelmilch *et al* (1997a) found a negative relationship of age with the likelihood of giving to charity. Brown and Lankford (1992) find an increase of donations with age that levels off after 45. In contrast to these results, Randolph (1995) finds that giving increases with age, at an increasing rate for those over 40; a discrepancy that may be explained by the fact that Randolph did not include variables for the number of children and marital status other than marriage.

An early study by Feldstein and Clotfelter (1976) found no significant differences in giving relative to age in the amount donated. A later study also did not find differences relative to age, controlling for a large number of background and context characteristics (Schiff 1990). Rooney, Steinberg, and Schervish (2001) do not find a significant relationship between age and charitable giving in analyses including income, itemization status, minority status, sharing a household, education and gender. Feldman (2007) found no relationship of age with the likelihood of making donations in a study including a wide variety of control variables. Age was not related to giving in a study on giving in Indonesia (Okten & Osili

2004) and in a study of business school alumni giving in the U.S. (Okunade & Berl 1997). Also, studies of giving to human services (Marx 2000) and donations to panhandlers (Lee & Farrell 2003) found no differences relative to age.

Knoke (1990) also does not find a significant relationship between giving and age. This may be the result of the fact that the respondents were members of professional societies, recreational organizations, and women's organizations. Park and Park (2004) found no relationship between age and donations in Korea.

There may be gender differences in the relationship between age and philanthropy. Duncan (1999) found no significant relationships for age of husbands, but only for wives. A similar gender difference was found in a study of religious contributions (Sullivan 1985). Daneshvary and Luksetich (1997) find that age differences vary by income: at higher income levels, giving does not decline after 65.

Reece (1979) and Hrungr (2004) find a significantly positive relationship between age and religious giving, but not with other giving. Yen (2002) finds a positive relationship between age and giving to religion and charity, but not to "other organizations." Brown and Ferris (2007) find a positive but declining relationship of age to the amount donated to secular causes, but not to religious organizations.

Wiepking (2006) finds age to positively affect donations to organizations using appeal letters as a fundraising method in the Netherlands. In contrast, she also finds that older people have a lower probability of donating to organizations soliciting by means of door-to-door collections. This is likely due to the inclination of older people not to answer the door during evenings (Wiepking 2006).

Why age is related to giving is unclear. The age relationship could reflect life cycle-effects or cohort effects. An obvious life-cycle explanation is that disposable income increases with age, but the age relationship persists in many studies controlling for income. Olson and Caddell (1994) and Bekkers and Schuyt (2005) find that the relationship with age diminishes once church attendance is controlled. This finding suggests that older people give more because their level of church involvement is higher. The result in Auten and Joufaian (1996) that the age effect declines when children's income is controlled suggests that older people donate more because they are less concerned about their children's future. The elderly may be more responsive to needs of distant others because their children's needs are met. The aging of the population in times of increasing wealth and decreasing numbers of children per family constitute a promising future for charitable organizations. Cohort explanations refer to generational differences in religious involvement and social values. To disentangle life cycle and cohort effects, a set of repeated cross-sectional surveys is required. Using such data, Wilhelm, Rooney and Tempel (2007) show that generational differences in religious involvement explain the lower than expected giving by baby boomers.

Marital status

Marriage is mostly found to be positively related to giving (Andreoni & Scholz 1998; Auten *et al* 1992; Auten & Rudney 1990; Barrett 1991; Brooks 2005; Brown & Ferris 2007; Chang 2005a; Choe & Jeong 1993; Duquette 1999; Eaton 2001; Eschholz & Van Slyke 2002; Feenberg 1987; Feldman 2007; Feldstein & Taylor 1976; Frey & Meier 2004a; Hrungr 2004; Jencks 1987; Lankford & Wyckoff 1991; Long 2000; Matsunaga 2006; O'Neill *et al* 1996; Pitts & Skelly 1984; Randolph 1995; Reed & Selbee 2002; Regnerus *et al* 1998; Rooney *et al* 2005; Rooney *et al* 2001; Slemrod 1989; Tiehen 2001; Van Slyke & Brooks 2005; Wilhelm *et al* 2006; Wu *et al* 2004). However, a sizeable number of other studies find no relationship of marital status with giving (Apinunmahakul & Devlin 2004; Bielefeld *et al* 2005; Brooks 2002; Bryant *et al* 2003; Carroll *et al* 2006; Clotfelter 1980; Hodgkinson & Weitzman 1996; Houston 2006; Jones & Posnett 1991a; Lee & Farrell 2003; Marx 2000; Schiff 1990).

Two U.S. studies found that persons with a partner in the same household are more likely to donate but do not donate higher amounts (Mesch *et al* 2006; Rooney *et al* 2001), but a study from the Netherlands found the reverse (Bekkers & Wiepking 2006). Hodgkinson and Weitzman (1996) also find no differences between married, divorced, widowed, and single people in the percentage of income donated.

In two studies including many other variables, Duncan (1999) and Monks (2003) find a negative effect of marriage on charitable giving. Olson and Caddell (1994) find that the never married give more to their congregation than those who have ever been married; Gruber (2004) finds a similar pattern. In a study of donations to the American Lung Association, Keyt, Yavas and Riecken (2002) find that singles are more likely to be donors than those who are married. Clotfelter (2003) finds that married alumni in the United States give less to their alma mater than singles, which is also found by Belfield & Beney (2000) in the United Kingdom. Daneshvary and Luksetich (1997) find that marriage is only related to higher giving among high income households. Belfield & Beney (2000) find that having a spouse from the same university does not increase alumni contributions; Lunn, Klay and Douglass (2001) found that having a spouse who is also a member of the Presbyterian church actually lowers giving, religious and non-religious alike.

Relations of divorce and widowhood with philanthropy have rarely been studied thus far. Bryant *et al* (2003) find no effect of being divorced or widowed compared to being married on the probability of giving. A study of itemized deductions found no effect of widowhood on giving (Long 2000).

Having children

The number of children in a household is positively related to philanthropy in most studies that include this variable (Auten *et al* 1992; Auten & Rudney 1990; Banks & Tanner 1999; Carroll *et al* 2006; Choe & Jeong 1993; Daneshvary & Luksetich 1997; Greenwood 1993; Hoge & Yang 1994; Jencks 1987; Lankford & Wyckoff 1991; Long 2000; Matsunaga 2006; O'Neill *et al* 1996; Tiehen 2001; Yamauchi & Yokoyama 2005). Studies of donations in the U.K. and Ireland find a positive relationship between the number of children and the likelihood of making donations but not with the amount donated (Carroll *et al* 2006; Pharaoh & Tanner 1997). Sullivan (1985) finds that the presence of school-aged children (6-17) is related to higher religious contributions, but not the presence of children in preschool ages. Yen (2002) and Hrung (2004) both find a positive effect of household size on religious giving, but no effect on giving to (secular) charitable causes. Brown and Ferris (2007) and Brooks (2005) find a positive relationship with religious giving and a negative relationship with secular giving, controlling for memberships and trust. In a different analysis of the same dataset, a positive relationship of having children with religious giving but no relationship with secular giving was found (Brooks 2004). Wiepking (2006) finds that there is a positive effect of having children on making donations to organizations that support children.

However, no effect of children on philanthropy is found by Barrett (1991), Brooks (2002), Bryant *et al.* (2003), Duncan (1999), Feldman (2007), Houston (2006), Lyons and Passey (2005), Marx (2000), Schiff (1990), and Smith, Kehoe and Cremer (1995).

In Indonesia, the number of children younger than 14 is negatively related to the likelihood of giving and the amount donated (Okten & Osili 2004). In Taiwan, larger households donate less (Chang 2005b; Wu *et al* 2004); also in the Netherlands a negative relationship can be found between household size and amount donated as measured in a short questionnaire (Bekkers & Wiepking 2006). In a study of alumni giving, donations were lower among business school alumni with children in the age range of 12-18 (Okunade & Berl 1997).

Employment

The employed donate more than the unemployed (Banks & Tanner 1999; Chang 2005a; Chang 2005b; Eschholz & Van Slyke 2002; Feldman 2007; Lyons & Nivison-Smith 2006; Pharoah & Tanner 1997; Weerts & Ronca 2007), though one study found that the retired donate more than those still working (Schervish & Havens 1997) and another study found no differences between the employed and the non-employed (Feldstein & Taylor 1976). Studies of donations to human services (Marx 2000) and panhandlers (Lee & Farrell 2003) found no difference between employed and non-employed individuals. A study in Canada found that the employed were more likely to donate (Reed & Selbee 2002); a similar finding is reported for Australia (Lyons & Passey 2005). Brooks (2004) finds that the nonworking poor give less to charities, controlling for income. This result contrasts with that of Hodgkinson and Weitzman (1996), who found that unemployed people donate a larger percentage of their income than employed people. This result can be explained by the relatively large donations of those who are retired.

The self-employed are found to be less generous in Ireland (Carroll *et al* 2006), the United Kingdom (Banks & Tanner 1999; Pharoah & Tanner 1997) and Japan (Yamauchi & Yokoyama 2005), but not in the United States (Feldstein & Clotfelter 1976; Smith *et al* 1995). Another finding from Japan (Yamauchi & Yokoyama 2005) is that individuals working more days per year donate more. In a study from the Netherlands, Bekkers (2004) found that individuals working more hours per month are more likely to engage in philanthropy and donate higher amounts, controlling for income and education. Brown and Lankford (1992) find no such pattern in Florida.

Public service employees are more likely to engage in philanthropy than for-profit employees, both in the United States (Houston 2006) as well as in Japan (Yamauchi & Yokoyama 2005). Specifically, persons employed in helping professions are more strongly engaged in philanthropy and other forms of formal helping behaviour (Amato 1985). In contrast, business school alumni give less to their alma mater when their spouse is employed in a "service occupation" (Okunade & Berl 1997).

Place of residence

Town size is negatively related to giving in several studies (Apinunmahakul & Devlin 2004; Bekkers 2006b; Putnam 2000; Reed & Selbee 2002; Wu *et al* 2004). Consistent with these findings, in a study of UK households, London households were less likely to contribute than other households and Scottish households (Jones & Posnett 1991a). Scottish households were also more active in philanthropy in another study (Pharoah & Tanner 1997). In Ireland, however, Dublin residents are more likely to donate and also donate more than residents of smaller communities (Carroll *et al* 2006). In the Netherlands, the negative effect of town size seems to be limited to the likelihood of giving (Bekkers and Wiepking, 2006). The background of the negative town size effect may be an enhanced perceived risk of crime in urban areas (House & Wolf 1978) or a higher level of community stability in rural areas, which promotes giving (Schiff, 1990).

However, there are also some studies that report other results. Regnerus, Smith, and Sikkink (1998) find that people living in larger communities more often donate towards the poor. This finding may be the result of higher need in larger communities. Andreoni and Scholz (1998) find a slightly positive relationship between urban residence and the total amount donated as do Lunn, Klay and Douglass (2001). Bryant *et al.* (2003) find that living in larger communities increases the likelihood of donating when asked, but lowers the likelihood of donating if not asked. No relationship is found in Houston (2006) and Brooks (2002; 2004; 2005). Feldstein and Clotfelter (1976) find higher donations in mid-sized cities (250,000-1,000,000) than in both smaller and larger towns. Likewise, Simmons and Emanuele (2004)

find higher donations by those living in suburbs rather than in the country. In Indonesia, urban residents give more often and higher amounts (Okten & Osili 2004). Duncan (1999) finds a negative effect of living in small cities on the amount donated. Bryant *et al.* (2003) find that people living in a city have a higher probability of donating when they are solicited for a donation, but a lower probability when they did not receive a request. No relationship (Amato 1993; Korte *et al* 1975), or even the reverse may be found for interpersonal helping behaviour (Weiner, 1976; Bekkers *et al.* 2005).

Gender

Findings on gender differences in giving are mixed. Most studies find no reliable differences between males and females. A group of studies find that while females are more likely to give, males give higher amounts (Andreoni *et al* 2003; Bekkers 2004; Belfield & Beney 2000; CAF 2005; Jackson & Latané 1981; Lyons & Passey 2005; Sokolowski 1996; Weyant 1984). Two studies found that females were more likely to give but do not give higher amounts than males (Lyons & Nivison-Smith 2006; Mesch *et al* 2006). Knoke (1990) finds that males contribute more to professional societies, recreational organizations and women's organizations. Brown and Ferris (2007) find that males give more to religion. Alpizar *et al.* find that males are more likely to contribute to a natural park in Costa Rica (Alpizar *et al* 2007). A study in Taiwan found higher giving among males (Chang 2005a). Two U.S. studies found that male alumni give more than female alumni (Okunade 1996; Wunnava & Lauze 2001).

On the other hand, a study from the U.K. finds that philanthropy increases with the percentage of female household members (Pharoah & Tanner 1997). Brown and Ferris (2007) find that females give more to secular organizations. Carman (2006) finds that female employees are more likely to give to United Way in a workplace giving program, but finds no gender difference in the amount donated. Yen (2002) finds that females donate more to religious causes in the US. Regnerus, Smith and Sikkink (1998) find that women are more likely to give to the poor. Keyt, Yavas and Riecken (2002) find that females are more likely to give to the American Lung Association. In one of the regressions reported by Rooney and colleagues (Rooney *et al* 2001) women donated more than males, but not in the other three regressions. Feldman (2007) and Reed and Selbee (2002) find that females are more likely to donate than males. Regnerus *et al.* (1998) find that females are more likely to donate to organizations that help the needy and the poor. Midlarsky and Hannah (1989) find that women are more likely to donate to a fund for children with birth defects than men. A field experiment found males younger than 50 to donate less than females from the same age range, but no statistical difference among the older age group (List 2004). In a study on giving to human services, women were found to donate more often than men (Marx 2000).

All of these findings are complicated by the fact that most charitable contributions are made by multi-person households but survey data are usually based on only one respondent per household. As a result, gender differences in reported household contributions are more likely to reflect better recall of donations by females or socially desirable responding (Bekkers & Wiepking 2006). The only paper examining differences between male and female one-person households found no difference (Andreoni *et al* 2003).

Experimental designs are better suited to test for gender effects on philanthropy. However, the evidence on gender differences in philanthropy from experiments is also mixed. In the Netherlands, Bekkers finds that males from the population at large are more likely to give to health charities (2007b) and their alma mater (Bekkers 2007a). Frey and Meier (2004a; 2005) also find that male students give more to social funds of their university. In contrast, Eckel and colleagues (Eckel & Grossman 2003; Eckel *et al* 2005) find that U.S. female students donate more than males in a dictator game experiment with ten charities

identified as recipients. A recent field experiment suggests that males are more likely to donate when solicited at the door by attractive females (Landry *et al* 2006). However, other studies have failed to find such effects (Bekkers 2007a; Weyant 1984).

Race

A common finding in the U.S. literature is that Caucasians are more likely to give than people of other races (Apinunmahakul & Devlin 2004; Bielefeld *et al* 2005; Bryant *et al* 2003; Eschholz & Van Slyke 2002; Feldman 2007; Jencks 1987; Marx 2000; Tiehen 2001; Van Slyke & Brooks 2005).

However, Regnerus, Smith and Sikkink (1998) find that non-whites are more likely to donate to organizations that help the poor and the needy than whites. Carson (1987) and Brooks (2005) find that both Caucasians and African Americans are larger religious donors than other groups. Gruber (2004) finds that whites and blacks donate more than Hispanics. Brooks (2002) finds no difference between whites and persons of other race. Steinberg and Wilhelm (2005) find that black families give slightly more than families of other races, because they give more to religion. Brooks (2004) finds that non-whites give more to religion but less to secular organizations. Brown and Ferris (2007) find that blacks give more to religion than whites, but that the difference disappears when membership in organizations and trust are controlled. In the same study, blacks are found to donate less to secular organizations than whites. Brooks (2005) finds that whites and blacks give more than persons of other races to religion, and whites give more to secular organizations. Andreoni and Scholz (1998) find lower total giving among whites than among other respondents, controlling for state of residence.

Work by Rooney and colleagues (2001; 2004) found that part of the gap between Caucasians and people of other races is due to method-effects. Caucasians appear to be more likely to understand what counts as giving in brief measures of philanthropy. Other researchers have found no effect of race on the incidence and level of giving when other factors correlated with ethnicity are controlled, such as income, wealth and education (Feldstein & Clotfelter 1976; Houston 2006; Lee & Farrell 2003; McClelland & Kokoski 1994; Mesch *et al* 2006; Okunade & Berl 1997; Regnerus *et al* 1998; Steinberg & Wilhelm 2005; Yen 2002).

Immigration and citizenship status

Osili and Du (2005) found that immigrants in the United States are less likely to give to charitable organizations and also give less, but that these differences are due to differences in racial background, lower levels of income, and education. Wong, Lien and Conway (2005) find that immigrants (especially foreign-born non US citizens) are less likely to donate money to political parties than US born citizens. Frey and Meier (2004a; 2005) find that immigrant students are less likely to donate to social funds of their university than native students. Individuals born in a non-English speaking country give less often and lower amounts in Australia (Lyons & Nivison-Smith 2006). Mean amounts donated by foreign born and Canadian born citizens do not seem to differ (Mata & McRae 2000) though contributions increase with the number of years residing in the country. Osili and Du (2005) find that the gap between immigrants and native citizens closes as time spent in the US increases. They also find that immigrants spend more on informal donations to family members – often in their country of origin (remittances) – than native Americans. While informal donations among native Americans also exceed formal donations (Schervish & Havens 2002), this gap appears to be wider among immigrants. Brown and Ferris (2007) find that US citizens give more to religion than immigrants, controlling for memberships and trust.

Parental background

While relatively few studies have looked at the influence of parental background on giving, it is likely that parental background affects giving by their children. Giving is a form of prosocial behavior that is encouraged by parents. A study in the U.S. (Wilhelm *et al* 2006) finds that concurrent giving by parents and children are significantly correlated. This may be the result of social influence. Higher levels of parental education, parental religious involvement, and parental volunteering in the past are related to higher amounts currently donated by children (Bekkers 2005a). These influences are likely to be more than just social influence, but also the result of prosocial value socialization. Low income and family instability in childhood lower giving in adulthood (Bandy & Wilhelm 2007). Parental volunteering was not related to the proportion of income donated in one study (Schervish & Havens 1997) when other correlates of generosity were included; it was related to the likelihood of donating in one study (Feldman 2007) but not in another (Bryant *et al* 2003).

Current parental income (Marr *et al* 2005) and current parental church attendance (Lunn *et al* 2001) increase alumni contributions.

Youth participation

A report by the Independent Sector (2000) reveals that individuals who were active in voluntary associations in their youth are more generous as adults. Feldman (2007) and Bekkers (2005a) find that this bivariate association holds when numerous controls are included. The study also reveals that youth participation is one of the channels through which parental background affects giving by children. Children of higher educated parents, children of parents who are more strongly involved in religion and children of parents who volunteered themselves when their children were young are more generous as adults because these children are more likely to be engaged in voluntary associations in their youth. Youth participation strengthens the social bonds of children in the community, and makes them accessible for nonprofit organizations.

Current participation

Several studies report a link between current participation in voluntary associations and donations (Alpizar *et al* 2007; Brooks 2005; Brown & Ferris 2007; Hunter *et al* 1999; Schervish & Havens 1997; Van Slyke & Brooks 2005; Yavas *et al* 1981); one study on giving to human services did not (Marx 2000). Studies on alumni giving find that donations increase in reunion years, which are times of elevated participation (Bristol 1990; Willemain *et al* 1994). Some studies of alumni giving find that alumni who participated in clubs during study are more likely to give to their alma mater after graduation (Okunade *et al* 1994; Wunnava & Lauze 2001).

Volunteering

In a simple bivariate analysis, volunteers are usually found to donate more (often) to charitable causes than non-volunteers (Amato 1985; Farmer & Fedor 2001; Feldman 2007; Independent-Sector 2000; Matsunaga 2006; Putnam 2000; Reed & Selbee 2001; Schlegelmilch *et al* 1997b). An exception to this pattern is reported by Pitts and Skelly (1984). However, differences between volunteers and non-volunteers often vanish in multiple regression analyses controlling for joint determinants of giving and volunteering (Bekkers 2002; 2006a; Wiepking & Maas 2006). In contrast, Park and Park (2004) found a positive relationship between volunteering and donations in Korea controlling for age, education, income, religion, tax price and social status; Van Slyke and Brooks (2005) and Tiehen (2001) report similar findings in a study of Atlanta residents and a random sample of the U.S. population, respectively. A study in Australia found that religious volunteers give more to

religion, controlling for several other variables (Lyons & Nivison-Smith 2006). A study of alumni giving in the U.S. found that alumni who volunteer for their college give more to their alma mater (Wunnava & Lauze 2001). Volunteers for homeless shelters give more to panhandlers (Lee & Farrell 2003). Schiff (1990) finds that those who report more frequent helping of others give more to health organizations, controlling for a large number of other variables.

Schiff (1990) finds negative cross-price elasticities for giving time and money, meaning that an increase in the price of giving leads to a decrease in volunteering. Schervish and Havens (1997) report that those volunteering more hours per month give a higher proportion of income. There is also evidence of complementarity of giving and volunteering at the organizational level. Studies of contributions of time and money received by nonprofit organizations tend to find a positive relationship (Callen 1994; Marcuello & Salas 2000; 2001).

Personality

While an early study of the relationship of personality with giving to United Way found no reliable differences (Yavas *et al* 1981), more recent studies reveal that donations to charitable causes are related to individual differences in personality characteristics (Bekkers 2006b; Levy *et al* 2002). In terms of the Five Factor Model of personality (the “Big Five”), donations are found to increase with emotional stability and extraversion in a large random sample of citizens in the Netherlands (Bekkers 2006b). The relation between philanthropy and emotional stability is not surprising given the evidence on mood effects discussed earlier. Another reason may be that neurotic persons are less trusting of others. Giving (especially to secular organizations) has been found to increase with the level of generalized social trust (Bekkers 2003; 2006a; 2007b; Brooks 2005; Brown & Ferris 2007; Lyons & Nivison-Smith 2006; Micklewright & Schnepf 2007; Uslaner 2002). Extraverted persons may be more likely to give because they are more likely to be asked for donations (Bekkers 2004). Another personality characteristic that is related to philanthropy is empathy (Bekkers 2006b; Bekkers & Wilhelm 2006; Bennett 2003). In a U.S. study, donations by students to the homelessness increased with openness to experience, but not with conscientiousness (Levy *et al* 2002).

Cognitive ability

Persons with higher scores on a vocabulary test donate more (Bekkers 2006a; 2006b; Bekkers & De Graaf 2006). A study of hypothetical measures of altruism also revealed a positive relationship between altruism and intelligence measured with an IQ test (Millet & Dewitte 2007). A study of alumni contributions found that contributions increase with GPA (Marr *et al* 2005). Awareness of need and confidence mediate the relationship of cognitive ability on philanthropy (Bekkers 2006a). Students who view the world in more abstract terms were found to donate more often to the homeless (Levy *et al* 2002).

Context

Some studies have included measures of (local, state) context characteristics along characteristics of individuals and households. Findings from these studies suggest that the context in which individuals and households decide on philanthropic contributions matters.

Survey studies reveal that people adapt their giving to what others in their environment are giving (Carman 2006; Olson & Caddell 1994; Wu *et al* 2004). This may be the result of social pressure, but also of feelings of guilt or enhanced confidence. In a survey study on social influences in workplace giving, Carman (2006) finds that charitable giving is especially influenced by behaviour of co-workers in the same salary quartile. However, so called “peer effects” as observed in surveys by a correlation between contributions of

individuals in the same environment may also be the result of correlations among omitted variables, of self-selection of individuals with similar gift levels in the same environment, or both.

Okten and Osili (2004) find that contributions are lower in regions with higher levels of income inequality and higher levels of ethnic diversity.

Zaleski and Zech (1992: 469-470) find that “a larger population of whites” in an area has a negative effect on congregational giving in that area.

Olson and Caddell (1994) found that individuals contribute less to their congregation when the average income of fellow congregation members increases. This is most likely the result of “free riding”: a lower perceived need for contributions.

Schiff (1990) finds that people contribute less to welfare organizations in states with a higher number of donors.

Another set of studies report relations between context characteristics and average giving. These studies suggest the importance of context but did not include data at the individual level.

Smith and Ehrenberg (2003) find that alumni giving decreases when the current percentage of female students at the university increases.

Hughes and Luksetich (1999) find that total private contributions to art museums are higher in states with a higher proportion of the population voting Republican in presidential elections. In contrast, Bielefeld, Rooney & Steinberg (2005) find no support for a link between political color of a state and individual giving.

Booth, Higgins and Cornelius (1989) found that per capita giving to United Way is lower in areas with larger population changes and with a higher proportion of firms that are retail, while giving was higher in areas where a higher proportion of the population voted, a higher proportion was employed in manufacturing, a higher proportion of the work force was female, and effective buying income was higher.

Contributions to public broadcasting are higher in U.S. states with a higher level of “civic norms” - higher census response rates, voter turnout and belief in the honesty of others (Kropf & Knack 2003).

One study found that giving is more common in more “individualistic” (rather than “collectivistic”) states (Kemmelmeier *et al* 2006).

Clotfelter (2003) and Drezner (2006) show that the volume of philanthropy depends strongly on the stock market.

Other variables

Several other variables are infrequently studied in relation to philanthropy, but are found to be significant predictors nonetheless.

Years of residence. No relationship with giving in Japan (Yamauchi & Yokoyama 2005). Studies in the U.S. and Canada find a positive relationship (Brown & Ferris 2007; Mata & McRae 2000; Schervish & Havens 1997; Schiff 1990).

Occupational prestige. Positive in Banks & Tanner (1999), Carroll, McCarthy & Newman (2006), Houston (2006), Knoke (1990) and Yavas, Riecken and Parameswaran (1981). No significant differences between groups of occupations in Andreoni & Scholz (1998).

Political preference. Persons with more liberal political views are more likely to donate money to panhandlers (Lee & Farrell 2003). Conservatives are found to give more to religion than liberals (Brooks 2005), while no differences are found for donations to secular organizations.

Other consumption. An analysis of donations in Ireland yields interesting results on the relationship between charitable donations and other forms of consumption (Carroll *et al*

2006). Households spending money on printed media and the arts are more likely to donate, while households spending money on tobacco are less likely to donate.

Property value. Not surprisingly, households owning a house with a larger number of rooms are more likely to be donors and donate more (Banks & Tanner 1999; Carroll *et al* 2006).

Farming background. Households living on a farm give less in Duncan (1999), but those owning an agricultural business give more in Smith, Kehoe and Cremer (1995).

Needing care. In Japan, households with members requiring care give more (Yamauchi & Yokoyama 2005).

Fraternity/sorority membership. Positive in Marr, Mullin and Siegfried (2005) and Bekkers (2007a).

Locus of control. Persons with an internal locus of control are more likely to engage in philanthropy and other formal helping behaviors (Amato 1985).

Authoritarianism as measured by the F-Scale is negatively related to formal helping behaviour (Amato 1985).

Confidence in government is negatively related to religious giving in the US (Brooks & Lewis 2001).

Health. People in better health donate more (Bekkers 2006b; Bekkers & De Graaf 2006).

Limitations

Knowledge on who gives what is of limited value to scholars who want to test theories on philanthropy and to fundraisers who wonder how they should design fundraising campaigns. The main problem is that knowledge on who gives what is descriptive in nature. It reveals relations between philanthropy and all kinds of characteristics of households and individuals, but it is difficult to show why these relations exist. There may be numerous reasons why characteristics like education or religion are related to philanthropy. Without further information on respondents and advanced statistical methods, it is rarely clear why the observed relations exist. An additional problem is that it is unclear to what extent self-reports on philanthropy are accurate. Experiments do not have these problems.

Part 2. Why do people give?

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, we can draw conclusions 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.

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 social psychological studies on helping and altruism (Schroeder *et al* 1995; Schwartz 1975; Schwartz & Howard 1984), in which helping others has also been conceptualized as a series of consecutive decisions. For each mechanism, we present the main effect, as well as a list of moderating and mediating factors. Moderating factors are factors that weaken or strengthen the effect of the mechanism: conditions or personal characteristics that interact with the main effect.

1. Awareness of Need

Awareness of need is a first prerequisite for philanthropy. People have to become aware of a need for support. The effects of need have been documented in field experiments from the mid 1960s onwards, most prominently by Leonard Berkowitz, Shalom Schwartz and colleagues (Berkowitz 1968; Berkowitz & Daniels 1964; 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; 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 (Feldman & Feldman 1985). Survey studies reveal that more generous alumni perceive a higher need for contributions to their alma mater (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 (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 *et al* 2002; Radley & Kennedy 1995). Survey studies 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 & Meijer 2008; Burgoyne *et al* 2005; Wiepking 2006), though they may not give more on average (Smith *et al* 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 *et al* 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 (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 *et al* 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 *et al* 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). A study from Canada found no effect of organizational age on contributions received by organizations (Callen 1994). A study in Singapore found positive age effects (Wong *et al* 1998). A study on health charities in Norway found a positive age effect (Olsen & Eidem 2003).

Moderators. The effect of need is often diminished by other factors. Moderators of the effect of need include: dependence of the beneficiary on the donor; social class; costs; social approval; perceptions of deservingness; acceptance (vs. denial) of responsibility; efficacy; framing; mood; religiosity; and political orientation.

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.

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

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

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 *et al* 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 *et al* 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 *et al* 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 *et al* 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 (Auten & Joulfaian 1996; Joulfaian 2004). They reduce giving to charities and increase bequests when their children's income is lower.

Framing the need for contributions by identifying a specific victim is more likely to result in willingness to contribute (Kogut & Ritov 2005a; 2005b) and actual donations than framing the need by providing 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).

The display of need may backfire when the need is perceived as impossible to solve (Small *et al* 2007; Warren & Walker 1991; for further evidence on the interaction with efficacy, see below) 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 *et al* 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.

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.

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).

2. Solicitation

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 are following a solicitation for a contribution. Bekkers (2005b) 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 finding in an experiment showing that actively soliciting contributions rather than passively presenting an opportunity to give increases the likelihood that people donate (Lindskold *et al* 1977). The implication is that the more opportunities to give people encounter, the more likely they are to give. Survey studies usually find that receiving a higher number of solicitations for charitable contributions is associated with increased philanthropic activity (Bekkers 2005b; Lee & Farrell 2003; Schlegelmilch *et al* 1997b; Simmons & Emanuele 2004; Tiehen 2001), 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 *et al* 2006). 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 2005b; Van Diepen *et al* 2006). 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). 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 (Diamond & Noble 2001; Wiepking 2006). 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 *et al* 1979).

Moderators. Obviously, not all types of solicitations are equally effective. Ingredients of the most effective solicitations are discussed below under the other mechanisms. In addition, some types of people may be more compliant with requests for charitable contributions than others. Finally, one remarkable study tested whether monetary compensation for 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.

3. (a) Costs

Obviously, giving money costs money. When the costs of a donation are lowered, giving increases (Bekkers 2005d; Eckel & Grossman 2004; Eckel & Grossman 2003; Karlan

& List 2006). 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). Increasing the amount requested may increase the amount donated 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 *et al* 2007).

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 (Abrams & Schmitz 1978; 1984; Andreoni 1993; Andreoni & Payne 2003; Auten *et al* 1992; Auten *et al* 2002; Barrett 1991; Barrett *et al* 1997; Boskin & Feldstein 1977; Brooks 2003c; Brown & Lankford 1992; Choe & Jeong 1993; Chua & Wong 1999; Daneshvary & Luksetich 1997; Duncan 2004; Eaton 2001; Feenberg 1987; Feldman 2007; Feldstein 1975a; 1975b; Feldstein & Taylor 1976; Glenday *et al* 1986; Greenwood 1993; Hood *et al* 1977; Jones & Posnett 1991a; 1991b; Khanna *et al* 1995; Khanna & Sandler 2000; Kingma 1989; Lankford & Wyckoff 1991; Long 2000; McClelland & Kokoski 1994; O’Neill *et al* 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; Steinberg 1985; Steinberg 1991; Taussig 1967). We do not review these papers here in detail, as reviews of these studies are already 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 *et al* 2002). Tax benefits appear to be 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).

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 (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 (Jobu & 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 *et al* 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).

Moderators. Price effects depend on national context, characteristics of recipient organizations, personal characteristics and the perception of costs by donors.

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 (Jones & Posnett 1991a; 1991b). 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 forthcoming). 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 *et al* 2006). Obviously, if households do not know about the possibility of deducing 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 *et al* 2006).

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 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 *et al* 2003). Price effects usually increase with income (Auten *et al* 1992; Duquette 1999; Feldstein & Taylor 1976; O'Neill *et al* 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).

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 2005d; Eckel & Grossman 2004; Eckel & Grossman 2003). However, other studies cast doubt on the generality (Fraser & Hite 1989) and validity (Davis *et al* 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 *et al* 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 museums 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 *et al* 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).

3. (b) Benefits

Occasionally, donations to charitable organizations buy services or other selective incentives. 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. Alumni are more generous after graduation if their university spent more on them (Baade & Sundberg 1996a; 1996b; Harrison *et al* 1995). A study of donations to the opera found that such 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 *et al* 2006). Offering material benefits may also provide donors with an excuse for a donation in cases where they are 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 *et al* 2006; Edlund *et al* 2007; Harris *et al* 1973), with different results. Alpizar *et al.* 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 *et al* 2005; Schervish & Havens 2002). Clotfelter (2003) finds that those who are related to former alumni tend to give more to private colleges and universities.

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; Olson & Caddell 1994; Stonebraker 2003; Sullivan 1985; Zaleski & Zech 1992; 1994; Zaleski *et al* 1994). However, giving may also be lower in larger groups because of free rider-effects (Kropf & Knack 2003; Olson & Caddell 1994; Olson 1965), because of a lower level of commitment to the group (Finke *et al* 2006; Knoke 1981), or because of a lower level of social pressure (see below). In Presbyterian churches, however, giving increases with congregation size (Lunn *et al* 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 *et al* 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 (forthcoming) 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. Another study, however, provides evidence of “crowding in”: Bekkers (2005d) studied the effect of an incidental subsidy for contributions to health charities on subsequent contributions to Tsunami victims and found a slightly positive effect.

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 will be recognized by fellow community members, and may be explained by reference to the mechanism of reputation discussed below. In addition, 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).

4. Altruism

An obvious reason why individuals may contribute money to charities is because they care about the organization’s output (e.g., services rendered to recipients). Economists have labelled this motive “altruism” (Andreoni 2006b). 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 2003c; 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 (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 nonprofit organizations is not likely, on average, to be made up by donations from private donors” (Payne 1998: 338).

Moderators. Crowding out effects vary with the sector receiving donations; the level of benefits provided by nonprofit organizations to donors; fundraising activities by nonprofit organizations; the amount of information among donors on contributions of others; beliefs

about changes in contributions by others; the size of contributions of others; benign thoughts among donors; characteristics of donors; and the research design used to obtain data.

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), though 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 *et al* 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; Brooks 2000a; Hughes & Luksetich 1999).

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.

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.

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.

The effect of a third party contribution also depends on the information about the third party contribution given to individuals. In many cases, donors do not know about changes in the contributions of others (Horne *et al* 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 *et al* 2005).

The weight of altruistic concerns increases with benign thoughts. People are more generous after they have spent some time thinking about their own death (Jonas *et al* 2002), about an act of forgiveness (Karremans *et al* 2005), or about things in life for which they are grateful (Soetevent 2005).

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).

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).

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

5. Reputation

Reputation refers to one's social standing. Giving is viewed as a positive thing to do (CAF 2005; Horne 2003; Muehleman *et al* 1976), especially when giving reduces inequality (Brickman & Bryan 1975), and when giving is less costly, recipients 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). They receive recognition and approval from others. Laboratory experiments with abstract public goods games reveal that individuals are willing to incur costs to recognize generous contributions (Clark 2002). Conversely, not giving damages one's reputation. This is especially true when donations are announced in public or when they are directly observable (Alpizar *et al* 2007; Barclay 2004; Bateson *et al* 2006; Bereczkei *et al* 2007; Harris *et al* 1975; Hoffman *et al* 1996; 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 *et al* 1984), and giving people the option of donating money in an envelope rather than handing over the money reduces donations (Hoffman *et al* 1996; Thornton *et al* 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 increase in bars and school classes (Wiesenthal *et al* 1983). Survey studies have consistently found a negative relation between the size of congregations and religious contributions (Davidson & Pyle 1994; Hungerman 2005; 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 2005; Mathur 1996; Pitts & Skelly 1984; Smith & McSweeney 2007).

Moderators. The effect of approval on giving increases with the value of that approval. The value of approval depends on liking of the solicitor, group size, social norms and social status of the donor and solicitor.

Social pressure 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. 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 (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.

The value of approval increases with liking of the solicitor. 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 *et al* 1977), social attitudes (Sole *et al* 1975), educational institution (Aune & Basil 1994; Howard *et al* 1995), and personal characteristics such as sharing a birthday or name (Burger *et al* 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 *et al* 2005; Dolinski *et al* 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 *et al* 2006; West & Brown 1975; Wiesenthal *et al* 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 (Lindsfold *et al* 1977). One survey study on alumni giving found an opposite sex-effect (Belfield & Beney 2000), but an experimental study did not (Bekkers 2007a).

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

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).

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 2005). 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 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 *et al* 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).

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).

Reputation may overpower other factors; 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). The effect of reputation in face-to-face solicitations, even by unknown solicitors, is so strong that it takes away the effect of a

picture of beneficiaries that does increase donations in a direct-mail campaign (Thornton *et al* 1991).

6. Psychological benefits

Giving not only yields social benefits, but also psychological benefits. 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 *et al* 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 *et al* 2007).

Self-image

When giving entails positive psychological benefits, people are said to have positive personal norms (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 *et al* 1967; Konečki 1972; Regan *et al* 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 *et al* 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; Bekkers & Wilhelm 2006; Bennett 2003; Davis 1983; Piferi *et al* 2006). 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 *et al* 1997a). 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 (Lee *et al* 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” that will be discussed below. 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: 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 *et al* 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 (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 *et al* 1976). A survey study in the U.K. found that individuals with a stronger sense of accomplishment are more likely to donate (Sargeant *et al* 2000). A survey study in New Zealand found that individuals with a more passive orientation to life are less likely to donate (Todd & Lawson 1999). 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).

Having the power to affect the lives of others by making a donation seems to be enough of a reward to motivate people to give. Donors want their donation to have a noticeable impact (Duncan 2004). When given the choice of donating money or nicotine patches to a smoking diabetes patient, people clearly prefer the latter (Jacobsson *et al* 2007). A survey study supports the positive association between the impact motive and giving (Mathur 1996).

Mood

Mood effects refer not to the anticipated psychological rewards of giving, but to the (often unconscious) effects of mood states on giving. People’s moods are related to giving, but in a complicated way. Inducing a positive mood facilitates giving, but negative moods may also facilitate giving in specific circumstances. The positive mood effect was discovered in experiments on helping behaviour. Berkowitz and Connor (1966) found that willingness to

help other people was lower after a frustrating experience than after a successful experience. Isen & Levin (1972) showed that unexpectedly receiving cookies from a stranger or finding change in a phone booth increased the willingness to help another person. In a study on philanthropy, 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. Fried and Berkowitz (1979) showed that soothing music (Mendelssohn) can be used to induce a positive mood that facilitates helping. 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”). In other circumstances, negative moods may not discourage giving. In a study on volunteering for charity, Weyant (1978) found that negative moods did not decrease volunteering when doing so was relatively easy and still yielded benefits for a charity.

Foot-in-the-door

The Foot-in-the-door effect refers to the observation that “once an individual has complied with a small request for help, that individual will be more likely to comply with a larger request in the future” (Freedman & Fraser 1996). The foot-in-the-door technique is different from the low ball technique discussed earlier because the second request in the foot-in-the-door technique is made on a later occasion as the initial request. Also the mechanism that makes the technique work is different.

Many studies have documented the foot-in-the-door effect (DeJong 1981; Guéguen & Fisher-Lokou 1999; Pliner *et al* 1974; Reingen 1978; Rittle 1981; Seligman *et al* 1976; Williams & Williams 1989). 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.

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 *et al* 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.

“Even a penny helps”

Another technique based on the self-image mechanism is called “legitimizing paltry contributions”. Many people have developed cognitive strategies to justify their rejection of the responsibility for the welfare of others. One such strategy is the argument that one “cannot afford a donation”. Legitimizing paltry contributions by adding the phrase “Even a penny helps” in a solicitation for contributions may neutralize these strategies ((Brockner *et al* 1984; Cialdini & Schroeder 1976; Doob & McLaughlin 1989; Reingen 1978; Weyant & Smith 1987). When even a penny helps, one easily appears to be an unhelpful person if one does not donate, which makes it difficult to say no.

Limitations to the legitimization of paltry contributions effect concern amount donated, the base rate and the face-to-face context. First of all, none of the studies cited above has found that the “even a penny helps” technique increases the amount donated; only the likelihood of giving is increased. Mark and Shotland (1983) found that legitimization of paltry contributions in a door-to-door fundraising campaign for the American Cancer Society lowered the likelihood of giving, and reasoned that this was due to the relatively high base rate (60%). Another limitation of the technique is that it only works when donations are publicly observable. When donations are anonymous, the phrase does not increase contributions (Perrine & Heather 2000; Reeves *et al* 1987). When used in a direct mail context, the phrase may even decrease the amount donated, exactly because it legitimizes paltry contributions (DeJong & Oopik 1992). One final limitation of the technique is that it does not seem to work with high-income donors (Weyant & Smith 1987).

Good news

Hornstein, LaKind, Frankel, and Manne (1975) found that news radio broadcasts reporting “good news” produced increased generosity towards total strangers in an abstract game situation, in part because of a more positive outlook on human nature. Mood effects were tested as well, but were not found to be significant. Holloway, Tucker and Hornstein (1977) replicated these findings, and also found that only social information affects generosity. Reports about exceptional helping behavior promoted generosity, and reports about a murder decreased generosity. Nonsocial information (on how unusual weather saved or destroyed a family’s life) did not affect generosity.

7. Values

In the eyes of donors, the works of nonprofit organizations may make the world a better place. 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 *et al* forthcoming). Survey studies show that people who have altruistic values (Bekkers & Schuyt 2005; Farmer

& Fedor 2001), who have prosocial values (Bekkers 2006b; 2007b; Van Lange *et al* forthcoming), 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 (Bekkers & Wilhelm 2006; Schervish & Havens 2002), 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 *et al* 2004) 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. 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. Obviously, donors to political parties endorse values central to the ideology of those parties (Francia *et al* 2005).

Moderators. 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 *et al* 2006). A survey study revealed that contributions to religion are less strongly related to social values than contributions to other organizations (Bekkers & Schuyt 2005).

8. Efficacy

Efficacy refers to the perception of donors that their contribution makes a difference to the cause they are supporting. Survey studies reveal that when people perceive that their contribution does not make a difference, they are less likely to give (Arumi *et al* 2005; Diamond & Kashyap 1997; Radley & Kennedy 1992; Smith & McSweeney 2007). 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 (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 2005c; 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 *et al* 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 *et al* 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 *et al* 2006a). 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* 2006a; Schervish & Havens 2002; Schlegelmilch *et al* 1997a; Yavas *et al* 1981). Survey studies by Sargeant and colleagues reveal that the relationship of confidence with giving is mediated by relationship commitment (Sargeant *et al* 2006a; Sargeant & Lee 2004).

While attractive design of fundraising materials is often believed to attract the attention of donors (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.

Multiple mechanisms

A number of papers deal with phenomena that involve a mix of mechanisms identified above. One such phenomenon is the effect of social information, which refers to the observation that people are more likely to give and also give more to a charitable cause when they receive information that other people have donated as well. Announcement of prior contributions by others increases donations (Catt & Benson 1977; Cialdini & Schroeder 1976; Jones & McKee 2004; Martin & Randal 2005; Meier 2006; Reingen 1982; Sell & Wilson 1991).

Several mechanisms may account for social information effects. Social information should lead to the expectation that others will donate. A survey study found that own contributions are positively correlated with the expected number of other contributors (Borck *et al* 2006) and the number of other contributors aware of (Okunade & Berl 1997). However, these relations are not necessarily causal. Comer, Kardes and Sullivan (1992) and Sweeney (1973) did not obtain an effect of expectations about the behaviour of others on own cooperation in experimental games. More recent studies by Offerman, Sonnemans and Schram (1996) and Frey and Meier (2004b) conclude that the effect does exist, but is weak when justification effects are taken into account. Laboratory experiments with contributions to abstract public goods reveal that people adapt their expectations about other people's behavior to their own behavior (Dawes *et al* 1977). Finally, one study that simply suggested contribution levels found that such suggestions have little effect unless they are accompanied by information about the average behavior of others (Jones & McKee 2004). People do not want to stand out as a person who failed to give among their co-workers. Contributions by others may set the group standard and create pressure to conform, an application of the mechanism of reputation (Blake *et al* 1955).

Contributions by others may also signal to consecutive decision makers that the charity is trustworthy; an application of the efficacy mechanism (Andreoni 2006a). Finally, contributions by others may create social comparison processes, such that people give in order to be better than others; an application of the mechanism of psychological self-rewards (McNeel 1973).

Moderators of social information effects include gender, certainty, expectations, and similarity. One study found that males are more affected by social information than females (Meier 2006). Social comparison affects behavior most strongly when people feel uncertain about themselves (Gerard 1963). Reingen (1982) shows that in order for social information to work it should not violate expectations. When others are described as overly generous, this description does not promote giving. Martin and Randal (2005) found that displaying larger previous contributions increased the amount donated per donor, but reduced the number of donors. A study on helping behaviour that peer effects are enhanced by attitudinal similarity (Smith *et al* 1972).

Relative influence of mechanisms

The relative influence of each of the 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. Obviously, 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. We will go into these issues below.

Limitations

Almost all of the experiments we reviewed only test for short-term effects of manipulations. Long-term effects are rarely analyzed. Four exceptions are the study on post-9/11 giving (Piferi *et al* 2006), the study on mail order catalogues by Desmet (1998), the study on anonymity of religious giving by Soetevent (2005) and the study on subsidies by Meier (forthcoming). The obvious problem in all of the other studies is that it is unclear to what extent the effects persist over time. As the study by Meier (forthcoming) shows, an initially positive effect of a manipulation may turn into a negative effect in the long run.

A second problem with experimental studies is that they usually rely on small numbers of participants. This makes it difficult to test hypotheses on the sensitivity of groups of individuals with certain characteristics to the manipulations, though not impossible (an example is Fong, 2007).

Another problem of experimental studies is that the conditions created may be artificial, or may not be generalized to the general population. That is why field studies among representative samples of the population are needed. Field studies are rather common in the papers we reviewed, but experiments among representative population samples are not. The “dictator game”, developed by experimental economists in the 1990s (Eckel & Grossman 1996), can be used easily in survey research (Bekkers 2007b).

The Problem of Reactance

Fundraising organizations trying to increase the effectiveness of their fundraising strategies should be careful not to give potential donors the feeling they are “forced” into giving. When people’s freedom is restricted, for instance by social pressure, strongly emotional appeals, or the foresight of future dependency (e.g., more solicitations), people feel that their freedom to act is restricted. In many cases, the result is “reactance” (Brehm 1966), a motivational state that lowers compliance with requests. Many donors mention fundraising strategies designed to maximize to increase donations through social influence techniques as a threat to their freedom that put them off (Burgoyne *et al* 2005; Sargeant & Woodliffe 2005).

Part 3. A Case for Progress?

If the studies discussed above are viewed in a chronological order, do we then see any evidence for progress in the study of philanthropy? Based on Karl Popper's philosophy of science, Ultee (1980) formulated criteria for an assessment of progress in social sciences. Progress can be made in three respects: in the research questions, the theories, and the data and methods used. Progress in research questions is made if they are increasingly based on validated assumptions, and research questions are enriched. Progress in theory is made if theories are made more informative and are generalized. Progress in data and methods is made if more adequate measures are developed for the objects under study, data are used covering a higher number of actors from a higher number of periods and areas. We conclude our paper with an assessment of the pace of progress in research on philanthropy in the past 50 years.

Theoretical progress

Taken together, theoretical progress in the literature on philanthropy is limited. The majority of papers we reviewed are not based on solid theoretical foundations. The literature on philanthropy may be characterized as largely empirical. The papers that we reviewed under Type 2 knowledge mostly contain regression analyses based on earlier regressions, but do not test hypotheses derived from overarching theories. 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 reviewed under Type 1 knowledge, 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 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 *et al* 1996). Both signals buy prestige (Harbaugh 1998). Duncan's model of impact philanthropy focuses on the desire of donors to have impact on recipients (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.

Our review shows that a vast array of "factors" is associated with philanthropy. Theoretical progress can be made by incorporating the multitude of mechanisms that affect philanthropy in one elegant model. Philanthropic acts are commonly the result of multiple mechanisms working at once. However, formal models of philanthropy have focussed on only one or sometimes two motives. 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”. That 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.

Methodological progress

Methodological progress can be made by better research designs, higher data quality, more data, and more sophisticated analyses.

Research design. The prevailing research design in most of the studies in the field of philanthropic studies is the cross-sectional survey. But as David Horton Smith remarked more than thirty years ago, “one great flaw in all research so far [relating voluntary action participation to attitude-personality dimensions] is that there have been no adequate longitudinal panel surveys. An equally good case can often be made for selection *and* socialization effects with regard to attitude and personality measures, and both processes probably operate for most voluntary action participation. As a result, whether attitudes and personality dispositions will be seen as causes or consequences of voluntary action participation varies with investigator’s theoretical preferences in cross-sectional research, and the basic issue of causation remains unresolved.” (Smith 1975: 259). This critique holds for most of the relations observed between philanthropy and socio-demographic, economic or psychological characteristics of households in the papers we reviewed. Very few studies employ a longitudinal design. An exception is the literature on tax price effects in economics that relies on samples of tax returns. However, these papers usually contain only a few socio-demographic characteristics.

Recently, two panel studies of philanthropy have become available to researchers: the Center on Philanthropy Philanthropy Panel Study (COPPS) and the Giving in the Netherlands Panel Study (GINPS). In the US, the Center on Philanthropy Panel Study (COPPS), a supplement to the Panel Study of Income Dynamics (PSID), documents charitable donations in several sectors by households. In the Netherlands, the Giving in the Netherlands Panel Study (GINPS) documents charitable donations in ten different sectors by households. Both studies also contain data on volunteering. The strengths of the COPPS dataset are that it is publicly available, its coverage of high income households and the possibility of linking the COPPS module to other PSID supplements (Wilhelm 2006; 2007). The strength of the GINPS dataset is its coverage of a broad range of socioeconomic and attitudinal correlates of charitable giving. However, few studies use these data.

Data quality. Data quality depends on the validity and reliability of survey instruments. In the measurement of philanthropy, “methodology is destiny” (Rooney *et al* 2004). Including a higher number of questions in survey instruments to measure philanthropy increases the estimated volume of philanthropy and increases the validity of the instrument (Rooney *et al* 2004; Schervish & Havens 1998a). Short instruments bias coefficients in the analysis of whether people give upward but downward in the analysis of the amount donated (Bekkers & Wiepking 2006).

A problem that remains in many survey studies is that individuals respond to surveys about household contributions. Usually household contributions are regressed on characteristics of the respondent only, but not of other household members. As a result, what we know about the relative influence of husbands and wives on giving by households comes from only two studies (Andreoni *et al* 2003; Wiepking & Bekkers 2006).

Next to nothing is known about the accuracy of self-reports on philanthropy. Philanthropy is socially desirable behavior: one may expect respondents to exaggerate their giving, especially in face-to-face or telephone interviews. The extent of the social desirability effect is unclear. We found only one study that compared survey responses with actual contributions (Burt & Popple 1998). Another paper studied itemized charitable contributions reported on tax forms that had been subject to audit and those that had not (Slemrod 1989). Both papers suggest that people may overestimate their level of giving. There is no research available showing which characteristics of individuals are related to “over reporting”. This is an important issue for future research (Andreoni 2006b).

Data quality has improved with the advent of COPPS in the United States, the National Survey of Giving, Volunteering and Participating (NSGVP) in Canada, and the Giving in the Netherlands Panel Survey. Previous surveys in these countries contained fewer questions on philanthropy. We also see high quality surveys in countries that started from scratch like Korea (Park & Park 2004) and Australia (Lyons & Passey 2005). Since shortcomings were noted in UK data on giving more than ten years ago (Lee *et al* 1995), the situation has improved recently with the inclusion of questions on giving in the ONS omnibus survey. For other countries like Germany, France, Spain and Italy national surveys on philanthropy are completely lacking.

Data quality in experimental studies has not progressed for a long time. As in previous decades, experiments are usually conducted with small, non-random samples of the population. The lack of variance in background characteristics among such samples limits the possibility to generalize results to the population at large. In addition, hypotheses on interactions between effects of experimental conditions and personal characteristics are more difficult to test. Recently, however, economists have taken Steinberg’s advice to heart that field experiments are very much needed (Steinberg 1997). In sociology, a method has been proposed that enables observation of charitable giving in experiments embedded in surveys (Bekkers 2007b). This method combines the strengths of survey as well as experimental research methods.

Analytical models. With respect to methods of analysis we observe some progress. While many studies using survey data still use an ordinary least squares (OLS) regression model, more and more research uses more sophisticated models like the tobit model or the Heckman two stage regression. Rooney *et al.* (2001) provide a nice overview of these alternative methods. The OLS model is not adequate when many people give nothing and regression weights differ for characteristics in the analysis of whether people and how much they give. Including the non-donors as zeros biases regression coefficients downward. The tobit-specification is perhaps more adequate, but relies on assumptions that may not be realistic. If the tobit model is used, decomposition of coefficients is instructive (LeClere 1994). Jones and Posnett (1991a) develop a generalized tobit model, which is also used by Carroll, McCarthy & Newman (2006), but the efficiency and robustness of this model is yet unclear. Another increasingly popular model is the Heckman two-stage regression model (Bekkers 2006b; 2007b; Smith *et al* 1995; Wiepking forthcoming), which produces two sets of coefficients: one set for the relationships of independent variables with the likelihood of donating, and one set for the amount donated (conditional upon giving). However, in our experience, the results of Heckman models are not always robust.

What we don’t know: a research agenda

While the preceding review shows that there is a vast amount of knowledge on determinants of philanthropy, there are also considerable gaps in our knowledge. For each mechanism in part I and for each characteristic in part II one could easily imagine further research questions. We leave the reader to imagine these gaps. Instead, we pose eleven rather

general questions on philanthropy that in our view have received too little attention in the literature. We have ordered these questions from more to less general – which is not necessarily the order of priority.

What are the most important motives for philanthropy?

On the whole, is philanthropy more strongly dependent on solicitation, awareness of need, (tax) incentives, reputation, values, psychological rewards, or efficacy? Commonly, donors cite multiple motives as forces shaping their giving (Burgoyne *et al* 2005; Madden 2006; Radley & Kennedy 1995). As Drezner (2006) wrote: “It is hard to figure out how much giving is done to avoid taxes, how much is based on a form of altruism and how much is a combination of the two”. It has been argued that reputation is the prime mechanism underlying charitable contributions in the United States (Landry *et al* 2006; Lee Adams-Chau 1988). Most of the type 2-studies investigate only one of these mechanisms, and do not enable a comparison of the relative strength of these mechanisms. In future experiments, multiple mechanisms should be studied simultaneously. Survey studies rarely contain measures of the mechanisms. Future surveys would profit from such measures.

How can changes in philanthropy be explained?

How do people decide to increase or decrease the amount donated to philanthropy, or to quit donating to an organization altogether? Dynamic analyses of donation patterns over time are clearly needed. A number of papers on taxation have used panel data sets of itemizers. From these studies, it is unclear how stable giving is over time. One study found that giving by households varies considerably over time, especially among high income households (Auten & Rudney 1990), while another found exactly the opposite (Daneshvary & Luksetich 1997). The least one can say is that charitable giving is to some extent habitual behaviour (Barrett 1991; Barrett *et al* 1997). However, these datasets contain limited information on socio-demographic characteristics of households, and do not contain measures of mechanisms affecting philanthropy.

Hardly any studies have investigated the motives of donors to start and stop giving (Sargeant 2001a). To adequately inform fundraising strategies, such knowledge is crucial (Sargeant 2001b). Clearly more research is needed on this issue. It is also relevant from a public policy perspective: if government grants to nonprofit organizations are shifted from one sector (e.g., human services) to another (e.g., education), how do donors react (Payne 1998)? We urge scholars to make better use of the available panel datasets in future research.

What are the cross-national differences in the size and predictors of philanthropy?

The majority of the studies we reviewed are based on data from US citizens. Some papers originated in other Anglo-Saxon countries (the United Kingdom, Canada, Australia, Ireland); some papers are based on data from the Netherlands, and a few papers are from other countries: Poland, Spain, Austria, South Africa, Japan, Taiwan, Singapore and South Korea. Comparative research is much needed, but hampered by the lack of comparative data. We know of only two datasets that used the same questionnaire and the same sampling procedure in multiple countries: the Giving in Asia survey (Asia_Pacific_Philanthropy_Consortium 2002) and the European Social Survey 2002. The ESS dataset, however, is far from perfect. Philanthropy was not defined for respondents; only a no/yes measure of donations was included, and donations to health organizations could not be reported.

Why do people donate to specific charitable organizations, and not to others?

Most studies investigate the total amount donated or donations to a specific (type of) organization(s), but not the choice among multiple potential recipient organizations. This

question has been identified before as an important one for future research (Clotfelter 1997). However, still very little is known about how consumers decide which organizations they will support. One might expect that people contribute more to organizations which provide services that they (expect to) use themselves (in the future). If this is true, philanthropy does not reduce inequalities in society. One article argued there are no meaningful relationships between socio-demographic and lifestyle variables and preferences for different types of charitable organizations (Schlegelmilch & Tynan 1989). However, Bennett (2003) and Wiepking (2006) do find systematic differences in giving to specific organizations with regard to a number of characteristics. There is also some evidence that donors substitute donations to one type of charity to another (Reinstein 2006). How donors make such choices, however, is unclear.

How is philanthropy related to other types of prosocial behaviour?

What is the relationship between giving and volunteering? Do people trade-off these two “civic duties” (Andreoni 2006b; Brown & Lankford 1992; Duncan 1999; Gruber 2004)? Many studies have found that philanthropy is actually positively correlated with other prosocial behaviors like volunteering (Houston 2006; Independent-Sector 2000; Reed & Selbee 2001). It is unclear, however, why they are correlated. Does a change in one type of prosocial behavior cause a change in the other? Or are they just the result of a similar set of determinants (Bekkers 2002)?

How do donors differ in their responsiveness to the eight mechanisms?

It seems that different motives affect philanthropy for different groups of people (Cermak *et al* 1994; Mount & Kaciak 2003; Van Slyke *et al* 2007; Van Slyke & Brooks 2005). Stated differently, personal characteristics of donors moderate the effects of the eight mechanisms. For fundraisers, this would mean that different groups of donors require different treatment (Polonsky *et al* 2002).

How generous are philanthropic donations?

Most of the studies we reviewed analyze the absolute amount donated. For many, the share of income would be a more interesting dependent variable. The share of income donated may be labelled as generosity, as higher relative contributions are more generous. Do the amount donated and the share of income donated have different backgrounds?

How do fundraising organizations influence philanthropy?

What is the impact of fundraising on donors (Andreoni 2006b)? How do solicitation strategies affect donor’s motivations to give? Do different motives motivate contributions in response to personal solicitations and anonymous donations?

To what extent and how does the context in which people live determine philanthropy?

The oldest paper we found is on the influence of context (Blake *et al* 1955). For a long time, little progress was made in identifying the influence of context. Clotfelter (1997) identified the question as an important one for future research. Using survey data, it is very difficult to identify whether correlations between donations of individuals are due to endogenous, exogenous or correlated effects (Manski 1993). Incorporating experiments in surveys may shed new light on the issue.

Do different motives motivate different types of donations?

Bequests may be motivated by a somewhat different set of motives than regular donations (Sargeant *et al* 2006b). Donations that are solicited personally (e.g., requests by

friends, colleagues, door-to-door) are likely to be motivated more strongly by the reputation mechanism. Donations made in response to direct mail, through bank transfers, and online donations are more likely to be driven by values and efficacy. Testing such hypotheses could provide empirical tests of formal models describing the effects of multiple mechanisms at once. Such tests would also yield useful knowledge for fundraisers.

Do different motives motivate large and small donations?

Large and small donors may have different motives for giving (Reinstein 2006; Schervish 1997). Do segmentations of the “average donor market” and the major donor market (Cermak *et al* 1994; Greeves 2006; Prince & File 2001) look the same?

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