

Research Article

# A literature review of experimental studies in fundraising

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**Abstract:** This paper extends previous literature reviews focusing on fundraising and the mechanisms motivating charitable giving. We analyze 187 experimental research articles focusing on fundraising, published in journals across diverse disciplines between 2007-2019. Interest in studying fundraising spans many disciplines, each of which tends to focus on different aspects, supporting earlier claims that fundraising has no single academic “home.” Most of the literature focuses on two key areas: the philanthropic environment in which fundraising occurs, largely focused on potential donors’ experiences, preferences, and motivations; and testing fundraising tactics and techniques that result in different behavior by potential donors. More than 40% of the experiments were published in Economics journals. Correspondingly, topics such as warm glow and mechanisms such as lotteries, raffles, and auctions are well represented. Experimental studies largely omit the practical and the ethical considerations of fundraisers and of beneficiaries. For instance, studies focusing on the identified victim phenomenon often stereotype beneficiaries in order to foster guilt among donors and thereby increase giving. We identify several opportunities for research to examine new questions to support ethical and effective fundraising practice and nonprofit administration.

Keywords: Fundraising, Charitable giving, Donations, Experimental methods

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Nonprofit organizations play a central role in public administration by delivering public goods and services along with public agencies (Young, 2006). Both government funds and private philanthropy support nonprofit organizations, and the constraints upon which that funding is contingent will affect the type and quality of the services provided by nonprofits (e.g., Lipsky & Smith, 1993; Marwell & Calabrese, 2014). At the same time, nonprofits are established to support government entities, such as associations to support libraries (Schatteman & Bingle, 2015), schools (Nelson & Gazley, 2014), universities (Worth, 2016), or parks (Cheng, 2019). The nonprofit sector is experiencing increased competition for donations: the number of

organizations is growing, and at the same time government grants and contracts are becoming increasingly competitive (Bhati, 2018). These recent trends have prompted scholars across disciplines in the social sciences and public administration to study different aspects of fundraising as it directly affects the success of nonprofit organizations (Kim, Mason, & Li, 2017).

Currently, much of this literature in fundraising focuses on two major areas: (1) *who gives*, examining sociodemographic details of donors such as income, age, gender, employment, etc.; and (2) *why people give*, investigating personal benefits, values, and incentives (Bekkers & Wiepking, 2011; Lindahl & Conley, 2002; Waters, 2016; Wiepking & Bekkers, 2012). It has been nearly ten years since the most recent comprehensive review (Bekkers & Wiepking, 2011).

In that time, scholars have called for research that identifies causal relationships to complement other observational and correlational research methods (James, Jilke, & Van Ryzin, 2017, p. 3). Experimental research is a good method by which to test competing explanations and establish causality, tying rigorous research methods to real-world

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practice (Jilke, Van de Walle, & Kim, 2016). Whether the design emphasizes control (laboratory experiments) or external validity (field experiments), experimental research has much to offer to the theorization and practice of fundraising (Kim et al. 2017). Mason (2013) also argues for the importance of randomized, controlled field experiments to better understand causal relationships, and finds that experimental research methods are underrepresented within a leading nonprofit journal, *Nonprofit and Voluntary Sector Quarterly*. A previous collection of experimental research on the topic of giving explored issues of judgment, decision making, and emotions (Oppenheimer & Olivola, 2011). More recently, Kim et al. (2017) maintain that “despite a growing body of experimental research on altruism and charitable

giving, only a limited number of public and nonprofit management studies use experiments” (p. 416).

Heeding these calls, while also recognizing the substantial contribution of studies that use many different and complementary approaches to producing knowledge, we focus here on experiments to highlight their contributions to our understanding of fundraising. We systematically review studies using experimental methods during the period 2007 to 2019 across diverse disciplines. This review extends earlier reviews such as Lindahl & Conley (2002) and Bekkers & Wiepking (2011) (which collected data through 2007) but is also more narrowly focused on fundraising studies using experimental methods. We structure the review into two major areas: (1) *Donors’ Experiences, Preferences, and Motivations* is divided into

**Table 1**  
**Summary of Key Articles Using Experiments in Charitable Giving, 2008-2019**

<b>Authors</b>	<b>Year</b>	<b>Journal</b>	<b>Mechanism tested</b>	<b>Findings</b>
Falk	2007	Eco	Solicitation	Small gift in mailer increases likelihood of getting a donation
Small, Loewenstein & Slovic	2007	OBHDP	Images	Sympathy for identified victim can be suppressed but at the same time sympathy for large scale problem does not increase
Dunn, Aknin, & Norton	2008	Science	Altruism & warm glow	Spending on others increases happiness more than spending on oneself
Liu & Aaker	2008	JCR	Solicitation	Nudging solicitation from amount of money to amount of time increases giving
Ariely, Bracha, & Meier	2009	AER	Reputation & social pressure	In public, people want to be seen as acting prosocially. In private, extrinsic incentives work better.
Small & Verrochi	2009	JMR	Images	Participants are more willing to donate to sad child image than happy
Piff, Kraus, Cote, Cheng & Keltner	2010	JPSP	Values	Lower income individuals are more generous because they subscribe to more egalitarian values
DellaVigna, List & Malmendier	2012	QJE	Reputation & social pressure	In door-to-door solicitation people feel social pressure to say yes
Andreoni, Rao & Trachtman	2017	JPE	Reputation & social pressure	Making avoidance difficult increases giving and verbal ask is more effective

Note: AER – American Economic Review; Eco- Econometrica; JPSP – Journal of Personality and Social Psychology; JMR – Journal of Marketing Research; JCR – Journal of Consumer Research; OBHDP – Organizational Behavior and Human Development Processes; QJE – The Quarterly Journal of Economics.

several themes focusing on (a) the psychological benefits of giving, such as warm glow (or “joy of giving”), and debates between altruism in the economic sense, altruistic values, and warm glow; (b) reputation and social pressure; and (c) efficacy and values. The second area, (2) *Fundraising Practices & Techniques* is divided into themes focusing on (a) images and messages; (b) suggesting gift amounts; and (c) social events such as auctions, raffles, and walks/runs. Overall, we incorporate practical and the ethical considerations for fundraising practice.

### **Methodology & Data**

We performed an analysis of experimental studies that help us understand fundraising, reviewing a total of 187 articles published in 83 journals across diverse disciplines. Articles were identified through a systematic search of (a) online full text of publishers such as Wiley, Emerald, SpringerLink, Sage, and Elsevier; (b) academic databases such as PsychInfo, PubMed, Web of Sciences, and EconLit; (c) Google Scholar; (d) our own literature databases; and (e) references cited in the articles found, using key words such as donations, philanthropy, charitable giving, fundraising and experimental design.

We reviewed papers that were published after Bekkers & Wiepking (2011) ceased data collection in late 2007, and continuing into 2019, performing the search between November 2018 and September 2019. Similar to Lindahl & Conley (2002), we focus on how people and organizations engage in fundraising. We limit our analysis to those using experimental processes, including public goods games, dictator games, etc., which are commonly used within behavioral economics. We excluded studies of donations of blood, tissue, and human biologics. We also excluded studies of donations of time and expertise. Although these are valuable resources, they are conceptually distinct from the financial focus we typically expect of fundraising (Worth, 2016, p. 6).

We used a content analysis approach. For each paper, we developed notes to analyze the key research questions, experimental methods used, key findings, and the number of citations using Google Scholar. Then, we carefully developed themes using both the a priori categories developed by previous prominent fundraising literature reviews (Bekkers & Wiepking, 2011; Lindahl & Conley, 2002), which are well-known to nonprofit researchers, and using an iterative process to identify emergent themes from

the data. Then, we performed a series of descriptive analyses of the data, including analyzing papers by year, by journal, by the primary discipline of the journal, and by citations. Finally, we identified key papers among each theme by using the citations index, as suggested by Ma & Konrath (2018). See Table 1 for summary of key articles using experiments in charitable giving from 2007 to 2019. On average, 15 articles reporting on fundraising experiments were published each year during this period. The largest disciplinary contributor was Economics, with 81 articles published in 31 journals. Psychology and Social Psychology (combined) published 34 articles in 18 journals; disciplines within Business (combined) published 29 articles in 15 journals; and journals focused on some aspect of Nonprofit studies (combined with Public Administration) produced 27 articles in 7 journals. Articles were categorized by the primary focus of the journal in which they were published. Since journals may serve topics that cross disciplinary fields, the primary description used by the journal itself was used in categorization. See Appendix A for a complete list of categories and journals, and the number of articles in each.

Our analyses synthesize findings, placing them within a structure that highlights the duality of donor motivation and fundraising practice. We also offer a critical eye, examining assumptions and the interests of various stakeholders in the fundraising process – the donors, the organizations, its client beneficiaries, and the fundraisers themselves. Based on this work, we offer suggestions for both research opportunities and fundraising practice.

### **Findings**

In this section, we categorize the fundraising studies into two major themes: (1) *Donors’ Experiences, Preferences, and Motivations*, focusing on factors why donors give money to charities; and (2) *Fundraising Practices & Techniques*, analyzing different methods used by charities in soliciting donations.

**Donors’ Experiences, Preferences, and Motivations.** There is an extensive literature on prosocial behavior. Here, we have bounded these topics by focusing on those addressing the voluntary donation of money to charities. This section is divided into three further sections reflecting the most prominent themes: (a) altruism, altruistic values, and warm glow; (b) reputation and social pressure; and (c) efficacy and values.

**Altruism, Altruistic Values, and Warm Glow.**

There is ongoing tension in the literature about motivations of donors to give. Economists have defined “pure altruism” as concern for a given public good or outcome, often complemented by “warm glow,” a psychological benefit from the act of giving in and of itself (Andreoni, 1989; 1990). In our analysis we found several studies in economics following Andreoni’s work, attempting to parse pure altruism from warm glow. Crumpler & Grossman (2008) designed an experimental study to isolate and measure the magnitude of warm glow, using six sessions of a dictator game with 150 university students in a laboratory setting. They found that warm glow was significant and motivated a substantial portion of giving. In a field experiment with 122 children between 3-5 years old, List & Samak (2013) found evidence of pure altruism and not warm glow, and argued that warm glow in adults, as found by Crumpler and Grossman (2008), might develop over time through socialization processes. The size of the gift considered also seems to be tied to different motivations, with larger donors responding better to promotion of charity effectiveness, but smaller donors responding negatively to the same message, suggesting that large wealthy donors are driven by altruism whereas small donors are motivated by warm glow motives (Karlán & Wood, 2017). The closeness of a giver’s relationship to the recipient also affects the size of giving, suggesting that the strength of altruistic behavior may be “target dependent” (Ben-Ner & Kramer, 2011).

Social psychologists have used altruism to mean concern for others, such as the presence of prosocial values. Using this approach, undergraduate students reported lower intentions to give to Make-A-Wish Foundation when presented with both altruistic and egoistic motives, compared to either altruistic motives or egoistic motives separately, suggesting that participants may consider altruistic and egoistic motives as incompatible (Feiler, Tost, & Grant, 2012). Prosocial spending on others – acting on altruistic values – promotes happiness for the giver (Aknin, Dunn, & Norton, 2012; Dunn, Aknin, & Norton, 2008; Dunn, Aknin, & Norton, 2014). Dunn et al. (2014) tested this prosocial spending hypothesis in 120 countries and found a positive relationship. The “strength of relationship varied among countries, individuals in poor and rich countries alike reported more happiness if they engaged in prosocial spending” (p. 42), suggesting altruistic values may be universal.

However, Krishna (2011) argues prosocial spending may function differently in the case of purchasing cause-related products, as the purchase may be perceived as an egoistic act, and therefore not increase happiness. Another study found evidence of increased giving as a method of guilt reduction (Ohtsubo & Watanabe, 2013).

**Reputation and Social Pressure.** Prior experimental studies have suggested that giving increases one’s positive self-image, as the donor is seen as kind and benevolent and experiences an improved reputation (Bekkers & Wiepking, 2011). Bekkers & Wiepking (2011) further state, “the effect of reputation on giving increases with the value of approval received by donors” (p. 951). In our analysis, we found several studies suggesting that information about others’ high contributions positively influences participants’ donation, supporting the premise that approval would be perceived as valuable (Croson, Handy, & Shang, 2009; Croson & Shang, 2008; Güth, Levati, Sutter, & Heijden, 2007; Huck, Rasul, & Shephard, 2015; Jones & Linardi, 2014; Karlán & McConnell, 2014; Kessler, 2017; Kumru & Vesterlund, 2010; Martin & Randal, 2008; Shang & Croson, 2009; Yuan, Wu, & Kou, 2018). One prominent field experiment by Shang & Croson (2009) found participants, who had already decided to donate, gave more when informed about others’ high contributions. Similar results were found by other studies where donors changed their donations based on the information of previous contribution (Croson et al., 2009; Croson & Shang, 2008; Güth et al., 2007; Huck et al., 2015). Following on this idea of social pressure, Martin & Randal (2008) conducted a field experiment in an art museum where they manipulated donations by displaying different amounts of money (empty, 50-cent, \$5 and \$50) in a transparent box. The propensity to donate was highest in the 50-cent treatment, indicating a norm to make a small contribution.

People are likely to give more when others are present, as they want to be seen as doing good. Even the presence of a solicitor creates social pressure, which is difficult to resist (Alpizar, Carlsson, & Johansson-Stenman, 2008; Alpizar & Martinsson, 2013; Andreoni, Rao, & Trachtman, 2017; Ariely, Bracha, & Meier, 2009; Mason, 2016; Reinstein & Riener, 2012). In an important study conducted by Ariely et al. (2009) using both laboratory and field experiment methods, people wanted to be seen by others when acting prosocially. The presence of a solicitor increased donations by 25% over those

made in private among lone travelers in a national park in Costa Rica (Alpizar & Martinsson, 2013). Reinstein & Riener (2012) agree with Bekkers & Wiepking (2011) that it is not just being observed that matters, but also the perceived value of the observer's opinion. The strength of the "reputation-seeking effect" they observed depended upon the nature and closeness of individuals' relationships with peers in the experiment. Publicly acknowledging participating donors can also increase donations (Mason, 2016). But sometimes the reputation aspect works in favor of social norms for conformity, rather than increased generosity: donors may choose to donate within a popular range to avoid standing out in either a positive or negative way (Jones & Linardi, 2014; Zafar, 2011).

Giving can increase the perceived trustworthiness of donors (Fehrler & Przepiorka, 2013) and the desirability of both men and women as long-term relationship prospects (Barclay, 2010). High income (and thus high status) participants can be motivated to give more if they believe that they are providing an example for low-income participants (Kumru & Vesterlund, 2010). Social pressure can influence not just the amount, but also the likelihood of giving. DellaVigna, List, & Malmendier (2012) studied door-to-door fundraising solicitations and argued that people give because they feel social pressure to say "yes." Other studies by Andreoni et al. (2017) and Jasper & Samek (2014) found similar results. Interestingly, DellaVigna, List, Malmendier, & Rao (2013) found that men and women were equally generous in a door-to-door solicitation; however, women were less generous if it was easy for them to avoid the solicitor. The researchers concluded that women may be more sensitive to social cues, and this may affect their prosocial behavior. Men's social behavior depends on the sex of the observer – they tend to contribute more when observed by the opposite sex, rather than a male or no observer, while varying the sex of the observer "did not significantly vary across three observer conditions. Findings support the notion that men's generosity might have evolved as a mating signal" (Iredale, Vugt, & Dunbar, 2008, p. 386).

**Efficacy and Values.** Efficacy refers to the "perception of donors that contributions make a difference to the cause they are supporting" (Bekkers & Wiepking, 2011, p. 942) – and donors are more likely to give if they feel their gift will make a difference. Surprisingly, some studies in our current analysis of experimental articles suggest that efficacy,

or Perceived Donation Efficacy (PDE), does not have a direct relationship with giving (Carroll & Kachersky, 2019; Vollan, Henning, & Staewa, 2017). Vollan et al. (2017) suggest that efficacy is not positively associated with fundraising because most donors assume the organization has already earned a seal of quality, and therefore emphasizing their efficacy might make donors skeptical. Perhaps concern for effectiveness is also often raised as a convenient excuse for what is essentially more self-regarding preferences (Exley, 2016). But perhaps the situation matters -- Rasul & Huck (2010) find that the mere presence of a lead donor signals to others that the particular nonprofit is of high quality, increasing others' giving.

Large organizations might have more capacity to bring about changes in the lives of beneficiaries, or efficacy towards a cause, but donors may prefer to support smaller organizations (Borgloh, Dannenberg, & Aretz, 2013; Bradley, Lawrence, & Ferguson, 2019). Borgloh et al. (2013) conducted a field experiment with non-student populations and found that participants chose small organizations with low revenues over large organizations. They argue that preferring small organizations suggests that participants feel their donation will make more of an impact on the small organization's ability to grow and help the beneficiaries more than a gift to large organizations. Similar "underdog effect" results were found by Bradley et al., (2019) where donors supported the charity with least other support.

Other means of evaluating effectiveness include preferring local giving over giving further away, as donors associate physical closeness with greater impact (Touré-Tillery & Fishbach, 2017), and preferencing higher proportions of service over higher absolute numbers (Bartels & Burnett, 2011). Bartels & Burnett (2011) found that experiment participants preferred a program that saved 50% (50 lives out of 100) to a program that saved 25% (60 lives saved out of 240), despite the fact that the second program saved 10 more lives.

Of course, effectiveness will also be evaluated differently by people who value different things. Donors see the work of nonprofits as a way to change the world, so whether a particular cause or organization is more or less attractive depends on the values and attitudes of a given donor. Donors want to improve the issues they care about, and those particular issues are tied to their sense of identity. For instance, people who identify with environmentalism give to environmental organizations (Simon,

Trötschel, & Dähne, 2008). Another important study in this area examined socioeconomic status, and found lower income individuals more generous, trusting, helpful, and charitable than their upper-class counterparts (Piff, Kraus, Cote, Cheng, & Keltner, 2010). They argue that participants with less disposable income are more generous than higher income individuals because lower income circumstances correlate with more egalitarian values and feelings of compassion. There is also evidence of “karmic-investment” behavior, in which people act more prosocially when they are hoping for the satisfactory resolution of an uncertain event, such as waiting for an acceptance letter, a job offer, or medical test results (Converse, Risen, & Carter, 2012). Converse et al. (2012) encourage fundraisers to solicit donations when people are awaiting results from uncertain events. Interestingly, Malhotra (2010) found religious people more likely than non-religious individuals to engage in prosocial behavior on days when they attend services, but on other days the level of religiosity does not have any behavioral effect.

### **Fundraising Practices & Techniques**

Studies of fundraising techniques may vary one aspect of an appeal in order to observe donor behaviors such as participation or size of donation. In this section, we include three categories that are prominent in both the collected experimental literature and in fundraising practice: (a) usage of images and messages; (b) suggested ask amount; and (c) fundraising events: auctions, raffles, and walks/runs.

**Usage of Images and Messages.** In our review, we found two prominent themes emerging that focused on the relationship between images in solicitations and giving: (a) sad versus happy children, and (b) a single child versus a group. Studies suggest that images of children with sad faces increase sympathy and guilt for not giving among donors, thereby increasing donation intentions (Albouy, 2017; Allred & Amos, 2018; Cao & Jia, 2017; Cockrill & Parsonage, 2016; Fisher & Ma, 2014; Hideg & Van Kleef, 2017; Merchant, Ford, & Sargeant, 2010; Small & Verrochi, 2009). In a laboratory experiment with university students and staff, participants were more willing to donate when they saw a sad child versus a happy child’s face (Small & Verrochi, 2009). Studies by social psychologists argue that the image of a child with a sad face makes viewers feel guilty or sad, and giving gives them an opportunity to convert such

negative feelings into a positive emotion; so, images of a sad child increase giving (Basil, Ridgway, & Basil, 2008; Merchant et al., 2010). Fisher & Ma (2014) found using images of attractive children in fundraising appeals also led to a negative effect on empathy and actual helping behavior.

Cockrill & Parsonage (2016) argue that shocking images, in isolation, decrease the viewer’s intent to agree with the cause. They found emotions most associated with an increased likelihood of helping the charity financially were compassion, relief, interest, surprise, and shame. However, Albouy (2017) argues that negative emotions such as fear, sadness, and shock increase intent to donate. In a dictator game, Van Rijn, Barham, & Sundaram-Stukel (2017) found that using videos that highlight the situational difference between donors and beneficiaries (“negative/ traditional” approach) fosters guilt in viewers, and is more effective in raising donations than using “positive” videos that highlight similarities. Cao & Jia (2017) found that sad images versus happy images garner stronger donation intentions among participants who were less involved with the charity, but the reverse was true for highly involved participants. This suggests that committed donors are more able to think through a problem and need of beneficiaries, and hence happy images make committed donors feel their donation is making a difference.

Studies have suggested that the framing of fundraising written appeals also affects how donors perceive the cause, and their subsequent decision to give. A negatively framed fundraising message (the consequences of not giving) was found to be more effective when coupled with the use of statistical information about the beneficiaries, while a positively framed message (the outcomes of making a gift) was more effective when coupled with the use of emotional information (Das, Kerkhof, & Kuiper, 2008). In addition, participants’ giving intentions were higher for messages that addressed goal attainment (Chang & Lee, 2009; Das et al., 2008). Chou & Murnighan (2013) found that using a “loss message” (e.g., your action can “prevent a death” – which is still an outcome of positive action) is more likely to increase intentions to volunteer and donate than a positive message (e.g., your action can “save a life”). Erlandsson, Nilsson, & Västfjäll (2018) argue that donation behavior and attitudes towards charity appeals do not always go hand in hand. They argue that it’s “possible to hate a negative charity appeal and be angry at the organization behind it but still

donate money after seeking it or alternatively, to love a charity appeal and the organization behind it but still refrain from donating” (p. 23). In summary, these studies highlight the cognition discontinuity among donors making a decision to give based on seeing images of beneficiaries. At one level, donors like to see children in a positive light; but they may donate to a sad faced child if that image induces sadness and guilt.

Attribution also plays a role in how messages are perceived. Across experiments, Zagefka, Noor, Brown, de Moura, & Hopthrow (2011) found that more donations are given to victims of natural disasters than to those affected by human-caused disasters, such as genocide, because donors feel that natural disasters could happen to anyone, and that the victim has no blame in the situation.

Adding to this tension, Hudson, Vanheerde-Hudson, Dasandi, & Gaines (2016), examined the common practice of “traditional” fundraising appeals that intentionally appeal to guilt and pity with depictions of “poor, malnourished, suffering, and typically African, children” (Hudson et al., 2016, p.3) to prompt donations to international development organizations. Using a survey experiment (N=701) Hudson et al. (2016) confirmed that this practice does tend to generate giving, while also priming negative emotions such as repulsion that drive potential donors away and may diminish future engagement. “Alternative” fundraising appeals, which highlight commonalities between the recipients and donors, activate hope rather than guilt and anger. “Alternative” appeals also increased the likelihood of a donation and improved readers’ sense of personal efficacy. Hence, nonprofits using “traditional” approaches may be trading long-term effects for short-term donations, and should consider the long-term effects their fundraising raising appeals may have on donors.

Other scholars have focused on the phenomenon known as “identified victim effect,” where participants are more likely to respond emotionally and help single beneficiaries than they are to help wider groups of individuals (Cryder, Loewenstein, & Scheines, 2013; Dickert, Kleber, Västfjäll, & Slovic, 2016; Erlandsson, Björklund, & Bäckström, 2015; Genevsky, Västfjäll, Slovic, & Knutson, 2013; Hsee, Zhang, Lu, & Xu, 2013; Kogut & Kogut, 2013; Kogut & Ritov, 2007; Small, Loewenstein, & Slovic, 2007; Smith, Faro, & Burson, 2013; Soyer & Hogarth, 2011; Västfjäll, Slovic, Mayorga, & Peters, 2014; Yeomans & Al-ubaydli,

2018). Using a student population (N=121), Small et al. (2007) found that discussing the details about the full scale of a large problem reduced sympathy towards “identified victims” or single victims, and did not generate sympathy for the larger number of victims. Adding to the findings of Small et al. (2007), Kogut & Ritov (2007) found that identifying a single victim increases the participant’s generosity only when the victim is from a participant’s in-group (i.e. sharing participants’ identity name representing certain region). Smith et al. (2013) added that donors may donate to multiple victims when they perceive them as *entitative* – comprising a single coherent unit, such as a mother with four children. Cryder et al. (2013) using three field and lab experiments found donors’ perception of impact of their donation increases giving as they feel their money is making a difference in the lives of the beneficiaries.

Västfjäll et al. (2014) re-tests the findings by designing different experiments testing one or more components together, and finds that affective feeling toward a charitable cause is highest when the victim is single. They argue that as the number of victims increases, donors feel their contribution will be less impactful. However, in a different study by Soyer & Hogarth (2011), donations increased with the number of potential beneficiaries, but at a decreasing rate. It seems that there is more to learn about this phenomenon, as we try to understand the circumstances that affect readers’ perceptions.

**Suggested Ask Amount.** Several experimental studies have focused on the relationship between suggesting an amount to give, and the resulting behavior (De Bruyn & Prokopec, 2013; Edwards & List, 2014; Fielding & Knowles, 2015; Goswami & Urminsky, 2016; Reiley & Samek, 2019). In one study, Edwards & List (2014) asked US college graduates to donate to their alma mater. Those who received a specific ask amount were more likely to respond, and to send a gift near the suggested number. Similarly, Fielding & Knowles (2015) found that a verbal invitation to donate is more impactful than visual clues in isolation, as it acts as peer pressure on the donor. Also, the effect of a verbal invitation is larger if participants have more loose change, as it is more convenient to give change and reduce the peer pressure and guilt of not making a donation.

Often, response cards enclosed with a mailing will have a range of suggested donation amounts, with the first amount referred to as the “anchor,” because of its ability to anchor perceptions relative to it. Evidence suggests that providing a relatively low

anchor will increase the amount of response to the appeal (De Bruyn & Prokopec, 2013; Goswami & Urminsky, 2016), although it may also result in lower giving per donor than a response card with no anchoring amount (Goswami & Urminsky, 2016). De Bruyn & Prokopec (2013) find that it is possible to counteract the effect on gift size by increasing the amount between each suggested gift, so that there is a steeper increase. However, fundraisers may want to keep the suggested amounts in multiples of \$5 or \$10, as donors seem to prefer round numbers, and it is easier to give a suggested amount than to pick another one. In fact, response may be suppressed if “strange” numbers are suggested, because it is easier to not give than to write in one’s own amount (Reiley & Samek, 2019).

Donors seem to have internal reference points, to which suggestions are compared: ask too little or too much, and the request will not be persuasive (De Bruyn & Prokopec, 2017). Fundraisers can use the last gift received for guidance in establishing the anchor amount (De Bruyn & Prokopec, 2013). However, introducing any default may also distract from other positive information about the charity that is included within the appeal (Goswami & Urminsky, 2016). It should also be noted that donors’ giving standards – expectations about appropriate donation amounts – vary across different methods of solicitation, such as door-to-door or direct mail (Wiepking & Heijnen, 2011).

**Fundraising and Events: Auctions, Raffles, and Walks/Runs.** Special events are commonly used in fundraising, which may relate to social motivations such as solicitation (being prompted to attend, and subsequent asks throughout an event); costs and benefits (as in a dinner, entertainment, or a chance to win something); altruism (when they care about the organization’s activities); reputation (as in being seen as a charitable person); psychological benefits (such as contributing to one’s self-image, or enjoying the company of others); and values (when the cause being supported aligns well with the individual’s priorities). While no experiments addressed the gala-type event, we did find experiments that addressed three aspects commonly associated with special events: auctions, raffles, and walks/runs for charity:

**Auctions.** Multiple forms of auctions exist, for example: oral auctions, in which an auctioneer calls out ascending bids; silent auctions, in which bids are written down or communicated electronically; sealed, or blind, auctions, in which bidders have no

knowledge of others’ bids. Lab experiments have tended to support the theory that an all-pay format – in which everyone bidding must pay their bid for an item whether or not they win – will result in higher contributions than the common winner-pay auction (Faravelli & Stanca, 2012; Schram & Onderstal, 2009). However, all-pay auctions are not commonly used in fundraising. This may be because outside the lab, people are more likely to perceive a choice as to whether or not to participate. In natural field experiments within an existing fundraising event, more people participated, and more was raised, in an auction in which only the winner paid the highest bid (Carpenter, Holmes, & Matthews, 2007). Both the prizes offered and charitable inclination are factors affecting bidding. Evidence shows that, within an auction, some prizes generate more interest than others (Carpenter, et al., 2007). Separately, when identical items were placed for auction in both a non-charitable context and a charitable context, those in which a charity or charities benefitted from the higher price paid sold for a higher price (Leszczyc & Rothkopf, 2010).

**Raffles.** All else being equal, using a lottery or raffle prompts people to contribute more than simply asking for donations – people generally respond well to the chance to win a prize (Lange, List, & Price, 2007). In a lab experiment using a “self-financing” (or 50/50) raffle, in which money is collected in a short period of time while participants are present, and half the money contributed (the “pot”) was donated to charity, sharing information about the size of the pot after a first round of ticket sales increased the tickets sold in a second round (Goerg, Lightle, & Ryvkin, 2016). Another common form of raffle is one in which tickets, each of which represents one chance to win, are available over a longer period of time, often several weeks, with proceeds benefiting a local charity. In a field experiment in which proceeds benefited local poverty relief, Carpenter & Matthews (2017) found that two variations performed better than the standard linear raffle (in which each ticket sells for the same price). The highest income resulted from pricing with discounts for purchasing more tickets. Another variant, in which people received the same number of chances for any amount donated over a floor amount, also resulted in higher income than simply selling tickets at a fixed price (Carpenter & Matthews, 2017).

**Charitable Walks/Runs.** When people are suffering, such as from cancer, Alzheimer’s disease



or another chronic illness, or depression leading to suicide, they will donate more when there is effort or discomfort, such as physical exertion, involved in their donation compared to a similar event that is purely social. This decision is mediated by individuals' perception of the act as meaningful, suggesting a psychological benefit (Olivola & Shafir, 2013)

## Discussion & Conclusion

This study provides a rigorous review and analysis of experimental studies on charitable fundraising reported across many disciplinary journals and joins others in calling for high-quality experimental research in the nonprofit fundraising field. We develop themes in two areas: (1) donors' experiences, preferences, and motivations, and (2) fundraising practices and techniques. Our review of the past decade's published research suggests that the majority centers around donor motivation and behavior, focusing on why donors give and how nonprofits can promote more giving. In this section, we share important insights from the review of the literature, followed by suggestions for future researchers of fundraising, and practical insights for practitioners.

*First*, prosocial spending on others promotes happiness and warm glow among donors (Aknin et al. 2012; Dunn et al. 2008; Dunn et al., 2014).

*Second*, "warm glow," or the "joy of giving," may result from a socialization process, as evidence suggests children give because of pure altruism (List & Samak, 2013). That said, a recent study by Body, Lau & Josephidou (2019) highlighted the common practice of encouraging transactional fundraising among children, such as encouraging fundraising efforts through incentive rewards, rather than engaging children about their ideas and values about giving. They argue that a more critical engagement of children in ideas of giving often results in increased effort to support causes that matter to them – potentially a different goal than that of the organizations incentivizing the transactional fundraising efforts. This both illustrates the socialization process in action, and suggests that a different approach to engaging with children around fundraising can support their altruistic impulses.

*Third*, Karlan & Wood (2017) suggested donor motivation differs based on the size of the gift. For instance, they found that large donors are driven by altruism; on the other hand, smaller donors are driven by warm glow motives. Given the

demographics of likely donors, it would be helpful to test whether other motivations differ systematically, such as whether older adults' motivations differ from those of younger or mid-life adults.

A *fourth* insight pertains to the role of reputation and social pressure. Several studies suggested donors contribute more after knowledge of others' donations (Croson et al., 2009; Croson & Shang, 2008), which also supports the idea of giving standards raised in Wiepking & Heijnen (2011).

A *fifth* insight is that efficacy (or PDE) toward a cause does not have a direct relationship with giving (Carroll & Kachersky, 2019; Vollan et al., 2017). Studies have suggested that donors tend to support smaller or less supported organizations known as "underdog effect" as they feel their giving is making a difference to these organizations (Borgloh et al., 2013; Bradley et al., 2019). Also, Bartels & Burnett (2011) found participants are more willing to give to programs that save higher proportions of individuals even if it means lesser lives as they feel their contribution is making a difference to a large percentage of people.

*Sixth*, we found evidence that sad face images increase sympathy and guilt, and thereby increase donations (Cao & Jia; Merchant et al., 2010; Small & Verrochi, 2009), and that donors respond to an "identified victim effect" (Cryder et al., 2013; Dickert et al., 2016; Genevsky et al., 2013). Hudson et al. (2016) suggest that charities should adopt a long-term strategy to cultivate and educate donors about the real issues rather than simply focusing on emotional images or message framing to attract more donations in the short term. One way to educate donors is by bringing more voices of beneficiaries in fundraising and tell more complete stories, particularly about needy or marginalized people, rather than just overwhelmingly focusing on donor motivation to give (Bhati & Eikenberry, 2016). Also, the relationship between the race of beneficiaries and generosity should be further explored to understand whether how beneficiaries are represented is leading to stereotyping poor and contributing to racial bias (Fong & Luttmer, 2011).

*Seventh*, lab experiments support the argument of an all pay auction format (Faravelli & Stanca, 2012; Schram & Onderstal, 2009; but see our caveats below under *Practical and Ethical Considerations and Future Research*), and that raffles promote giving (Lange et al., 2007).

*Eighth*, we found only handful of studies focusing on using experimental design outside of

U.S., consistent with the findings of Ma & Konrath (2018) regarding most of the nonprofit literature, including experimental studies in nonprofits, is produced in Anglosphere countries.

*Ninth*, very few of the experiments addressed issues of fundraising management. Studies explored the importance of task significance in fundraising performance (Grant, 2008); potential donors' response to the communication implicit within fundraisers' titles in the context of a possible sophisticated charitable gift (James, 2016); and the cultural embeddedness of donor behavior across international borders (Banerjee & Chakravarty, 2014; Špalek & Berná, 2012; see Wiepking & Handy, 2015 for a more comprehensive treatment). Given the reliance of charitable organizations on both the income generated by charitable gifts and, relatedly, having the right staff in place to meet fundraising goals (Nonprofit Research Collaborative, 2015), issues of management in fundraising in the U.S. and around the world seem a worthy avenue for further research. For example, when one compares the activities of fundraising (Breeze, 2017) with the definition of leadership as "the ability to influence a group toward the achievement of a vision or set of goals" (Robbins & Judge, 2019), an entire arm of leadership literature can be implicated in understanding how fundraisers work with donors and organizations.

A less bright, but ethically important management topic involves the interaction of social preferences and hiring practices. In a study of door-to-door fundraising in North Carolina, minority fundraisers received fewer gifts, and a lower total amount, compared to Caucasian fundraisers, regardless of the race of the household approached (List & Price, 2009). Sadly, this is consistent with other evidence of widespread racial bias. Nonprofits, particularly those with a mission of promoting social justice, should consider how to incorporate this mission into their administrative practice, as well as raising funds for their programs.

*Tenth*, although there is a robust experimental fundraising literature, these studies are not often published in journals focusing on Public, Nonprofit, or Philanthropic Studies. While there is evidence that Nonprofit Studies may be consolidating as a discipline (Ma & Konrath, 2018), examining the past twelve years' evidence demonstrates that fundraising is also studied experimentally across many other fields, notably Economics, Psychology, and Business. This finding aligns with others who have asserted

that fundraising has no single "academic home in higher education" (Mack, Kelly, & Wilson, 2016, p. 180), but the disciplines prevalent in our review differ from those previously identified - Public Relations, Marketing, and Nonprofit Management (Mack et al. 2016). We examined the top ten ranked articles for citations. Of these, five addressed donor motivation and behavior; one examined task significance - an issue of interest broadly within organizational behavior, but here analyzed specifically using fundraisers; and six studied strategic considerations of fundraising practice. Of the top ten, four were Economics journals, three were Business journals, and two were Psychology journals. On the one hand, the distribution suggests that the most influential journals in experimental fundraising research are not among those focused primarily on Public, Nonprofit, or Philanthropic Studies. On the other hand, Economics, Business, and Psychology are all well-established areas of study with large numbers of affiliated scholars, and we do not know whether the scholars citing these articles are studying fundraising or some other related topic. That analysis is beyond the scope of this paper.

*Practical and Ethical Considerations and Future Research:* Past economic research has been enthusiastic about structuring charitable auctions in all-pay formats to increase the funds contributed, although since evidence from field experiments is at odds with evidence from laboratory experiments, research into the boundary conditions is needed (Schram & Onderstal, 2009). However, there are other considerations, among them legal and ethical standards. Auctions are often regulated, and are not legal in all jurisdictions (National Council of Nonprofits, 2019). Additionally, money paid for bids at auction or chances at a lottery are not tax deductible for charitable purposes in the US, although donations are. In recent years, the paddle raise has gained popularity, in which an audience is given a short presentation about the charity's work, and an auctioneer invites people to raise their auction paddles (or their hands) to make a publicly observed pledge to donate at a given level, with no material prize. Since the charity benefits similarly and the cost is less for the individual donating (compared to bidding), it may be ethically preferable for fundraisers to prefer paddle raises over all-pay auction formats. Therefore, we cannot support the enthusiastic recommendations for fundraising practitioners to embrace all-pay auctions, but we do recommend that researchers evaluate the relative effectiveness of the-

se two options.

In this paper, we found that the majority of the literature on fundraising techniques focuses on donor motivations and behavior: very few studies focus on beneficiaries or fundraisers. Generally, most experiments focusing on fundraising practices and techniques focus on donors' responses, with the goal of increasing the amount of money transferred to the charity. Lab experiments, in particular, tend to measure one-shot transactional giving opportunities, representing the effort of constantly trying to acquire new donors, and they may treat the kind of charity recipient as generic. Research design decisions are sometimes oddly contradictory to studies of donor motivation, which show that donors' giving decisions are strongly aligned to their values, preferences, and identity, and that strong attachment to a charity or a cause results in different evaluation choices than a casual or prospective donor. While these experiments may have high internal validity, real-world circumstances may result in different behavior than that performed in the lab (e.g. all-pay auctions perform well in lab experiments (Schram & Onderstal, 2009; Faravelli & Stanca, 2012) but see poor participation in field experiments (Carpenter et al., 2007). Similarly, recommended fundraising practice includes acquiring new donors – but also retaining them, engaging them, and cultivating a closer relationship, which is understood to result in a change in behavior over time (Worth, 2016). Working with existing donors requires different strategies than acquiring first time donors, notably incorporating donor stewardship, an element of fundraising practice that incorporates elements of demonstrating gratitude to donors, responsibility to stakeholders, reporting on project developments, and relationship nurturing strategies (Waters, 2009). Similarly, the motivations of individuals who give may change as they interact with and continue to support a charity, often increasing their commitment over time (e.g. Karlan & Wood, 2017). In 2018, 97% of American and Canadian charities surveyed reported using major gift and planned giving methods, which rely on these relationship-building strategies (Nonprofit Research Collaborative, 2019). This practice tends to be highly individual, which is harder to examine experimentally, but survey research has confirmed that donors who give more often perceive a stronger relationship with the organization than one-time donors (Waters, 2008).

This raises an ethical aspect in recognizing that the emphasis on short term fundraising results in

experimental research is incomplete, at best, and biased at worst. Just as managing for short term results can have negative consequences for the long term, the emphasis on short term fundraising results may not be a good strategy in the long term for the charity, its donors, or its clients. For example, if a charity, responding to experimental evidence, intentionally induces feelings of shock or shame so that people can relieve those feelings with a gift, what is the long-term effect of people's willingness to read charitable appeals? How does it affect how they think of that charity? How does it affect how they think of the people served by that charity? Evidence from a study on global poverty suggests that such tactics do negatively affect readers' perception of efficacy (Hudson, et al., 2016). Considerations such as this inform fundraising professional codes of ethics, such as that of the Association of Fundraising Professionals (AFP, 1964, 2014). Similarly, if fundraisers take to heart the "Karmic Investment" approach, soliciting donations when people are awaiting results from uncertain events (Converse et al., 2012), it may result in predatory behavior and exploiting vulnerabilities to raise donations in the short term. This is counter to a professional "duty of care" for donors (Lewis, 2019), or, put another way, valuing the interests and well-being of donors (AFP, 1964, 2014). We encourage researchers to consider ethical ideals and practice when designing studies and considering their application.

*Practical Considerations for Fundraisers:*

- Auctions: Research supports the received wisdom that prizes should be selected with the audience in mind, and that more people will participate (and more money will be raised) by continuing to have only the winner with the highest bid pay, rather than requiring all bidders to pay, regardless of who wins the prize.
- Raffles: In states where charitable raffles are legal, charities can increase the funds raised by either giving a volume discount for purchasing a greater number of tickets, or by selling tickets as "pay what you want" with a floor price. If the raffle is a 50/50, sell tickets in at least two waves, and share the size of the pot before beginning the second wave.
- Walks/ Runs: These work best when benefitting a cause where people are suffering, not causes for human enjoyment. Treat the participants' exertion as a tribute to others in need.
- Stewardship: Make use of stewardship materials

to not only thank donors, but also to educate them further about the issues and whole personhood of the clients benefitting from their gifts. This may include addressing a fuller scope of issues, some policy considerations, etc. – but should in all cases take care not to diminish the personhood of clients by reducing their voice or agency. Instead, build on commonalities between the clients and donors.

This paper updates and consolidates our knowledge of experimental studies across multiple behavioral and professional disciplines that inform the practice of fundraising. It reviews the disciplines and outlets for this research, and selectively extends the Bekkers

& Wiepking (2011) review of donor motivations, tying the recent experimental literature of this supply side of philanthropy to its counterpart on the demand side: fundraising practice. We offer a stakeholder-informed perspective of both the practices of fundraising and the research that informs it. Finally, we offer suggestions to both researchers and practitioners in the area of charitable fundraising.

### Acknowledgments

The authors wish to thank the anonymous reviewers for their helpful suggestions, Richard Steinberg, Andrew Burk, and session participants at the 2019 ARNOVA conference.

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## Appendix

*Analytic categories of disciplines and journals*

Key:

**Bold** indicates a primary category (# of journals - # of articles)

***Bold italicized*** indicates a sub-category (# of journals - # of articles)

Name of Journal (# of articles)

<b>Economics (31 – 81)</b>	<b>Psychology/ Social Psychology (18 – 34)</b>	<b>Business Disciplines (15 – 29)</b>	<b>Nonprofits &amp; Public Administration (7 – 27)</b>	<b>Other (12 – 16)</b>
American Economic Journal: Economic Policy (1)	<b><i>Psychology (12 – 22)</i></b>	<b><i>Advertising (3 – 4)</i></b>	<b><i>Art Management (1 – 1)</i></b>	<b><i>Biology (6 – 6)</i></b>
American Economic Review (4)	Applied Psychology (1)	International Journal of Advertising (1)	International Journal of Art Management (1)	Journal of Neuroscience (1)
Applied Economics (1)	British Journal of Psychology (1)	Journal of Advertising (1)	<b><i>Nonprofit &amp; Public Sector (6 – 26)</i></b>	Letters on Evolutionary Behavioral Science (1)
Applied Economics Letters (1)	Current Directions in Psychological Science (1)	Journal of Advertising Research (2)	Nonprofit and Voluntary Sector Quarterly (8)	NeuroImage (1)
Ecological Economics (3)	Journal of Applied Psychology (1)	<b><i>Business, General (2 – 7)</i></b>	Voluntas (3)	Philosophical Transactions of the Royal Society B: Biological Sciences (1)
Econometrica (1)	Journal of Behavioral Decision Making (3)	Journal of Business Research (4)	International Journal of Nonprofit and Voluntary Sector Marketing (6)	Evolution and Human Behavior (1)
Economic Inquiry (3)	Journal of Happiness Studies (1)	Journal of Consumer Psychology (3)	International Review on Public and Nonprofit Marketing (1)	Ethology (1)
Economics Letters (3)	Journal of Personality and Social Psychology (2)	<b><i>Finance (1 – 1)</i></b>	Journal of Nonprofit & Public Sector Marketing (1)	<b><i>Communication (1 – 1)</i></b>
Ekonomický časopis (Economic	Judgment & Decision Making (5)	Financial Accountability & Management in Governments,	Nonprofit Management & Leadership (7)	Journal of Applied Communication Research

Magazine -- Slovak) (1)		Public Services and Charities (1)		
European Economic Review (1)	Personality and Individual Differences (1)	<b>Management (3 – 6)</b>		<b>International Development (2 – 2)</b>
Experimental Economics (6)	Psychological Science (3)	Journal of Organizational Behavior (1)		Journal of Development Effectiveness (1)
Games and Economic Behavior (1)	Evolutionary Psychology (1)	Management Science (2)		The Journal of Development Studies (1)
Global Economics and Management Review (1)	Theory and Decision (2)	Organizational Behavior and Human Decision Processes (3)		<b>Science, General (2 – 6)</b>
International Economic Review (2)	<b>Social Psychology (6 – 12)</b>	<b>Marketing (6 – 11)</b>		PLoS ONE (4)
Journal of Behavioral and Experimental Economics (9)	Asian Journal of Social Psychology (1)	International Journal of Research in Marketing (1)		Science (2)
Journal of Economic Behavior & Organization (8)	European Journal of Social Psychology (2)	Journal of Marketing Research (4)		<b>Technology (1 – 1)</b>
Journal of Economic Psychology (3)	Journal of Applied Social Psychology (2)	Journal of Social Marketing (1)		Expert Systems with Applications (1)
Journal of Political Economy (1)	Journal of Experimental Social Psychology (4)	Recherche et Applications en Marketing (1)		
Journal of Public Economic Theory (1)	Personality and Social Psychology Bulletin (2)	Journal of Consumer Research (3)		
Journal of Public Economics (18)	Social Psychology (1)	Psychology & Marketing (1)		
Journal of the European Economic Association (1)				
Kyklos (1)				
Oxford Review of Economic Policy (1)				
Review of Behavioral Economics (1)				

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Southern Economic Journal (1)				
The American Economic Review (1)				
The BE Journal of Economic Analysis & Policy (1)				
The Economic Journal (2)				
The Quarterly Journal of Economics (1)				
The Review of Economic Studies (1)				
The Scandinavian Journal of Economics (1)				