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DONOR PORTFOLIO MANAGEMENT IN CHARITABLE ORGANIZATIONS: DRIVING FACTORS AND CONSEQUENCES ON FUNDRAISING

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Donor Portfolio Management in Charitable Organizations: Driving Factors and Consequences on Fundraising

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CHAPTER I

INTRODUCTION

Over the last decades, our society has witnessed periods of social and economic instability caused by important events such as the Great Recession that started in 2008, the consecutive civil conflicts in Eastern countries, climate change accompanied by natural disasters and, more recently, the Russo-Ukrainian War, which have led to the persistence of important social problems, such as inequality, large migrant population movements, and poverty around the world. In addition, the health crisis caused by COVID-19 has exacerbated the broader vulnerabilities of the most disadvantaged communities and existing inequalities between people by increasing global unemployment and dramatically lowering individuals' incomes (United Nations, 2020). Aware of the seriousness of the situation, during the last 15 years, global institutions and experts have postulated to ensure the well-being of society as a top priority, especially in the most disadvantaged regions, by providing global assistance and developing a strategic plan aimed at curbing the negative effects of the emerging events on common welfare. For example, in September 2015, the United Nations General Assembly adopted the 2030 Agenda aimed at ending poverty, protecting the planet, and ensuring prosperity within the next few years. At the heart of this Agenda are the 17 Sustainable Development Goals (SDGs), which are aimed at all actors on the planet, such as governments, civil society, and private sector organizations. Likewise, to address the overwhelming effects of COVID-19, United Nations humanitarian agencies, along with the World Health Organization, propose to overcome the severe systemic inequities exposed by the pandemic through the adoption of policies that address the devastating socio-economic, humanitarian, and human rights aspects of the crisis (United Nations, 2020).

As a critical requirement for the execution of this new framework for contributing to social development and facing important issues, a call has been made to scholars in the business and management discipline, as a central research field facing society's challenges, to create knowledge that makes a positive difference by broadening their perspective and considering marketing's impact on a variety of stakeholders and societal well-being (Cross et al., 2022; Moorman, 2018). A clear example of this is the increasing directions for future research provided by important academic journals, such as the Journal of Marketing, in recent special issues, for example, "Better Marketing for a Better World". Here, several research priorities related to the concerns shared by marketing academics and practitioners today about marketing's role in creating a better world and improving societal outcomes (Moorman, 2018), are proposed:

- *How do marketing activities influence the livelihood, functioning, and sustainability of the important human systems that are critical for consumer and community welfare?*
- *How do consumers, policy makers, and other stakeholders determine and pursue better outcomes, for example, by improving self-efficacy, framing, education, or other strategies?*
- *How and under what conditions can marketing do well by doing good in the areas of consumer and social welfare?*
- *How can charitable donations, recycling, and other positive consumer behaviors be encouraged?*

Similarly, Chandy et al. (2021) states that "the winds of change in science, regulation, demographics, and the physical environment are creating new opportunities for marketing to make an impact on the world at large" and underlines the current academic interest in emphasizing the role of marketing in enhancing the welfare of the world's other stakeholders and institutions (e.g., charitable organizations).

Marketing has become especially fundamental in the charitable giving domain since fundraising represents one of the main challenges in the management of these organizations (Helmig, Jegers, & Lapsley, 2004). Over the past 20 years, marketing strategies have taken on an increasingly important role for fundraisers, given their need to raise sufficient resources to address a greater number of social needs. They have paid more attention to key aspects related to donor value and relationship management, thus taking a more relational approach in their fundraising activity (Bennett, 2006; Sargeant, 2001; Faulkner, Romaniuk, & Stern, 2016; Thomas, Feng, & Krishnan, 2015; Waters, 2011). Marketing research in this context is important because, by offering valuable practical contributions that enable charitable organizations to optimize their donor portfolio and target the right audiences (Faulkner, Romaniuk, & Stern, 2016; MacMillan et al., 2005; Ranganathan & Henley, 2008), managers can achieve fruitful relationships between the organization and their financial supporters (Bennett & Barkensjo, 2005; Khodakarami, Petersen, & Venkatesan, 2015; Kim, Gupta, & Lee, 2021; Rupp, Kern, & Helmig, 2014) and, most importantly, ensure sufficient monetary resources to successfully address important social issues.

Charitable organizations play a key role as agents in developing initiatives whose main priority is to exert the greatest social impact through their actions (Song, Li, & Sahoo, 2021), aimed at contributing to the sustainable development of the community, building a fair society, reducing social inequality, and improving the living conditions of the most vulnerable communities (Boenigk et al., 2021). Charities are also fundamental in addressing emergency situations, such as those caused by environmental disasters, or those caused by pandemic diseases (Bin-Nashwan et al., 2020). Moreover, through their charitable projects and the launch of fundraising campaigns, charitable organizations promote helping behaviors and achieve significantly higher levels of financial support among their potential donors (Sargeant

& Shang, 2011). For these reasons, these institutions are crucial in the fundraising process and the development of society and its welfare, as well as in the achievement of the SDGs.

Nevertheless, the intensification of social problems, together with the proliferation of nonprofit organizations and decreasing governmental support in the past few years, are making the achievement of the mission of these institutions more challenging (Arnett et al., 2003; Fang, Fombelle, & Bolton, 2021; Venable et al., 2005). Consequently, charity's fundraisers are struggling to manage the "double bottom line", trying to balance the financial resources they receive and the social mission they pursue (Álvarez-González et al., 2017; Dolnicar, Irvine, & Lazarevski, 2008; Fairfax, 2004). Given this, charitable organizations fundamentally rely on the support of individual donors, recognized as their most significant resource of revenue (Ranganathan & Henley, 2008; Sudhir, Roy, & Cherian, 2016). However, while this private support represents a large part of the funds raised by these institutions and is achieving very significant donations in recent years—for example, U.S. charitable giving reached a record $471.44 billion, of which $324.10 billion came from American individuals (Giving USA, 2021) and also major European foundations acknowledge receiving almost 95% of their funds from individual donors (Transnational Giving Europe, 2021)—a decreasing trend is observed among these donations. The competitive pressures for funding in this sector (Álvarez-González et al., 2017; Fang, Fombelle, & Bolton 2021; Venable et al., 2005) has led individuals to spread their donations among different organizations and social causes, thus reducing the total donations received by one single charity and creating serious financial difficulties that jeopardize the execution of many social projects, and therefore threatening the survival of these organizations (Development Initiatives, 2020).

In this context, the donor portfolio plays an essential role in guaranteeing stable and substantial funding that allows the accomplishment of the organization's goals and mission (Bekkers, Gouwenberg & Schuyt, 2020; Drollinger, 2018; Sargeant & Woodliffe, 2007).

Implementing a donor portfolio management approach has become essential for charitable organizations to develop successful relationships with their donors and gain their sustained support (AbouAssi, 2013; Khodakarami, Petersen, & Venkatesan, 2015). However, this requires an appropriate understanding of the donor base in terms of the types of donors that provide support, their donation behavior, and how it evolves over time. This, in turn, would enable the organization to identify and design the most appropriate strategies that maximize retention rates and the funds collected (Kim, Gupta, & Lee, 2021), thus building a stable donor portfolio with sufficient financial resources to ensure the effective implementation of programs that successfully address important social challenges in the long term.

Given this, the present doctoral dissertation aims *to provide a comprehensive understanding of the different types of donors and their donation behavior over time to help charitable organizations improve the management of their donor portfolio and obtain greater and more stable funding to successfully address their social projects.*

With this general objective in mind, this doctoral dissertation focuses on three key challenges that charitable organizations face in their attempt to implement effective management of their donor portfolio. The first relates to the way in which charitable organizations should approach their donors, given the heterogeneity in donors' preferences for different types of relationships (i.e., transactional versus relational), and the implications that this can have on fundraising. The second involves donors' personal traits and, particularly, their beliefs about how society should work (i.e., political ideology), and the need to understand what is the impact that this has on donation behavior over time. The third has to do with regular donors and relates to the frequency with which they provide their contributions in a year, and the implications that this can have on their donation amounts in subsequent periods. These challenges are addressed in three different studies, which seek to provide valuable knowledge and practical tools to help charitable organizations manage their donor base effectively. We discuss each of these challenges, and the studies that are developed to address them, in turn.

1.1 CHALLENGE 1. HOW TO APPROACH DONORS WITH DIFFERENT RELATIONSHIP ORIENTATIONS

Previous literature has underscored the key role of marketing strategies, in promoting giving behaviors (Khodakarami, Petersen, & Venkatesan, 2015; van Dijk, Van Herk, & Prins, 2019), and donor portfolio management, as essential tools for creating valuable and profitable relationships (Drollinger, 2018; Sargeant & Woodliffe, 2007). In this sense, relationship marketing has been postulated as a predominant managerial approach through which managers can achieve greater retention rates, as well as maintain or increase funds collected (Camarero & Garrido, 2012; Morgan & Hunt, 1994). However, despite this tendency toward researching one true "ideal" relationship, prior work has acknowledged that not all individuals desire to form relationships with organizations and establish the same type of involvement with them (Dalziel, Harris, & Laing, 2011). Therefore, managers need to understand ***how to approach donors with different relationship orientations,*** and based on this, design appropriate strategies that maximize the value of every financial supporter (e.g., commitment to the organization or monetary value of their contributions).

While prior relevant work has examined the role of relationship marketing in these organizations, as well as the determinants that lead donors to offer future support by contributing through regular amounts for long periods of time (Bennett & Barkensjo, 2005; Drollinger, 2018; Khodakarami, Petersen, & Venkatesan, 2015; MacMillan et al., 2005; van Dijk, Van Herk, & Prins, 2019), the approach that considers donor segmentation in order to identify which type of relationship is most appropriate to develop with each donor has hardly been addressed. As Rupp, Kern and Helmig argued "segmentation is an important prerequisite for relationship marketing success and that, vice versa, relationship marketing considerations are the starting point for many a segmentation effort" (2014, p. 83). However, they also noted that nonprofit literature scarcely provides this link, thereby resulting in a lack of knowledge about behavioral factors reflecting donors' relational orientations and indicating which individuals can be more prone to engage in long-term behaviors and be more receptive to relationship marketing strategies.

Although, in the for-profit domain, literature has devoted more attention to relationship marketing strategies and identified factors as important indicators through which individuals show a tendency towards participative behavior and a greater interest in continuing the relationship (Ashley et al., 2011; Brodie et al., 2013; Smit, Bronner, & Tolboom, 2007), research on how these elements influence the actual behavior of individuals is still scarce.

Given the above, two important questions remain unanswered: *How to best capture preferences for long-term relationships in a charitable giving context? How will relationship orientations affect the organization's performance both in terms of long-term commitment and funds collected?*

In this regard, the present doctoral dissertation aims to address the following objectives:

Research objective 1. *To identify individuals' preferences for relationship marketing analyzing their influence on the building of enduring relationships and subsequent donation behavior.*

Research objective 2. *To analyze the role of past giving behavior and its join impact with preferences for relationship marketing in enduring donor–organization relationships.*

In addressing these research objectives, Study 1 is developed. Specifically, this study investigates the effect of consenting to direct marketing and analyzes the extent to which individuals' willingness to share their data with the organization can affect whether they will engage in an enduring relationship with it (i.e., become members or regular donors). In addition, this study analyzes past giving behavior (i.e., frequency and donation amount) as a factor moderating this relationship. Study 1 also explores the donation amounts of the individuals who decide to become members of the charity during the first year of their membership, as well as whether their consent to direct marketing plays a role in driving these amounts. Using a database of donors from a charitable organization, which contains longitudinal information (behavioral aspects, relational factors, and membership registration data) for a period of seven years (2013–2020), this study applies the Heckman's (1979) two-stage correction approach (in Stata 16) for the simultaneous estimation of two models (probit and OLS) to derive a proper understanding of the studied phenomenon.

1.2 CHALLENGE 2. POLITICAL IDEOLOGY AND CHARITABLE GIVING

Another important issue, which has recently aroused the interest of scholars in different disciplines, is that citizens are increasingly greatly divided socially, psychologically, and politically (Groskopf, 2016; Jost, 2017). This aspect has gained great relevance in the study of consumer behavior and charitable giving (Farmer, Kidwell, & Hardesty, 2020; Fernandes et al., 2022; Winterich, Zhang, & Mittal, 2012). However, a major challenge for charity's fundraisers is the more intensive application, in donor portfolio management, of an approach that helps them to correctly ***address the typology of their financial supporters and***

accommodate communication messages to different political audiences, to maximize the value of the entire donor portfolio.

In recent years, research has devoted special attention to better understanding how political ideology, such as conservatism and liberalism, influences donation behavior (Farmer, Kidwell, & Hardesty, 2020; Kaikati et al., 2017; van Esch, Cui, & Jain, 2021). This is important since understanding why people give, based on how they understand society and rationalize the existing structure of inequalities between groups, may lead to proper targeting and increased charitable behavior (Jost et al., 2003; Paharia & Swaminathan, 2019; Robson & Hart, 2020). However, a large portion of empirical studies consider political ideology merely as a control variable and analyze its impact mostly on the amount of giving and the type of organization donors support (Bekkers, 2005; Brooks, 2005; Robson & Hart, 2019; Yang & Liu, 2021). Indeed, recent research has underscored the need for more research exploring under what conditions conservatives and liberals display charitable behavior and answering questions about how and when each can be more generous (Farmer, Kidwell, & Hardesty, 2020; Yang & Liu, 2021). This highlights the need for new empirical work studying the influence of political ideology on donation behavior from a multi-dimensional perspective, where individuals face two important donation decisions (i.e., donation frequency and donation amount) and other decisions related to the adherence to different forms of giving (i.e., membership and donations; Kim, Gupta & Lee, 2021), which have not yet been addressed.

Prior literature recognizes that the existence of various forms of giving (e.g., through membership and donation programs) suggests that there may be different motives related to the way donors understand helping behavior and how they allocate their financial support to multiple initiatives (AbouAssi, 2013; Khodakarami, Petersen, & Venkatesan, 2015). However, despite the wide use of different fundraising programs in nonprofit organizations

(Gruen, Summers, & Acito, 2000; Kim, Gupta & Lee, 2021), there is no evidence on their implications on individual's donation decisions.

Therefore, the following research questions are proposed: *Can political ideology influence multiple donation decisions and the choice of the form of giving differently? How will the form of giving chosen affect the donation decisions of audiences with different political ideologies?*

In answering these questions, the present doctoral dissertation aims to approach two important objectives:

Research objective 3*. To investigate the consequences of political ideology on different donation decisions (frequency and amount) and forms of giving (membership and donations).*

Research objective 4. *To explore how the impact of political ideology on donation decisions varies across different forms of giving.*

To approach these objectives, Study 2 is carried out. This study draws from system justification theory to deepen our understanding of ideological processes and outcomes in the helping behavior domain. It discusses two important aspects: (i) donation decisions (i.e., frequency and donation amount) and (ii) forms of giving (i.e., membership and donations). Then, this study offers elaborated arguments to motivate the research hypotheses on how political ideology influences donation decisions and the form of giving, and on how the form of giving moderates the relationship between political ideology and donations. Study 2 uses data corresponding to a representative sample of 7,159 donors from a charitable organization observed over eight years (2013–2020). The data set contains longitudinal information on donation behavior, sociodemographic, and political ideology (capturing the voting results over time in the country studied and its different regions at the residential area level). This study uses a seemingly unrelated regression method (SUREG procedure in Stata 16) and estimates a system of three equations simultaneously in a single step. The results offer novel insights into the role played by political ideology in charitable giving.

1.3 CHALLENGE 3. MANAGING PAYMENT SCHEDULES OF THE REGULAR DONOR PORTFOLIO

Within the private support received by charitable organizations, their regular donor portfolio plays an essential role, as it provides a stable flow of resources that allows the sustainability of the organization in its daily performance (Drollinger 2018; Sargeant & Woodliffe, 2007). Understanding their donation behavior over time, therefore, is essential to designing effective strategies aimed at building stronger relationships with the donors and maximizing the financial support they give. One of the most important challenges for fundraisers with respect to their regular donors is related to ***how to manage the payment schedules***, ***that is, how to temporally reframe their donations*** (i.e., the level of aggregation of their annual contribution through different donation frequencies).

While temporal reframing has become popular among scholars within the for-profit context (Bambauer-Sachse & Grewal, 2011; Hershfield, Shu, & Benartzi, 2020), little is known about the influence of this strategy in the charitable giving field. Those that offer evidence in this regard focused solely on occasional donors (Atlas & Bartels, 2018; Basu, 2021; Gourville, 1998; Sudhir, Roy & Cherian, 2016). Moreover, the wide use of cross-sectional information limits the ability to understand the potential dynamics of this strategy over time. Furthermore, although the member segment should also be studied from a multidimensional perspective in relation to their motivations for helping (Rupp, Kern, &

Helmig, 2014), there is still a need to better understand the motives that lead donors to both the choice of the amount donated and the frequency they choose to contribute (Atlas & Bartels, 2018).

Therefore, two important questions need to be answered: *How will different donation frequencies affect the contributions of regular donors in the long term? How to better capture motives for donating to help understand the amount donated and preferences for different donation frequencies?*

In order to answer these questions, this doctoral thesis develops the following objectives:

Research objective 5. *To understand how the impact of different donation frequencies on the total contributions of regular donors varies across motivations to donate (self- and other-oriented).*

Research objective 6. *To analyze internal (motivations to donate) and external (donation options) factors as the drivers of donation frequency.*

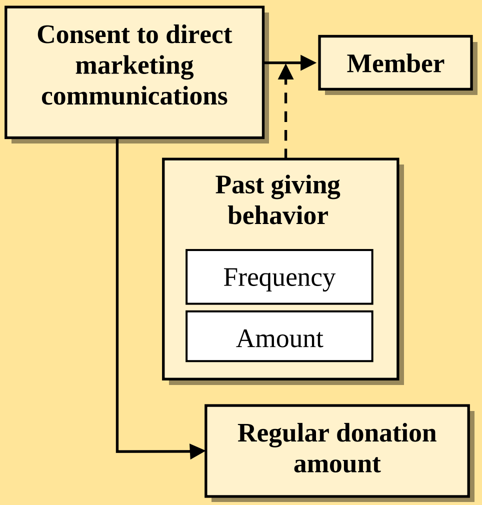
In addressing these research objectives, Study 3 is conducted. Specifically, this study investigates the impact of different frequencies of donation (i.e., monthly, quarterly, bi-yearly, and yearly) on the donation amount based on the perceived value (i.e., benefits versus costs) derived by the donor from the different donation frequencies. Importantly, it is proposed that the impact of donation frequencies is heterogeneous across donors and notes the importance of considering the motives that drive individuals to give: (i) helping others (i.e., other-oriented motivation) and (ii) deriving a private benefit (i.e., self-oriented motivation). This study also explores why individuals choose different donation frequencies and focuses on internal (i.e., motives) and external factors (donation options included in the request when individuals register as members). Study 3 uses data corresponding to a representative sample of 5,168 members from a charitable organization and contains longitudinal information over a seven-year period (2013–2019) on donation behaviors, registration, communications, and socio-demographics. Then, it applies the System GMM estimator with a two-step robust estimation and an OLS regression (in Stata 16) to test two models. The results provide new knowledge into the role played by donation frequencies in understanding the donation behavior over time of regular donors.

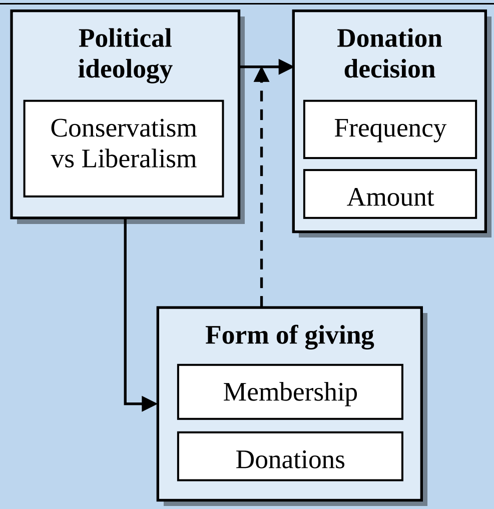
Table 1.1 displays a summary of the above research gaps that have been identified and the research questions proposed. Also, this table shows the research objectives of the present doctoral dissertation and the three studies conducted, including their conceptual models. In the next three chapters (Chapters 2, 3, and 4), the conceptual framework and hypotheses' development, methodology, findings, and theoretical and practical implications of these three studies are developed in depth. Finally, in Chapter 5, the general discussion and conclusions of the doctoral thesis are presented.

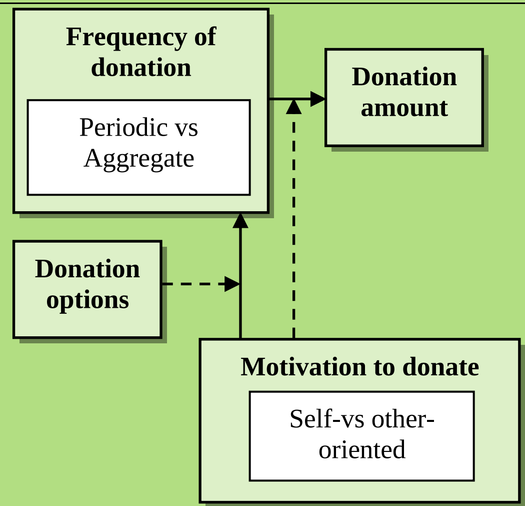
Table 1.1 Doctoral thesis research gaps, questions, and objectives

Main objective. To provide a comprehensive understanding of the different types of donors and their donation behavior over time to help charitable organizations improve the management of their donor portfolio and obtain greater and more stable funding to successfully address their social projects.

STUDY 1	STUDY 2	STUDY 3
GAP1: Lack of research on behavioral factors indicating relationship orientations and their effect on the engagement in enduring relationships with charitable organizations ***GAP2***: Little attention to the differences between relational orientations and their influence on the organization's performance	***GAP3***: Limited understanding about the impact of political ideology on different dimensions of donation behavior and preferences for different fundraising programs ***GAP4***: Lack of evidence on the role of the fundraising program chosen and its implications on donation decisions	***GAP5***: Lack of studies analyzing the impact of different levels of aggregation in the donation amount on regular donors' contributions from a dynamic perspective ***GAP6***: Little attention to the motivations driving the amount donated and the choice of frequencies
RQ1: How to best capture preferences for long-term relationships in a charitable giving context? ***RQ2***: How will relationship orientations affect the organization's performance both in terms of long-term commitment and funds collected?	***RQ3***: Can political ideology influence multiple donation decisions and the choice of the form of giving differently? ***RQ4***: How will the form of giving chosen affect the donation decisions of audiences with different political ideologies?	***RQ5***: How will different donation frequencies affect the contributions of regular donors in the long-term? ***RQ6***: How to better capture motives for donating to help understand the amount donated and preferences for different donation frequencies?
RO1. To identify individuals' preferences for relationship marketing analyzing their influence on the building of enduring relationships and subsequent donation behavior. ***RO2.*** To analyze the role of past giving behavior and its join impact with preferences for relationship marketing in enduring donor-organization relationships.	***RO3.*** To investigate the consequences of political ideology on different donation decisions (frequency and amount) and forms of giving (membership and donations). ***RO4***. To explore how the impact of political ideology on donation decisions varies across different forms of giving.	***RO5.*** To understand how the impact of different donation frequencies on the total contributions of regular donors varies across motivations to donate (self- and other-oriented). ***RO6***. To analyze internal (motivations to donate) and external (donation options) factors as the drivers of donation frequency.







1.4 INTENDED CONTRIBUTIONS

By addressing the previously mentioned objectives and through the development of these three studies, this doctoral dissertation intends to make a number of contributions to social marketing. From a **theoretical point of view**, we aim to expand the existing knowledge on the relationship marketing literature by highlighting the importance of taking a multi-dimensional approach to the types of relationships consumers may establish with organizations and revealing a key behavioral aspect that allows the identification of different types of individuals according to their relational expectations, thus demonstrating its influence on the formation of strong and enduring relationships. In addition, we try to extend research on political ideology and its influence on charitable behavior by providing further insights into why and under what circumstances liberals and conservatives can be more or less generous, thus reconciling the mixed results found in previous literature. In doing this, we are aimed at contributing by considering a multi-dimensional perspective, where donation behaviors incorporate various decisions—frequency and amount donated—and multiple forms of giving—membership and donations. With this, we intend to offer a more precise understanding of the effects of political ideology on charitable giving. In addition, we aim to provide a more nuanced understanding of temporal reframing effects by providing novel conceptual insights into the reasons why different frequencies influence the amounts donated differently, based on an analysis of cost-benefit evaluation and a perceived value approach. We also aim to demonstrate that the impact of donation frequency on the amount donated is contingent on individuals' motivations for donating (i.e., other-oriented and self-oriented motives) and that these motivations and donation options jointly explain the primary decision to donate more versus less frequently.

From a managerial perspective, we intend to contribute to the maintenance and improvement of the donor portfolio of charitable organizations and provide a useful guide for fundraisers to manage relationship marketing strategies by targeting donors according to their relational expectations. We also try to advise managers of the need to be aware of the existence of simultaneous behaviors (past donation frequencies and amounts donated, and consent to direct marketing communications) and develop strategies that accommodate these behaviors. Moreover, through our studies we intend to offer fundraisers interesting tools that will enable them to better manage the financial support from their donors by suggesting the use of public sources to collect useful information at the individual level and effectively target their audiences through personalized communications. In addition, we aim to offer an opportunity for organizations to leverage donation frequency to improve donors' perceived value and subsequent contributions by suggesting managers distinguish their donors based on their motivations for donating. Finally, we try to offer guidance for how managers can properly manage their registration forms and the presence of donation options within them by applying this strategy carefully in order that it contributes to both the well-being of donors, by increasing perceived value, and to the well-being of the recipients of the aid.

Finally, through these implications, we aim to **address key research priorities** identified in the business and management discipline, especially in the marketing domain, and contribute to social development by addressing important issues, such as considering the role of marketing in improving societal outcomes. In doing so, this doctoral thesis intends to provide responses on how marketing activities can influence the subsistence of charities as entities that are critical to community well-being and how they determine and pursue better outcomes by improving their strategies. Similarly, we are also aimed at providing answers on how and under what conditions marketing can do well by doing good in the areas of consumer and social welfare and how charitable donations and other positive consumer behaviors can be encouraged.

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CHAPTER II

WHY DO YOU WANT A RELATIONSHIP, ANYWAY?

CONSENT TO RECEIVE MARKETING COMMUNICATIONS AND DONORS' WILLINGNESS TO ENGAGE WITH CHARITIES

2.1 INTRODUCTION

In this chapter we aim to address the first challenge identified in this doctoral dissertation, related to need to understand ***how to approach donors with different relationship orientations***. As noted, while relationship marketing represents a predominant managerial approach among charitable organizations, it is imperative that fundraisers note differences in the relational expectations among their donors and, therefore, take an approach aimed at identifying what type of relationship is most appropriate for each individual in order to maximize the effectiveness of their segmentation and marketing strategies. Then, knowing how to capture behavioral factors that define donors' preferences for forming stable and enduring relationships and how these factors can influence the organization's future outcomes would help fundraisers to better manage their donor portfolio and create valuable and profitable relationships. In this regard, the present chapter is aimed at ***identifying individuals' preferences for relationship marketing analyzing their influence on the building of enduring relationships and subsequent donation behavior***. Likewise, our purpose is ***to analyze the role of past giving behavior and its join impact with preferences for relationship marketing in enduring donor-organization relationships***.

In this chapter, therefore, we develop a theoretical framework built on literature on relationship marketing and social exchange theory and respond to these objectives by providing a better understanding of the diversity of relational approaches that individuals consider (Dwyer, Schurr, & Oh 1987; Palmatier et al., 2006) – i.e., through the study of consenting to direct marketing communications. In this way, we favor the study of the drivers that promote the decision to donate by participating in enduring relationships (Kim, Gupta, & Lee, 2021), and encourage greater charitable donations in the long run. Moreover, by identifying consenting to direct marketing communications, as a highly influential factor in explaining an individual's decision to become a regular donor to a charity, we are able to guide fundraisers to develop more effective relationship marketing campaigns.

2.2 MOTIVATION

Previous evidence shows that not every individual is willing to form close or enduring relationships with organizations (Bowden, Gabbott, & Naumann, 2015; Dalziel, Harris, & Laing, 2011; Dwyer, Schurr, & Oh, 1987; Parish & Holloway, 2010), with many preferring instead to develop more functional or transactional exchanges (Dalziel, Harris, & Laing, 2011; Caliskan, 2019; Palmatier et al., 2006). In the case of charitable organizations, some reports point to individuals' increasing reluctance to engage with charities. For example, "Giving in the Netherlands 2020," a report by Bekkers, Gouwenberg, and Schuyt (2020), shows that a substantial number of people tend to donate only once, or for a short period of time, to a specific charity (78% of individuals belonging to Generation Y and 70% for older generations). It is only a minority who prefer to maintain long-term relationships with these organizations (22% among Generation Y and 30% among older generations). Prior work suggests that the relationship orientation of individuals falls along a continuum, from a strong inclination to develop close and intimate relationships with firms to a desire to engage in purely functional transaction-focused exchanges (Dalziel, Harris, & Laing, 2011; Dwyer, Schurr, & Oh, 1987; Palmatier et al., 2006; Witell et al., 2020). The literature has devoted significant attention to demonstrating the positive impact of developing strong relationships with customers (Arli, Bauer, & Palmatier, 2018; Kim, Steinhoff, & Palmatier, 2021) and identifying the elements that lead to the formation and development of customer–firm relationships, including trust, commitment, relational benefits, relationship stage, service quality, interactions, and personal connection (Dalziel, Harris, & Laing, 2011; Kim, Steinhoff,

& Palmatier, 2021). However, little is known about the differences between consumers who want to form relationships with organizations and those who are reluctant to do so.

Given individuals' varying preferences for relational orientations (Caliskan, 2019; Waters, 2009), it is important to consider and address how charities identify each type of donor—those who seek a closer relationship versus those who do not—and develop appropriate strategies for them. With these organizations making major investments in relationship marketing initiatives, it is essential for them to get a better understanding of which individuals they are most likely to form relationships with. Some past work examines the role of relationship marketing in these organizations (Khodakarami, Petersen, & Venkatesan, 2015; Kim, Gupta, & Lee, 2021; MacMillan et al., 2005), as well as the determinants that lead donors to offer future support by contributing through membership programs for long periods of time, such as psychological involvement, commitment, trust, satisfaction (Drollinger, 2018), personal links, shared values, service, and relationship quality or relationship investment (Bennett & Barkensjo, 2005; van Dijk, Van Herk, & Prins, 2019). Despite this, there is a void of research regarding the factors that indicate which individuals are more likely to become regular donors; such insights could help charities develop relational or transactional marketing actions in a more meaningful way (Sargeant & Lee, 2004).

In addressing these gaps, this study has two main goals. First, it aims to examine whether an occasional donor (i.e., a noncommitted donor giving one-time donations) may want to develop a relationship with a charitable organization by becoming a member (i.e., a donor who provides regular funding through a membership program; Kim, Gupta, & Lee, 2021; Thomas, Feng, & Krishnan, 2015). In doing so, this work focuses on the effect of consenting to direct marketing and analyzes the extent to which individuals' willingness to share their data with the charity can affect whether they will engage in an enduring relationship with it. This factor is an important indicator through which individuals show higher levels of commitment and trust (Mazurek & Małagocka, 2019), a tendency towards participative behavior, and a greater interest in continuing the relationship (Ashley et al., 2011; Brodie et al., 2013; Smit, Bronner, & Tolboom, 2007). In addition, this study considers past giving behavior (i.e., frequency and monetary value) as a key moderating factor that may help to better understand the circumstances under which consenting to direct marketing communications leads donors to want to establish a longer and more stable relationship with the organization. Second, this study investigates the donation amounts of the individuals who decide to become members of the charity during the first year of their membership, as well as whether their consenting to the direct marketing played a role in driving these amounts. We intend to accomplish our goals using a longitudinal study design with a sample of 1,719 occasional donors of a charitable organization over a seven-year period (2013-2019).

This study and its results offer contributions to both research and practice. First, it contributes to a better understanding of the diversity of relational approaches that individuals consider (Caliskan, 2019; Dwyer, Schurr, & Oh 1987; Palmatier et al., 2006). Our findings provide the relationship management literature with new insights on segmentation strategies that consider consumers' inclinations to form relationships with firms. This research favors the study of the drivers that promote the decision to donate by participating in membership programs and enduring relationships (Kim, Gupta, & Lee, 2021; Rupp, Kern, & Helmig, 2014; Verhaert & Van den Poel, 2012), and encourage greater financial support of those who commit to the long term (Arnett, German, & Hunt, 2003; Fang, Fombelle, & Bolton, 2021). Second, this study addresses overlooked research on relationship marketing in the charitable giving field and explores the effect of gaining consent for personal communications, which is highly influential in explaining an individual's decision to become a regular donor to a charity.

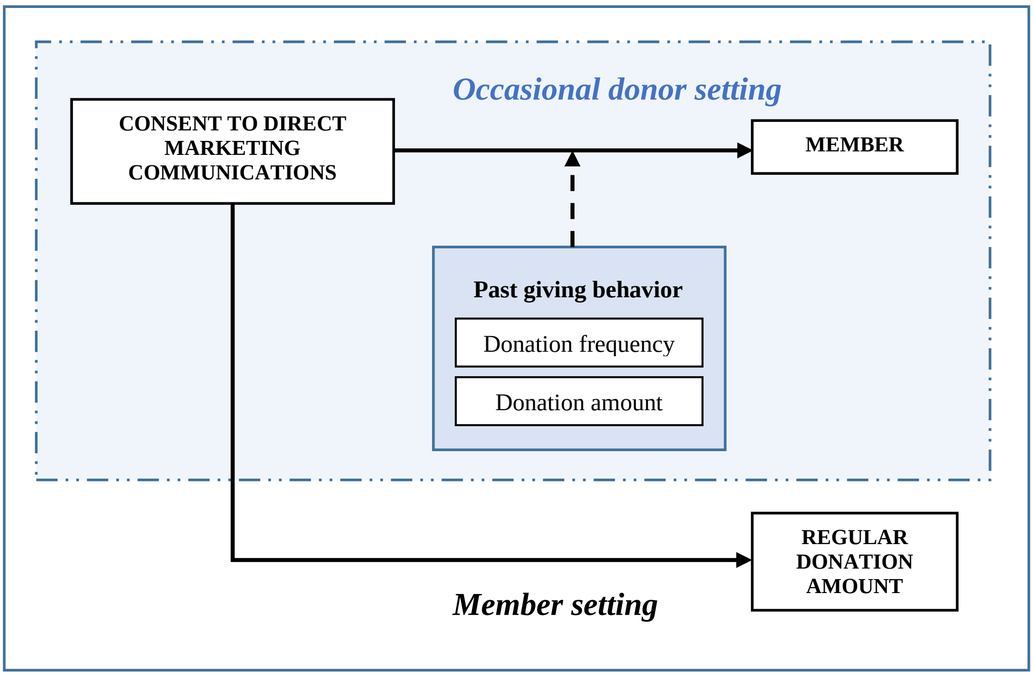
Third, this study helps organizations by facilitating the identification of which individuals are predisposed to form stable relationships with organizations, as well as the creation of more effective relationship marketing campaigns (Fang, Fombelle, & Bolton, 2021). Finally, as today's charities increasingly take responsibility for providing many important public services, they have taken on an essential role in society. With our results, we contribute to the maintenance and improvement of the donor portfolio of these organizations, as charities need to have the resources necessary to carry out their daily activities. Moreover, we provide a useful guide for fundraisers to manage consent marketing more effectively in an attempt to form better relationships and promote more donations.

2.3 CONCEPTUAL BACKGROUND AND HYPOTHESES

This study develops a theoretical framework built on literature on relationship marketing and social exchange theory (Bowden, Gabbott, & Naumann, 2015; Dwyer, Schurr, & Oh 1987; Johnson & Selnes, 2004; Kim, Steinhoff, & Palmatier, 2021; Palmatier et al., 2006), and contributes to an understanding of when charitable organizations should grow relationships with their donors. Specifically, we analyze the impact that consenting to direct marketing communications has on the predisposition of occasional donors to become members of a charitable organization. Consenting to direct marketing refers to individuals' agreement to share contact information (e.g., personal email address) with the organization and to receive direct marketing communications (Bennett & Barkensjo, 2005). Occasional donors are noncommitted donors who contribute sporadically, one-time donations to the organization, and members are donors who commit to the organization on a medium to long-term basis and make regular donations through membership (Kim, Gupta, & Lee, 2021; Thomas, Feng, & Krishnan, 2015).

In addition to studying the main impact of consenting to direct marketing on the likelihood that individuals will become regular donors, we consider the moderating role that past giving behavior exerts on the proposed relationship. We try to understand for which donors, according to the frequency (i.e., number of donations) and amount of their donations in previous periods, consenting to direct marketing has a greater impact on their willingness to become members. Importantly, this study also aims to provide a better understanding of the donation amounts provided by regular donors, once they decide to engage in this type of relationship with the organization, and analyzes whether their consenting to the direct marketing played a role in driving these amounts. Figure 2.1 shows the graphical representation of the proposed conceptual model.

Figure 2.1 Conceptual model



Researchers recognize that customer relationships vary across a spectrum from transactional to relational orientations (Dalziel, Harris, & Laing, 2011; Palmatier et al., 2006; Witell et al., 2020), where exchange relationships span a continuum from short-term discrete exchanges to long-term relational exchanges (Taylor, Donovan, & Ishida, 2014). While discrete exchanges are characterized by very limited communications and narrow content, relational exchanges involve collaborative behaviors which contribute towards building and strengthening customer relationships, and favor cost reduction, increased value, and the achievement of mutual benefits (Beckers, Van Doorn, & Verhoef, 2018; Dwyer, Schurr, & Oh, 1987; MacMillan et al., 2005).

As noted by Dwyer, Schurr, and Oh (1987), the basis for individuals' future collaboration may also be supported by implicit and explicit assumptions, trust, and planning. As previous research notes, the expectations donors form about the benefits they receive from their relationship with the organization (whether they are more transactional or relational), as well as their personal reciprocity or relationship proneness (Ashley et al., 2011; Odekerken-Schröder, De Wulf, & Schumacher, 2003; Witell et al., 2020), are both fundamental elements of relationship development between individuals (donors) and the organization (Dalziel, Harris, & Laing, 2011).

The relationship marketing literature clearly notes the importance of a multidimensional understanding of the types of relationships that individuals can establish with organizations and service providers (Palmatier et al., 2006), as well as the need to develop strategies for each segment of individuals according to their relational expectations (Dalziel, Harris, & Laing, 2011). When individuals develop a desire to maintain a closer relationship with the organization, both parties' internalized beliefs and expectations about the balance of obligations and benefits become more latent (Ashley et al., 2011; Drollinger, 2018; Waters, 2011). When this occurs, it is natural to believe that the relationship is a reciprocal commitment built on mutual trust (Palmatier, 2008). Individuals who experience personal reciprocity are more likely to establish a reciprocal and mutually beneficial relationship with the organization (Drollinger, 2018). In addition, other work has suggested the application of this multidimensional approach based on the premise that transactional or relational marketing strategies should depend on the customer's relationship orientation (Ashley et al., 2011; Parish & Holloway, 2010). Individuals' relationship orientations can be identified by their predisposition to participate and cooperate. In turn, both participation and cooperation necessarily need to consider other elements that characterize the nature of the relationship, such as trust, reliability, support, and commitment (Mazurek & Małagocka, 2019; Morgan & Hunt, 1994; Palmatier et al., 2006).

In relation to this, some work postulates that the participation of individuals in relationship marketing programs is a cooperative and collaborative behavior, and has the potential to generate significant benefits for the organization and to create mutual economic value (Noble & Phillips, 2004; Mollen & Wilson, 2010). Through these programs, individuals can receive ongoing communications in exchange for sharing their personal information, such as by signing up for an organization's mailing list. Gaining individuals' permission to access their data becomes critical for managers, since interactive communication allows them to understand preferences and develop better and more profitable relationships (Caliskan, 2019; Ponder, Holloway, & Hansen, 2016). Moreover, researchers agree that individuals who consent to direct marketing and disclosure of personal information are expressing a willingness to communicate openly and form social ties with the organization, which crucially depends on prior trust-building and the development of commitment (Hennig-Thurau, Gwinner, & Gremler, 2002; Mazurek & Małagocka, 2019; Ponder, Holloway, & Hansen, 2016). In the charitable context, obtaining donor consent to receive communications is a major issue (Ashley et al., 2011; Waters, 2008). Any form of donor–charity interaction has the potential to foster greater donor knowledge about the organization and its work, cultivate greater levels of trust and commitment, and reduce uncertainty generated by not knowing where and how donors' gifts are allocated (Carroll & Kachersky, 2019; Waters, 2009, 2011).

2.3.1 Consenting to direct marketing and its influence on long-term relationships

Communication between exchange partners requires both organizations and individuals to exchange information (Ashley et al., 2011; Bruneau, Swaen, & Zidda, 2018). Relationships are formed and continued if individuals want to interact and are willing to share personal information (Smit, Bronner, & Tolboom, 2007). When deciding to consent to direct marketing, individuals know that they have to disclose personal contact information, and that they are giving permission for managers to send them marketing communications (Chang, Rizal, & Amin, 2013). Individuals who form expectations about the relationship in terms of future obligations and mutual reciprocity are also those who show a greater need to communicate with the organization by consenting to receive information from it (Bruneau, Swaen, & Zidda, 2018). Signing up for an organization's mailing list has been proposed as an element capable of capturing the individual's desire to engage in relationship marketing activities (Ashley et al., 2011) and therefore, it can help identify those who might want to develop a stronger relationship with the organization. One reason why individuals consent to direct marketing communications is that the provider can offer them a service that meets their relational expectations (Dalziel, Harris, & Laing, 2011) and needs (Mazurek & Małagocka, 2019; Smit, Bronner, & Tolboom, 2007). By consenting to direct marketing, individuals may perceive greater value in the communications they receive (Ashley et al., 2011) and consider it as a source of useful and beneficial information, which in turn allows them to learn about new opportunities for cooperation with the organization (Connors et al., 2021; Reimer, Rutz, & Pauwels, 2014). These individuals tend to perceive greater gains from ongoing communications and interactions with an organization that allows them to participate in joint activities (Bennet, 2013) and thus reinforces their connection with the organization.

In the context of donor–charity relationships, these aspects become even more important, as charities are usually required to be more transparent and thus need these communication tools to demonstrate responsibility and accountability to their supporters (Blouin, Lee, & Erickson, 2018; Waters, 2009). In addition, the intangible nature of their services underscores the importance of communication activities, which requires that both parties agree to share information (Bennett, 2013; Bennett & Barkensjo, 2005; Jones et al., 2015). Previous research suggests that donors who engage in relationship marketing activities are those most likely to form expectations of continuity (Ashley et al., 2011; Smit, Bronner, & Tolboom, 2007), and to show a greater interest in the organization's performance (Sargeant & Lee, 2004; Waters, 2009). These donors also tend to develop higher levels of commitment and the need for greater reciprocity, with which they seek a balance between "giving" and "receiving" (Fournier, Dobscha, & Mick, 1998; Drollinger, 2018; Sargeant, Ford, & West, 2006). Likewise, charities have several activities that together make it possible to fulfill the social objective for which they were created. These activities are communicated to donors who subscribe to the organization's mailing list. Signing up for organization's mailing list therefore helps to distinguish between the donors who show a desire to support and participate in the organization's direct marketing programs and a willingness to invest in maintaining a relationship with the organization (Bennet, 2013; Bennett & Barkensjo, 2005; Pressgrove & McKeever, 2016; Waters, 2011), and those who do not.

Based on this discussion, we expect that consenting to direct marketing reveals a donor's desire to engage in communications, as well as in a longer-term relationship, with the organization. Moreover, we expect that these donors will show a higher predisposition to committing, such as through becoming members. Hence,

***H1**. Occasional donors who consent to direct marketing communications will be more likely to become members.*

2.3.2 The moderating effect of past giving behavior

In performing segmentation strategies, managers also need to consider other behaviors that will allow them to identify which individuals may want to develop stronger relationships with the organization (Lin, Boh, & Goh, 2014). Previous work has suggested donation behavior as one of the most relevant factors reflecting heterogeneous motivation for charitable giving (Zhong & Lin, 2018). Research has also noted that individuals' behavior is largely shaped by previous experiences and past behavior (De Bruyn & Prokopec, 2013; Verhaert & Vanden Poel, 2012). Based on these premises, research analyzing the most effective strategies for influencing donors' behavior suggests that in practice, an organization should differentiate its communication by considering the behavior of its donors (Karlan & Wood, 2017; Rupp, Kern, & Helmig, 2014). Accordingly, retention strategies have been recommended for those individuals who have shown signs of loyalty in the past through a higher donation frequency and greater donation amounts. Donation frequency refers to the number of times that a donor made a donation during a period (i.e., the number of gifts per year; Rupp, Kern, & Helmig, 2014; Shen & Tsai, 2010). Donation amount refers to the total monetary amount contributed over a period (i.e., the annual amount given by a donor in previous periods; Shen & Tsai, 2010).

2.3.2.1 Donation frequency

Prior evidence has shown that individuals with more activity in the organization—through higher frequency purchases or service usage—are those who are expected to stay longer in the organization (Faulkner, Romaniuk, & Stern, 2016). Those who interact more frequently feel closer to the organization, and therefore are more receptive to the relationship marketing programs that allow them to get more value from their interactions (Ashley et al., 2011; Bruneau, Swaen, & Zidda, 2018). Waters (2008) also suggested that donors who give multiple gifts to an organization may assign greater value to their relationship with it. Donors who have donated frequently are individuals who demonstrate a high degree of participation in activities, as well as active, regular giving behavior (Zhong & Lin, 2018). Through marketing communications, these donors may engage in the charity's new programs and activities, increasing their incidence of giving (Bennet, 2013; Thomas, Feng, & Krishnan, 2015). Thus, giving consent to direct marketing is expected to be more effective for these individuals and to lead to a greater willingness to establish a more lasting relationship with the organization. Hence, we propose the following hypothesis:

***H2**. The positive impact of giving consent to direct marketing communications on the likelihood of becoming a member is stronger for occasional donors who have donated more frequently in previous periods.*

2.3.2.2 Donation amount

The amount donated by a donor in previous periods also provides a signal to fundraisers about the concern a donor shows for supporting the organization (Karlan & Wood, 2017; Verhaert & Van den Poel, 2012). Waters (2008) demonstrates that major gift donors (those who provide the largest donations) evaluate the relationship as being more communal – where organizations and individuals provide benefits to each other because they are concerned for the common well-being (Waters, 2008). For these donors, receiving communications from the organization could mean knowing more about its operations and needs, and the effectiveness of its programs (Karlan & Wood, 2017; Waters, 2009), or even receiving recognition for their financial effort as donors. These communications can generate greater value for the donors, increasing their satisfaction and thus their commitment to continuing the relationship (Ashley et al., 2011; Bolton, Lemon, & Verhoef, 2004; Thomas, Feng, & Krishnan, 2015). Therefore, consenting to direct marketing is expected to be more effective in these individuals, leading to a greater predisposition to establish a more lasting relationship with the organization. Hence, we propose the following hypothesis:

***H3**. The positive impact of giving consent to direct marketing communications on the likelihood of becoming a member is stronger for occasional donors who have donated higher amounts in previous periods.*

2.3.3 Consent to direct marketing communications and its influence on the charity's success: Future monetary donations

Studies recognize that the success of a charitable organization is based on obtaining significant financial resources from its supporters, so that it is able to execute its projects and fulfill its mission (Bennett & Barkensjo, 2005; Drollinger, 2018). Being motivated to maintain a relationship with an organization suggests the existence of an involvement with the service provider, and receptivity towards the organization's relationship marketing programs and activities (Ashley et al., 2011; Bruneau, Swaen, & Zidda, 2018). Furthermore, when an individual identifies with the organization, a deep, committed, and meaningful relationship can exist (Bhattacharya & Sen, 2003; Fang, Fombelle, & Bolton, 2021). This leads to a stronger willingness to invest effort in maintaining the relationship, greater feelings of affiliation (Lee, Park, & Koo, 2015; Morgan & Hunt, 1994), and greater interest in personalized interactions (Chen, Mandler, & Meyer-Waarden, 2021). As a result, charities can obtain greater funding due to increased financial resources provided by their committed supporters, thus contributing to the success of the organization (Arnett, German, & Hunt, 2003; Fang, Fombelle, & Bolton, 2021).

Supporting this, some studies note the significant positive relationship between the possibility of members obtaining information—which facilitates knowledge about the organization’s objectives, values, and culture—and the affective psychological attachment that a member develops towards the organization, leading to higher levels of member participation (Bruneau, Swaen, & Zidda, 2018; Gruen, Summers, & Acito, 2000). For members who value the organization’s communication, having access to content and information is one of the most significant reasons for joining the organization (Waltham, 2008). Likewise, those who appreciate regular communications, find organizational messages useful, and assign high value to the service offered by the organization are those who show a greater willingness to share personal information and who tend to buy more frequently and spend more (Karlan & Wood, 2017; Leppäniemi, Karjaluoto, & Saarijärvi, 2017). Thus, it is expected that donors who have consented to direct marketing communications will offer greater financial support to the organization once they become members. Accordingly, we hypothesized:

H4. *Members who had previously consented to direct marketing communications when they were occasional donors will contribute greater donation amounts to the organization.*

2.4 METHOD

2.4.1 Research context and sample data

The research context is a charitable organization in a European country. The organization has a database of occasional donors who contribute sporadically through monetary contributions. The database contains longitudinal information for a period of seven years starting on January 1, 2013 and ending on December 31, 2019. The information includes behavioral aspects (i.e., donation frequency and amount donated), relational factors (i.e., date of first donation, years donating, and contact information), and membership registration information for those who registered during the studied period (i.e., registration date, registration channel, donation periodicity, and periodic membership fee), as well as sociodemographic characteristics (i.e., gender and type of residential area) and socioeconomic factors (i.e., income). The sample consists of 1,719 occasional donors (some of whom became members during the studied period). For the selection of this sample, we excluded the observations of anonymous donors, as well as those who contributed extremely high amounts during this period. In doing so, we applied the median plus 2.5 times the MAD[1] method for outlier detection. We selected the threshold of 2.5, which is considered moderately conservative, for being a reasonable choice for rejecting a value (Miller, 1991). We now explain in detail the operationalization of the focal variables of our study.

[1] MAD, the Median Absolute Deviation, is a measure strongly recommended for outlier detection (Leys et al., 2013). Unlike other indicators, MAD has several advantages (e.g., it is totally immune to the sample size, it can be easily calculated in statistical software, and it is one of the most robust dispersion measures in presence of outliers).

2.4.2 Variable operationalization

Membership. This binary variable captures the decision of the occasional donor *i* to register as a member of the organization (*Membership*) in year *t*, taking the value 1 if registered, and 0 if not.

Consenting to direct marketing. This study distinguishes between donors based on their willingness to consent to direct email marketing communications from the organization (*CDM*). This variable is measured through a binary variable that takes the value 1 if the occasional donor *i* provides their email to the organization for marketing communications purposes, and 0 otherwise.

Donation frequency. We consider this variable (*Frequency*) as a continuous variable that captures the average frequency used to donate by donor *i* in the previous periods (*t-1* ...*t-n*).

Donation amount. The donation amount is measured as the annual average of all contributions made by occasional donor *i* in the previous periods (*t-1* ...*t-n*). Amount variables frequently do not follow a normal distribution (Rifkin, Du, & Berger, 2021), as individuals are very heterogeneous in their giving behavior, thus causing this variable to be potentially skewed. A Kolmogorov-Smirnov normality test showed that the donation amount was not normally distributed (skewness = 3.30; SE = 877.97; $p < .001$). We then log-transformed this variable (*lnAmount*). The logarithmic transformation of the dependent variable ameliorates potential non-normality and heteroskedasticity of the error terms (Yen & Rosinski, 2008).

Regular donation amount (*MemberFee*). This variable captures the annual amount given by donor *i* in the first year of membership. We also log-transformed this variable (*lnMemberFee*), given that it was also positively skewed (skewness = 4.65; SE = 739.56; $p < .001$).

The operationalization of all variables of the study is detailed in Table 2.1. We also conduct additional preliminary analyses on the descriptive statistics and correlations of the variables studied (Table 2.2).

Table 2.1 Variable operationalization

Variable	Operationalization
Membership	Dummy variable: 1 if occasional donor *i* registers as a member of the organization in year *t*; 0 if not.
Consent direct marketing	Dummy variable: 1 if occasional donor *i* provides an email contact to the organization to be reached with marketing communications; 0 otherwise.
Donation frequency	Total average frequency used to donate by donor i in the previous periods (*t-1* ...*t-n*).
Donation amount	Total average of all contributions made by occasional donor *i* in the previous periods (*t-1, ...t-n*). We include the log-transformed value of this variable in our models.
Regular donation amount (Membership Fee)	Total annual amount given by donor *i* in the first year of her membership. We include the log-transformed value of this variable in our models.
Gender	Dummy variable: 1 if donor *i* is female (0 if male).
Income	Disposable income per capita in the residential area of donor *i* in year *t*. We include the log-transformed value of this variable in our models.
NGOs' negative news	Total number of negative news about NGOs in the donors' *i* country.

Table 2.2 Descriptive statistics and correlations

	Variable	Mean	Std. Dev.	1	2	3	4	5	6	7	8
1	**Membership**	.25	.43	1							
2	**Membership Fee**	505.70	739.56	N.A.	1						
3	**Consent direct marketing**	.13	.33	0.337*	0.141*	1					
4	**Frequency**	2.24	2.57	-0.171*	0.220*	-0.131*	1				
5	**Donation amount**	601.70	877.97	-0.248*	0.560*	-0.105*	0.227*	1			
6	**Gender**	.49	.50	-0.012	-0.045	-0.076*	-0.002	-0.004	1		
7	**Income**	15,044.88	4,464.65	-0.049*	0.229*	0.002	0.033*	0.289*	0.019	1	
8	**NGOs' negative news**	5.98	4.14	-0.323*	0.004	-0.081*	0.079*	0.126*	0.006	0.174*	1

Notes: * = Correlation coefficients significant at the 5% level. N.A.= Not applicable.

2.4.3 Modeling approach

Based on the preceding discussion, our main purpose is to analyze the influence of consenting to direct marketing communications, as well as the interaction of this behavior with past donation behaviors (donation frequency and amount donated in previous periods), on the probability of occasional donors registering as members in the organization. Another important goal is to test the role played by consenting to direct marketing in driving the regular donation amount contributed by individuals who decide to become members of the charity during their first year of membership.

Given that this study analyzes two decisions in which one, the amount donated as a member during the first year (*MemberFee*), is conditional upon the other, the decision to become a member of the organization (*Membership*), a simultaneous modeling that takes into account the nature of this conditional relationship is necessary. Because occasional donors may or may not become members, selection bias may occur. Therefore, we turned to statistical techniques to correct bias from incidentally truncated dependent variables by employing the Heckman's (1979) two-stage correction approach. In the first stage model, we used a probit regression in which the dependent variable was *Membership* (capturing the decision of the occasional donor *i* to register as a member of the organization in year *t*, taking the value 1 if registered, and 0 if not). From this probit, we used the estimated parameters to calculate the inverse Mills ratio (IMR), which is the ratio of the probability density function to the cumulative distribution function of the distribution.

To achieve identification in this first stage, we used the number of negative news items about non-governmental organizations (NGOs) (*NegativeNews*) in the donors' country[2]. For the first-stage model, we estimated the following equation:

$$Membership_{it} = \beta_0 + \beta_1 CDM_{it} + \beta_2 Frequency_{it} + \beta_3 lnAmount_{it} +$$

$$\beta_4 CDM_{it}\ X\ Frequency_{it} + \beta_5 CDM_{it}\ X\ lnAmount_{it} +$$

$$\beta_6 Gender_{it} + \beta_7 Income_{it} + \beta_8 NegativeNews_{it} + \varepsilon_i \qquad (1)$$

where CDM_{it} is the dummy variable capturing the willingness of donors to consent to direct marketing communications. $Frequency_{it}$ and $lnAmount_{it}$ are, respectively, the past donation frequency and the amount donated in previous periods; $CDM_{it}\ X\ Frequency_{it}$ and $CDM_{it}\ X\ lnAmount_{it}$ are the interaction terms between the willingness to consent to direct marketing communications and, respectively, donation frequency and the amount donated in previous periods; $Gender_{it}$, and $Income_{it}$ are control variables referring to the respective demographic and socioeconomic personal characteristics; $NegativeNews_{it}$ is a control variable referring to external factors such as the number of negative news stories about NGOs in the donor's *i* country in year *t*; and ε_i is the error term.

For the second stage—the regular donation amount model—the IMR is incorporated as an additional independent variable in the truncated ordinary least squares (OLS) model estimation. The statistical significance of the IMR in the model indicates the existence of a sample selection bias, and the Heckman two-stage approach is believed to be an appropriate procedure (Heckman, 1979). Below, we estimated the following second-stage model equation:

[2] Gaining legitimacy with its financial supporters is an important aspect of increasing a charitable organization's chances of survival (Meyer & Rowan, 1977). The number of negative news items about organizations in the charitable sector may be a relevant factor influencing individuals' decision to support a charity (Boenigk & Becker, 2016).

$$ln(MemberFee_{it}) = \alpha_0 + \beta_1 CDM_{it} + \beta_2 Frequency_{it} + \beta_3 lnAmount_{it} +$$

$$\beta_4 CDM_{it}\ X\ Frequency_{it} + \beta_5 CDM_{it}\ X\ lnAmount_{it} +$$

$$\beta_6 Gender_{it} + \beta_7\ Income_{it} + \beta_9 (IMR_i) + \varepsilon_{it} \qquad (2)$$

where $ln(MemberFee_{it})$, the dependent variable, is the total amount donated through the member's *i* membership fee in the first year of their membership (log-transformed). CDM_{it}; $Frequency_{it}$ and $lnAmount_{it}$, $CDM_{it}\ X\ Frequency_{it}$ and $CDMit\ X\ lnAmount_{it}$, and $Gender_{it}$, and $Income_{it}$ are respectively the focal variables, the interaction terms, and the control variables, all of which were explained in the above stage. IMR_i is the Inverse Mills Ratio from the first-stage selection model and εi is the error term.

We computed the variance inflation factor (VIF) in this second stage. VIF scores range between 1.27 and 2.58, thus indicating that each main independent variable is not highly correlated with the other predictors and therefore ensuring the reliability of the regression results (multicollinearity is not an issue). To control for heteroskedasticity we used the White's (1980) standard error method and estimated an auxiliary regression model with squared residuals as dependent variable and initial regressors, their squares and cross-products as covariates. Computing the test by SPSS, we decided not to reject the null hypothesis of homoskedasticity in the model (W = 6.29; p = .0721), thus ensuring the variance of the errors in a regression model be constant.

2.5 ESTIMATION RESULTS

2.5.1 Main study

Of the 1,719 occasional donors in the sample, 990 (57.6%) experienced the event of interest during the study period, and 350 (20.4%) shared their email address with the organization. Among those who shared their contact information, 316 (90.3%) had registered as members at some point in time. In total, 674 of the donors who did not share their email address (49.3%) registered as members.

We then performed the estimation of the Heckman's model as described in the previous section, and estimated the following three models sequentially: (i) a base model (Model 1) that analyzes the impact of the control variables on the probability of becoming a member; (ii) a model (Model 2) that, in addition to the control variables, includes the main effects of consenting to direct marketing communications and of past donation behavior (through frequency and donation amount in previous periods); and (iii) a full model (Model 3) that considers the interaction terms between consenting to direct marketing and past donation behavior.

The estimation results in Table 2.3 reveal that consenting to direct marketing communications significantly influences the probability that an individual will register as a member ($\beta = 1.083$; $p < .001$). This finding supports hypothesis H1. Our data also shows that donors who donated more frequently and in larger amounts in the past are less likely to become members ($\beta = -.058$; $p < .001$; $\beta = -.197$; $p < .001$, respectively). In terms of the moderating effects of past donation behavior, our results show that obtaining consent for direct marketing communications could be more effective, and thus could increase the probability of occasional donors becoming members, for donors who had donated more frequently and in greater amounts in previous periods. However, these interaction effects are not significant.

In Table 2.3, we also report the coefficient estimates for the results from the second stage model of the truncated OLS estimation. Our data indicate a positive main effect of consenting to direct marketing on the amount donated by members ($\beta = .764$; $p < .001$). In addition, for occasional donors, members who donated with higher frequencies and greater amounts contribute greater membership fees ($\beta = .089$; $p < .001$; $\beta = .482$; $p < .001$, respectively). However, the findings also reveal that those consenting to marketing communications who contributed higher donation amounts in the past contribute lower amounts as members ($\beta = -.099$; $p < .01$).

Table 2.3 Estimation results of the Heckman's model (two stage correction approach)

	Probit Model (first stage) Membership			**OLS Model (second stage) Membership Fee**		
	Model 1	**Model 2**	**Model 3**	**Model 1**	**Model 2**	**Model 3**
Intercept	-1.260	-1.879**	-1.852**	3.512***	-1.716*	-1.867*
Consent direct marketing		1.291***	1.083***		.248***	.764***
Past behavior						
Frequency		-.057***	-.058***		.089***	.089***
Amount		-.192***	-.197***		.446***	.482***
Interactions						
Frequency*Consent direct marketing			.018			-.016
Amount*Consent direct marketing			.034			-.099**
Controls						
Female	-.059	.055	.056	-.059	-.030	-.034
Income	.967**	.381***	.381***	.967***	.514***	.513***
NGOs' negative news	-.236***	-.263***	-.262***			
IMR				-.172*	-.165**	-.191**

Notes: ***p<.01; **p<.05; *p<.10. IMR = Inverse Mills ratio. Number of observations = 3,395; Censored observations = 2,405; Uncensored observations = 990.

2.5.2 Alternative model specification

In our study, the information is measured at discrete time intervals (years), and we observe a series of longitudinal binary responses denoting whether the donor becomes a member of the organization at some point in time. To test the robustness of the first stage model—the decision to become a member—we turned to survival analysis techniques, which enable us to model the timing and occurrence of the event of interest, registering as a member (*Membership*). Survival analysis is used to study random variables that represent the time of the event of interest. A feature of these analyses is that survival times can be censored, implying that time-to-event information is incomplete for some individuals, and thus only partial information is collected (Jenkins, 2005). In survival analysis, the response variable is discrete when the event occurs at specific times (t_0, t_1 ...t_n). We therefore use discrete time duration models to approach our main analysis.

Let T denote a discrete random variable indicating the time of an event occurrence. Events are observed at discretely defined points in time, t_i. The unconditional probability of an event occurring at time t_i is given by the probability mass function (*Equation 3*). The probability of an event not occurring beyond time t_i, expressed as the survivor function, is given in *Equation 4*.

$$f(t) = Pr(T = t_i) \qquad (3)$$

$$S(t) = Pr(T \geq t_i) = \sum_{j \geq i} f(t_j) \qquad (4)$$

where j denotes an occurrence time.

The hazard rate is:

$$h(t) = f(t)/S(t) \tag{5}$$

which demonstrates that the risk of an event occurrence is equivalent to the ratio of the probability of failure to the probability of survival. This ratio can be expressed as the conditional probability of failure, given survival up until that point in time (note that we can talk of the hazard rate in terms of probability in the discrete time case). Thus, the hazard probability for the discrete time case is:

$$h(t) = Pr(T = t_i \mid T \geq t_i) \tag{6}$$

The parametric form used in this study is the complementary log log (*cloglog*)[3] model (Singer & Willett, 2003). Using *cloglog*, maximum likelihood estimators of the parameters of discrete models can be obtained by using logistic regression methods. The *cloglog* hazard function is represented in the following equation (*Equation 7*).

$$\begin{aligned} hi(t) = 1 - \exp[-\exp(&\beta_0 + \beta_1 CDM_{it} + \beta_2 Frequency_{it} + \beta_3 lnAmount_{it} + \\ &\beta_4 CDM_{it}\ X\ Frequency_{it} + \beta_5 CDM_{it}\ X\ lnAmount_{it} + \\ &\beta_6 Gender_{it} + \beta_7 Income_{it} + \beta_8 NegativeNews_{it})] \end{aligned} \tag{7}$$

To derive the parameters of interest ($\beta 1$, $\beta 4$ and $\beta 5$), we employ the estimation command *cloglog* using Stata 16.1.

[3] We explored an alternative logistic (*logit*) model and found that the *cloglog* model fits better, since the deviance for the logistic model, 3378.50, is higher than the deviance for the *cloglog* model, 3374.44. This change also is evident by comparing AIC values (1.44 and .99 respectively).

In Table 2.4, the estimation results reveal that consenting to direct marketing communications positively influences the probability of individuals registering as members ($\beta = .621$; $p < .10$). This finding supports hypothesis H1. Our data also show that when donors have made more frequent donations in the past or have donated larger amounts, they are less likely to become members ($\beta = -122$; $p < .001$; $\beta = -.233$; $p < .001$, respectively). Regarding the moderating effects of past donation behavior, we find that consenting to direct marketing communications could be more effective in those who have donated greater amounts in previous periods ($\beta = .115$; $p < .10$) and may lead those donors to become members. These results provide support for hypothesis H3. In our data, we do not find support for the effect of the interaction between consenting to direct marketing and past donation frequency. Therefore, hypothesis H2 is not supported.

Table 2.4 Alternative model specification

Dependent variable: Membership	**Model 1**	**Model 2**	**Model 3**
Intercept	1.020	-1.236	-.979
Consent direct marketing		1.332***	.621*
Past behavior			
Frequency		-.116***	-.122***
Amount		-.211***	-.233***
Interactions			
Frequency*Consent direct marketing			.072
Amount*Consent direct marketing			.115*
Controls			
Female	-.041	.049	.045
Income	.055	.385***	.371***
NGOs' negative news	-.547***	-.505***	-.502***

Note: Significant parameters: ***p < .01; **p < .05; p* < .10.

In addition, we also split the sample depending on the frequency (those donating once, between 2 and 4 times, and more than 4 times per year) and the amount donated (those donating between 1 and 100, between 101 and 300 and more than 300 euros). We then run two ANOVA and found that, consenting to direct marketing increases the likelihood of become members of all donors, especially those donating through higher frequencies in past periods, thus reducing the differences with those who donate less frequently ($p >. 05$). Something similar occurs with those donors who have contributed larger amounts in past periods, as they increase their likelihood significantly, thus showing a large effect of consenting to marketing communications in promoting greater predisposition to become a member in these donors, and therefore reducing the differences with those who donate smaller amounts ($p < .05$). Figures 2.2 and 2.3 display these effects.

Figure 2.2 Member as a function of consent to direct marketing and donation frequency

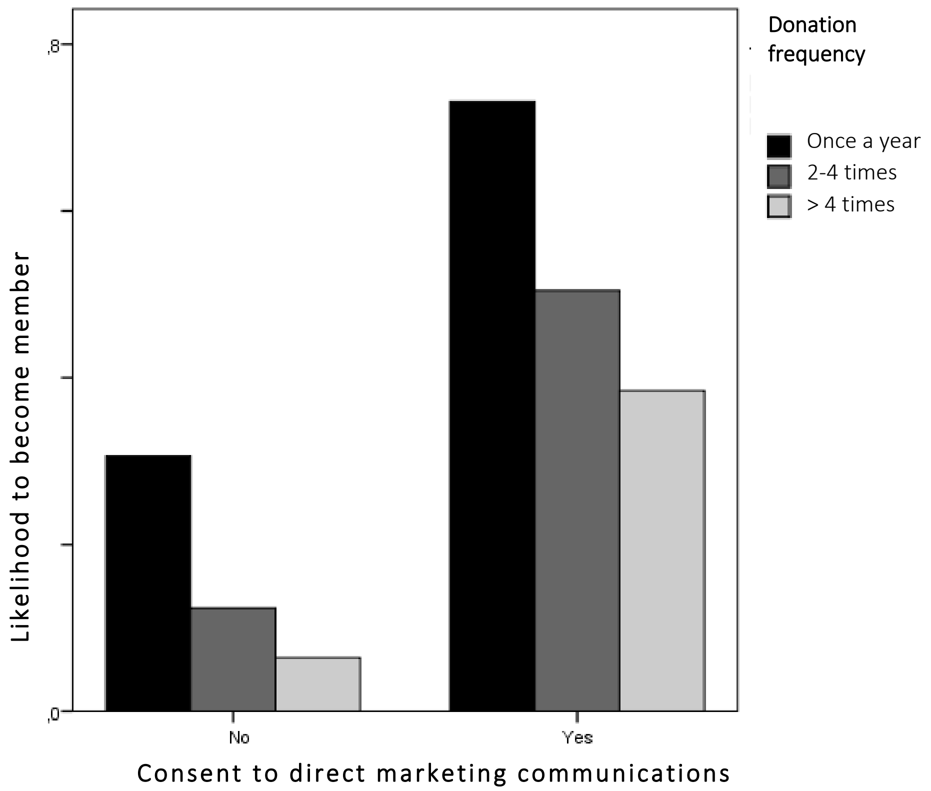
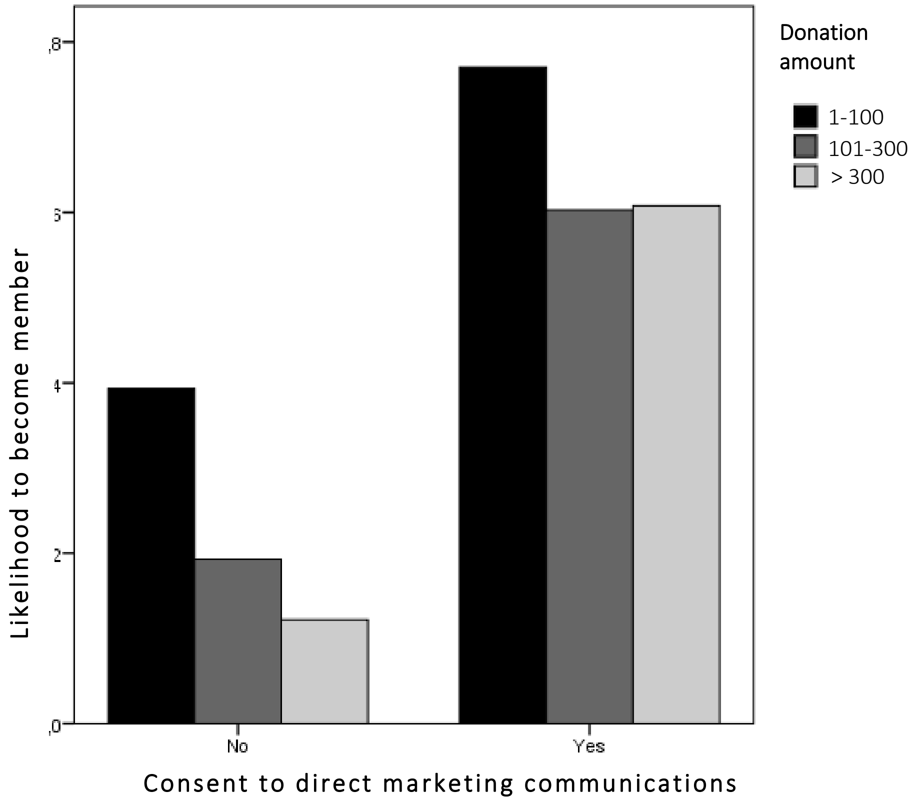


Figure 2.3 Member as a function of consent to direct marketing and donation amount



2.6 DISCUSSION

Over the past few years, there has been a growing interest among charities in building long and stable relationships with their donors (Drollinger, 2018; Faulkner, Romaniuk, & Stern, 2016; Khodakarami, Petersen, & Venkatesan, 2015; Thomas, Feng, & Krishnan, 2015). Although the use of relationship marketing techniques has been key to developing higher levels of trust and commitment and to promoting donor continuity in the organization, it is not clear whether efforts to develop relationship marketing strategies are effective for all individuals who choose to financially support a charitable organization. A key goal of this study is to investigate the effects of consenting to direct marketing communications—as an instrument reflecting an individual's orientation to establishing long-term relationships with organizations (Ashley et al., 2011; Brodie et al., 2013; Smit, Bronner, & Tolboom, 2007)—and the moderating role of past giving behavior (frequency and amount donated) on an occasional donor's decision to become a member. Furthermore, this study aims to demonstrate the influence that consenting to direct marketing communications has on the total amount donated by a member who engages in a long-term relationship with the organization. The findings from this study offer a number of important contributions to relationship marketing management research, as well as to charity managers.

2.6.1 Theoretical implications

The extant literature recognizes that consumer–organization relationships span a continuum from short-term discrete exchanges to long-term relational exchanges (Dalziel, Harris, & Laing, 2011; Dwyer, Schurr, & Oh, 1987; Palmatier et al., 2006; Witell et al., 2020). Research has noted that the level of commitment consumers develop towards the organization and their intention to continue the relationship are usually explained by the nature of the service offered (Palmatier et al., 2006), the orientation and attitudes towards relationships with organizations (Bowden, Gabbott, & Naumann, 2015; Dwyer, Schurr, & Oh, 1987; Parish & Holloway, 2010), and the receptiveness to relationship marketing and information exchange (Ashley et al., 2011; Bruneau, Swaen, & Zidda, 2018; Jones et al., 2015). However, little evidence has been found on the underlying mechanisms that influence individuals' decisions to start closer and more stable relationships in the charitable sector. Similarly, research also notes the lack of contributions that consider the evolution of customer-firm relationships – through their relational stages – and how these are fundamental to understanding the effectiveness of relationship marketing strategies and their implications for the formation of stable and lasting relationships (Kim, Steinhoff, & Palmatier, 2021). This study provides insights into the influence of consenting to direct marketing communications on an occasional donor's predisposition to become a member of the organization. In doing so, we contribute to existing research that points to the importance of taking a multidimensional approach to the types of relationships consumers may establish with organizations and service providers and developing segmentation strategies based on these consumers' relational expectations (Dalziel, Harris, & Laing, 2011; Mazurek & Małagocka, 2019; Palmatier et al., 2006). We also heed the call for more research on the effect of receptiveness to relationship marketing on the actual behavior of individuals (Ashley et al., 2011; Bruneau, Swaen, & Zidda, 2018). By identifying and testing this factor, we make a significant contribution by proving that those donors who give consent to direct marketing communications—with a more relational orientation—are those more likely to develop a long-term relationship as members and collaborate with the organization.

Another contribution of this study is the moderating role of past giving behavior in the building of customer–organization relationships. Our results show that a higher frequency of giving, as well as higher amounts donated, does not always lead donors to want to make a long-term commitment, be more loyal, or stay for longer periods of time in the organization, a result which differs from what has been suggested by previous studies (Verhaert & Van den Poel, 2012). However, by examining how these past behavioral factors interact with an individual's relational orientation, this study provides a better explanation as to why some donors, despite their giving behavior, do not want to engage with the organization. Recent research persuasively suggests that consumer engagement should be measured from a behavioral perspective, but it is essential to also take it into account from an attitudinal approach – based on the consumer's feelings towards the organization (Petzer & Van Tonder, 2019). Donors can demonstrate positive behavior towards the organization through high donation frequencies or large sums of money and yet have a negative attitude towards direct marketing communications, or in general to relationship marketing (Jones et al., 2015). Our results reveal that donors, who contributed significantly during past periods and show receptiveness to relationship marketing—they consent to receive direct marketing communications and share their contact information with the organization—, are those who tend to be part of the organization's membership portfolio. This study converges with previous research suggesting that donors follow different longitudinal patterns, and that those more active in giving (either by giving a greater number of gifts per year or larger sums of money) may be more responsive to marketing communications and solicitations from the charity (Shen & Tsai, 2010). This result underscores the importance of taking into account factors other than giving behavior when explaining donor loyalty and commitment to these organizations.

Importantly, our results extend those of previous studies concerned with charities' performances through member donations and provide insights into the significant link between individuals' relationship orientations and their donation amounts. Specifically, our findings reveal that members who consent to direct marketing communications not only show greater interest in interactions with fundraising managers (Ashley et al., 2011; Bruneau, Swaen, & Zidda, 2018), but also support the organization financially in a remarkable way (Karlan & Wood, 2017). Some factors that can contribute to organizational success include valuing regular communications as a source of useful information (Leppäniemi, Karjaluoto, & Saarijärvi, 2017), facilitating members' desire to participate (Bruneau, Swaen, & Zidda, 2018), and expanding members' knowledge about the organization's goals, values, and culture (Gruen, Summers, & Acito, 2000). We show that when members consent to direct marketing communications, they are exposed to these elements, giving rise to an easily identifiable variable in research on member and donor portfolio relationship management, as well as on relationship management with other organizational stakeholders (Bhattacharya & Sen, 2003; Fang, Fombelle, & Bolton, 2021).

Finally, this study offers novel insights into the dynamics underlying donor engagement and the building of strong and stable relationships with customers and members (Ashley et al., 2011; Bruneau, Swaen, & Zidda, 2018; MacMillan et al., 2005). Our theoretical framework allows us to conceptualize and understand the different types of relational orientations that individuals develop, as well as the interactions between both these behaviors and the behaviors within the organization that lead to higher retention rates and better organizational outcomes. Through analyzing the impact of behavioral factors over time, this study provides further knowledge into the process of transitioning from an occasional donor (or sporadic product or service user) to a member or regular consumer.

2.6.2 Practical implications

Implementing relationship marketing contributes to better organizational and fundraising performance of charitable organizations. However, one of the major challenges for fundraising managers is the lack of knowledge in the use of marketing techniques, making relationship marketing research in the charitable giving field necessary (Lee & Markham, 2018). This study makes several contributions with managerial implications. Specifically, the findings highlight the need for charities to recognize that there are different reasons why their donors financially support social causes, and that not everyone wants to form strong and close relationships with the organization. There is a significant portion of donors whose primary purpose is to help through their gifts, but who do not wish to engage collaboratively with organizations (Bennett & Barkensjo, 2005; Parish & Holloway, 2010). This is sizable segment: 70% of donors according to Bekkers, Gouwenberg, and Schuyt (2020), and 45% according to our study (which considers a much wider time horizon). On the other hand, there are donors who, in addition to their donations, want to feel close to the organization and engage with it more intensively, through multiple interactions and information exchanges (Bennett & Barkensjo, 2005). For fundraising managers, therefore, it is imperative to design effective marketing strategies by targeting donors according to their relational orientations. Charitable organizations usually have a large donor portfolio, therefore they may need to offer multiple communication options to ensure contact with most of their donors, depending on their behaviors and attitudes towards the organization and relationship marketing. For example, fundraising managers should offer different types of information that donors may be willing to receive and include opt-in and opt-out options, thus helping to provide personalized offers based on their relational expectations with the organization.

This research finds that donors, who show interest in sharing personal information in exchange for receiving direct marketing communications, are more likely to become ongoing supporters, as they typically engage in regular donations over long periods of time. For donors with positive attitudes towards relationship marketing, fundraisers should communicate special services aimed at increasing satisfaction and generating greater levels of engagement (e.g., invitations to participate in talks and in charity auctions) and design social media channels that allow interactive relationships and interpersonal communication – with the organization and other donors (Boenigk & Helmig, 2013). Additionally, fundraisers can offer different types of communications (e.g., news, periodic newsletters, course offerings, or volunteer activities) and frequency with which they send these communications. By doing this, managers will be able to collect the responses from their donors in their database systems and use these responses as key criteria to profile and segment their donor groups. In this way, managers will be able to efficiently apply more transactional or relational marketing strategies.

This study also presents interesting implications for fundraising managers regarding the role of past giving behavior and its impact on the formation of long-term relationships with the organization. First, the results reveal that those occasional donors who donate larger amounts in previous periods and those who donate more frequently are less likely to become members. Although these donors may be less likely to engage in relational behaviors with the charity, they may simply be concerned about the social cause they support and thus only want to focus on contributing in a meaningful way; i.e., by giving substantial amounts of money (Palmatier et al., 2006). This suggests that some donors may be more profitable—that is, give larger amounts—as transactional donors (e.g., as occasional donors) than as relational donors. Managers can thus know in advance that for these individuals, relational marketing strategies may not be appropriate, and that they may respond better to transactional marketing strategies. Fundraisers can develop actions aimed at promoting interest in donating to multiple causes by offering these donors the opportunity to choose the destination of their funds at the time they provide their gifts. Donors may also be interested in obtaining advantages for donating, thus reducing the perceived cost of their donations. By providing information at the moment of donation about the tax benefits donors can obtain by supporting a charity, managers can encourage donors to contribute larger amounts.

Second, our findings tested the moderating role of past giving behavior and suggest that donors who give larger amounts and who have simultaneously consented to receive direct marketing communications are more likely to become members of the organization. Managers should note these simultaneous behaviors of their donors and accordingly develop strategies that accommodate giving behaviors. Some interesting communications that fundraisers can send to promote more collaborative behavior in these donors include requests for regular financial support (i.e., registration as a member). Taking advantage of the fact that these donors can offer large financial support, fundraisers should use direct marketing to communicate opportunities to engage in habit-based loyalty programs (Henderson, Beck, & Palmatier, 2011), so that in the long-term they continue to give large gifts. This donor (member) relationship strategy can implement various levels of giving with increasing benefits, an approach aligned with the idea of building strong and trusting relationships with donors, and in turn allows for gathering data to identify the most valuable supporters (Boenigk & Scherhag, 2014). Alternatively, fundraising managers can also communicate other opportunities to donate and encourage donation variety among donors. For example, sending information soliciting support for multiple initiatives. By allocating donations to different social causes donors perceive having a personal role in helping the organization and are more likely to maintain their financial support and provide larger gifts (Khodakarami, Petersen, & Venkatesan, 2015).

Finally, our findings provide important insights for charity practitioners who seek member loyalty and the maintenance of good and profitable relationships. The results indicate that once donors have decided to commit to frequent donations to the organization (as members), the ones who share personal information in exchange for marketing communications are more profitable for the organization (they donate greater sums of money). Keeping these major donors loyal becomes one of the most important challenges for fundraisers (Drollinger, 2018; Waters, 2008), who should be able to achieve high levels of satisfaction and trust among these donors (Ashley et al., 2011; Ponder, Holloway, & Hansen, 2016). Thus, as previous research points out, relationship marketing becomes critical for fundraisers, since interactive communication allows them to understand donor preferences and thus to develop better and more profitable relationships with donors (Ponder, Holloway, & Hansen, 2016). When a donor engages with the organization, trust is one of the most important factors in the relationship (Waters, 2009). To maintain or increase this level of trust, managers must turn to relationship marketing tools to provide relevant information that reflects accountability (Waters, 2009, 2011). Long-term financial supporters can demand greater transparency and up-to-date information on the organization’s work and results in order to verify the effectiveness of its activities. Similarly, another important factor is the concern donors have about what the organization is doing with their gifts (Waters, 2009). Strategies aimed at promoting joint collaboration between donor and organization (e.g., meetings with managers for value co-creation purposes that favor the activity carried out by the organization), in addition to reporting on the fulfillment of their objectives and the interventions performed (Carroll & Kachersky, 2019), contribute to the formation of a closer relationship and allow for a better understanding of the organization. Since maintaining regular donors also entails significant costs, it is imperative that the communications they receive include interesting and attractive content to them. By regularly updating their systems to include the type of communication their donors want to receive, charities can achieve higher levels of donor satisfaction (Bolton, Lemon, & Verhoef, 2004; Ashley et al., 2011) and consequently, can increase the likelihood of donor retention and achieve better financial results. Therefore, fundraising managers should strive to gain donors' consent to receive direct marketing communications and permission to access their data, so that they can provide appropriate information and thus ensure successful relationships.

2.7 LIMITATIONS AND DIRECTIONS FOR FURTHER RESEARCH

We have identified four particular limitations in our study, which in turn offer fruitful avenues for further research. First, through this study we provide a key factor for facilitating the identification of individuals who are more receptive to relationship marketing communications and whom managers can therefore classify as potential long-term donors. Future research may examine additional variables that can be easily identified when individuals provide their contact information, such as the type of communications they wish to receive (e.g., informational, transactional, or collaborative) or the frequency with which they wish to receive it (Zhang, Kumar, & Cosguner, 2017). Interestingly, these variables can be interrelated with personal factors that are possible barriers or facilitators of relationship marketing effectiveness (e.g., individual differences in the use and adoption of new technologies).

Second. While secondary data on actual behavior (e.g., donor membership, consent to direct marketing communications, frequency and amounts contributed) is key to testing the generalizability of the findings to real-world settings, it would also be important to carry out additional research analyzing the underlying factors based on altruistic motives and attitudes towards performing philanthropic behavior. Altruistic people often choose to donate to more than one organization, and as a result, they tend not to formally commit to a single organization (Farmer, Kidwell, & Hardesty, 2020). In addition, marketing communications are oftentimes perceived as intrusive by many individuals (Jones et al., 2015). Future research can investigate the different needs (e.g., those of self or others) or motivations (altruistic or egoistic) of donors, and additionally test their attitudes towards engaging in different relational tactics (e.g., measuring the preferences for receiving marketing communications, sharing personal information, participating in multiple activities, or the use of different communication channels). These aspects may allow for the evaluation of alternative direct marketing schedules aimed at effectively engaging the entire donor portfolio.

Third, the interaction between an individual's past donation frequency and whether they consent to direct marketing communications—an interaction which was considered especially important from a conceptual perspective—does not empirically appear to be significant. However, the results suggest that past donation behavior is potentially important and therefore deserves further investigation. In our study, we considered the most-used past behavioral variables—frequency and monetary value—which have been shown to have the greatest impact on donation behavior (De Bruyn & Prokopec, 2013; Rupp, Kern, & Helmig, 2014). Nevertheless, researchers can go further and test our proposal by considering other interesting behavioral variables, such as the recency of past donations and the number of years a donor has been donating (Verhaert & Van den Poel, 2012). The findings of this study suggest that some donors may be very profitable for organizational performance as occasional donors, rather than adhering to a membership. This implies that it may be useful to analyze the effect of past behavioral factors on the contributions of occasional donors and how this contributes to the total funds raised.

Fourth, we recognize that this study was conducted with a single charitable organization in Europe, thus subject to cultural factors that may potentially limit the generalizability of the study. A direction for future research would be to look into how the influence of cultural traits affects donor behavior. Donation frequencies, amounts donated, or the tendency to adhere to memberships may signal the donor’s concern about whether to help a larger number of people, instead to help specific groups (in-group vs out-group members). These behaviors may be determined by each individual’s understanding of society and how it functions (e.g., political orientation; Farmer, Kidwell, & Hardesty, 2020). Cultural factors also involve changes in the environment that influence preferences for transactional or relational marketing (Rezaei & Elahi Rad, 2007). Cultural frameworks can also be used to explain cross-cultural differences in orientation towards long-term relationships with organizations (Chen, Mandler, & Meyer-Waarden, 2021). We encourage future studies to identify the underlying factors determining cross-cultural differences and similarities related to personal data sharing and consent to receive direct marketing communications, and how they affect individuals’ subsequent behavior. Hedonism, social status and prestige, benevolence or communitarianism vs. individualism are some of the personal factors that could be used as boundary conditions of the mentioned variables above (Chen, Mandler, & Meyer-Waarden, 2021).

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CHAPTER III

POLITICAL IDEOLOGY AND CHARITABLE GIVING:

IMPACT ON THE AMOUNT AND FREQUENCY OF DONATIONS FOR DIFFERENT FORMS OF GIVING

3.1 INTRODUCTION

In this chapter, we approach another important challenge that pertains to the relationship between ***political ideology*** and ***charitable giving***. Earlier research has suggested that political orientations strongly determine individuals' perceptions of equality and causal attributions regarding reactions to perceived causes of need and social issues (Paharia & Swaminathan, 2019; Song, Sheinin, & Yoon, 2017). Consequently, conservatives and liberals substantially differ in how they help others and when and why each group can be more generous (Brooks, 2006; Kaikati et al., 2017; Winterich, Zhang, & Mittal, 2012). For this reason, charity fundraisers need to turn to an approach that enables them to correctly address the typology of their financial supporters regarding their donation decisions and the forms of giving they choose to contribute to the organization, and adapt communication messages to them. By doing this, fundraisers would be able to maximize the value of the entire donor portfolio and the funds collected from their financial supporters. Therefore, knowing how political ideology can influence multiple donation decisions and the choice of the form of giving, as well as understanding how these forms of giving can affect donation decisions of audiences with different political ideologies, becomes essential for charity managers.

In response to these questions, the present chapter ***investigates the consequences of political ideology on different donation decisions (frequency and amount) and forms of giving (membership and donations)***. It also ***explores how the impact of political ideology on donation decisions varies across different forms of giving.*** We address these objectives by providing a more nuanced understanding of political ideology effects on donation frequency and the donation amount of financial supporters. Then, drawing from system justification theory, we are able to explain under what circumstances conservatives and liberals can provide further donations and why they prefer to endorse different forms of giving when they support charities. In addition, by exploring its joint impact with political ideology, we demonstrate how endorsing membership programs can affect the influence of political orientations on individuals' donation decisions, by weakening this impact.

3.2 MOTIVATION

Optimizing their performance by balancing fundraising efforts and the allocation of resources among their multiple initiatives is one of the major challenges facing charitable organizations (Dolnicar, Irvine, & Lazarevski, 2008; Fairfax, 2004; Kim, Gupta, & Lee, 2021). In this context, the donor portfolio plays an essential role, since it guarantees stable funding and significant financial resources that allow the accomplishment of the organization's mission in addressing several societal issues (Bekkers, Gouwenberg, & Schuyt, 2020; Drollinger, 2018; Sargeant & Woodliffe, 2007). Therefore, gaining a deeper knowledge of the donors, by better understanding their donation behavior, becomes crucial for fundraisers to properly manage their donor portfolio and, therefore, ensure the execution of the charity's activities (AbouAssi, 2013; Khodakarami, Petersen, & Venkatesan, 2015).

To address this important issue, it is essential for fundraising managers to understand the reasons why individuals differ in their giving behavior and identify which personal characteristics, based on their beliefs and values, lead to charitable behaviors (White & Peloza, 2009; Winterich, Mittal, & Aquino, 2013). This can also help to explain important differences among donors, thus enabling fundraisers to design effective strategies that accommodate the behavior of their different audiences (Venable, Rose, Bush, & Gilbert, 2005). Among the personal traits identified, recent literature has underscored political ideology as an important factor defining individuals' attitudes and values and explaining the diversity of beliefs about the functioning of society and has paid special attention to its key role in driving different giving behaviors (Yang & Liu, 2021).Table 3.1 offers a review of the relevant work exploring the influence of political ideology on charitable giving.

In this regard, a large body of work has provided evidence that conservatives, given their greater attachment to religion, their belief about the ineffectiveness of government redistribution, or their socio-economic status, are more charitable (Brooks, 2008; Wiepking & Bekkers, 2011). However, other studies have suggested that charitable giving is not significantly associated with political ideology, as conservatives and liberals differ in the type and number of organizations they support, and sometimes there is a non-significant difference in their monetary donations, thus providing inconsistent results in this literature (Farmer, Kidwell, & Hardesty, 2020; Kaikati et al., 2017; Winterich, Zhang, & Mittal, 2012). This mixed evidence could be explained by considering a multi-dimensional perspective, where donation behaviors incorporate various decisions, such as donation frequency or amount donated, and where political ideology may influence each of these donation decisions differently. This aspect, however, has hardly been addressed by previous literature (Farmer, Kidwell, & Hardesty, 2020). Also, political ideology can have divergent effects on decisions related to the choice of fundraising programs (such as membership or donations). Despite the widespread use of these programs in charitable organizations, little attention has been given to the motivational aspects driving the financial supporters’ preferences for engaging in these different forms of giving (Kim, Gupta, & Lee, 2021; Paswan & Troy, 2004). However, research solely addressing this important aspect offers contributions from a general perspective (i.e., without controlling for political ideology).

Table 3.1 Literature on political ideology and charitable giving

Authors	Donation decisions			Form of giving		Interactions	Data	Research method	Key findings
	Frequency	Amount	Others	Membership	Donations				
Brooks (2004)	X	✓		X	✓		Cross-sectional	Field data	Conservative and liberal tendencies both push up general giving. Being conservative is insignificantly related to nonreligious giving.
Bekkers (2005)	X	X		V	X		Cross-sectional	Field data	Liberals are more likely to be members and volunteers of voluntary associations (both non-political and quasi-political).
Brooks (2005)	X	✓		X	✓		Cross-sectional	Field data	Conservatives give more to religious charities while liberals give less.
Brooks (2006)	X	✓	Incidence	X	✓		Cross-sectional	Field data	The incidence of conservatives donating is higher than for liberals. Conservatives rather than liberals give higher donation amounts to charities.
Mesch et al. (2011)	X	✓	Incidence	X	✓		Cross-sectional	Field data	The positive effect of a conservative ideology on amount donated is greater than the effect of a liberal ideology.
Vaidyanathan, Hill, and Smith (2011)	X	✓	Incidence	X	✓	Religious and civic practices	Cross-sectional	Field data	Conservatives give more to religious congregations than liberals. This effect, however, is mainly explained by the mediation of the participation in religious and civic practices.
Winterich, Zhang, and Mittal (2012)	X	✓	Incidence	X	✓	Type of charity, moral identity and charity moral foundations	Cross-sectional	Field experiment	Conservatives (liberals) give more when charity aligns with binding (individualizing) moral foundations.

Table 3.1 Literature on political ideology and charitable giving (Continued)

Authors	**Donation decisions**			**Form of giving**		**Interactions**	**Data**	**Research method**	**Key findings**
	Frequency	Amount	Others	Membership	Donations				
Forbes and Zampelli (2013)	X	✓	Incidence	X	✓		Cross-sectional	Field data	Conservatives are more likely to give to secular causes than liberals. In addition, conservatives give more to both religious and secular causes than liberals.
Yen and Zampelli (2014)	X	✓	Incidence	X	✓	Religiosity	Cross-sectional	Field data	There is no evidence that political ideology impacts the probabilities of giving or the mean giving levels for religious and non-religious purposes. The impact of political ideology is mainly explained by the importance of religion.
Eger et al. (2015)	X	✓		X	✓		Cross-sectional	Field data	Those religiously very conservative are expected to contribute more than the self-identified very liberal, both in total and religious contributions.
Nilsson, Erlandsson, and Västfjäll (2016)	X	✓	Incidence	X	✓	Positively vs. negatively framed appeal and ingroup vs outgroup charity	Cross-sectional	Field data and experiment	Liberalism predicts higher intentions to donate to begging EU-migrants and greater self-reported donations to charity organizations.

Table 3.1 Literature on political ideology and charitable giving (Continued)

Authors	**Donation decisions**			**Form of giving**		**Interactions**	**Data**	**Research method**	**Key findings**
	Frequency	Amount	Others	Membership	Donations				
Margolis and Sances (2017)	X	✓		X	✓	Religious attendance	Cross-sectional and longitudinal	Field data	Conservatives give more to charity on average than liberals. However, these differences are explained by religious identity.
Kaikati et al. (2017)	X	✓		X	✓	Accountability, identity salience and desire to seek approval	Cross-sectional	Field experiment	When anticipating accountability to others with whom they share a salient social identity conservatives donate more when the audience is perceived to have a liberal ideology. This is driven by their desire to seek approval.
Thomsson and Vostroknutov (2017)	X	✓		X	✓	Social norms and beliefs of others	Cross-sectional	Field experiment	There is no difference in the amount donated given by conservatives and liberals. Unlike liberals, conservatives are influenced by norms and beliefs.
Brown and Taylor (2019)	X	✓		X	✓		Longitudinal	Field data	People supporting a liberal party, compared to those supporting a conservative party, donate more of their annual income to charity.

Table 3.1 Literature on political ideology and charitable giving (Continued)

Authors	Donation decisions			Form of giving		Interactions	Data	Research method	Key findings
	Frequency	Amount	Others	Membership	Donations				
Manesi et al. (2019)	X	✓	Incidence	X	✓		Cross-sectional	Field experiment	Those being more liberal are more likely to donate. There is no effect of political ideology on the amount donated.
Farmer, Kidwell, and Hardesty (2020)	X	✓	Number of causes	X	✓	Social order vs. social justice	Cross-sectional	Field data and experiment	Conservatives give with depth, while liberals give with breadth. Conservatives can give with breadth when protecting social order and liberals can give with depth when equality is restored.
van Esch, Cui, and Jain (2021)	X	✓	Incidence	X	✓	Identifiable victim vs. statistical victims; state anxiety	Cross-sectional	Field experiment	Conservatives have higher donation intent when observe the identifiable victim message frame. State anxiety reduces donation intention and allocations for conservatives.
Our study	✓	✓		✓	✓	Form of giving: membership vs. donations	Longitudinal	Field data	While conservatives donate larger amounts, liberals donate more frequently. These effects become weaker under membership. Conservatives are more willing to endorse membership.

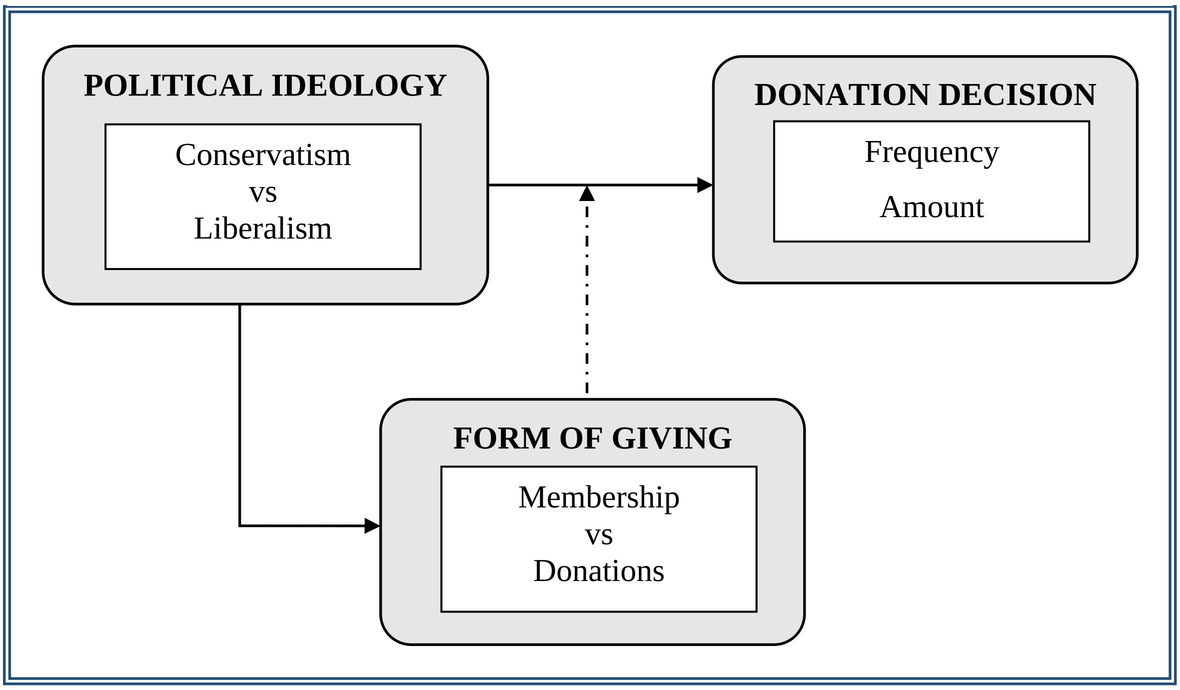
The purpose of the present study is to address the previously identified gaps and develop a comprehensive understanding of the effects of donors' political ideology on donation decisions (i.e., frequency and amount donated) for different forms of giving (i.e., membership and donations). This study uses data from a representative sample of 7,159 donors, pertaining to one charitable organization, observed over a period of eight years (2013–2020). We complement this data with political information derived from a public source that captures the voting results over time in the country studied and its different regions at the residential area level. To test the conceptual model, this study applies panel data techniques.

The present research contributes to theory and practice in several important ways. First, it provides a more nuanced understanding of political ideology effects on donation behavior. Specifically, this study analyzes the impact of political ideology on different donation decisions, thus, demonstrating that while conservatives donate larger amounts, liberals tend to donate more frequently. Second, we provide novel insights into the impact of political ideology on different forms of giving. Fundraising programs, and the form of giving they represent, are critical for charitable organizations, as they directly affect the timing of the flow of funding (Kim, Gupta, & Lee, 2021). This study also sheds light on the effect of political ideology on the preference for different forms of giving. Finally, drawing from system justification theory, we provide a conceptual understanding of these effects. Our findings reveal strong preferences for membership programs (versus donation programs) among conservative audiences (versus liberals). However, by endorsing membership, the positive impact of conservative ideology on donation amount, and the positive impact of liberal ideology on donation frequency, become weaker.

3.3 THEORETICAL BACKGROUND

We draw on system justification theory to develop our conceptual framework. We first provide a brief overview of the literature on system justification to deepen our understanding of ideological processes and outcomes in the helping behavior domain and discuss two important aspects: (i) donation decisions (i.e., frequency and donation amount) and (ii) forms of giving (i.e., membership and donations), which are central to understanding individual giving behavior (Kim, Gupta, & Lee, 2021). Next, we elaborate the arguments motivating the research hypotheses on how political ideology influences donation decisions and the form of giving, and on how the form of giving moderates the relationship between political ideology and donations. Figure 3.1 offers a graphical representation of our conceptual model.

Figure 3.1 Conceptual model



3.3.1 System justification and political ideology

Social problems are endemic in human society. However, their determinants, or the causes behind them, are very varied depending on the point of view from which individuals see and understand society and how it functions (Farmer, Kidwell, & Hardesty, 2020). Here, system justification theory can explain the motivation of some individuals to defend and justify the existing structure of inequalities between groups (Jost et al., 2003), and how people perceive responsibility and deservedness of disadvantaged groups in society (Ho et al., 2012; Lee, Seo, & Yoon, 2020). People exhibiting system-justifying tendencies tend to defend and rationalize existing social and economic events (Jost, 2019), motivating them to perceive the system as fair, legitimate, and stable. Similarly, psychological needs to manage uncertainty, threat, and social belongingness can also help to explain the adherence of people to political belief systems (Hennes et al., 2012; Hirsh et al., 2010).

Earlier research has concluded that people have different belief systems determining their political ideology and, therefore, their perceptions of equality and causal attributions regarding reactions to perceived causes of need and social issues such as poverty or misfortune (Paharia & Swaminathan, 2019; Song, Sheinin, & Yoon, 2017). Conservatives tend to apply system justification beliefs that represent the idea that one gets what one deserves (Ho et al., 2012). They place causality within the person and attribute poverty to dispositional characteristics and internal causes such as lack of effort (Lee, Seo, & Yoon, 2020; Weiner, Osborne, & Rudolph, 2011) and believe that the social system is fair and just (Ho et al., 2012). Liberals, in contrast, tend to perceive that structural causes are responsible for social ills and attribute poverty to external causes such as unjust social structures and practices (e.g., unfair employment opportunities; Lee, Seo, & Yoon, 2020; Skitka et al., 2002).

A key related aspect integrated within system justification theory is the motivational need to avoid uncertainty and accept inequality, which helps explain the differences between liberals and conservatives in the way they interact with their environments and the behavior performed in their daily lives (Jung & Mittal, 2020; Olson, McFerran, Morales, & Dahl, 2016; Ordabayeva & Fernandes 2017, 2018). Conservatives have greater needs to manage threat and uncertainty, which leads to resistance to change and rationalize social order (Jost, Federico, & Napier, 2013). As they believe that people are responsible for their actions and outcomes, conservatives are also more likely to justify and accept inequality (Krijnen et al., 2021). In contrast, liberals are more sensitive to fairness considerations and value social justice more, which leads them to seek to reduce or eliminate inequality (Haidt & Graham, 2007; Ordabayeva & Fernandes, 2017). They also tend to show greater tolerance of uncertainty and ambiguity (Farmer, Kidwell, & Hardesty, 2020).

These differences between conservatives and liberals suggest they are fundamentally different in how they help others and when and why they can be more generous (Brooks, 2006; Kaikati et al., 2017; Winterich, Zhang, & Mittal, 2012). Research on charitable giving is concerned with how individuals make donations, and previous studies suggest it may be influenced by the way individuals embrace political belief systems (Farmer, Kidwell, & Hardesty, 2020). The present study focuses on two main decisions related to helping behavior: (1) the frequency of donation and (2) the donation amount (Fajardo, Townsend, & Bolander, 2018). We also focus on two forms of giving: (1) membership and (2) donations (Kim, Gupta, & Lee, 2021). We discuss each in turn.

3.3.2 Donation decisions: Frequency and donation amount

Prior evidence notes the importance of giving donors control over how their gifts are allocated for motivating sustained giving in nonprofit organizations (Khodakarami, Petersen, & Venkatesan, 2015). Once they decide to donate, donors have to make subsequent decisions such as how much to donate (i.e., donation amount) and how often (i.e., donation frequency). These are distinct decisions with different underlying processes (Dickert, Sagara, & Slovic, 2011; Fajardo, Townsend, & Bolander, 2018) and can be driven by different moral motives (Farmer, Kidwell, & Hardesty, 2020). The decision regarding how much to donate is viewed more in terms of the impact that the total amount donated has on the beneficiaries of the aid (Sargeant, Ford, & West, 2006). When donors put the emphasis on this decision, they are focused on how their donation might influence the organization’s performance and the amount of resources it receives to accomplish its mission (Fajardo, Townsend, & Bolander, 2018). The monetary effort they make may depend on the donor’s desire to protect the subsistence of the charity supported and maintain its stability (Farmer, Kidwell, & Hardesty, 2020). People more interested in ensuring the charity’s survival may tend to invest greater monetary resources that contribute to achieving the charity’s purpose (Botner, Mishra, & Mishra, 2015).

On the other hand, the decision regarding how often to donate is mostly viewed in terms of the breadth of giving, which is related to the extent repeated donations cover a number of social causes. When donors put the emphasis on this donation decision, they are focused on how the donations might be distributed and allocated among the different initiatives offered by a charity (Khodakarami, Petersen, & Venkatesan, 2015). The frequency with which they donate may depend on their motivation to help as many beneficiaries as possible (Farmer, Kidwell, & Hardesty, 2020). Then, people concerned with maximizing social benefit would tend to provide more frequent support. Moreover, donation frequency may be driven by a desire to protect disadvantaged groups and reduce inequality, leading people to give help more broadly to remedy widespread inequality across society (Farmer, Kidwell, & Hardesty, 2020).

3.3.3 Form of giving: Membership and donations

There are two main forms of giving through which donors can provide their financial support: membership and donations (Kim, Gupta, & Lee, 2021). Membership is considered a form of charitable donation whereby donors provide regular funding in the medium or long run. It is characterized by a formalized agreement that includes regular dues payments and an annual membership renewal (Gruen, Summers, & Acito, 2000;). Through membership, donors choose their level of participation, such as the frequency (i.e., monthly, quarterly, bi-yearly, and yearly) and the donation amount (i.e., the monetary due) with which to provide regular financial support to the organization. Donation, on the other hand, is a form of giving whereby donors provide sporadic, one-time donations to the organization. Through this form of giving, donors do not follow a fixed pattern of helping behavior (in terms of the frequency and amount donated) and allocate monetary resources on an occasional basis, without committing to the organization to provide regular donations.

The existence of various forms of giving suggests that there may be different motives related to the way donors understand helping behavior and how they prioritize the organization’s needs and the allocation of resources to multiple initiatives (AbouAssi, 2013; Khodakarami, Petersen, & Venkatesan, 2015). When donating, some donors feel a responsibility to ensure the security and survival of the organization, so their support is focused on protecting the proper performance of its interventions and the system it applies to allocate the financial resources. By endorsing membership, donors may be able to provide predictability and stability to the funds raised by the organization (Faulkner, Romaniuk, & Stern, 2016). Through this committed financial support, donors also help fundraisers to address uncontrollable needs, thus allowing the organization to manage unexpected situations where monetary resources are needed. Similarly, the tendency to avoid uncertainty that some individuals show can motivate them to identify with community groups (Hogg, 2007), which may lead them to be more likely to stay with and help an organization by endorsing membership (Farmer, Kidwell, & Hardesty, 2020). Other donors, in contrast, may feel a responsibility to help a nonprofit organization by targeting donations to those social causes requiring further financial support. Likewise, some individuals may support nonprofit organizations by focusing on those initiatives that are aimed at minimizing inequality (Janoff-Bulman & Carnes, 2013). Choosing donations as a form of giving may allow donors to have more control over the destination of their contributions and allocate the appropriate financial support to the social causes they desire to help.

3.4 HYPOTHESES DEVELOPMENT

3.4.1 Political ideology and its impact on donation decisions

As noted, a key aspect that distinguishes liberals from conservatives is the differential attributions they make about the causes of social problems (Paharia & Swaminathan, 2019; Song, Sheinin, & Yoon, 2017; Skitka et al., 2002). Together with these perceptions, their tendency to endorse social justice and social order may determine their willingness to assist people as a function of why they need help and, therefore, the way in which they give to charities (Farmer, Kidwell, & Hardesty, 2020). For liberals, structural causes lead to inequality across society and they consider the social systems and the institutions to be responsible for social ills (Skitka et al., 2002; Song, Sheinin, & Yoon, 2017). As liberals are more sensitive to fairness, they embrace social justice by performing behaviors aimed at helping others in the community to advance (Janoff-Bulman & Sheikh, 2006). Their focus on minimizing inequality relative to the distribution of resources (Janoff-Bulman & Carnes, 2013) leads them to feel a higher level of responsibility to aid others in general (Winterich & Zhang, 2014). Given this, liberals may contribute to a charity moved by the desire to increase social benefit and provide their donations by maximizing the impact of the monetary resources through a broader support (e.g., donating to several initiatives; Farmer, Kidwell, & Hardesty, 2020). Moreover, as they are interested in correcting problems caused by social systems and structures, liberals may believe more strongly in the importance of working for the welfare of society recurrently (Todd & Lawson, 1999), thus leading them to be more willing to provide more frequent support to charity.

Conservatives, in contrast, tend to develop internal causal attributions for outcomes in life (e.g., poverty) and believe that people have more autonomous control over their behavior (Everett et al., 2021; Krijnen et al., 2021). For them, disadvantaged groups are experiencing their appropriate social position, thus justifying inequality among groups in society (Winterich & Zhang, 2014) and legitimizing the social system (Jost et al., 2003). As conservatives are more system-justifiers and exhibit desires to preserve existing arrangements within the social system, they are more likely to embrace social order and focus their efforts on maintaining and protecting the system (Farmer, Kidwell, & Hardesty, 2020; Matthews, Levin, & Sidanius, 2009). Conservatives' endorsement of social order motivates them to perform behaviors and practices that contribute to its maintenance (Jost et al., 2003; Peifer, Khalsa, & Howard, 2016). Similarly, their behavior is more based on efficacy motives and is oriented toward maintaining and enhancing feelings of competence and control (Breakwell, 1993). As they tend to support organizations with which they mostly identify (Jung et al., 2017), conservatives concentrate their help on a fewer number of charities and provide greater financial support to those they choose to help (Farmer, Kidwell, & Hardesty, 2020), thus contributing to their subsistence and stability, and therefore to the social system's maintenance.

Based on the previous discussion, liberals, compared with conservatives, are expected to provide help with higher donation frequencies. On the other hand, compared with liberals, conservatives are expected to provide help by donating greater amounts. Hence, we propose the following hypotheses:

H1. *Political ideology influences donation frequency, such that liberals are expected to donate more frequently than conservatives*

H2. *Political ideology influences donation amounts, such that conservatives are expected to donate higher amounts than liberals*

3.4.2 Political ideology and the form of giving

We also advance the premise that the form of giving may be determined by the way individuals understand helping behavior and their priorities regarding the allocation of financial resources to an organization and its multiple initiatives (AbouAssi, 2013; Khodakarami, Petersen, & Venkatesan, 2015). These aspects, in turn, also depend on the individuals' political belief systems (Farmer, Kidwell, & Hardesty, 2020). As noted, conservatives exhibit system-justifying tendencies and are more likely to endorse social order, which is prompted by the need to provide certainty and stability (Janoff-Bulman & Sheikh, 2006). From this perspective, conservatives are expected to support practices aimed at defending against threats and legitimizing the existing social system (Jost et al., 2003; Peifer, Khalsa, & Howard, 2016). As a result, they are more likely to develop a sense of group membership and adhere to communities under the assumption that conforming to group norms will help with the preservation of social order (Fernandes & Mandel, 2014; Kidwell, Farmer, & Hardesty, 2013). Similarly, conservatives strongly favor in-group loyalty, focus on principles of obligation and responsibility, and show stronger feelings of responsibility to ensure the security and survival of the groups they belong to (Haidt & Graham, 2007; Winterich, Zhang, & Mittal, 2012). Therefore, when they decide to support an organization, it is more likely that they will stay and help it.

In addition, unlike liberals, conservatives show stronger uncertainty intolerance (Jost, Federico, & Napier, 2013) and a higher motivation to seek control in the environment, which leads them to perform behaviors aimed at decreasing uncertainty and restoring a sense of order and structure (Fernandes & Mandel, 2014). Their uncertainty avoidance may also explain their tendency to security-seeking attachment behaviors (Chan & Ilicic, 2019) and the greater ease of retaining these individuals in the organization (Jung et al., 2017). This, therefore, can lead conservatives be more likely to engage in a sustained provision of funds to an organization. Liberals, in contrast, given their social justice orientation, tend to see systemic factors (e.g., discrimination and favoritism; Krijnen et al., 2021) as responsible for inequality. Because they focus strongly on the equitable treatment of all individuals when they give to charity, they will try to maximize everyone's autonomy and welfare. Moreover, unlike conservatives, liberals show a lower motivation for organizational attachment (Chan & Ilicic, 2019). They tend to avoid and reject group favoritism and discrimination and have preferences for egalitarian (versus hierarchical) relations in their pursuit of social justice (Krijnen et al., 2021; Ordabayeva & Fernandes, 2018). These factors may lead liberals to allocate their donations to groups of people or social causes that are particularly in need of support. In addition, as liberals perceive changes in people's well-being as unpredictable and determined by chance events (Krijnen et al., 2021), their support may not focus on fixed donation programs, but they will prefer to allocate resources at times when they feel they are more appropriate.

The previous discussion suggests that, compared with liberals, who may prefer to control the timing and target group of their donations, conservatives may tend to engage in membership programs. This form of giving allows conservatives to provide support aimed at preserving the order and stability of the organization, as well as the system in place, and to avoid situations of uncertainty. Hence, the following hypothesis is proposed:

H3. *Political ideology influences the form of giving, such that conservatives are expected to have a higher likelihood of choosing membership versus donations compared with liberals*

3.4.3 Moderating role of the form of giving

Importantly, the form of giving could also influence donors' perceptions regarding the support the organization receives and, thus, affect the level of resources they can provide in subsequent donation decisions. Here, we discuss how adherence to membership (versus donations) may moderate the impact that political ideology—based on their political belief system—has on the two decisions considered: donation frequency and donation amount.

Donation frequency. In H1 we argue that liberals are expected to donate more frequently than conservatives. Here, we ask the question of whether this effect will be reinforced or not when donors provide their donations through membership (compared with donations). As discussed, through membership, charities can obtain stable funding and increase the availability of resources to address different social intervention programs. Therefore, if the charity is perceived as having an abundance of resources, regular supporters who desire to support multiple initiatives could expect a positive impact through the funds collected (Rak, 2021). In this sense, for liberals, whose motivation for donating is based on their need to allocate resources equitably and support those beneficiaries most affected by systemic factors (Krijnen et al., 2021), donating through membership may lead them to perceive that the sustainable support (in the long run) they provide to the organization could allow for a broader social intervention, covering the purpose of each initiative to a greater extent. This, in turn, may reduce liberals' need to provide recurrent support, thus leading them to reduce their donation frequency.

In contrast, conservatives, as high system justifiers, when supporting a charity, are more likely to reinforce continuity, based on their need to maintain or enhance feelings of closeness (Jung et al., 2017; Vignoles et al., 2006). Moreover, as they are focused on maintaining stability and predictability within the organization, membership may motivate them to offer recurrent support, perceiving that this may contribute to the proper development of the organization, while reducing the uncertainty generated by unexpected situations. Based on this, compared with conservatives, liberals are expected to reduce their donation frequency under membership (versus donations). Hence, we propose the following hypothesis:

***H4**. The positive (negative) impact of a liberal (conservative) political ideology on donation frequency becomes weaker for membership (compared with donations)*

Donation amount. In H2 we argue that conservatives are expected to donate greater amounts than liberals. We aim to understand whether this effect will be stronger or weaker when donors provide their donations through membership (compared with donations). Prior evidence analyzing members' helping behavior notes that membership fees paid may lead members to perceive that, by contributing with their fees, they are providing the necessary support (Wang & Ashcraft, 2014). Therefore, their expectations, related to their priorities about the allocation of financial resources, are fulfilled. In this sense, by endorsing membership, conservatives may perceive that through this continuous and stable form of giving fundraising managers can carry out their daily activity—contributing to the organization's stability—as well as intervene in those situations that appear unexpectedly, thus reducing uncertainty (Jost, Federico, & Napier, 2013), and their need to provide greater sums of money. Similarly, prior evidence notes that organizations can be thought of as 'systems' in that they share many of the same psychological properties as typical systems such as the government and related social institutions. Therefore, organizations can provide individuals with structure, order, predictability, and resources (Proudfoot & Kay, 2014, p. 175). Following this work, as higher system justifiers, when conservatives perceive the status quo as relatively permanent and unchanging, they are expected to maintain it. Therefore, if they perceive the organizational performance to be relatively stable, conservatives may perceive less need to act in order to protect the system, thus reducing their desire to provide higher amounts.

On the other hand, when liberals choose membership as a form of giving, they can experience higher levels of commitment to the organization. As noted above, unlike conservatives, liberals show a lower motivation for organizational attachment (Chan & Ilicic, 2019). However, membership may lead them to develop a stronger sense of confidence in the charitable organization and think that their contributions are properly allocated to important causes, thus perceiving more efficacy in the charity's interventions (Bekkers, 2006; Sargeant, Ford, & West, 2006) and motivating them to provide greater amounts. The previous discussion suggests that, compared with liberals, conservatives are expected to reduce their donation amount under membership (versus donations). Hence, we propose:

H5. *The positive (negative) impact of a conservative (liberal) political ideology on donation amount becomes weaker for membership (compared with donations)*

3.5 METHOD

3.5.1 Sample and data

To test the proposed conceptual model, we used data from a charitable organization donor database in a major European country. The collaborating organization develops projects for social intervention in problems such as social and labor exclusion, and poverty or violence suffered by the neediest groups, and it provides aid to the most disadvantaged regions in the world. The data corresponds to a representative sample of 7,159 donors observed during a time window of eight years (from January 2013 to December 2020). It contains longitudinal information on different aspects of the relationship between the donor and the organization. The data set includes the donation frequency and the donation amount provided, the form of giving, and socio-demographic information (gender, and type of residence area where the donor lives). We complemented this data with political information derived from a public source that captures the voting results over time in the country studied and its different regions at the residential area level. We also complemented the data set with the disposable income per capita obtained from another external source. This comprehensive data set enabled us to empirically test our hypotheses regarding the impact of political ideology on donation frequencies and donation amounts and on the form of giving, and also investigate the moderating relationships. Table 3.2 contains a description of the operationalization of all variables in the study. Table 3.3 presents the descriptive statistics and correlations. Below, we explain in detail the operationalization of the central variables in the study.

Table 3.2 Variable operationalization

Variable	Operationalization
Donation frequency	Number of times individual *i* donates in year *t*.
Donation amount	Annual sum of all contributions made by individual *i* in year *t*. Log-transformed for the model estimations
Political identity	Dummy: 1 if the most voted party in the residential area of individual *i* is a conservative party; 0 if it is a liberal party
Form of giving	Dummy: 1 if individual *i* donates through membership in year *t*; 0 otherwise
Period	Ordinal: 1=2013; 2=2014; 3=2015; 4=2016; 5=2017; 6=2018; 7=2019; and 8=2020
Income	Disposable income per capita in the residential area of donor *i* in year *t*. Log-transformed for the model estimations
Residential area	Dummy: 1 if donor *i* lives in an urban area in year *t*, 0 if rural
Gender	Dummy: 1 if donor i is female; 0 if male
Ageing index (%)	Annual index of ageing in the residential area of individual *i* in year *t*
Poverty index (%)	Annual index of poverty in the region of individual *i* in year *t*
Government support	Annual sum of all funds (in millions of euros) provided by the government to charities and nonprofit organizations in year *t*
Political participation	Percentage (mean-centered) of citizens that participate in the voting process, with respect to the total census in the residential area of individual *i* in each election
Governing party	Dummy: 1 if the political party in power in state government in year *t* is a conservative party; 0 if it is a liberal party

Table 3.3 Descriptive statistics and correlations

	Variable	Mean	Std. Dev.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1	**Frequency**	4.79	4.5	1														
2	**Donation amount**	263.81	470.7	.46	1													
3	**Political identity**	.71	.5	.02	.09	1												
4	**Form of giving**	.93	.3	.12	-.21	.02	1											
5	**Period**	N.A.	N.A.	.05	.02	.22	.07	1										
6	**Income**	14285.51	4415.1	.13	.34	.52	-.05	.22	1									
7	**Residential area**	.75	.4	.23	.46	.09	-.12	*.00*	.48	1								
8	**Gender**	.46	.5	.02	.04	.03	-.02	*.01*	.03	.04	1							
9	**Ageing**	179.07	73.7	-.045	*.02*	.17	-.02	.27	.18	.07	.04	1						
10	**Poverty**	18.73	1.6	-*.01*	-*.01*	-.09	*.00*	-.05	*.01*	-*.01*	-*.00*	.05	1					
11	**Government support**	15367.84	4415	.04	.02	.15	.04	.68	.13	*.00*	*.01*	.15	-.23	1				
12	**Donation amount (t-1)**	252.11	461.8	.47	.98	.09	-.21	.03	.34	.46	.04	.02	-*.01*	.03	1			
13	**Frequency (t-1)**	4.53	4.1	.95	.55	.03	.10	.04	.16	.29	.03	-.05	-*.00*	.04	.54	1		
14	**Political participation**	73.98	5.7	.05	.19	.43	-.04	*.35*	.000	.78	.21	.01	*.07*	-*.00*	.00	.20	1	
15	**Governing party**	.74	.4	-.03	-.01	-.12	-.06	-.13	-0.76	-*.18*	*.00*	-.00	-.27	-.39	-.31	-.02	*0.00*	1

Notes. Nonsignificant correlations are italicized. N.A.= Not applicable.

3.5.2 Measures

Donation decisions. We consider two key donation decisions in our study, donation frequency and donation amount. Donation frequency ($Frequency_{it}$) captures the number of times individual *i* donates in year *t*. Donation amount ($Amount_{it}$) is measured as the annual sum of all contributions made by individual *i* in year *t*. Individuals in our sample are very heterogeneous in their donations, thus causing donation amount to be potentially skewed. We conducted a Kolmogorov-Smirnov normality test to ensure that this variable is not normally distributed (skewness = 5.43; SE = 454.48; p < .001). Then, for the model estimations, we log-transformed this variable.

Form of giving. Form of giving ($FormGiving_{it}$) is operationalized as a binary variable that takes the value 1 if individual *i* donates through membership in year *t*, and 0 through donations.

Political ideology. Political ideology ($PolIdeology_{it}$) is operationalized as a binary variable that takes the value 1 if the most voted party in the residential area where individual *i* lives in year *t* is a conservative party, 0 if it is a liberal party. As noted previously, the information available includes the specific address of the donor, and the voting results over time (for up to four different elections that took place during the time window of the sample) broken down by residential area. We matched the residential address for donor *i* with the voting results at time *t* of the corresponding residential area to determine the dominant political ideology.

Control variables. We controlled for a number of additional variables in our models, including demographic variables, such as gender and type of residential area, and socio-economic variables, such as income (disposable income per capita). Additional political variables were also included such as political participation (i.e., people exerting their rights by voting) registered in the residential area in each election, and the political party in power in state government during the study period. We also controlled for government support of charity, which was measured as the total amount (in millions of euros) of funds allocated from the government to charities and nonprofit organizations in year *t*. Moreover, as the time window of our study included the year 2020, COVID-19 pandemic effects could be influencing our results regarding the number of monetary allocations to charities during 2020. Then, we controlled for the period in which the individuals in the sample give. Finally, we considered two important indices representing the ageing population registered in each zip code (i.e., the ratio of people aged 65 and older to people under 15 years old) and the level of poverty and social exclusion registered in the region of the study sample (i.e., obtained through the index of At Risk of Poverty or Social Exclusion, AROPE), measured every year *t*.

3.5.3 Model and estimation

This study aimed to investigate the impact of political ideology on the donation frequency, the donation amount, and the form of giving, as well as potential moderating effects. The three focal decisions, donation frequency, donation amount, and form of giving, are interrelated. We, thus, proposed estimating a system of three equations as follows:

$$\begin{aligned} Frequency_{it} = \beta_0 &+ \beta_1 PolIdeology_{it} + \beta_2 FormGiving_{it} + \beta_3 Amount_{it-1} \\ &+ \beta_4 PolIdeology_{it}\ X\ FormGiving_{it} \\ &+ \beta_5 Controls_{it} + \varepsilon_{it} \end{aligned} \qquad (1)$$

$$\begin{aligned} Amount_{it} = \beta_0 &+ \beta_1 PolIdeology_{it} + \beta_2 FormGiving_{it} + \beta_3 Frequency_{it-1} \\ &+ \beta_4 PolIdeology_{it}\ X\ FormGiving_{it} \\ &+ \beta_5 Controls_{it} + \varepsilon_{it} \end{aligned} \qquad (2)$$

and

$$FormGiving_{it} = \beta_0 + \beta_1 PolIdeology_{it} + \beta_2 Controls_{it} + \varepsilon_{it} \qquad (3)$$

where, the dependent variables are $Frequency_{it}$, that is, the donation frequency by donor i in period t, $Amount_{it}$, that is, the donation amount by donor i in period t, and $FormGiving_{it}$, that is, the form of giving through which donor i donates in period t, in equations 1, 2 and 3, respectively. The predictor variables are $PolIdeology_{it}$ in all equations and $FormGiving_{it}$ in equations 1 and 2. $\mathrm{Controls}_{it}$ refers to a vector of control variables that we have discussed before. In equations 1 and 2, we included the impact of the donation amount and the donation frequency, respectively, to estimate the delayed influence of these variables in *t-1*. In these equations we also included the term $PolIdeology_{it}$ *X* $FormGiving_{it}$ to investigate the potential moderating effect. Finally, ε_{it} is the residual term.

We estimated the three models simultaneously in a single step (Preacher, Rucker, & Hayes, 2007). In doing this, we controlled for the correlation between the errors of the three equations. In addition, since the information and data collected were not equal for each individual, we had an unbalanced panel. Thus, we used a seemingly unrelated regression method (SUREG procedure in STATA 16), which accommodates the unbalanced nature of the panel. This simultaneous estimation provides robust standard errors, compared with individually testing each model.

3.6 FINDINGS

3.6.1 Model-free evidence

Before we present the results of our proposed model, we provide model-free evidence of the effect of political ideology and the moderation of the form of giving. Results from a preliminary descriptive analysis reveal that liberals on average donate more frequently than conservatives ([$M_{Liberals}$ = 4.34; SD = 4.39]; [$M_{Conservatives}$ = 4.32; SD = 4.32]; p = .927), although these differences are not statistically significant. On the other hand, conservatives in general contribute significantly more amounts of money than liberals ([$M_{Liberals}$ = 184.96; SD = 342.98]; [$M_{Conservatives}$ = 281.77; SD = 493.51]; p < .001). To examine in more detail the effects of political ideology on donation frequency, we categorized this dependent variable into four groups according to the number of times a donor contributes per year: 1= once a year; 2 = between 2 and 3 times; 3 = between 4 and 6 times; and 4 = more than 6 times. A chi-square analysis reveals significant differences between the percentage of liberals and conservatives regarding the number of times they contribute per year (χ^2(3, N = 42346) = 23.17; p<.001). Although more than 40% of the sample donates once a year, conservatives use this frequency more than liberals (43.1% and 41.2% respectively). From these results we can also see that liberals donate more through higher frequencies (22.4% donate between 4 and 6 times, and 23.6% more than 6 times, in comparison with conservatives (20% and 23% respectively).

In addition, we also split the sample into two groups: (1) those choosing membership and (2) those choosing donations. We then determined the average of the frequency used and the amount donated, and the average of the conservative (vs liberal) ideology under each form of giving. In Table 3.4 we present the summary of these statistics. Results reveal that, in general, under membership (compared with donations), people donate more frequently (5.06

times and 2.29 times respectively) but donate lower amounts (231.28€ and 616.18€ respectively). In line with our conceptual development, the results show that conservative people tend to choose more membership as a form of giving instead donations (71% and 68% respectively). On the other hand, liberals, compared with conservatives, tend to donate less frequently under membership (5.03 times and 5.15 times respectively) ($F(1,42346) = 5.27$; $p < .05$). Regarding the donation amount, under membership, conservatives reduce significantly more their amount (12.3%) compared to liberals (4.32%) ($F(1,42346) = 81.94$; $p < .001$), with respect to the mean donated by each type of donor. Figures 3.2 and 3.3 graphically represent these results.

Table 3.4 Results from model-free evidence analysis

	Membership	**Donations**	**All forms of giving**
Number of individuals	6134	1025	7159
Donation frequency	5.06(4.5)	2.29(2.6)	4.79(4.5)
Donation amount	231.28(398.9)	616.18(873.6)	263.81(470.7)
Conservative ideology	.71(.5)	.68(.5)	.71(.5)
Donation frequency			
$\text{Frequency}_{\text{Liberals}}$	5.03(4.5)	2.38(2.7)	4.82(4.5)
$\text{Frequency}_{\text{Conservatives}}$	5.15(4.6)	2.06(2.2)	4.79(4.4)
Donation amount			
$\text{Amount}_{\text{Liberals}}$	176.97(292.0)	458.12(748.7)	184.96(342.9)
$\text{Amount}_{\text{Conservatives}}$	253.32(432.9)	689.8(916.9)	288.83(504.7)

Figure 3.2 Donation frequency as a function of political ideology and form of giving

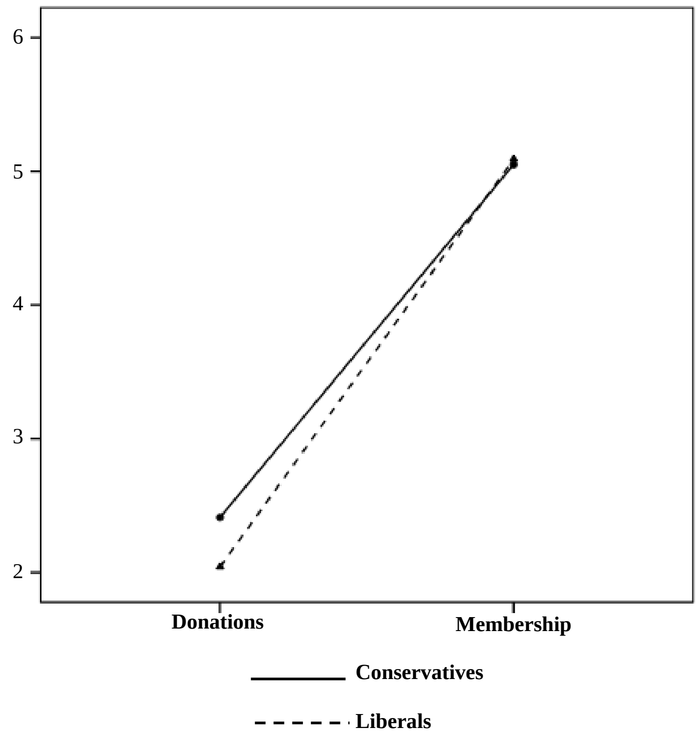
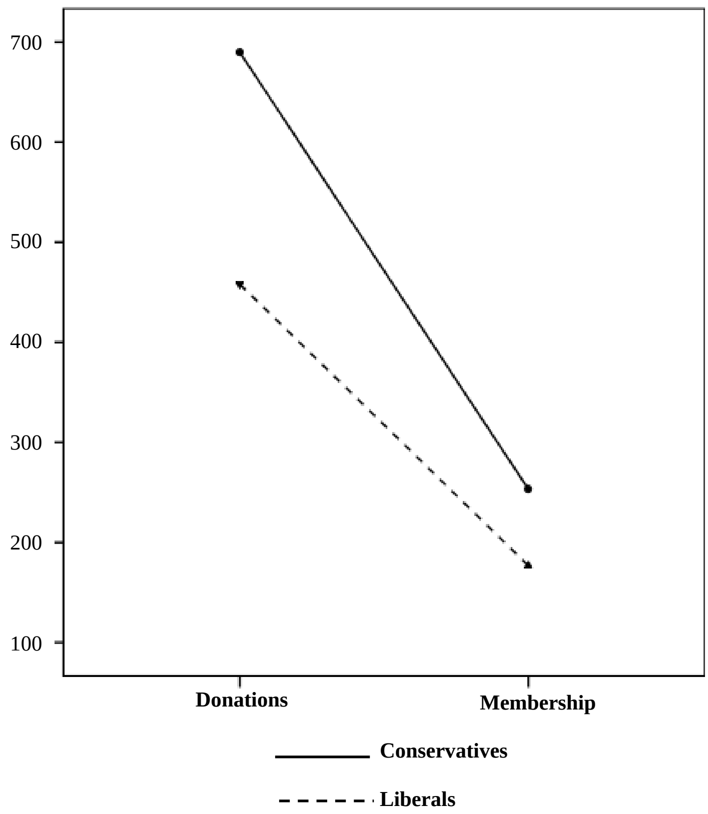


Figure 3.3 Donation amount as a function of political ideology and form of giving



3.6.2 Overall model fit

For the estimation of the three models, we proceeded to estimate a base model with control variables (M1), a second model including the main effects (M2), and a full model (M3) that considers the interaction terms (for frequency and donation amount models). We performed a post-estimation test to identify the best fitting model by comparing the F test statistics and the values of Akaike's information criterion (AIC) and the Bayesian information criterion (BIC) of each nested model. We identified that model fit significantly improves when adding each set of variables. The full model (M3) of frequency and amount donated fits better ($F(11, 27581) = 703.82$, $p < .001$; $F(11, 27581) = 1095.36$, $p < .001$, respectively) in comparison with models without explanatory variables (M1) and without interaction terms (M2). For the estimation of the form of giving, the model including the explanatory variable (M2) fits better ($F(9, 27583) = 135.74$, $p < .001$) in comparison with the base model (M1). We describe below the estimation results pertaining to the models with better fit. As Table 3.4 displays, our full model explains 22% of the variance in donation frequency, 30.41% of the variance in donation amount, and 5.40% of the variance in the choice of the form of giving.

3.7 ESTIMATION RESULTS

3.7.1 Main study

As shows in Table 3.5 political ideology significantly impacts the two donation decisions differently. The results indicate that conservatives tend to donate less frequently than liberals ($\beta_{Conservative}= -.459$; $p < .05$). In contrast, conservatives donate higher amounts compared with liberals ($\beta_{Conservative}= .215$; $p < .001$). These results provide support for hypotheses one and two. The results also show a significant effect of political ideology on the form of giving. Compared with liberals, conservatives have a higher likelihood of choosing membership as a form of giving ($\beta_{Conservative}$= .025; $p < .001$), thus supporting hypothesis three. Also, the form of giving has a significant main effect on donation decisions. Membership leads members to donate more frequently (β= 4.558; $p < .001$) but lower amounts (β= -1.383; $p < .001$), compared with the alternative form of giving—donations. Turning to the moderating effects proposed, we found significant differences. The results reveal that under membership, the positive impact of liberal ideology (unlike conservative) on donation frequency becomes weaker ($\beta_{Conservative}$ = .431; $p < .05$). On the other hand, the impact of conservative ideology (unlike liberal) on donation amount becomes weaker through this form of giving ((β= -.232; $p < .001$). These results are in line with hypotheses four and five.

Regarding the set of control variables, the results show significant effects on donation decisions. For example, those individuals living in an urban area, or where the age of the population is higher, or those with higher income levels tend to donate with lower frequency (β= -.768; $p < .01$; β= -.003; $p < .001$; β= -2.274; $p < .001$) but contribute greater amounts of money (β= .434; $p < .001$; β= .000; $p < .001$; β= .734; $p < .001$). Political participation also shows a positive and significant impact on donation frequency (β= .018; $p < .05$). However, there is no significant influence on donation amount. On the other hand, living in an urban area, or where the age of the population is higher, or there are higher income levels lead individuals to donate less frequently (β= -.053; $p < .001$; β= -.001; $p < .001$; β= -.039; $p < .01$). In contrast, when the poverty index in the region is greater, when the funds provided by the government to charities is higher, or when the party in power is conservative, individuals tend to choose membership programs (instead of donations) to support charity (β= .012; $p < .001$; β= .000; $p < .001$; β= .034; $p < .001$).

Table 3.5 Seemingly unrelated regression method and estimation results

	Frequency	**Donation amount**	**Form of giving (Membership)**
Political identity$_{it}$	-.458*(.204)	.215***(.057)	.025***(.004)
Form of giving$_{it}$	4.558***(.178)	-1.383***(.050)	--
Donation amount$_{it-1}$	2.425***(.017)	--	--
Frequency$_{it-1}$	--	.1004***(.006)	--
Political identity$_{it}$ X Form Giving$_{it}$	.431*(.208)	-.232***(.058)	--
Covariates			
Period$_{it}$	.154***(.038)	-.049**(.016)	.039***(.004)
Income$_{it}$	-2.274***(.109)	.744***(.030)	-.039***(.012)
Urban$_{it}$	-.768**(.256)	.434***(.072)	-.053**(.017)
Gender$_{it}$	.223***(.048)	-.044**(.013)	-.010**(.003)
Ageing$_{it}$	-.002***(.000)	.000***(.000)	-.000***(.000)
Poverty$_{it}$	.004(.015)	-.005(.005)	.012***(.001)
Government support$_{it}$	.000(.000)	.000(.000)	-.000***(.000)
Political participation$_{it}$	.018*(.000)	.000(.002)	-.000(.000)
Governing party$_{it}$	.001(.125)	-.020(.035)	.034***(.001)
Constant	12.144***(2.518)	-3.003***(.707	1.892***(.162)
R^2	.2200	.3041	.0540
AIC	216904.7		
BIC	217225.5		

Note. AIC = Akaike information criterion; BIC = Bayesian information criterion. Standard errors are in parentheses.
***p < .001. **p < .01. *p < .05.

3.7.2 Robustness check

To check the reliability of the core regression coefficient estimates in our main model, we ran an alternative model specification. To do so, we replaced the political ideology variable (dummy) with a new variable that measures the total percentage of votes received by conservative parties in each residential area and period of election. We then subtracted this variable's mean from all observations in the data set and mean centered this variable, so that the predictors had mean 0. In Table 3.6, we provide the results obtained. Again, model fit significantly improves when adding each set of variables. The full model (M3) of frequency and amount donated fits better ($F(13, 27759) = 731.66$, $p < .001$; $F(13, 27759) = 927.39$, $p < .001$, respectively) in comparison with models without explanatory variables (M1) and without interaction terms (M2). For the estimation of the form of giving, the model including the explanatory variable (M2) fits better ($F(10, 32029) = 64.80$ $p < .001$) in comparison with the base model (M1). We also compared the AIC and BIC values of each nested model. Results show that these values are lower in the full model in comparison with the models with no explanatory variables or interaction term. However, the values are higher than those found in our core model (with political ideology conceptualized as a binary variable), thus supporting the adequacy of the main results presented.

The results from this additional estimation are consistent with the main findings of our study, with political ideology significantly impacting both donation decisions. As shown in Table 3.6, compared with liberals, conservatives donate less frequently ($\beta = -.019$; $p = .001$) but contribute with higher amounts ($\beta = .007$; $p < .001$), thus supporting hypotheses one and two. In line with hypothesis three, the results seem to indicate that conservatives show a higher likelihood to choose membership as a form of giving, in comparison with liberals ($\beta = .000$; $p < .001$). Regarding the interaction terms, the results are in line with those in our core model. Choosing membership as a form of giving reduces the positive impact of liberal ideology (compared to conservative) on the donation frequency, although this result is not statistically significant. On the other hand, contributions through membership significantly reduce the positive impact of conservative ideology (compared to liberal) on donation amount (β= -.232; p < .001), providing support for hypothesis five.

Table 3.6 Estimation results with political ideology mean-centered percentage

	Frequency	Donation amount	Form of giving (Membership)
Political identity$_{it}$	-.019**(.006)	.007***(.002)	.000*(.000)
Form of giving$_{it}$	4.833***(.096)	-1.530***(.027)	--
Donation amount$_{it-1}$	2.423***(.017)	--	--
Frequency$_{it-1}$	--	1.004***(.006)	--
Political identity$_{it}$ X Form Giving$_{it}$	.009(.006)	-.006***(.002)	--
Covariates			
Period$_{it}$	.118*(.057)	-.044**(.016)	.038***(.004)
Income$_{it}$	-1.762***(.215)	.681***(.060)	-.014(.014)
Urban$_{it}$	-.781**(.255)	.441***(.072)	-.059***(.016)
Gender$_{it}$	.231***(.048)	-.045**(.013)	-.010**(.003)
Ageing$_{it}$	-.002***(.000)	0.000**(.000)	.000***(.000)
Poverty$_{it}$	.003(.018	-.006(.005)	.011***(.001)
Government support$_{it}$	.000(.000)	.000(.000)	.000***(.000)
Political participation$_{it}$	.014(.008)	.001(.002)	.000(.001)
Governing party$_{it}$	-.010(.125)	-.019(.035)	.035***(.008)
Constant	6.531**(2.793)	-2.260(.784)	1.615***(.000)
R^2	.2207	.3042	.0530
AIC	216940.8		
BIC	217261.6		

Note. AIC = Akaike information criterion; BIC = Bayesian information criterion. Standard errors are in parentheses.***p < .001. **p < .01. *p < .05.

3.8 DISCUSSION

3.8.1 Theoretical implications

We make several theoretical contributions in this study. First, we extend research on political ideology and its influence on helping behavior. Despite the resurgence of research on political orientation in the charity domain (Yang & Liu, 2021), little is known about how people help others and when and why they can be more generous (Farmer, Kidwell, & Hardesty, 2020). Literature has recently focused primarily on understanding the effect of political ideology on donations, although it has been approached from a general perspective, thus neglecting the separate impact on different donation components (i.e., donation frequency and amount). We fill this gap by suggesting that political ideology greatly affects the individual’s donation decisions in different ways.

We draw on system justification theory to explain how political belief systems, leading individuals to different perceptions about causes of need and social issues (Jost et al., 2003), may influence charitable giving, specifically, two donation decisions—frequency of donation and amount donated. Consequently, we go beyond previous research that seeks to identify who is more charitable, conservatives or liberals. Instead, we found that liberals donate more frequently, because of their desire to maximize social benefit and their motivation to help as many beneficiaries as possible (Farmer, Kidwell, & Hardesty, 2020), while conservatives donate larger amounts, given their need to seek the organization’s stability and subsistence and their motivations to maintain and protect the system (Jost et al., 2003, 2004; Peifer, Khalsa, & Howard, 2016).

Furthermore, in this study we also emphasize that analyzing simultaneous decisions individuals make when they support charities is critical to better understand charitable behavior. Only a few scholars have differentiated between participation and amount decisions (e.g., Fajardo, Townsend, & Bolander, 2018; Kim, Gupta, & Lee, 2021), which is critical for the development of effective strategies aimed at increasing the funds collected and the availability of funding. Filling this gap, we simultaneously consider two main donation decisions—frequency and donation amount—and suggest that they imply different underlying cognition processes regarding the perceived impact on the organization's outcomes and the allocation among different initiatives (Khodakarami, Petersen, & Venkatesan, 2015). Our research demonstrates that both donation decisions are differently influenced by political orientations and sheds new light by unpacking the different components of donation and demonstrating the countervailing effects. Therefore, this study provides a more nuanced understanding of political ideology effects on donations and can help reconcile previous mixed findings in the literature.

Second, our findings add to the political ideology literature and philanthropic behavior research by identifying a new aspect where conservative and liberal tendencies may have strong influence within the charitable giving context, the form of giving. Despite the widespread usage of different fundraising programs offered by nonprofit organizations, little attention has been given to the motivational aspects driving the financial supporters' preferences for engaging in different forms of giving (Kim, Gupta, & Lee, 2021; Paswan & Troy, 2004). We offer evidence on how political ideology determines the choice of membership and donations, as two main forms of giving individuals use to allocate their money to nonprofit organizations (Kim, Gupta, & Lee, 2021). Our findings suggest that, while liberals, given their social justice orientation, may tend to prefer to allocate resources to social causes that are particularly in need of support and at times when they feel they are most appropriate, conservatism leads people to prefer membership. This form of giving may allow them to develop a sense of group, procure predictability and stability for the funds collected, and help the organization to address unexpected situations, thus reducing uncertainty and preserving social order (Fernandes & Mandel, 2014; Kidwell, Farmer, & Hardesty, 2013).

Finally, by proposing the moderating role of the form of giving, we offer novel insights to the nonprofit marketing literature that seeks a better understanding of how charities can direct the financial support of heterogenous audiences (Bennett, 2003; Lee et al., 2018; Wymer & Gross, 2021) and to identify strategies aimed at maximizing fundraising efforts (Sargeant & Ewing, 2001; Winterich, Mittal, & Aquino, 2013; Winterich, Zhang, & Mittal, 2012) as well as increasing the retention rates of their regular supporters (Jung et al., 2017; Wymer & Rundle-Thiele, 2016). In this study, we argue that the form of giving could influence donors' perceptions regarding the support the organization receives and, thus, affect the level of resources they can provide in subsequent donation decisions. We discuss how adherence to membership (versus donations) can reinforce or undermine the impact that political ideology has on both donation decisions' frequency and donation amount. Our results shed new light by showing that by choosing membership as a form of giving, the positive effect of political ideology on the donation frequency of liberals and the donation amount of conservatives may become diminished.

Drawing on system justification theory, we explain that embracing this form of giving, liberals' need for equitable allocation of resources may be largely satisfied, because they perceive abundance of resources (Krijnen et al., 2021; Rak, 2021), thus reducing their desire to provide recurrent support. In contrast, conservatives, given their need to maintain and enhance feelings of closeness (Jung et al., 2017; Vignoles et al., 2006), could be more prone to reinforcing continuity by providing more frequent support. However, as they can also perceive that through the membership fees paid, the organizational performance is relatively stable (Wang & Ashcraft, 2014), their need to act to protect the system is lower, leading them to reduce their desire to provide higher amounts. Together with this, when liberals increase their confidence in the charitable organization, driven by their commitment through stable donations over time, it is more likely that they tend to think that resources are properly allocated to important causes (Bekkers, 2006; Sargeant, Ford, & West, 2006), which can favor their motivation to provide greater amounts. With these findings, we also contribute by expanding existing knowledge on how perceptions, regarding the efficacy perceived about the distribution of resources, may be used to better target different politically oriented audiences (Ordabayeva & Fernandes, 2018; Winterich, Zhang, & Mittal, 2012).

3.8.2 Practical implications

From a practical perspective, the findings of this study offer important implications for fundraising managers of charitable organizations. A key aspect of our research is the identification of individuals' political ideology by using publicly available data, as an interesting tool that may allow managers to better target their financial supporters. In this sense, fundraisers should turn to public sources providing voter registration records to collect useful information at the individual level to efficiently target audiences and offer customized communications (Lee et al., 2018). In addition, they can also access observed behavioral variables that are readily available from the donor database, such as the frequency of donation, the amount donated, or even the type of initiatives they most help. Charitable organizations usually use fundraising strategies and employ them universally for all individuals. Instead, we argue that managers must be aware of the existence of different motivations and expectations among their financial supporters and develop more targeted actions aimed at maximizing the donation decisions of each individual. Our findings strongly support the premise that people living in a residential area where the most voted-for party has a conservative ideology provide greater donation amounts. Importantly, this study also offers novel insights into another important donation decision, the frequency with which individuals contribute, and suggests that those living in areas where a liberal orientation dominates tend to donate more frequently.

Fundraising managers can use our results to better assess their marketing communications when they approach their audiences by framing messages according to the attributions they may make about the causes of social problems and the way they give to charities (Farmer, Kidwell, & Hardesty, 2020). For example, for conservative-oriented supporters, messages should contain information congruent with their values (Septianto, Seo, & Paramita, 2022), highlighting the important role that the individual's behavior plays for the accomplishment of the organization's goals (Das, Kerkhof, & Kuiper, 2008) and its subsistence, and for the protection of the social system (Matthews, Levin, & Sidanius, 2009). On the other hand, for more liberal-oriented people, managers should communicate messages appealing to the positive influence that donations have on addressing multiple social causes (Chang & Lee, 2010) and emphasizing the importance of donating recurrently to reduce inequality and achieve a social change that benefits the entire society.

Importantly, this study also differentiates the form of giving individuals choose to contribute to charity, which has been strongly recommended when studying the drivers of charitable giving (Kim, Gupta, & Lee, 2021). Our findings suggest important implications for managers by revealing strong preferences for membership programs (versus donation programs) among conservative audiences. We acknowledge that membership is one of the most used forms of giving whereby members provide a stable funding every year to charitable organizations. It plays a key role in the accomplishment of the organization's goals and mission (Bradford, 2021; Drollinger, 2018), representing in most cases the main source of income for charities. The present study provides charities a theoretical understanding of the motivations behind an individual's endorsement membership. Our findings suggest that if fundraisers want to increase their member portfolio, they should especially pay more attention to those individuals pertaining to populations where a conservative orientation predominates, since, in line with our findings, they are more likely to become ongoing supporters, thus engaging in regular donations over long periods of time. Also, we recommend that for those with a more liberal orientation—and more likely to choose donations as their form of giving—fundraisers may design actions aimed at communicating the availability of multiple initiatives and offer them the opportunity to choose the destination of their funds. Despite the highlighted relevance of membership programs in the organization's performance, donation programs also represent an important source of income for charities. Fundraising managers should then manage these two forms of giving by approaching the right audience, so that the strategies implemented maximize the funds raised.

Finally, this research also has implications for how charitable organizations can motivate the contributions of their members successfully by designing communication messages appealing to the importance of individuals' contributions to the fulfillment of the organization's goals. Prior research notes that matching donors' and charities' values helps to better persuade individuals to donate (Chang & Lee, 2010). Likewise, a charity's positioning increases donations when they align with donors' political ideology (Winterich, Zhang, & Mittal, 2012). However, we note that it is also of utmost importance to develop strategies aimed at increasing donors' benefits and accomplishing their expectations. We argue that through membership, donors may see their priorities regarding the allocation of financial resources fulfilled. This may occur when individuals perceive their membership fees are providing the necessary support (Wang & Ashcraft, 2014) and that the provision of additional funds will not substantially improve the organization's performance (Das, Kerkhof, & Kuiper, 2008). Indeed, our findings reveal that by endorsing membership, liberal audiences tend to reduce their donation frequency, and conservative audiences tend to reduce the amount donated. In line with our theoretical arguments, and the results found, we recommend fundraising managers not only communicate the organization's goals (i.e., by matching political beliefs with individuals), but also describe the impact that contributions have on both the organization and recipients. For liberal-oriented members, who care not just about the aggregate donation, but also about the number of potential recipients, it would be useful to communicate the number of social causes they are helping.

In addition, managers should be especially cautious with those communications exhibiting an equality-based allocation of resources. Although highly aligned with their expectations (Lee et al., 2018), this strategy could lead to a reduction in liberals' perceptions that recurrent support is needed. For conservatives, who make philanthropic decisions according to outcome efficacy and uncertainty avoidance (Lee, Seo, & Yoon, 2020), fundraisers should include financial information regarding how the resources are being allocated and emphasize the need to obtain more funds to be able to deal with unexpected situations that require urgent intervention. It would be necessary, however, that messages include requests for necessary donation amounts or frequencies, noting that such frequencies and amounts donated would be contributing to the proper performance of the organization. Maintaining the congruency between the financial support required in these requests and the messages appealing to the political orientations and expectations could help enhance the overall effect of marketing communications (Kim et al., 2019).

3.9 LIMITATIONS AND DIRECTIONS FOR FURTHER RESEARCH

The present study is subject to some limitations that, in turn, offer the opportunity to expand knowledge in future investigation. We relied on data from a single charitable organization. An important reason that justifies the choice of this type of organization is the fit between its mission, which is to provide social intervention in problems such as social and labor exclusion or poverty, and the focus of the study on better understanding how different individuals' perceptions about the causal attributions regarding need and social issues, such as poverty or misfortune, impact donors' charitable giving decisions. However, future research could replicate our study, and test its generalizability, by studying other nonprofit contexts (e.g., gender inequality, animal abuse, or environmental issues). We also examined political ideology's influence on the choice of different forms of giving, and a logical expansion of this study would be to test the impact of political ideology on the preferences for endorsing membership (versus other types of fundraising programs) in other service settings (e.g., membership associations, museums, or sport organizations).

Likewise, this study relied on the donation behavior and political ideology of a region within a single European country. Previous evidence has shown that moral values, as well as political belief systems, function differently in different cultural contexts, thus affecting individuals' levels of uncertainty tolerance, inequality acceptance, and social order rationalization (Jost, Federico, & Napier, 2013; Paharia & Swaminathan, 2019; Song, Sheinin, & Yoon, 2017). Since these aspects directly influence helping behavior and thus charitable giving, they should be explored across cultures in future studies to better understand the role of contextual factors, that is, at the country level, as key moderators of the influence of political ideology.

A significant contribution of this study is the wide time window that collected results from four different voting processes, showing the ideological orientation of segments of the population at a disaggregated level. Managers can also develop other techniques to obtain information about their donor base, such as surveys, that allow them to identify their opinions about the underlying causes of various social problems and their attitudes toward supporting multiple initiatives, as well as to know what their key priorities are or the degree of importance they assign to the role of the organization as an agent that provides stability and social order or reduces inequality. Future research could explore the impact of these attitudinal aspects on charitable behavior, which would offer a broader view of how political belief systems determine helping behavior, and would help managers to segment their audiences efficiently, thus optimizing the entire portfolio. Therefore, extending our work with the above attitudinal measures is warranted.

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CHAPTER IV

PERIODIC VERSUS AGGREGATE DONATIONS: LEVERAGING DONATION FREQUENCIES TO CULTIVATE THE REGULAR DONOR PORTFOLIO

4.1 INTRODUCTION

This chapter aims to address the third challenge identified in this doctoral dissertation, which is related to the ***management of the payment schedules by regular donors*** (i.e., the level of aggregation of their annual contribution through different donation frequencies) and its impact on donation amounts over time. As noted, the regular donor portfolio provides a stable flow of resources in the long run, then it plays an essential role in allowing the sustainability of the organization in its daily performance (Drollinger 2018; Sargeant and Woodliffe 2007). Therefore, understanding how different donation frequencies can affect the regular donors' contributions in the long-term, as well as, knowing how to better capture motives for donating to help understand the amount donated and preferences for different donation frequencies, are important aspects that need to be addressed.

To approach these questions, the present chapter is aimed at ***understanding how the impact of different donation frequencies on the total contributions of regular donors varies across motivations to donate (self- and other-oriented)***. In addition, this chapter focuses on ***analyzing internal (motivations to donate) and external (donation options) factors as the drivers of donation frequency***. In addressing these objectives, we adopt a perceived value approach, where donors evaluate their donations based on the perceived costs and benefits resulting from their donations. In this way, we are able to offer novel insights into how the frequency with which regular donors donate to the charity affects their donation amounts over time and demonstrate the role of the motivations to donate (i.e., other-oriented and self-oriented motivations) in moderating this relationship. To capture motivations, we relied on behaviors, such as consenting to receive information from the organization, volunteering, or making extra donations (both those contributed during the year, and those contributed with the purpose of make adjustments to the amount donated at specific moments in time), thus enabling fundraisers to develop effective strategies among their different types of regular donors. In addition, we expand knowledge by identifying the drivers of donation frequency and demonstrate how these choices depend crucially on the individual motivations to donate, as well as on the presence of donation options during donor registration.

4.2 MOTIVATION

Service research considers the study of the relationship between services and well-being a key priority (Ostrom et al., 2015), highlighting the need for research “that aims to create uplifting changes and improvements in the well-being of individuals” (p. 140). This societal focus underscores the central role of charitable organizations, as providers of essential community services aimed at the most disadvantaged groups and sectors (Boenigk et al., 2021; Fang, Fombelle, & Bolton, 2021), within the service ecosystem. Unfortunately, today charitable organizations struggle to access sufficient economic resources to fulfill their missions. The global economic crisis caused by the COVID-19 pandemic and the resulting increase in social problems (e.g., growing inequalities, more people in need) is creating strong pressures for funding. Fundraisers fundamentally rely on the support of individuals, as they remain as the largest source of income, accounting for 70% of the contributions made by the private sector (US$4.7 billion; Development Initiatives, 2020). However, the decreasing trend in these contributions over time (Giving USA, 2019) is jeopardizing the execution of many social projects and the very survival of charities. In this context, the regular donor portfolio adopts an essential role, since it guarantees stable funding that allows the accomplishment of the organization’s goals (Drollinger, 2018; Sargeant & Woodliffe, 2007). The challenge, therefore, is how to retain and cultivate the regular donor portfolio (Nonprofit Research Collaborative, 2019).

The focus of this study is on the frequency with which regular donors provide their monetary contributions to charity and its impact on their donation amounts. Regular donors commit to providing an annual contribution to the organization, which can be distributed in different frequencies such as yearly (once a year), quarterly (four times a year), or monthly (twelve times a year). For example, a $120 donation in a year can be provided as $120 yearly, $30 quarterly, or $10 monthly. The effects of different levels of aggregation of economic sums on individual perceptions and behaviors have received increasing attention in recent years in the temporal reframing literature (Bambauer-Sachse & Grewal, 2011; Hershfield, Shu, & Benartzi, 2020; Sudhir, Roy & Cherian, 2016). Temporal reframing has become popular due to its ample use in for-profit contexts, where companies frequently resort to this strategy to trivialize the costs and make them appear more affordable. Previous studies have demonstrated that less aggregated sums of money (e.g., $1 a day vs. $365 a year) lead to higher purchase intentions (Bambauer-Sachse & Grewal, 2011; Hershfield, Shu, & Benartzi, 2020), because framing a price in a series of small payments reduces the perceived cost of the spend.

Whether less aggregated payment schedules lead to more donations in the context of charitable giving represents an important research question. The previous work in for-profit contexts has focused exclusively on the cost side of the transaction; that is, less aggregated sums of money are perceived as more affordable, under the logic that the benefits provided by the goods or services received are not fundamentally altered by the payment structure. Individuals who donate to charity, however, do not receive any specific good/service in exchange (McCort, 1994), and they can derive different types of utility from the act of donating (i.e., egoistic and altruistic, Song, Li, & Sahoo, 2021). This makes valuation of the benefits from donating particularly subject to several aspects of the interaction, including the one we study in our research – donation frequencies (Atlas & Bartels, 2018). How do periodic vs. aggregate donations impact the perceived benefits and costs from the donations?

While the literature has devoted an increasing attention to investigating the amounts individuals donate to charity and their drivers (Johnson & Park, 2021; Shang & Croson, 2009), studies have frequently ignored the role played by donation frequencies. Table 4.1 offers a review of the relevant work investigating actual donation amounts. From this table we can identify a number of important gaps. First, only a few studies investigate the impact of the level of aggregation in the donations on the donation amounts (Basu, 2021; Gourville, 1998, Atlas & Bartels, 2018; Sudhir, Roy & Cherian, 2016). Second, the focus of these studies is solely on occasional donors. Regular donors, however, represent a key source of stable economic resources for charities, and the higher commitment to the organization's goals and mission makes them engage in other important behaviors such as volunteering and activism (Bradford, 2021). Third, given the study design (lab or field experiments), previous studies focused on the consequences of the donation frequencies on the donation amount, thus preventing from providing an understanding of the factors that explain the choice of frequencies by individuals in the first place. Finally, previous studies use cross-sectional information, which limits the ability to understand potential dynamics of donation frequencies over time.

Table 4.1 Literature review on temporal reframing of donations and the role of donation frequency on donation amount

Source	Type of donor	Frequency of donation (level of aggregation)	Heterogeneity (Moderators)	Drivers of frequency	Data	Research method	Key findings
Gourville (1998)	Occasional	✓	Suggested amount	X	Cross-sectional	Field experiment	Daily frame transactions (aggregate frame) result in higher (lower) compliance with donation requests
Verhaert and Van den Poel (2012)	Occasional	X	Seed money strategy	X	Cross-sectional	Field experiment	Donors who have donated more frequently are more likely to donate and to contribute greater amounts (especially when the threshold is rather high).
De Bruyn and Prokopec (2013)	Regular/ Occasional	X	Suggested amount	X	Cross-sectional	Field experiment	Frequent donors showed greater likelihood to donate but appeared less susceptible to appeal scale manipulations.
Hladká and Hyánek (2015)	Occasional	X	X	Motives (investment, egoistic and altruistic)	Cross-sectional	Field data	Respondents who identified with egoistic motives donated higher amounts and more frequently.
Sudhir, Roy and Cherian (2016)	Occasional	✓	Past behavior	X	Cross-sectional	Field experiment	Monthly temporal framing generated more donors and more donations than the daily framing. As the giving rates are higher among past donors, the money raised is larger.
Atlas and Bartels (2018)	Occasional	✓	Perceptions (costs and benefits; advantages and disadvantages) and affective involvement	X	Cross-sectional	Field experiment	Daily frame increases donation intentions by changing the perceived benefits of donating and the mental representation of the contract's benefits. Daily donations increased intentions when high-affective involvement is present.
Basu (2021)	Occasional	✓	Perceived sacrifice and benefit to the recipient	X	Cross-sectional	Field experiment	When altruistic actions are framed in periodic (aggregate), donation is perceived as less moral. An aggregate-framed act increases observers' perception of the donors' sacrifice and the perceived magnitude of their help to the beneficiary.
Our study	Regular	✓	Type of donor (other- vs self-oriented)	Type of donor and donation options	Longitudinal	Field data	Higher frequencies of donations increase (reduce) donation amounts of self- (other-) oriented donors. Donation options lead to choose higher frequencies, especially for self-oriented donors.

To fill these gaps, the present study focuses on regular donors – representing the main source of income for charitable organizations – and the main goal is to investigate the impact of different frequencies of donations (e.g., yearly, bi-yearly, quarterly, monthly) on their donation amounts over time. We adopt a perceived value approach where donors evaluate their donations based on the perceived costs (e.g., economic sacrifice) and benefits (i.e., satisfaction from helping others and personal well-being) resulting from their donations (Atlas & Bartels, 2018; Basu, 2021). We test our theoretical predictions in a field study using a representative sample of 5,168 regular donors of a charitable organization in Europe observed over a seven-year period (2013–2019). We apply dynamic panel data techniques and find that higher frequencies lead to higher donations, with this effect varying greatly among donors based on their motivation to donate (i.e., stronger for selfish motives, weaker for altruistic motives). Our study also sheds light on the drivers of the choice of donation frequency by showing that both internal (motivations to donate) and external (donation options) factors jointly explain the decision to donate more versus less frequently to the organization.

The present study contributes to service theory and practice in several important ways. First, it addresses recent calls for research at the intersection between service and well-being (Ostrom et al., 2021), underscoring the importance of engaging individuals in regular contributions to charity to ensure these organizations can provide essential services to society (Bolton, 2020; Alkire et al., 2019). Second, our research offers novel insights into how the frequency with which regular donors donate to the organization affects their donation amounts over time. Specifically, the study demonstrates the importance of the motivations to donate (i.e., other-oriented and self-oriented motivations) as a central moderator in the relationship between perceived benefits and costs and the donation amounts, thus allowing for a more nuanced understanding of temporal framing effects than that previously provided by the literature. Third, our research contributes to a better understanding of the factors explaining the choice of donation frequencies. These choices depend crucially on the individual motivations to donate (self-oriented and other-oriented), as we show that donors tend to choose those frequencies that maximize the perceived value of their donations, but can also be influenced by the presence of donation options during donor registration. This aspect has significant managerial value, as it suggests that organizations can actively manage the donation frequencies of their donors in a way that maximizes both donor perceived value and the contributions made by donors. Finally, and at a more general level, this study enhances understanding of the donor portfolio and donors' contributions over time, offering important practical insights that can aid in the effective management of the donor base.

4.3 CONCEPTUAL FRAMEWORK

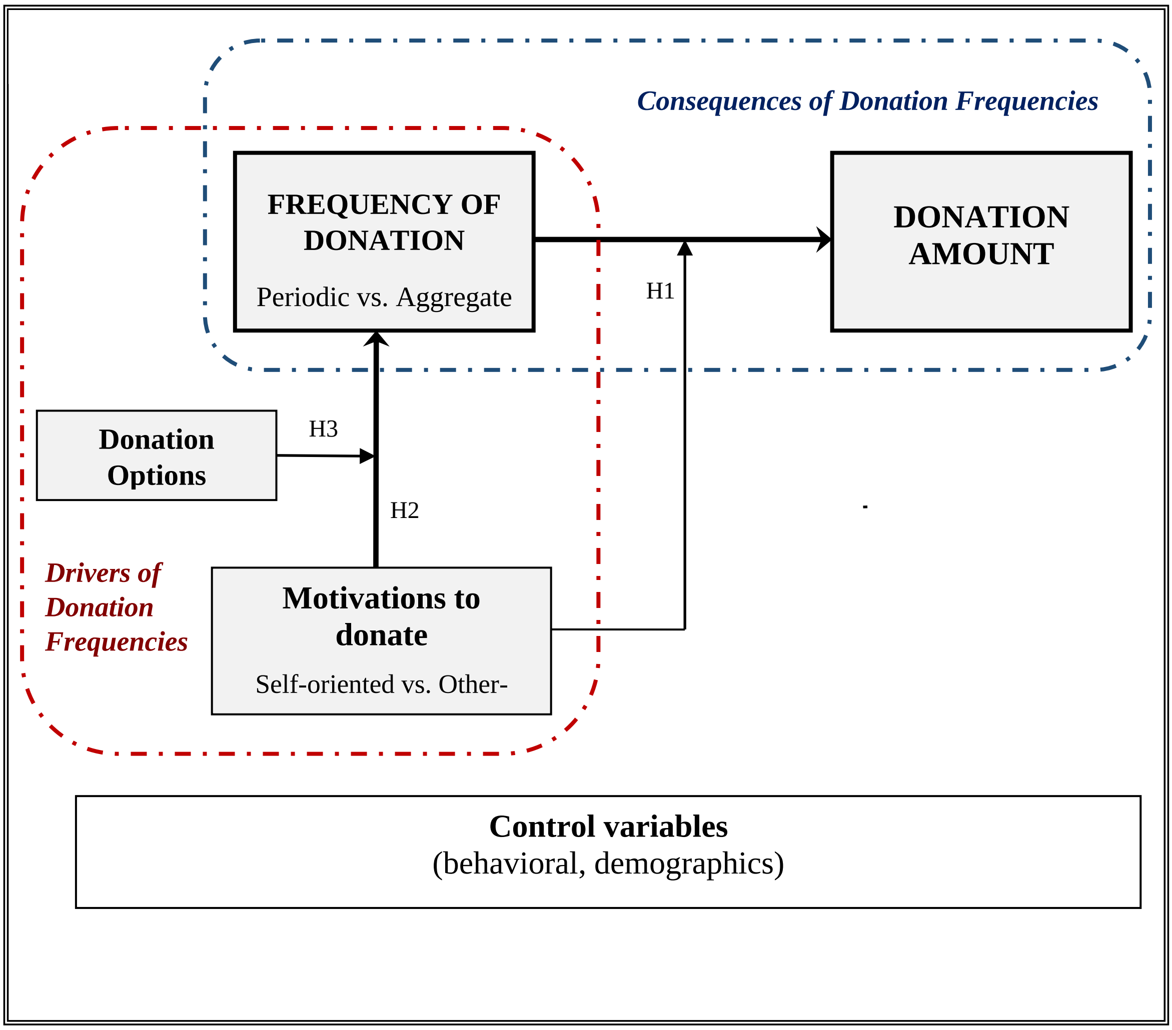
To gain a better understanding of how different donation frequencies can influence the monetary contributions that regular donors make to an organization over time, we propose a conceptual framework that links the frequency of donation and the donation amount. In developing our framework, we have drawn on the literature on temporal reframing (Gourville, 1998). This literature is concerned with understanding the psychological and behavioral responses of individuals to a similar amount of money that is framed in a more versus less aggregate way. In the domain of charitable giving, framing a similar donation amount in different levels of aggregation (e.g., yearly, bi-yearly, quarterly, monthly) may have important consequences not only on the perceived costs, as emphasized by previous research, but also on the perceived benefits associated with that particular donation (Atlas & Bartels, 2018), thereby influencing the perceived value from the donation and the amount individuals will be willing to donate in subsequent periods. Our framework provides an understanding of the impact of different frequencies of donation on the donation amount based on a discussion of the perceived value (i.e., benefits vs. costs) derived by the donor from the different donation frequencies. Importantly, we expect the impact of donation frequencies on the donation amount to be heterogeneous across donors (Atlas & Bartels, 2018). Previous research has noted the importance of considering the motives that drive individuals to give when investigating donation amounts (Webb, Green, & Brashear, 2000). Two key motivations have been identified by the literature (Andreoni, 1989; Cornelis, Van Hiel, & De Cremer, 2013): (i) helping others (i.e., other-oriented motivation) and (ii) deriving a private benefit (i.e., self-oriented motivation).

Given this study's demonstration of the central role played by donation frequencies in explaining the donation amount, another goal of our research is to understand why individuals choose different donation frequencies in the first place. To this end, we focus on internal and external factors by considering the donors' motivations to donate (help others and private benefit) and the donation options included in the request when individuals register as regular donors to the organization. Gaining a better understanding of this phenomenon not only offers novel insights into the drivers of donation frequencies but can also provide helpful advice for charities in their endeavor to engage their donors and increase those donors' contributions. Figure 1 offers a graphical representation of the model.

4.4 A PERCEIVED VALUE APPROACH. THE MODERATING ROLE OF MOTIVATIONS TO DONATE

To understand the impact of different donation frequencies on the donation amount, we adopt a perceived value approach. Donating to charity involves both benefits and costs to the donors, which are evaluated on an ongoing basis to determine the perceived value of their donations. Perceived value, in turn, determines donors' decisions about how much to donate in subsequent periods. In this section, we discuss how different donation frequencies can lead to different perceived benefits and costs associated with the donations made.

Figure 4.1 Conceptual model



4.4.1 Frequency of donation and perceived costs of donating

The cost of a donation for individuals involves a monetary sacrifice. The temporal reframing literature suggests that framing an amount of money in a less versus more aggregated way (e.g., daily vs. monthly vs. yearly) influences the perceptions of the affordability of the amounts, with less aggregation (e.g., $1 a day) leading to the perception that the cost is more trivial (i.e., a lower expenditure) compared with more aggregation (e.g., $365 a year; Shirai, 2017). In the charitable context, Gourville (1998) referred to temporal reframing as a "pennies a day" (PAD) strategy and demonstrated that small amounts donated daily were preferred by donors over a large aggregate amount donated yearly. As this author reasoned, when faced with very disaggregated amounts, donors easily assimilate these small expenditures and judge them as similar to other trivial and affordable categories of frequent spending (e.g., coffee, lunch, and taxi fares). In contrast, the same amounts presented in a more aggregate way led donors to assimilate this larger expenditure and judge it as similar to other less frequent, and therefore less affordable, categories of spending (e.g., suits and vacations). Subsequent work has supported the general prediction of temporal reframing by showing that a disaggregated expenditure is judged to be more advantageous, more attractive, and less expensive (Atlas & Bartels, 2018; Shirai, 2017). Based on this, different donation frequencies can lead to different perceived costs for a similar donation amount, with higher frequencies expected to produce lower perceived costs compared with lower frequencies.

4.4.2 Frequency of donation and perceived benefits of donating.

By engaging in donations, individuals can derive different types of benefits (Song, Li, & Sahoo, 2021). Previous literature has identified two main benefits associated with donating: (1) satisfaction from the good that the donations are doing for others who are in need, and (2) satisfaction from the good that the donations do for the donors themselves (Andreoni, 1989; Cain, Dana, & Newman, 2014; Shang et al., 2020). We argue that different frequencies of donation can affect these two benefits in different ways. Specifically, donating through higher frequencies (i.e., more disaggregated donation amounts) may lead to an increase in personal well-being (i.e., donors' warm glow). As demonstrated by Atlas and Bartels (2018), periodic donations lead donors to mentally represent the benefits in terms of multiple discrete events. Thus, higher frequencies, with the corresponding higher number of donation occasions (e.g., 12 with a monthly frequency vs. 1 with a yearly frequency), are expected to produce more frequent self-rewards in terms of personal satisfaction and positive emotional feelings. At the same time, a higher frequency of donations may lead to a decrease in the satisfaction derived from the help provided to others because donating smaller amounts (albeit more regularly) is expected to reduce the perceived help provided to others – that is, these small amounts may be seen as less significant when the objective is to provide financial support large enough to feel that important help is being given (Basu; 2021; Batson & Shaw, 1991; Moosmayer & Fuljahn 2010).

On the other hand, lower frequencies of donation are expected to have the opposite effect. By providing their contributions in a more aggregated way, donors can thus perceive that they are making more impact with their donations, which will enhance the satisfaction from helping others (Basu, 2021). However, donating less frequently will reduce the feeling of warm glow (personal well-being) as it produces a smaller number of self-rewards that ultimately help donors to feel good about themselves.

The above discussion suggests that, compared with more aggregated donations, periodic donations may lead to lower perceived costs for donors through a lower perceived monetary sacrifice. However, periodic donations can either increase or decrease a donor's perceived benefit from the donation. On the one hand, higher frequencies, by providing multiple discrete donation instances, may increase the perceived benefits relating to personal well-being; on the other hand, higher frequencies can reduce the perceived benefits associated with the contribution of the donations to helping others. To understand which of these effects may dominate, and thus to determine the ultimate impact of donation frequency on the donation amount, we suggest that donors weigh the costs and benefits derived from distinct frequencies differently depending on their motives for donating.

4.4.3 Contingent role of self- and other-oriented motives

The literature on prosocial behavior has recognized the importance of donors' motivations to explain helping behavior (Cain, Dana, & Newman, 2014; Webb, Green, & Brashear, 2000). Following Andreoni (1989), there are two fundamental reasons, not mutually exclusive, why individuals can engage in these behaviors. One is an altruistic motivation to contribute to the well-being of recipients of the charity: people may be motivated to donate by the ultimate desire to help others and reduce their suffering (Webb, Green, & Brashear, 2000). Another is an egoistic motivation to obtain a private benefit, such as deriving a positive emotional feeling or creating a positive self- or social image, by which helping behavior is performed mainly for the purpose of improving one's welfare and self-esteem. These are also labeled other-oriented and self-oriented motives, respectively, given the focus on others' welfare vs. one's own welfare, which can be used to categorize donors into self- vs. other-oriented (Cornelis, Van Hiel, & De Cremer, 2013). As noted, these motives are not mutually exclusive, but can both influence donation decisions (Batson & Shaw, 1991).

4.4.3.1 Self-oriented motivations

When individuals are driven by self-oriented motives, they put the focus on the psychological and intangible benefits they may experience after donating, such as a positive mood, or feeling good by doing good (Ottoni-Wilhelm, Vesterlund, & Xie, 2017). When they perform prosocial behaviors, they are usually motivated by the desire to feel good about oneself or signal positive moral traits to oneself (Johnson & Park, 2021). Through donations they can obtain personal rewards, such as increased self-esteem, avoid negative emotions that may arise from not donating (Bekkers & Wiepking, 2011; Ferguson et al., 2012), and reinforce one's relevant sense of self (Shang et al., 2020). Thus, donors driven by these motivations will value personal well-being benefits more than other types of benefits derived from their donations, given that they are usually considered as more egoistic or extrinsically motivated (Batson & Shaw, 1991) and can respond better to external incentives that are more focused on personal interest and rewards (Ariely, Bracha, & Meier, 2009).

Donors moved by self-oriented motives are also strongly interested in minimizing the monetary costs resulting from donations (Goeree, Holt, & Laury, 2002). This is because they mainly care about personal outcomes such as private enjoyment, their sense of personal worth as a donor, and avoidance of feelings of guilt (Ferguson et al., 2012). For them, a mere donation, even if low, may satisfy the selfish motivation to seek a warm glow and provide a sense of relief (Verhaert & Van den Poel, 2011). Therefore, a generous contribution would not be so important for them, and would at the same time avoid the excessive cost of donating large amounts. Given this, compared with low donation frequencies, high donation frequencies may lead to lower perceived costs for these donors through smaller perceived sacrifices, and to increased perceived self-benefits that are strongly appreciated by these donors. Compared with lower donation frequencies, higher donation frequencies would ultimately lead these individuals to derive a higher perceived value from their donations (through higher perceived benefits and lower perceived costs) and, thus, to donate more.

4.4.3.2 Other-oriented motivations

Individuals who are driven by other-oriented motives care about the well-being of others and intend to maximize the impact of their contributions (Ferguson et al., 2012; Webb, Green, & Brashear, 2000). These donors experience satisfaction derived from the feeling of being more helpful to recipients of the aid. One explanation for this motivation is based on the intrinsic incentive that the individual gets from making a greater effort or from spending (Imas, 2014), which is determined by "internal" moral and ethical considerations (Deci & Ryan, 1980) and by feelings of a social responsibility to make the world a better place (Bekkers & Wiepking, 2011). The donations also imply costs to other-oriented donors due to the economic sacrifice, but these donors are less likely to weigh these costs strongly given their central focus on helping others (Goeree, Holt, & Laury, 2002). This argument assumes that the act of donating is seen more in terms of the benefits provided to others than in terms of the cost to oneself (Basu, 2021; Batson & Shaw, 1991). Thus, donors moved by other-oriented motivations will put greater weight on increasing the well-being of others and helping in a significant way, regardless of the pain incurred by greater monetary sacrifice. Given this, other-oriented donors can derive higher value from donating with a low frequency (compared with a high frequency) because, as discussed, making contributions in a more aggregated way (larger sums) enhances the perceived impact of these contributions and the benefit of helping others. The perceived value from the donation will thus be higher for these donors when engaging in less frequent (more aggregated) donations.

The previous discussion suggests that the impact of donation frequency on the donation amount will depend on the motivations to donate. Compared with other-oriented motivations, self-oriented motivations will lead donors derive a higher perceived value from higher donation frequencies, resulting in more donations. Based on this, we hypothesize:

H1*: Donating through higher frequencies will lead to higher donation amounts for self-oriented motivations, compared with other-oriented motivations.*

4.5 CHOICE OF DONATION FREQUENCY

Our study is also concerned with the factors explaining a donor's choice of frequency. In particular, given the previous prediction in H1, we want to know whether, in practice, donors who differ in their motivations to donate (whether to derive a private benefit or to help others) choose naturally those frequencies that maximize the value from the donation – in other words, whether there is a higher predisposition among self-oriented donors to choose high frequencies, and among other-oriented donors to choose low frequencies. We are also interested in the effects of introducing donation options by the organization on the choice of donation frequency. Very often, when individuals register as regular donors, organizations provide them with different donating options (e.g., the registration form might include a list with different options – monthly, quarterly, bi-yearly, yearly – and individuals can tick the most appropriate one). How do these options change the natural tendency of donors to choose their frequencies? And do these options help donors make better choices, namely, those that produce the highest perceived value? We intend to provide answers to these questions.

4.5.1 Motivations to donate

We start by assuming that individuals will naturally choose the donation frequency that maximizes their expected value (Verhaert & Van den Poel, 2011). Prior to making their choices, individuals will try to anticipate the benefits and costs associated with the different options they have to arrive at a utility/value assessment (Tversky & Kahneman, 1981). As discussed previously, donors driven by self-oriented motives may derive more value from more frequent donations, so, anticipating this, they are expected to have a higher predisposition to choose high donation frequencies than are donors who are driven by other-oriented motivations. Hence:

***H2**: Compared with other-oriented motivations, self-oriented motivations to donate will lead donors to have a higher predisposition to choose higher donation frequencies.*

4.5.2 Donation options

Now we discuss the role of donation options in the choice of frequency. When individuals register as donors, organizations often present them with different alternatives for the frequency of their donations. Previous research points to the importance of developing appropriate compliance strategies by presenting a set of available responses from which individuals can choose (Weyant, 1996). The implementation of these types of compliance requests can provide important information to respondents, and they also act as reference frames that can alter donors' judgments and, thereby, their decision-making (De Bruyn & Prokopec, 2013; Verhaert & Van den Poel, 2012). This earlier evidence on the effect of appeal scales on donations suggests that donors will prefer the alternative that they consider most appropriate and that makes their contribution possible. Therefore, when faced with different options, donors should choose that which is a priori the most advantageous and beneficial for them, and hence to reject the rest. However, presenting different alternatives could make some donors aware that there are other donation options available, which, despite not initially being considered, could be seen as candidates (Weyant, 1996). From the donation options provided during registration, individuals can infer information such as the organizations' needs or goals (Goswami & Urminsky, 2016). According to Tversky and Kahneman (1981), the way in which a message is presented causes changes in preferences, which can be manipulated by changing the reference value of an individual.

Prior evidence suggests that the frequency with which a charity takes repeated actions to address certain social problems may affect consumer perceptions and therefore responses (Jin & He, 2018). For example, for donors with other-oriented motivations – who are focused on providing meaningful assistance – seeing that the organization offers the possibility of donating more frequently may make them feel that more frequent help is needed in order to address short-term objectives requiring urgent intervention (American Red Cross, 2020). In addition, these donors may interpret that the organization is interested in continuously addressing social problems and is persistent in achieving its objectives (Jin & He, 2018). Although these donors may have a lower preference for donating more frequently through small amounts, presenting various donation options can alter their frequency preferences, leading to a choice that departs from the one that maximizes perceived value.

Based on this explanation, it could be expected that presenting donation options can increase the likelihood of choosing more frequent donations for donors motivated by other-oriented reasons. On the other hand, for donors with self-oriented motivations – who are focused on achieving self-rewards and reducing the monetary sacrifice from their donations (Goeree, Holt, & Laury, 2002) – facing a request that offers the opportunity to frame their donations in a more disaggregated way will encourage them to select high frequencies to make their contribution. These individuals may get the most value from choosing high frequencies, so the donation options presented will reinforce their willingness to choose these frequencies. The weight they attribute to minimizing costs is strong for these individuals, so less frequent donations involving higher payments in a more aggregated way will be less likely to be chosen. Hence:

H3*: Presenting donation options will lead donors with self- and other-oriented motives to increase their predisposition to choose higher donation frequencies.*

4.6 METHOD

4.6.1 Sample and data

We empirically test the proposed conceptual model using data from a charitable organization donor database in a major European country. The collaborating organization develops projects for social intervention in problems such as social and labor exclusion, and poverty or violence suffered by the neediest groups, and it provides aid to the most disadvantaged regions in the world. The data corresponds to a representative sample of 5,168 regular donors (i.e. donors who have registered as members of the organization and collaborate providing funding on an ongoing basis) and contains longitudinal information over a seven-year period (2013–2019) on different aspects of the relationship between the donor and the organization, including (1) behavioral information (e.g., donation amounts, donation frequencies, previous occasional donor), (2) registering information (date of donor registration, donation options at registration), (3) communications (e.g., information/promotions sent to donors, channels of communication), and (4) sociodemographic data, which combines data provided by the organization, such as the demographic characteristics of the sample (gender, and type of residence area where the donor lives), with data obtained through external sources, such as socio-economic characteristics (disposable income per capita). This comprehensive dataset enabled us to test empirically our hypotheses regarding the impact of different donation frequencies on the donation amount for different types of donors, as well as about the drivers of the donation frequencies. Table 4.2 contains a description of the operationalization of all variables in the study. Also, Table 4.2 displays the descriptive statistics and correlations. Bellow, we explain in detail the operationalization of the central variables in the study.

Table 4.2 Variable operationalization

Variable	**Operationalization**
Donation frequency	
Monthly	1 if donation frequency is monthly; 0 otherwise
Quarterly	1 if donation frequency is quarterly; 0 otherwise
Bi-yearly	1 if donation frequency is bi-yearly; 0 otherwise
Donation amount	Total amount donated (log-transformed) by donor *i* in year *t*
Motivations to donate	
Other-oriented	Index composed of three dummy variables: (i) agree to receive information, (ii) volunteer, and (iii) extra donations. The index can take on the values 0, 1, 2, and 3 depending on the number of behaviors that donor i engaged in year *t* (higher number is indicative of a stronger other-oriented motivation)
Self-oriented	Index composed of three dummy variables: (i) extra donation in April and/or May, (ii) extra donation in second half of December, and (iii) increase in donation amount during 2015 and/or 2016. The index can take on the values 0, 1, 2, and 3 depending on the number of behaviors that donor i engaged in year *t* (higher number is indicative of a stronger self-oriented motivation)
Donation options	Dummy variable that takes the value 1 if donor *i* was presented donation options at registration; 0 otherwise
Controls	
Donation amount t-1	Total amount donated (log-transformed) by donor *i* in year *t-1*
Email	1 if donor *i* provides an e-mail address to the organization; 0 otherwise
Occasional donor	1 if donor *i* was a previous occasional donor at the organization before becoming a member; 0 otherwise
Experience	Number of years donor *i* has been a member of the organization in year *t*
Gender	1 if donor *i* is female; 0 if male
Income	Disposable income per capita in the residential area of donor *i* in year *t*
Residential area	1 if donor *i* lives in an urban area in year *t*, 0 if rural

Table 4.3 Descriptive statistics and correlations

	Variable	**Mean**	**Std. Dev.**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**	**14**
1	Monthly	.23	.42	1.00													
2	Quarterly	.22	.41	-0.42	1.00												
3	Bi-yearly	.12	.32	-0.31	-0.17	1.00											
4	Donation amount	201.52	295.18	0.27	-0.02	-0.07	1.00										
5	Donation amount *t*-1	196.74	277.58	0.27	-0.02	-0.07	0.91	1.00									
6	Other-oriented motivations	1.06	.42	*-0.08*	0.05	0.05	0.15	0.11	1.00								
7	Self-oriented motivations	.04	.21	-0.00	0.01	0.01	0.21	0.14	0.36	1.00							
8	Donation options	.78	.41	0.18	0.03	-0.02	0.13	0.13	0.09	*0.01*	1.00						
9	Residential area	.73	.44	0.11	0.04	0.00	0.15	0.16	0.02	0.03	0.13	1.00					
10	Gender	.45	.49	-0.07	*-0.04*	0.01	*-0.08*	*-0.08*	0.02	*-0.01*	-0.17	-0.12	1.00				
11	Email	.27	.45	0.13	*0.04*	0.01	0.11	0.11	0.01	-0.03	0.25	0.17	-0.19	1.00			
12	Income	14078.76	4349.01	0.01	0.03	0.01	0.17	0.18	-0.02	-0.00	0.034	0.37	-0.03	0.07	1.00		
13	Previous donor	.09	.28	0.02	-0.00	*-0.03*	0.15	0.15	0.09	0.12	0.05	0.07	-0.05	-0.04	0.03	1.00	
14	Experience	15.48	.12.05	-0.12	0.01	*0.01*	-0.03	-0.02	0.08	0.00	0.02	-0.10	-0.01	-0.16	-0.01	0.01	1.00

Notes: Nonsignificant correlations are italicized. Frequencies for the categorical variables (% in parenthesis): Monthly = 1,189 (23%); Quarterly = 1,137 (22%); Bi-yearly = 620 (12%); Donation options = 4,031 (78%); Residential area (Urban) = 3,773 (73%); Gender (Female) = 2,325 (45%); Email = 1,395 (27%) and Previous donor = 465 (9%).

4.6.2 Variable operationalization

Donation amount. Donation amount is measured as the annual sum of all contributions made by donor *i* in year *t*. We log-transformed the variable ($lnAmount_{it}$) due to the skewed distribution.

Donation frequency. This refers to the frequency with which donor *i* donates in year *t*. The information obtained from the data shows the different frequencies used: once a month; every two, three, and four months; twice a year, and once a year. However, as every two and four months are marginally used by regular donors,[4] we focused on the four most frequent options (monthly, quarterly, bi-yearly, and yearly) and created dummy variables for them (i.e., $Monthly_{it}$, $Quarterly_{it}$, $Bi\text{-}yearly_{it}$, with yearly acting as the base category).

Motivations to donate. This study considers two main motivations that can drive individuals to donate to charity: helping others (i.e., other-oriented motivation) and deriving a private benefit (i.e., self-oriented motivation). We relied on behavioral data from the donor database to derive variables that can act as proxies for the donors' underlying motives to donate. Specifically, we created two variables, one for other-oriented motivation ($Other_{it}$), and one for self-oriented motivation ($Self_{it}$), each of which is composed of various behaviors that are indicative of those motivations. $Other_{it}$ is an ordinal variable which can take values from 0 to 3 depending on whether donor *i* engaged or not in the following behaviors: (i) agreeing to receive information, (ii) volunteering, and (iii) making extra donations, all of which are related to exhibiting concern about the well-being of others (other-oriented motivation). Similarly, $Self_{it}$ is an ordinal variable which can take values from 0 to 3 depending on whether donor *i* engaged or not in the following behaviors: (i) making extra

[4] From the original sample, only six regular donors provided their contributions every two (4 donors) and four (2 donors) months, representing 0.001% of the regular donor database.

donations in the months of April and May, (ii) making extra donations in the second half of December, and (iii) adjusting their regular donations during the years 2015 and/or 2016, all of which are related to exhibiting concern for personal, tax-related benefits. Higher values of these variables are indicative of stronger (self- and/or other-oriented) motivations. We provide additional details about the way these variables were operationalized and their appropriateness in the next subsection, where we also describe the results of an additional study carried out that demonstrates that the chosen variables are able to capture the underlying other- and self-oriented motivations by donors.

Donation options. We capture the presence of donation options ($Options_{it}$) during the registration of the donor through a dummy variable that takes the value 1 if the request includes donation options for donor *i*, and 0 otherwise. The presence of donation options at registration depends on the channel through which individuals register as regular donors: donors who register online or physically are presented with options; those who register by telephone, e-mail, or fax are not.[5] The alternatives available in this request are fixed for all donors presented with these options (a total of four: monthly, quarterly, bi-yearly, and yearly). This is a reasonable number of options, as individuals' preferences show that they want a relatively small number of options from which to choose (Johnson et al., 2012).

We also consider control variables (*Controls*) that can impact the donation amount. We include behavioral factors such as the amount donated by donor *i* in the previous year ($lnAmountt\text{-}1_{it}$), whether donor *i* provided her email address to the charity ($Email_i$), whether donor *i* was an occasional donor before registering as member ($Occasional_i$), and the number of years as a member ($Experience_{it}$). We select these factors following prior evidence suggesting that donations can be highly influenced by past donation behavior (Verhaert and

[5] We clarify that donation options are not a necessary condition for individuals to donate with different frequencies. All donors, irrespective of whether they are shown donation options or not, decide their donation frequencies at member registration, but some are shown some pre-defined options.

Van den Poel 2012). We also include sociodemographic characteristics such as gender (*$Gender_i$*), income (*$Income_{it}$*), and type of residential area (*$Area_{it}$*).

4.6.3 Further details on the measurement of the motivations to donate

As noted, we relied on behavioral data from the donor database to derive variables that can act as proxies for the donors' underlying motives to donate. To do this, we engaged in interviews with the managers of the charity and carried out a literature review to identify behaviors that can reflect other-oriented vs. self-oriented motivations. These efforts led to the creation of two indexes, one for each motivation (other- and self-oriented).

To identify other-oriented motivation, the index was composed of the following three variables. First, we considered whether donors *agreed to receive information* from the organization. In agreeing to receive information, the donor is showing an interest in knowing whether more donations are needed or whether donations provided by donors are making a difference, or is exhibiting concern about the well-being of the less fortunate (Bekkers & Wiepking, 2011; Sargeant & Woodliffe, 2007). Donors driven by an other-oriented motivation derive satisfaction from the good that the donations are doing for others. Thus, these donors are expected to be more interested in knowing the impact that their donations have on others given that the utility of their philanthropic giving does fundamentally depend on the welfare of others (Song, Li, & Sahoo, 2021).

Second, we considered whether donors engaged in *volunteering* activities at the charitable organization. Volunteering can be a good indicator of a person's motivation to help others, as donating time, in addition to making monetary contributions, reflects altruism (Dittrich & Mey, 2021). Volunteering requires greater effort and stronger ties to charity, which leads to the development of a greater sense of moral responsibility (Cornelis, Van Hiel,

& De Cremer, 2013). Third, we also considered *extra donations*. The motivation to contribute in a significant way to an organization can encourage donors to donate more than they initially committed to. We recognize this characteristic mainly in those donors whose goal is closely related to the success of the organization and its results (Khodakarami, Petersen, & Venkatesan, 2015). These individuals can derive greater value through large contributions that make them feel that they are providing significant help (Moosmayer & Fuljahn, 2010). Based on this, we created an ordinal variable labeled $Other_{it}$, which can take values from 0 to 3 depending on whether donor i engaged or not in (i) agreeing to receive information, (ii) volunteering, and (iii) making extra donations. As engaging in multiple activities with the organization in addition to the regular contributions is associated with higher levels of involvement and empathic concern, higher values for this index are thus indicative of strong other-oriented motives to donate.

To identify self-oriented motivation, the index was composed of three variables that are related to obtaining personal benefits from the donation: i.e., tax benefits. These monetary incentives act as an extrinsic motivation that drive some individuals to donate, based on self-interest (Ariely, Bracha, & Meier, 2009). Given that self-oriented donors are viewed as extrinsically motivated (Ellen et al., 2000), they are expected to respond better to external incentives that are more focused on personal interest and rewards (Ariely et al., 2009). We considered (i) *extra donations made in the months of April and May*, and (ii) *extra donations made in the second half of December*. These two variables are indicative of an interest in obtaining tax benefits as individuals adjust their contributions to charity in these months to maximize their tax deductions. Similarly, we also considered (iii) whether donors *adjusted their regular donations during the years 2015 and/or 2016*, given that in these years there was a change in the tax regulations affecting the maximum amounts and the percentages of money that can be deduced. Based on this, we created an ordinal variable labeled $Self_{it}$, which can take values from 0 to 3 depending on whether donor *i* engaged or not in these behaviors. Higher values for this index are indicative of strong self-oriented motives to donate.

In addition to the guidance obtained from the charity managers and the support from the literature in deriving these two variables that capture motivations to donate, we developed an additional study to empirically determine whether the identified variables are indeed correlated with the underlying motivations to donate. The goal of this study was to obtain empirical support for the appropriateness of the measures used. We hired a market research company and conducted an online survey with a representative sample of individuals who are regular donors of charitable organizations. The information was collected during the first week of July 2021, with a total of 159 valid responses. Each respondent had to answer a number of questions regarding their motives for donating that were based on scales derived from the literature. Specifically, other-oriented motivations to donate were measured with an 8-item scale, and self-oriented motivations were also measured with an 8-item scale, based on work by Briggs, Peterson, and Gregory (2010), Cornelis, Van Hiel, and De Cremer (2013), and Konrath and Handy (2018). We also assessed the attitudes of individuals toward a number of behaviors including receiving information from the charity (4 items), tax advantages (4 items), and volunteering (4 items). Table 4.3 includes the specific items used to measure the different constructs.

We performed a factor analysis using SPSS (version 22) to test whether the items used to measure each construct loaded significantly on each of the constructs. The Kaiser–Meyer–Olkin (KMO) index and the significance of Bartlett's test of sphericity were .873 and $p<.001$, respectively, indicating the suitability of the respondent data for factor analysis. Table 4.4 shows that individual items load significantly on each construct (loadings >0.40).

Table 4.4 Items and rotated factors loadings

Item/ Variable	Motivations		Attitudes		
	Other-oriented	Self-oriented	Receiving information	Volunteering	Tax advantages
Other-oriented motivations					
1. *Helping people in need is very important to me*	.836				
2. *I feel that my donation provides a great benefit to those who receive it*	.803				
3. *I donate because I enjoy helping other people*	.601				
4. *I feel that my donation will improve the living conditions of others who are less fortunate than me*	.858				
5. *Through my donations I want to contribute to the success of the organization in helping others*	.730				
6. *I donate because of my concern for the underprivileged*	.748				
7. *I believe that people in need should receive support from others*	.782				
8. *I am a donor because of the human obligation to help and serve others*	.587				
Self-oriented motivations					
1. *I donate because not helping people in need makes me feel bad*		.523			
2. *Donating makes a positive impression on the people around me*		.808			
3. *Donating makes me feel good about myself*		.469			
4. *I donate because I would feel guilty if I did not*		.735			
5. *Donating increases my self-esteem*		.826			
6. *Donating makes me feel important*		.785			
7. *Donating is a decision that conveys something very positive to others about me as a person*		.759			
8. *People who hear about my contributions to the NGO will undoubtedly think of me as a good and caring person*		.864			
Receiving information					
1. *I like to receive information from the NGO about how the money I donate is spent*			.883		
2. *I like to receive information from the NGO about the results of actions and programs funded with donor money*			.886		
3. *I like to receive communications from the NGO that allow me to participate in events and other activities organized by the organization*			.771		
4. *I like to receive information from the NGO that allows me to learn more about the organization's mission and goals*			.906		
Volunteering					
1. *Volunteering is important to me*				.657	
2. *Volunteering allows you to help others and be useful to society*				.892	
3. *Volunteering helps you to give hope and dignity to disadvantaged people*				.830	
4. *I think volunteering is a good way to strengthen support for the NGO*				.796	
Tax advantages					
1. *I am aware of the tax advantages of donating to an NGO*					.694
2. *I consider the tax advantages I get for my donations to be relevant*					.760
3. *Tax advantages are an important reason for donating to NGOs*					.770
4. *I usually take tax advantages into account when deciding the amount of my donations*					.638

Notes: Extraction method: Principal component analysis. Rotation method: Varimax. NGO = Nongovernmental Organization

Subsequently, we used chi-square analysis in order to test the relationship between the variables other- and self-oriented motivations and attitudes toward the behaviors that we use in our main study (i.e., receiving information, volunteering, and tax benefits). Table 4.5 shows the descriptive statistics of the constructs, and 4.6 shows the results obtained from the chi-square analyses.

Table 4.5 Descriptive statistics of self- and other-oriented motivations and attitudes

	Mean	SD	Min.	Max.
Other-oriented	5.49	1.16	1	7
Self-oriented	3.28	1.32	1	7
Attitudes toward receiving information	4.98	1.52	1	7
Attitudes toward volunteering	5.18	1.28	1	7
Attitudes toward tax benefits	2.91	1.49	1	7

Table 4.6 Results from chi-square analyses

		Other- and self-oriented motivations		**Chi-square**	**df**	**p-value**
		High	Low			
Other-oriented	*Receiving information*	77.7(80)	48.2(27)	14.30	1	.000
	Volunteering	79.6(82)	19.6(11)	53.73	1	.000
	Tax benefits	62.1(64)	53.6(30)	.294	1	.189
Self-oriented	*Receiving information*	70.6(60)	63.5(47)	.90	1	.343
	Volunteering	58.8(50)	58.1(43)	.01	1	.927
	Tax benefits	72.9(62)	43.2(32)	14.44	1	.000

Notes: The results shown include all cases (individuals) that scored above the mean for each variable and thus denote positive attitudes toward (1) receiving information, (2) volunteering, and (3) tax benefits. The values in parentheses indicate the observed frequency (number of observations) in each analysis.

The findings reveal that regular donors who scored higher on the other-oriented motivations scale also scored higher on attitudes toward receiving information (scores above the mean; M = 4.98; SD = 1.52; range 1–7) and on attitudes toward volunteering (scores above the mean; M = 5.18; SD = 1.28; range 1–7), showing highly positive attitudes in both (χ^2(1, N = 159) = 14.30; p<.001) and (χ^2(1, N = 159) = 53.73; p<.001), respectively. For self-oriented donors these effects were not significant. On the other hand, regular donors who scored higher on the self-oriented scale showed better attitudes (scores above the mean; M = 2.91; SD = 1.49; range 1–7) toward the tax advantages of giving (χ^2(1, N = 159) = 14.43; p<.001). For other-oriented donors, however, these effects were not significant.

These results offer support for the measures used in our main study by providing evidence that engaging in behaviors such as agreeing to receive information from the charity or volunteering is related to more altruistic motivations to donate (other-oriented), while engaging in other behaviors, such as those that can help derive greater tax advantages, is related to more egoistic motivations to donate (self-oriented).

4.6.4 Estimation strategy and procedure

4.6.4.1 Donation amount model

We developed an econometric model to derive the impact of the donation frequency (i.e., $Monthly_{it}$, $Quarterly_{it}$, $Bi\text{-}yearly_{it}$) on the donation amount ($Amount_{it}$) and to consider the moderating role of motivations to donate ($Other_{it}$ and $Self_{it}$). The model that we estimated is shown in the following equation (Equation 1):

$$
\begin{aligned}
ln(Amount_{it}) = {} & \beta_0 + \beta_1 Monthly_{it} + \beta_2 Quarterly_{it} + \beta_3 Bi\text{-}yearly_{it} \\
& + \beta_4 Other_{it} + \beta_5 Self_{it} \\
& + \beta_6 Monthly_{it}\ X\ Other_{it} + \beta_7 Monthly_{it}\ X\ Self_{it} \\
& + \beta_8 Quarterly_{it}\ X\ Other_{it} + \beta_9 Quarterly_{it}\ X\ Self_{it} \\
& + \beta_{10} Bi\text{-}yearly_{it}\ X\ Other_{it} + \beta_{11} Bi\text{-}yearly_{it}\ X\ Self_{it} \\
& + \beta_{12} Controls_{it} + \varepsilon_{it} \qquad (1)
\end{aligned}
$$

where $ln(Amount_{it})$, the dependent variable, is the donation amount by donor *i* in year *t* (log-transformed); $Monthly_{it}$, $Quarterly_{it}$ and $Bi\text{-}yearly_{it}$ are the dummy variables capturing the donation frequency by donor *i* in year *t* (with the yearly frequency acting as the base category); $Other_{it}$ and $Self_{it}$ indicate the degree to which an other-oriented and self-oriented motivation is present for donor *i* in year *t*, respectively; $Monthly_{it}\ X\ Other_{it}$, $Monthly_{it}\ X\ Self_{it}$, $Quarterly_{it}\ X\ Other_{it}$, $Quarterly_{it}\ X\ Self_{it}$, $Bi\text{-}yearly_{it}\ X\ Other_{it}$, and $Bi\text{-}yearly_{it}\ X\ Self_{it}$ are the interactions between frequency of donation and motivations to donate; $Controls_{it}$ is a vector of control variables; and ε_{it} is the error term. Our focus is on the parameters β_1–β_3, which capture the main effects of the donation frequencies on the donation amount, and β_6–β_{11}, which reflect the interactions between the donation frequency and the motivations to donate.

To derive the parameters of interest, we applied panel data techniques. We included in our model the lag of the dependent variable ($Amount_{it-1}$), given the likely influence of previous donations on current donations (Verhaert & Van den Poel, 2012). We thus employed a dynamic model estimation approach. Specifically, in order to deal with the problem of multicollinearity of independent variables and individual effects derived from the fixed effects included in the models (Roodman, 2009), we proceeded by using the System GMM estimator with a two-step robust estimation (Stata 16). Although this procedure is more efficient than the one-step estimator, the two-step estimator tends to show severely downward biased standard errors (Arellano & Bond, 1991). Therefore, we used the *xtabond2* command because it corrects the finite sample of Windmeijer's (2005) two-step covariance matrix and allows the two-step robustness to be more efficient. The remaining independent variables in each model were incorporated into the instrument matrix.[6] The integration of these explanatory variables was performed step by step to identify and avoid problems of over-identification (generation of a high number of instruments) and allow a better adjustment of the model. To check whether the number of instruments was adequate, we used two tests. First, for each model, the Hansen test confirmed the validity of the instruments (Prob > $chi^2 \geq .05$). Second, the Arellano and Bond autocorrelation test proved the serial autocorrelation of the errors in first differences. This second test confirmed that the error terms were not serially correlated in the second order (Ar(2) pr > z > .05).

4.6.4.2 Donation frequency model

For the drivers of donation frequency, our dependent variable in this model, we investigated the impact of the motivations to donate ($Other_{it}$ and $Self_{it}$), and the moderating role of donation options ($Options_{it}$). In this model, we consider the donation frequency as a continuous variable that takes different values depending on the number of times that donor *i* donates (i.e.,1 for yearly; 2 for bi-yearly; 4 for quarterly; and 12 for monthly) in year *t*.[7] Thus,

[6] We also estimated our models by considering the donation frequency as an endogenous variable (see Findings section). We found the core results of the model to be substantially consistent with the results of the more parsimonious proposed model.
[7] As a robustness check (see Findings section), we also investigated alternative model specifications, including an ordered logistic regression. In general, the results are consistent with the main findings of the study.

higher values are indicative of higher frequencies (less aggregation in payments). The model that we estimated is shown in the following equation (Equation 2):

$$\begin{aligned} Frequency_{it} = \beta_0 + \beta_1 Other_{it} + \beta_2 Self_{it} + \beta_3 Options_{it} \\ + \beta_4 Other_{it}\ X\ Options_{it} + \beta_5 Self_{it}\ X\ Options_{it} \\ + \beta_6 Controls_{it} + \varepsilon_{it} \end{aligned} \tag{2}$$

where $Other_{it}$ and $Self_{it}$ indicate the degree to which an other-oriented and self-oriented motivation is present for donor *i* in year *t*, respectively; $Options_{it}$ refers to whether donation options are presented to the donor at registration; $Other_{it}\ X\ Options_{it}$ and $Self_{it}\ X\ Options_{it}$ are the interactions between the type of motivation and the presence of donation options; $Controls_{it}$ is the vector of control variables; and ε_{ijt} is an error term. The parameters of interest are β_1 *and* β_2, which indicate the main effects of the motivations to donate on the choice of donation frequency, and β_4 *and* β_5, which capture whether the presence of donation options alters the natural predisposition of other-oriented and self-oriented donors to choose the donation frequencies.

This model was tested using ordinary least squares (OLS) regression. The OLS regression was performed by using the *regress* command in Stata (16). Because we need to assume heteroscedasticity in our model (Stock & Watson, 2007), we use the robust option in the *regress* command, since Stata by default assumes homoscedastic standard errors. In addition, we checked the multicollinearity of the independent variables. When multicollinearity exists, standard errors can be inflated (Stock & Watson, 2007), so we then run a postestimation command to check the appropriateness of the variance inflation factor.

All indices were found to meet the necessary requirements and did not show multicollinearity problems (VIF < 10).

4.7 FINDINGS

4.7.1 Donation amount model

A first look at the data showed that, on average, yearly donating results in a donation amount of €90.71, bi-yearly in €161.32, quarterly in €235.48, and monthly in €375.65. Thus, the donation amount increases when individuals donate more frequently ($F = 9442.99$; $p < .001$). We then performed the estimation of our formal models as described in the previous section, and proceeded to estimate the following three models sequentially: (i) a base model (Model 1) that analyzes the impact of the control variables on the donation amount; (ii) a model that, in addition to the control variables, includes the main effects of donation frequency and motivations to donate (Model 2); and (iii) a full model that considers the interaction terms between donation frequency and motivations to donate (Model 3). We report the coefficient estimates in Table 4.7. An overall F test shows that model fit significantly improves when adding each set of variables. Model 2 fits better than Model 1 with no explanatory variables: ($F(12, 5167) = 1035.13$, $p < .001$), and Model 3 significantly increases the explanatory power of the different frequencies and their interaction with the donor motivations in comparison with Model 2, ($F(18, 5167) = 291.74$, $p < .001$). Among the three estimated models, Model 3 performs best according to the model fit statistics. We describe the results pertaining to Model 3 next.

Table 4.7 Estimation results for Donation Amount model

Dependent variable: ln($Amount_{it}$)	**Controls Model 1**	**Main effects Model 2**	**Interaction effects Model 3**
Intercept (β_0)	-1.673***(.460)	-2.504***(.357)	-3.479***(.499)
Frequency			
$Monthly_{it}$		1.116***(.174)	2.403***(.287)
$Quarterly_{it}$		.787***(.135)	1.865***(.286)
$Bi\text{-}yearly_{it}$		.516***(.098)	.1.265***(.336)
Motivations			
$Other_{it}$		.923***(.059)	1.733***(222)
$Self_{it}$		-.027(036)	-1.221***(369)
Interactions			
$Monthly_{it}$ X $Other_{it}$			-1.486***(.280)
$Quarterly_{it}$ X $Other_{it}$			-1.261***(.298)
$Bi\text{-}yearly_{it}$ X $Other_{it}$			-.786****(.295)
$Monthly_{it}$ X $Self_{it}$			1.684***(501)
$Quarterly_{it}$ X $Self_{it}$			1.738***(557)
$Bi\text{-}yearly_{it}$ X $Self_{it}$			1.098**(543)
Controls			
Donation $amount_{it-1}$	.209**(.106)	.321***(.108)	.115**(.045)
$Urban_{it}$	.975***(.150)	.562***(.098)	.892***(.101)
$Female_{it}$	.026(.029)	.018(.022)	.024(.029)
$Email_{it}$	.559***(.084)	.268***(.051)	.460***(.063)
$Income_{it}$	.462***(.073)	.370***(.065)	.466***(.056)
Previous $donor_{it}$	.614***(.093)	.253***(.093)	.409***(.074)
$Experience_{it}$	-.007***(.002)	-.004***(.001)	-.002***(.001)
F test			
F statistics	F (7, 5167)= 663.68	F (12, 5167)= 1035.13	F (18, 5167)= 291.74
Pr > F	.000	.000	.000
Hansen test			
Chi^2	4.89	1.61	2.33
Prob>chi^2	0.087	.447	.506
Arellano-Bond test			
Ar(2)	0.248	.246	.746
z (Ar2)	1.16	1.16	-.32

Note: Significant parameters**:** ***p < .01; **p < .05; p* < .10.

The results show that higher frequencies lead to higher donation amounts ($\beta_{Monthly}$ = 2.403; $p < .001$; $\beta_{Quarterly}$ = 1.865; $p < .001$; $\beta_{Bi\text{-}yearly}$ = 1.265; $p < .001$). They also show significant effects for the donation motivations, with other-oriented motivations having a positive effect (β_{Other} = 1.733; $p < .001$) and self-oriented motivations having a negative effect (β_{Self} = -1.221; $p < .001$) on the donation amount. Turning our attention to the moderating effects, we find that the positive impact of higher frequencies on donation amount decreases for other-oriented motives ($\beta_{MonthlyXOther}$ = -1.486; $p < .001$; $\beta_{QuarterlyXOther}$ = -1.261; $p = .001$; $\beta_{Bi\text{-}yearlyXOther}$ = -.786; $p < .01$), and increases for self-oriented motives ($\beta_{MonthlyXSelf}$ = 1.684; $p = .001$; $\beta_{QuarterlyXSelf}$ = 1.738; $p = .01$; $\beta_{Bi\text{-}yearlyXSelf}$ = 1.098; $p < .05$). These results provide support to H1.

Regarding the set of control variables, the results show that behavioral variables are also important in explaining the donation amount. The amount donated in the previous year has a positive effect on the current donation (β = .115; $p < .05$); individuals who were occasional donors prior to becoming regular donors and those providing their e-mail address tend to provide greater amounts (β = .409; $p < .001$; β = .460; $p < .001$). However, those with more years of experience within the organization donate less (β = -.002; $p < .001$). Sociodemographic variables also had an impact on the donation amount. The results suggest that living in an urban residential area (β = .892; $p < .001$) and having higher income levels (β = .466; $p < .001$) both have a positive and significant influence on the donation amount.

To check the robustness of the results, we estimated two alternative model specifications: (1) one where we treated the donation frequencies as endogenous, and (2) one where we changed the way donation frequency is operationalized (we included the change in the donation frequency over time, which serves as an additional test for the causality of this relationship). The results from these additional estimations are consistent with the main findings of our study. We provide additional details in the following section.

4.7.2 Robustness check for donation amount model

First, we re-estimated our models for the donation amount by treating donation frequencies as endogenous. Donors were not randomly assigned to the different donation frequencies, potentially leading to self-selection. We adapted the *gmm* command and re-estimated our model allowing donation frequency to be endogenous within the model. As shown in Table 4.8, in general, the results obtained are consistent with those found in our main model, despite some effects losing significance. Higher frequencies lead to higher donation amounts ($\beta_{Monthly} = 2.402$; $p < .001$; $\beta_{Quarterly} = 2.383$; $p < .001$). The results also reveal main effects of the motivations to donate (i.e., other-oriented donors tend to provide higher donation amounts; $\beta_{Other} = 1.281$; $p < .05$, while self-oriented donors tend to donate less; $\beta_{Self} = -.814$; $p < .10$). Finally, the results show negative interaction effects between high donation frequencies and other-oriented motivations ($\beta_{QuarterlyXOther} = -1.278$; $p < .10$); and positive interaction effects between high donation frequencies and self-oriented motivations ($\beta_{MonthlyXSelf} = 1.045$; $p < .05$; $\beta_{QuarterlyXSelf} = 1.509$; $p < .05$).

Table 4.8 Results for Donation Amount model (Frequency as endogenous variable)

Dependent variable: ln($Amount_{it}$)		**Controls Model 1**	**Main effects Model 2**	**Interaction effects Model 3**
Intercept (β_0)		-1.673***(.460)	-1.879***(.394)	-2.831***(.548)
Frequency				
$Monthly_{it}$			1.428***(.267)	2.402***(.761)
$Quarterly_{it}$			1.144***(.293)	2.383***(.899)
$Bi\text{-}yearly_{it}$			.438(.293)	1.137(1.151)
Motivations				
$Other_{it}$			.251***(.062)	1.281**(.562)
$Self_{it}$			.227***(.041)	-.814*(.433)
Interactions				
$Monthly_{it}$ X $Other_{it}$				-.993(.673)
$Quarterly_{it}$X $Other_{it}$				-1.278*(.759)
$Bi\text{-}yearly_{it}$ X $Other_{it}$				-.516(.989)
$Monthly_{it}$ X $Self_{it}$				1.045**(.492)
$Quarterly_{it}$ X $Self_{it}$				1.509**(.677)
$Bi\text{-}yearly_{it}$ X $Self_{it}$				.969(.875)
Controls				
Donation $amount_{it-1}$		.209**(.106)	.132**(.053)	.129**(.059)
$Urban_{it}$		.975 ***(.151)	.732***(.107)	.719***(.077)
$Gender_{it}$		.026(.029)	.039(.028)	.028(.030)
$Email_{it}$		.558***(.084)	.379***(.063)	.366***(.044)
$Income_{it}$		.462***(.073)	.435***(.049)	.429***(.059)
Previous $donor_{it}$		.614***(.093)	.509***(.059)	.436***(.077)
$Experience_{it}$		-.007***(.002)	-.002(.001)	-.003*(.001)
F test	F statistics	F (7, 5167)= 663.68	F (12, 5167)= 426.39	F (18, 5167)= 382.03
	Pr > F	.000	.000	.000
Hansen test				
Chi^2		4.89	51.29	39.33
Prob> chi^2		.087	.005	.076
Arellano-Bond test				
Ar(2)		.248	.434	.885
z (Ar2)		1.16	.78	.14

Note: Significant parameters**:** ***p < .01; **p < .05; p* < .10.

In our main model, we tested for the impact of donation frequency on donation amount considering the donation frequencies chosen (i.e., monthly, quarterly, bi-yearly, and yearly) as independent variables. An additional way to test for the causality of donation frequency on donation amount is to consider whether individuals changed their donation frequency over time, and, if so, what impact those changes had on the donation amount. Thus, we ran an alternative model specification using the change in donation frequencies as the independent variable, instead of the specific donation frequencies chosen. We thus replaced the donation frequency variables in our original model ($Monthly_{it}$, $Quarterly_{it}$, and $Bi\text{-}yearly_{it}$) with two dummy variables: (i) $HighFreq_{it}$ captures whether donor *i* changed to a higher frequency (e.g., from quarterly to monthly, or from yearly to bi-yearly) from period *t-1* to period *t* ($HighFreq_{it}$ = 1; 0 otherwise); (ii) $LowFreq_{it}$ captures whether donor *i* changed to a lower frequency (e.g., from monthly to quarterly, or from bi-yearly to yearly) from period *t-1* to period *t* ($LowFreq_{it}$ = 1; 0 otherwise).

We again proceeded by using the System GMM estimator with a two-step robust estimation. In Table 4.9 the estimated parameters indicate that when donors increase the frequency of their donations, greater amounts are donated (β_{High} = 4.400; $p < .001$). Furthermore, a decrease in a donor's frequency of donations leads to lower donation amounts, although this result was not significant. Again, the motivations to donate had a strong positive influence on donations (i.e., other-oriented donors donating higher amounts; β_{Other} = 1.229; $p < .001$ and self-oriented donors donating less β_{Self} = -.322; $p < .001$). Consistent with H1, the interaction term between the increase in the frequency of donations and donors' other-oriented motivated is negative and significant ($\beta_{HighXOther}$ = -3.956; $p < .001$) and is positive and significant for self-oriented donors ($\beta_{HighXSelf}$ = 7.689; $p < .001$). Moreover, for self-oriented donors, a decrease in the frequency of their donations leads to lower donation amounts ($\beta_{LowXSelf}$ = -1.728; $p < .001$).

Table 4.9 Results for Donation Amount model (with change of frequency)

Dependent variable: ln($Amount_{it}$)		**Controls Model 1**	**Main effects Model 2**	**Interaction effects Model 3**
Intercept (β_0)		-1.673***(.460)	-2.693***(.389)	-2.826***(.394)
Change of frequency				
High $frequency_{it}$			.480***(.090)	4.400***(.816)
Low $frequency_{it}$			-.158(.160)	-.848(.659)
Motivations				
$Other_{it}$			1.157***(.085)	1.229***(.099)
$Self_{it}$			-.188***(.072)	-.322***(.117)
Interactions				
High $frequency_{it}$ X $Other_{it}$				-3.956***(.806)
Low $frequency_{it}$ X $Other_{it}$				.567(.408)
High $frequency_{it}$ X $Self_{it}$				7.689***(2.837)
Low $frequency_{it}$ X $Self_{it}$				-1.728***(.288)
Control variables				
Donation $amount_{it-1}$		.209**(.106)	.246***(.032)	.255***(.035)
$Urban_{it}$		.975 ***(.150)	.952***(.065)	.937***(.068)
$Female_{it}$		.026 (.029)	.023(.027)	.021(.027)
$Email_{it}$		.559***(.084)	.529***(.039)	.519***(.040)
$Income_{it}$		.462***(.073)	.7418***(.043)	.421***(.044)
Previous $donor_{it}$		.614***(.093)	.350***(.054)	.314***(.058)
$Experience_{it}$		-.008***(.002)	-.002***(.001)	-.002(.001)
F test	F statistics	F (7, 5167)= 663.68	F (11, 5167)= 533.45	F (15, 5167)= 418.21
	Pr > F	.000	.000	.000
Hansen test				
Chi^2		4.89	64.77	41.31
$Prob>chi^2$		.087	.000	.082
Arellano-Bond test				
Ar(2)		.248	.516	.645
z (Ar2)		1.16	.65	-.46

Note: Significant parameters**:** ***p < .01; **p < .05; p* < .10.

4.7.3 Donation frequency model

We report the coefficient estimates for the donation frequency model in Table 4.10. As explained above, an OLS regression was applied to derive the parameters of interest. We ran the following models sequentially: (i) Model 1 investigates the impact of the control variables on the choice of frequency; (ii) Model 2 includes the main effects of motivations to donate and donation options; and (iii) Model 3 adds the interaction terms between donor motivations and donation options. As can be seen in Table 4.10, model fit improves when each set of variables is added. In comparison with Model 1 and Model 2, Model 3 increases model fit significantly when the interactions between donor motivations and donation options are added ($F(11,13639) = 5.31$, $p < .001$). We discuss the results from Model 3 next.

The results suggest that the motivations to donate can influence the choice of frequency of donation. Although we did not find significant effects in Model 3, Model 2 (without the interaction terms) shows that the motivations to donate significantly influence the choice of donation frequency, with other-oriented motivations decreasing the probability of choosing higher frequencies ($\beta_{Other} = -.972$; $p < .001$), and self-oriented motivations having a positive effect on the probability to select higher frequencies ($\beta_{Self} = .681$; $p < .001$), in line with our H2. The results from Model 3 also show that when donation options are included in the donation request, these increase the likelihood that donors choose higher donation frequencies ($\beta_{Options} = 3.006$; $p < .001$). Regarding the interaction effects between donor motivations and donation options, this interaction is negative and significant for other-oriented motivations ($\beta_{OtherXOptions} = -.878$; $p < .01$). However, this negative interaction effect is not large enough to compensate for the strong positive impact of donation options on the choice of high frequencies for these donors, suggesting that for other-oriented donors the presence of donation options increases their probability of choosing higher frequencies of donation. The interaction is positive for self-oriented motivations, suggesting that donation options reinforce the choice of higher frequencies made by donors driven by self-oriented motives, though this is not significant. These results therefore only partially support H3.

Table 4.10 Estimation results for Donation Frequency model

Dependent variable: $Frequency_{it}$	**Controls Model 1**	**Main effects Model 2**	**Interaction effects Model 3**
Intercept (β_0)	9.488***(1.359)	9.066***(1.346)	8.586***(1.354)
$Motivations_{it}$			
$Other_{it}$		-.972***(.099)	-.235(.248)
$Self_{it}$		.681***(.228)	.204(.554)
$Options_{it}$		2.113***(.106)	3.006***(.294)
Interactions			
$Other_{it}$ X $Options_{it}$			-.878***(.271)
$Self_{it}$ X $Options_{it}$			.562(.607)
Controls			
$Urban_{it}$	1.534***(.134)	1.331***(.133)	1.338***(.133)
$Female_{it}$	-.506***(.085)	-.275***(.085)	-.281***(.084)
$Email_{it}$	1.115***(.087)	.769***(.087)	.768***(.087)
$Income_{it}$	-.414***(.147)	-.409***(.144)	-.438***(.145)
Previous $donor_{it}$	.303**(.141)	.269*(.140)	.280**(.014)
$Experience_{it}$	-.118***(.010)	-.124***(.010)	-.121***(.010)
F test			
F statistics	F (6,13644)= 113.29	F (9,13641)= 154.49	F (11, 113639)= 5.31
Pr > F	.000	.000	.005

Note: Significant parameters**:** ***p < .01; **p < .05; p* < .10.

As we did in the donation amount model, we also checked the robustness of the results for the donation frequency model. Specifically, we estimated an alternative model specification considering the dependent variable, donation frequency, as an ordinal variable, instead of as a continuous variable. The results offer consistent evidence for the main findings of our study. We provide additional details for this estimation.

4.7.4 Robustness check for donation frequency model

In order to check the robustness of this model, we ran an additional model by considering the dependent variable, donation frequency, as an ordinal variable. Donation frequencies were captured through four values: 1 for yearly, 2 for bi-yearly, 3 for quarterly, and 4 for monthly frequency. Thus, donation frequencies become a categorical (values from 1 to 4) and ordered (higher values are indicative of higher frequencies of donation) variable. We ran an ordered logistic regression, which is an appropriate statistical model for handling an ordered outcome (McKelvey & Zavoina, 1975). Specifically, we used the *oglm* (ordinal generalized linear model) command in Stata and defined the dependent variable as an ordinal variable, thus allowing us to fit a properly specified model and obtain predicted probabilities.

As shown in Table 4.11, the results obtained are consistent with those found in our main model. In line with H2, the results from Model 3 show that other-oriented motivations decrease the probability of choosing higher frequencies (β_{Other}= -.149; $p < .05$), while self-oriented motivations increase this probability, although this effect is not significant. In addition, Model 3 also shows that, in general, donors are more likely to choose higher donation frequencies when donation options are present during registration ($\beta_{Options}$ = 1.082; $p < .001$). Similar to the OLS regression results, this model also suggests that other-oriented donors, compared with self-oriented donors, are less likely to choose higher frequencies when they are presented with donation options ($\beta_{OtherXOptions} = -.217$; $p < .05$), though the strong positive impact of the donation options compensates for this negative effect, in line with H3.

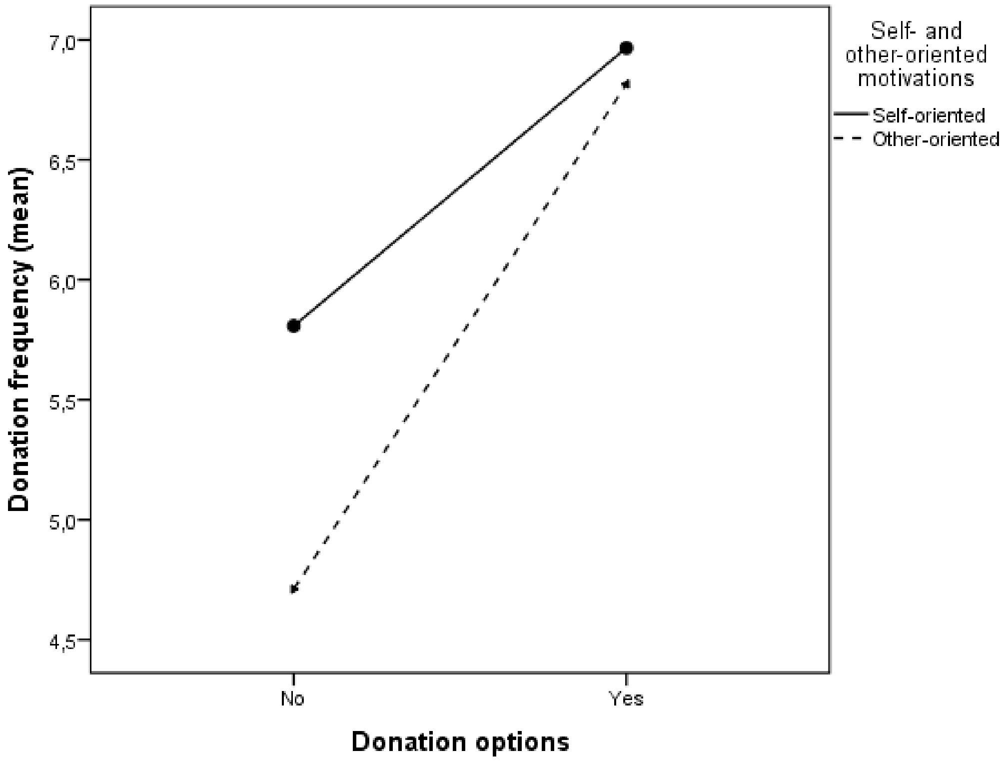
Table 4.11 estimation results

Dependent variable: Frequency$_{it}$	**Controls Model 1**	**Main effects Model 2**	**Interaction effects Model 3**
Motivations			
Other$_{it}$		-.299***(039)	-.149**(.070)
Self$_{it}$		.216**(.089)	.139(.207)
Options$_{it}$		.863***(.042)	1.082***(.095)
Interactions			
Other$_{it}$ X Options$_{it}$			-.217**(.085)
Self$_{it}$ X Options$_{it}$			-.049(.224)
Controls			
Urban$_{it}$	.707***(.051)	.633***(.052)	.629***(.052)
Female$_{it}$	-.235***(.033)	-.141***(.033)	-.143***(.033)
Email$_{it}$	.485***(.033)	.348***(.034)	.350***(.034)
Income$_{it}$	-.000(.000)	-.000***(.000)	-.000***(.00)
Previous donor$_{it}$	.108**(.055)	.088(.056)	.1076(.056)
Experience$_{it}$	-.050***(.004)	-.056***(.004)	-.055***(.005)
Log pseudo-likelihood	-16978.41	-16744.38	-16741.07
LR chi^2			
Chi^2 test statistics	864.15***	1332.20***	1338.83***

Note: Significant parameters**:** ***p < .01; **p < .05; p* < .10.

In addition, we created a new binary variable from the differences between donors' scores on the other-oriented variable and the scores on the self-oriented variable. Thus, donors who scored a positive value on this new variable were selected as other-oriented and assigned the value 1, and those who scored a negative value were selected as self-oriented and assigned the value 0. We then conducted a general linear model (in SPSS 26) and included the interactions between motivations and the availability of donation options, thus obtaining the averages of the frequency used by each donor. As Figure 4.2 displays, other-oriented motivated donors donate with a lower frequency (4.39) than self-oriented donors (5.45) and, for both, the availability of donation options on request considerably increases the frequency they choose to donate (6.91 and 7.11 respectively) ($F(1,13616) = 6.929$; $p < .01$).

Figure 4.2 Donation frequency as a function of motivations and donation options



4.8 DISCUSSION

4.8.1 Theoretical implications

The present study contributes to the growing interest in research on service and well-being (Boenigk et al., 2021). This societal focus underscores the central role of charitable organizations, as providers of essential community services aimed at the most disadvantaged groups and sectors, within the service ecosystem, and highlights the need for research in the area of consumer responsibility and proactivity for well-being (Ostrom et al., 2021). The focus of this study is on how to engage individuals to provide higher and more sustained contributions to charity in an attempt to alleviate the financial struggles that these organizations face, and to aid in their provision of essential community services to the more vulnerable groups in society.

In addressing this important research gap, this study offers a more comprehensive and nuanced understanding of consequences of donation frequencies on donation amounts. Only a few studies have investigated the temporal reframing of donations in the literature, and they have provided evidence of both positive and negative effects of higher frequencies (or lower levels of aggregation) on prosocial behavior (Atlas & Bartels, 2018; Basu, 2021; Gourville, 1998; Sudhir, Roy & Cherian 2016). In this research, we underscore the heterogeneous nature of these effects and demonstrate that the impact of the frequency of donation on the donation amount is contingent on the motivations of individuals to donate (i.e., altruistic versus selfish motives, Andreoni 1989; Batson & Shaw, 1991). Our results contribute to the temporal reframing literature by showing that while higher frequencies tend to promote higher donations, this effect is stronger for donors who are moved by self-oriented motives, and weaker for donors who are driven by other-oriented motives. Thus, the more nuanced understanding of the temporal reframing effects offered by this research enables us to reconcile the mixed findings in previous studies by introducing the important moderating role played by the motivations to donate.

We also provide novel conceptual insights into the reasons why different donation frequencies influence donation amounts in different ways based on a discussion of the cost–benefit evaluation and the perceived value individuals experience when donating. Previous studies in this domain have focused on how temporal reframing influences perceptions of costs, arguing that a series of small payments leads individuals to perceive the expenses as more affordable (Gourville, 1998). However, the decision to donate is closely related to a set of subjective judgments about the cost and benefit associated with a particular donation (Basu, 2021; Sargeant, West, & Ford, 2001), and most donation decisions can be explained with reference to the benefits that will accrue to donors as a consequence of their gift (Konrath & Handy, 2018). We propose that the frequency of donations influences the perceived benefits from the donation, including the personal well-being derived from doing good and the satisfaction obtained from helping others (Cornelis, Van Hiel, & De Cremer, 2013; Ferguson et al., 2012). We demonstrate that not all donors are equally sensitive to the benefits and costs derived from their donations, leading to different perceived values that ultimately explain the heterogeneous effects on the donation amounts.

Given the central role played by donation frequencies in explaining the donation amounts, our research has also investigated the drivers of the choice of donation frequencies. Previous studies on the effects of donation frequencies in a nonprofit domain have relied on experiments (either in the lab or in the field; e.g., Atlas & Bartels 2018; Gourville, 1998; Sudhir, Roy & Cherian, 2016), with participants assigned randomly to different donation frequencies. While easing concerns about self-selection, this approach prevents an understanding of the drivers of the choice of frequency. Our study findings offer novel insights into the way in which different donors choose the frequency of their donations, demonstrating that they naturally tend to choose those donation frequencies that maximize perceived value. Specifically, compared with other-oriented donors, self-oriented donors are more likely to choose higher frequencies, in line with our theorizing based on perceived value. Importantly, this study shows that marketing activities in the form of presenting donation options at the time registration can alter the tendencies of individuals to choose the appropriate frequencies. While donation options reinforce the natural tendency among self-oriented donors to choose higher donation frequencies, for other-oriented donors the presence of donation options moves them away from the choices that maximize their perceived value. By presenting this finding, our research extends previous studies on the consequences of compliance requests for decision-making (Basu, 2021; De Bruyn & Prokopec, 2013; Verhaert & Van den Poel, 2012). Overall, this study demonstrates that both internal and external factors play a key role in driving the choices of donation frequencies and offers additional evidence for the effectiveness of an adequate use of marketing activities in achieving societal benefits.

At a more general level, this study contributes to a better understanding of the donor portfolio, which represents the primary and most stable source of economic resources for charitable organizations. Previous research has usually focused on single donation requests directed at occasional donors (Atlas & Bartels, 2018; Gourville, 1998). Our work pays attention to the factors that drive membership retention and greater monetary donations, and adds new insights to the sparse literature on the issue of organizational membership in charitable giving (Fang, Fombelle, & Bolton, 2021; Oh & Ki, 2019; Ostrom et al., 2015). In particular, effective management of the donor base represents a major challenge for charitable organizations, and enhancing the perceived value from donations lies at the heart of any strategy that aims to cultivate and nurture a charity’s relationship with donors

(Sargeant, West, & Ford, 2001). Our study offers novel insights into the evolution of donation amounts over time and the influence exerted by donation frequencies, providing valuable knowledge to aid in effective management of the donor base so that both donors' perceived value and their total contributions are maximized.

4.8.2 Managerial and societal implications

Building relationships with donors to engage them in regular donations and increase their contributions over time has become a major focus for charitable organizations in their attempt to provide essential community services and improve the well-being of individuals, especially in the current context marked by a decline in contributions made by individuals to social causes, and by reduced governmental support (Arnett et al., 2003; Fang, Fombelle, & Bolton, 2021; Venable et al., 2005). Our study suggests an opportunity for organizations to leverage the frequency of donations and enhance donors' perceived value and subsequent member engagement. In this spirit, the findings from our field study can be used to offer advice to organizations regarding how to accomplish this effectively to encourage further contributions that will enable charities to address a larger number of societal problems.

One important conclusion from our research is that higher frequencies of donation (e.g., daily vs. monthly vs. yearly) do not always lead to better outcomes, as previous studies in the temporal reframing literature have suggested. Based on the previous evidence, many organizations apply the "pennies a day" (PAD) strategy, especially in single donation requests for funding, under the assumption that presenting the amounts in a less aggregated way (i.e., lower sums) will produce higher compliance with the requests. The results of our study from a regular donor base advises against this general application of the PAD strategy, and instead suggests that organizations adapt the strategy to the different donor profiles as their differences can alter the perceived benefits and costs of the donations. More specifically, our study recommends distinguishing donors based on their motivations to donate, whether to provide a social benefit or a private benefit, and that organizations should promote different donation frequencies for these donors: higher frequencies for self-oriented donors, and lower frequencies for other-oriented donors. This approach can offer “the best of both worlds”: it increases a donor’s perceived value from the donation and promotes an increase in the contributions over time.

This study can also help organizations identify donors’ underlying motivations to donate based on observed behavioral variables that are readily available from the donor database. We identified a number of variables that are directly related to altruistic motivations to donate, such as giving consent to receive information from the charity, or volunteering. Similarly, we also identified a number of behaviors that are related to selfish motives to donate. These, in our donation context, are linked to tax benefits and, thus, behaviors such as adjustments to the amount donated through extra donations made at specific moments in time (when individuals are preparing their tax deductions) can serve as good indicators of the more extrinsic (or selfish) motivations that drive some individuals to donate. Using these variables can help organizations better gauge the underlying motivations of regular donors to contribute to charity, and thus to develop marketing activities in a more targeted way.

An important finding from this study is that individuals tend to choose those donation frequencies that maximize their perceived value. Notably, our study demonstrates that marketing strategies in the form of presenting donation options during donor registration can alter these effects: for self-oriented donors the presence of donation options reinforces their tendency to choose higher frequencies, but for other-oriented donors the presence of options diverts them from their propensity to choose lower frequencies. While this can erode perceived value for these donors and have a damaging impact on future contributions, organizations can derive short-term benefits if, for example, they need to attend to urgent social problems. The bottom line is that this marketing activity, if implemented appropriately, can contribute jointly both to the well-being of the donors, by increasing the perceived value, and to the well-being of the recipients of the aid. As our study shows, marketing can, therefore, play an important role in creating societal value.

Finally, from a financial perspective, this study can also have important implications for charities regarding the availability of funding and its timing, which determines the *whether* and the *when* organizations can execute their social projects. Each of the different payment schedules (yearly, bi-yearly, quarterly, monthly, etc.) results in differences in the timing and the amount of funding that is available during the year. For example, with a donor registering in time T_1 at the organization and providing a contribution of \$120 in a year, the amount of money available for the organization over time would be different depending on the frequency chosen by the individual to provide her contribution. The organization would have all the money (i.e., \$120) available in T_1 if the donor chooses a yearly frequency, but only \$10 in T_1 (\$20 in T_2, \$30 in T_3, and so on) if she chooses a monthly frequency. The social problems that organizations address are very diverse, ranging from long-term problems including poverty, education, and employment to short-term problems that need urgent interventions, such as those caused by natural disasters or other reasons (e.g. the COVID-19 pandemic). The ability of charitable organizations to respond to all situations critically depends on the availability of funding. The present study provides charities an understanding of the drivers of the choice of frequency by regular donors, which can be used to predict the availability of funding at any time during the year and also to develop strategies aimed at encouraging individuals to choose specific donation frequencies that can be more beneficial for the organization from a financial perspective.

4.9 LIMITATIONS AND DIRECTIONS FOR FURTHER RESEARCH

This study is subject to a number of limitations, which offer the opportunity to expand knowledge in several ways. First, the focus is on a single charitable organization and its regular donor portfolio. While in spirit this is similar to other charitable organizations, differences may be present in the specific causes supported. Similarly, the donors in our study may have had different characteristics compared to those of other charities (e.g., sociodemographic characteristics, cultural traits). More research is needed to determine whether the findings from this study can be generalized to other charitable organizations and even to other types of nonprofit organizations that do not have a focus on helping disadvantaged groups in society (e.g., museums, sport organizations, etc.).

Second, this research relies on behavioral data to identify empirically self- and other-oriented motivations. Although we have demonstrated that the selected variables are good instruments to identify the underlying motivations to donate, other behaviors that are easily identifiable and accessible to the organization could be considered. With the increasing availability of big data (e.g., text- or image-based data), firms may also consider applying techniques (e.g., Natural Language Processing) to infer a donor's motivations from these new data sources. Also, though more costly, and only applicable to a subset of the donor base, firms can survey their donors and use perceptual information that more accurately captures the underlying reasons why donors make contributions to charity. Related to this, while our study looked at the independent role of the two motivations (self- and other-oriented), future research could investigate the relationships between them, and the extent to which donor behavior depends on the relative strength of the two motivations and their interaction.

Third, while we focused on the motivations to donate, looking at other moderating factors can help broaden our understanding of temporal reframing effects. Future studies can investigate proximal factors in modulating the temporal framing effects, such as a donor's disposable income, paycheck frequency, or frequency of donations made to other organizations, or the preference of the charitable organization for immediate versus delayed payment schedules. Also, while this study discusses the implications of the payment schedule on perceived costs and benefits separately, further research could study the cost-benefit trade off process by analyzing the influence of costs on benefits and vice versa. A reduction in perceived costs could lead to a greater warm glow and thus to an increase in perceived benefit for self-oriented motivated people.

Finally, given our focus on the frequency of donation, we investigate regular donors who provide stable funding (i.e., every year) to charitable organizations. However, occasional donors – those who donate sporadically to the organization and do not follow a fixed pattern in their contributions – represent an important source of income for charities as well. Given that these two groups of donors present important differences (e.g., in their commitment to the organization or in their sustained support; Sargeant & Lee, 2004), investigating potential differences in the way they donate or respond to marketing activities represents an important area for future research. Similarly, additional evidence can be provided with respect to the donation behavior of major donors – contributors that provide large sums of money – in an attempt to present a wider picture of the different sources of funding for charities, their dynamic evolution over time, and their (potentially different) drivers.

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CHAPTER V
GENERAL DISCUSSION AND CONCLUSIONS

Recurrent social problems in the world such as unemployment, lack of essential services, environmental disasters, or human migration have led many people to experience vulnerability and encounter barriers to integrating into society (Van Puyvelde & Brown, 2016). This, together with the health crisis caused by COVID-19, has exacerbated the broader vulnerabilities of the most disadvantaged communities and existing inequalities around the world (United Nations, 2020). Given the critical situation, global institutions and experts have postulated, as a top priority, to ensuring the well-being of society and have developed a strategic plan aimed at all actors on the planet, such as governments, civil society, and private sector organizations. Moreover, in an attempt to respond to these societal challenges, marketing scholars have highlighted the need for creating relevant research that improves well-being and have developed several research priorities related to the concerns shared by marketing academics and practitioners about marketing's role in improving societal outcomes (Cross et al., 2022; Moorman, 2018) and enhancing the welfare of the world's other stakeholders and institutions, such as charitable organizations.

Charitable organizations play an important role in society as key agents in reducing social inequality and improving the living conditions of the most vulnerable communities (Boenigk et al., 2021). For charities, financial support is critical, since it enables them to fund their programs and legitimizes their existence (van Dijk et al., 2019). However, the decreasing contributions provided by public institutions together with the proliferation of nonprofit organizations (Arnett et al., 2003; Fang et al., 2021), have forced charitable organizations to rely on private donations as their main source of financial support (Development Initiatives, 2020; Drollinger, 2018). However, the competitive pressure for funding in this sector (Álvarez-González et al., 2017; Fang, Fombelle, & Bolton, 2021; Venable et al., 2005), has led individuals to spread their donations among different organizations and social causes, thus reducing the total donations received by one single charity and creating serious financial difficulties that threaten the survival of these organizations (Development Initiatives, 2020). In this context, the donor portfolio has become essential to guarantee stable funding and sufficient financial resources that ensure the success of their interventions (Drollinger, 2018; Sargeant & Woodliffe 2007). Therefore, effective donor portfolio management is crucial for the proper execution of the organization's activities (AbouAssi, 2013; Khodakarami, Petersen, & Venkatesan, 2015), being imperative for fundraising managers to target the right segments in order to gain a better understanding of the donors' behavior and its evolution over time and, therefore, to successfully implement their communication and fundraising strategies.

Consequently, the present doctoral dissertation has aimed to *provide a comprehensive understanding of the different types of donors and their donation behavior over time to help charitable organizations improve the management of their donor portfolio and obtain greater and more stable funding to successfully address their social projects.*

In addressing this main goal, this doctoral dissertation has developed three related studies that have addressed important challenges facing charitable organizations.

Study 1 aimed to *identify individuals' preferences for relationship marketing analyzing their influence on the building of enduring relationships and subsequent donation behavior*. Also, this study focused on *analyzing the role of past giving behavior and its join impact with relationship orientations in enduring donor–organization relationships*.

To approach these objectives, we developed a theoretical framework built on literature on relationship marketing and social exchange theory and analyzed the impact that consenting to direct marketing communications has on the predisposition of occasional donors to become members and the role of past giving behavior as a factor moderating this relationship. In this study, we also explored the donation amounts of the individuals who decide to become members of the charity and the role played by consenting to direct marketing in driving these amounts.

The findings show that those occasional donors who consent direct marketing are more willing to engage in enduring relationships with charities, although this effect is weaker for donors who have contributed through higher donation amounts in the past. Moreover, our findings reveal that members consenting to direct marketing communications provide greater financial support.

Study 2 aimed *to investigate the consequences of political ideology on different donation decisions (donation frequency and amount donated) and forms of giving (membership and donations)*. In addition, this study sought *to explore how the impact of political ideology on donation decisions varies across different forms of giving.*

In addressing these objectives, we drew on system justification theory to explore how political ideology influences donation decisions (i.e., donation frequency and amount donated) and the form of giving (i.e., membership and donations) and on how the form of giving moderates the relationship between political ideology and donations.

The results revealed that political ideology significantly impacts the two donation decisions differently, showing that while liberals donate more frequently, conservatives donate larger amounts. Also, the findings show that political ideology determines the choice of the form of giving, as conservatives are more willing to endorse membership, compared to liberals. Finally, this research found that under membership, the positive impact of a liberal ideology on donation frequency and the positive impact of a conservative ideology on donation amount become weaker.

Finally, **Study 3** aimed to *understand how the impact of different donation frequencies on the total contributions of regular donors varies across motivations to donate (self- and other-oriented).* This study also aimed *to analyze internal (motivations to donate) and external (donation options) factors as the drivers of donation frequency*.

We approached these objectives by drawing on temporal reframing literature and providing a conceptual framework aimed at investigating the impact of different donation frequencies (e.g., yearly, bi-yearly, quarterly, monthly) on donation amounts over time and the moderating role of motivations to donate in this relationship. In doing this, we adopted a perceived value approach whereby donors evaluate their donations based on the perceived costs (e.g., economic sacrifice) and benefits (i.e., satisfaction from helping others and personal well-being) resulting from their donations. In this study, we also explored the drivers of the choice of donation frequency, both internal (motivations to donate) and external (donation options included in the donation request) factors.

The findings revealed that higher frequencies lead to higher donations, although this effect is strengthened by self-oriented motivations and weakened by other-oriented motivations. In addition, the findings suggests that while self-oriented motivations lead donors to choose higher frequencies, other-oriented motivations lead donors to choose lower donation frequencies. The results also showed that donation options have a strong influence on the choice of higher donation frequencies, although this effect is weaker for other-oriented donors.

The findings from these studies enable us to provide important theoretical as well as practical and societal contributions, that we describe next.

5.1 IMPLICATIONS FOR THEORY

5.1.1 Study 1's theoretical implications

Study 1 contributes to existing research that highlights the importance of taking a multi-dimensional approach to the types of relationships consumers may establish with organizations and developing segmentation strategies based on these consumers' relational expectations (Dalziel, Harris, & Laing, 2011; Mazurek & Małagocka, 2019; Palmatier et al., 2006). Previous work indicates that the level of commitment consumers develop toward the organization and their intention to continue the relationship are often explained by the orientation and attitudes toward relationships with organizations (Bowden, Gabbott, & Naumann, 2015; Dwyer, Schurr, & Oh, 1987; Parish & Holloway, 2010), and the consumers' receptiveness to relationship marketing and information sharing (Ashley et al., 2011; Bruneau, Swaen, & Zidda, 2018; Jones et al., 2015). However, little evidence has been found on the underlying mechanisms that influence individuals' decisions to initiate closer and more stable relationships in the context of charitable organizations.

Through its findings, Study 1 reveals that donors who are more prone to consent to direct marketing (i.e., provide contact information to receive information and communications from the organization) are more willing to form long-term relationships with charities, that is, they are more likely to become members of the organization. This effect, however, is weaker for donors who have contributed larger amounts of donations in previous periods. This result underscores the importance of accounting for factors other than giving behavior in explaining donors' loyalty and commitment to charities. Thus, we address the call made by previous literature of the need to develop more research on the effect of receptiveness to relationship marketing on individuals' actual behavior (Ashley et al., 2011; Bruneau, Swaen, & Zidda, 2018). We developed a theoretical framework that allowed us to conceptualize and understand the different types of relational orientations that individuals develop, as well as the interactions between both these behaviors and the behaviors within the organization that lead to higher retention rates and better organizational outcomes. Finally, the findings of this study reveal that members who are more likely to consent to direct marketing communications also provide greater financial support (donating larger amounts). In this way, we extend the existing knowledge by providing information on the significant link between individuals' relational orientations and the organizational outcomes.

5.1.2 Study 2's theoretical implications

Through its findings, Study 2 derives a number of important theoretical implications. First, it reconciles the mixed results found in previous literature on political ideology and its influence on helping behavior. While a large body of work has provided evidence showing that conservatives are more charitable, by donating larger amounts (Brooks, 2004, 2005; Margolis & Sances, 2017; Vaidyanathan, Hill, & Smith, 2011), other studies suggest that charitable giving is not significantly associated with political ideology, since conservatives and liberals may differ in the number and type of organizations they support, and sometimes with a non-significant difference in their monetary donations (Farmer, Kidwell, & Hardesty, 2020; Kaikati et al. 2017; Winterich, Zhang & Mittal 2012). In this sense, we contribute by considering a multi-dimensional perspective, where donation behaviors incorporate various decisions, such as donation frequency or amount donated, and where political ideology may influence each of these donation decisions differently. Only a few papers have differentiated between participation and amount decisions. However, those solely addressing this important aspect offer contributions from a general perspective (i.e., without controlling for political ideology) (Fajardo, Townsend, & Bolander, 2018; Kim, Gupta, & Lee, 2021). We draw on system justification theory to explain how political belief systems, which lead individuals to have different perceptions about causes of need and social problems (Jost et al., 2003), can influence these two donation decisions. The findings suggest that donors with a liberal orientation (those residing in areas where a liberal ideology predominates) donate more frequently, whereas more conservative donors (those residing in areas where conservatism is the predominant ideology) donate larger amounts. In this study we emphasize that analyzing the simultaneous decisions that individuals make when supporting charities is fundamental to better understand charitable behavior, thus extending knowledge regarding how liberals and conservatives help others and when and why they might be more generous (Farmer, Kidwell, & Hardesty, 2020). Therefore, this study provides a more precise understanding of the effects of political ideology on giving and may help reconcile the mixed results found in previous literature.

The results of Study 2 also show that political ideology determines the choice of the form of giving, with conservatives being more likely to choose membership (versus donations), compared to liberals. This study also finds that, under membership, conservatives, compared to liberals, tend to donate proportionately less amounts, and tend to donate more frequently. With this, the present study expands knowledge in the literature on charitable behavior and the form of giving donors choose to contribute to charities (Kim, Gupta, & Lee 2021; Paswan & Troy 2004). Despite the widespread use of different fundraising programs offered by charities, little attention has been paid to the study of the motivational aspects that drive donor preferences in choosing different forms of giving. Through the development of this study, we provide evidence on this important aspect.

5.1.3 Study 3's theoretical implications

Finally, through the development of Study 3, important implications for scholars have been derived. In particular, this study enables us to advance current knowledge on temporal reframing literature and provide a more complete and precise understanding of the consequences of donation frequencies on the amount donated. Only a few studies have explored the temporal reframing of donations and have provided evidence of both positive and negative effects of higher frequencies on the amounts contributed (Atlas & Bartels, 2018; Gourville, 1998; Sudhir, Roy, & Cherian 2016). In this research, we highlight the heterogeneous nature of these effects and demonstrate that the impact of donation frequency on the amount donated is contingent on individuals' motivations for donating (i.e., other-oriented and self-oriented motives, Andreoni, 1989; Batson & Shaw, 1991). Our results show that higher frequencies lead to higher donations, although this effect is stronger for those donors with self-oriented motivations, and weaker for those donors with other-oriented motivations. In this way, we provide new insights into the reasons why different frequencies influence the amounts donated differently, based on an analysis of cost-benefit evaluation and individuals' perceived value of donating. Prior work in this domain has focused on how temporal reframing influences perceptions of costs (Gourville, 1998), although the decision to donate is closely related to a set of subjective judgments about the cost and benefit associated with a particular donation (Sargeant, West, & Ford, 2001), and most donation decisions can be explained with reference to the benefits that will accrue to donors as a consequence of their gift (Konrath & Handy, 2018). In this study, therefore, we demonstrate that not all donors are equally sensitive to the benefits and costs derived from their donations, resulting in different perceived values that may ultimately explain the heterogeneous effects on the amounts donated.

Furthermore, given the central role played by donation frequencies in explaining the donation amounts, our research has also investigated the drivers of the choice of donation frequencies. Through its findings, this study offers novel insights into the way in which different donors, based on their motivations to donate, choose the frequency of their donations, demonstrating that they naturally tend to choose those donation frequencies that maximize perceived value. Importantly, this study shows that donation options reinforce the natural tendency among self-oriented donors to choose higher donation frequencies, while for other-oriented donors the presence of donation options moves them away from the choices that maximize their perceived value. In presenting this finding, the present study extends prior knowledge on the consequences of membership and fundraising requests on altering individuals' donation decisions (De Bruyn & Prokopec, 2013; Verhaert & Van den Poel, 2012).

5.2 PRACTICAL IMPLICATIONS

The present doctoral dissertation also has important practical implications for charity's fundraisers. Implementing marketing strategies contributes to better organizational and fundraising performance of charitable organizations. However, one of the major challenges for fundraising managers is the lack of knowledge of the use of marketing techniques, making relationship marketing research in the charitable giving field necessary (Lee & Markham, 2018).

5.2.1 Study 1's practical implications

Importantly, the findings of Study 1 have enabled us to highlight the need for charities to recognize that there is a significant portion of donors whose primary purpose is to help through their donations, but who do not wish to engage with the organizations in a collaborative way (Bennett & Barkensjo, 2005; Parish & Holloway, 2010). On the other hand, there are donors who, in addition to their donations, want to feel close to the organization and engage with it more intensely, through multiple interactions and information exchanges (Bennett & Barkensjo, 2005). Therefore, it is imperative for fundraisers to design effective strategies by targeting donors according to their relational expectations. For donors with positive attitudes toward relationship marketing activities, charity fundraisers should communicate special services aimed at increasing satisfaction and generating higher levels of engagement (e.g., invitations to participate in talks and in charity auctions) and design social media channels that allow interactive relationships and interpersonal communication with the organization and other donors. In addition, the organization can also offer different types of communications (e.g., news, periodic newsletters, course offerings, or volunteer activities) and the frequency with which they send these communications.

The findings of Study 1 also suggest that donors who give larger amounts and who have simultaneously consented to receive direct marketing communications (i.e., have provided contact information to receive communications) are more likely to become members of the organization. Managers should be aware of these simultaneous behaviors of their donors and, accordingly, develop strategies that accommodate them. Taking advantage of the fact that these donors may offer significant financial support, fundraisers could use direct marketing to communicate opportunities to participate in loyalty programs (Henderson, Beck, & Palmatier, 2011), so that they continue to make large donations in the long run. This strategy, in turn, can implement various levels of giving with increasing benefits to the member, an approach aligned with the idea of building strong and trusting relationships with them, while also allowing the collection of data to identify the most valuable supporters (Boenigk & Scherhag, 2014).

Furthermore, the findings indicate that once donors have decided to become members, those sharing personal information in exchange for receiving marketing communications are more valuable for the organization (they donate greater sums of money). Long-term financial supporters can demand greater transparency and up-to-date information about the organization's work and results in order to verify the effectiveness of its activities. By regularly updating their systems to include the type of communication donors want to receive, organizations can achieve higher levels of satisfaction (Ashley et al., 2011) and, consequently, can increase the likelihood of donor retention and achieve greater funds collected.

5.2.2 Study 2's practical implications

From a practical perspective, the results of Study 2 offer relevant implications for fundraising managers. A key aspect of our research is the identification of individuals' political ideology through the use of public data as an interesting tool that may allow fundraisers to better manage the financial support from their donors. In this regard, they should turn to public sources that provide results of voting process to collect useful information at the individual level and effectively target their audiences through personalized communications (Lee et al. 2018). In addition, they can also access easily observable behavioral variables in their databases, such as the frequency used to contribute, the amount donated, or even the types of initiatives donors help the most. Charities often employ fundraising strategies universally for all their donors. Our results strongly support the premise that people living in a residential area where the most voted party has a conservative ideology give larger donation amounts. Importantly, this study also offers new insights into another important donation decision, the frequency with which individuals contribute, and suggests that those living in areas where a liberal orientation predominates tend to donate more frequently.

Fundraising managers can use our results to better evaluate their marketing communications when targeting their audiences by framing messages based on the attributions they can make about the causes of social problems and how they give to charities (Farmer, Kidwell, & Hardesty, 2020). For example, for conservative supporters, messages should contain information congruent with their values (Septianto, Seo, & Paramita, 2022), emphasizing the important role that the individual's behavior plays in achieving the organization's goals and its subsistence (Das, Kerkhof, & Kuiper, 2008) and in protecting the social system (Matthews, Levin, & Sidanius, 2009). On the other hand, for those liberal supporters, managers should communicate messages that appeal to the positive influence that donations have in addressing multiple social causes (Chang & Lee, 2010) and that emphasize the importance of recurrent giving to reduce inequality and achieve social change that benefits society as a whole.

On the other hand, the results of Study 2 also suggest important implications for managers by revealing strong preferences for membership programs among those more conservative audiences. Our findings suggest that if fundraisers want to increase their membership portfolio, they should pay particular attention to those populations where a conservative orientation predominates. We also recommend that for those with a more liberal orientation—and perhaps more likely to choose donations as their primary form of giving—fundraisers should design actions to communicate the availability of multiple initiatives and offer them the opportunity to choose where their funds are allocated. Moreover, the findings of this study allow us to recommend to fundraising managers that, for liberal members (those contributing through membership), who care not just about the aggregate donation, but also about the number of potential recipients, it would be useful to communicate the number of social causes they are helping. In addition, managers should be especially cautious with those communications exhibiting an equality-based allocation of resources. Although highly aligned with their expectations (Lee et al., 2018), this strategy could lead to a reduction in liberals' perceptions that recurrent support is needed. For conservative members, who make philanthropic decisions according to outcome efficacy and uncertainty avoidance (Lee, Seo, & Yoon, 2020), fundraisers should include financial information regarding how the resources are being allocated and emphasize the need to obtain more funds to be able to deal with unexpected situations that require urgent intervention.

5.2.3 Study 3's practical implications

Finally, in developing Study 3, interesting practical implications have also been derived. In this regard, this study suggests an opportunity for organizations to leverage donation frequency to improve donors' perceived value and subsequent contributions. An important conclusion from our research is that high donation frequencies do not always lead to better outcomes, as previous studies in the literature on temporal reframing have suggested. The findings of this study suggest distinguishing donors based on their motivations for donating, whether to provide a social benefit or a private benefit, and to promote different donation frequencies for these donors: higher frequencies for self-oriented donors and lower frequencies for other-oriented donors. The findings of this study also allow us to help organizations identify donors' motivations based on observed behavioral variables that are available in the donor database. Specifically, we identified a number of variables that are directly related to altruistic motivations to donate, such as agreeing to receive information from the charity or volunteering. Similarly, we also identified a number of behaviors that are related to selfish motivations to donate. These, in our context of charitable giving, are linked to tax benefits and thus, behaviors such as adjustments to the amount donated through additional donations made at specific times (when individuals are preparing their tax deductions) can serve as good indicators of the more extrinsic (or selfish) motivations that drive some individuals to donate. The use of these variables can help organizations to better gauge the underlying motivations of regular donors to contribute to the organization and, therefore, develop more targeted marketing activities.

An important finding of this study is that individuals tend to choose those donation frequencies that maximize their perceived value. Specifically, our study demonstrates that presenting donation options in the request (e.g., alternatives showing different donation frequencies) during the membership registration can alter these effects: for self-oriented donors, the presence of donation options reinforces their tendency to choose higher frequencies, but for other-oriented donors, the presence of options deviates them from their propensity to choose lower frequencies. While this may erode the perceived value for these donors and have a detrimental impact on future contributions, organizations may realize short-term benefits if, for example, they need to address urgent social problems. The bottom line is that this marketing activity, if properly applied, can jointly contribute to both the well-being of donors, by increasing perceived value, and to the well-being of the recipients of the aid. Finally, from a financial perspective, this study also enables us to derive important implications for managers regarding the availability of funding and its timing, which determines *whether* and *when* organizations can execute their social projects. The ability of charitable organizations to respond to all situations critically depends on the availability of funding. We provide fundraising managers with a better understanding of the drivers of the choice of frequency by regular donors, which can be used to predict the availability of funding at any time during the year.

Table 5.1 displays the summary of the theoretical and practical implications derived from the three studies.

Table 5.1 Summary of theoretical and practical implications

	THEORETICAL IMPLICATIONS	PRACTICAL IMPLICATIONS
STUDY 1	• To offer new insights into the impact of consent to direct marketing communications on the willingness of donors to engage in enduring relationships. • Donors who contributed significantly during past periods and show receptiveness to relationship marketing are those more prone to become members. • To conceptualize and understand the different types of relational orientations that individuals develop. • To provide further knowledge of the process of transitioning from an occasional donor (or sporadic product or service user) to a member or regular consumer.	• For donors with positive attitudes toward relationship marketing, fundraisers should communicate special services aimed at increasing satisfaction and generating greater levels of engagement. • Managers should note simultaneous behaviors of their donors (larger amounts donated and consenting direct marketing communications) and accordingly develop strategies that accommodate giving behaviors. • Long-term financial supporters can demand greater transparency and up-to-date information on the organization's work and results in order to verify the effectiveness of its activities
STUDY 2	• Liberals tend to donate more frequently while conservatives tend to donate larger amounts. • To simultaneously consider two main donation decisions—frequency and donation amount (they imply different underlying cognition process). • To provide evidence on how political ideology determines the choice of the form of giving (i.e., membership and donations). • The form of giving could influence donors' perceptions regarding the support the organization receives and thus affect the level of resources they can provide in subsequent donation decisions.	• To turn to public sources providing voter registration records to collect useful information at the individual-level. • Managers may approach their audiences by framing messages according to the attributions they may make about the causes of social problems. • If fundraisers want to increase their member portfolio, they should especially pay more attention to conservative audiences. • For conservatives, managers can include financial information regarding how the resources are being allocated and emphasize the need to obtain more funds to be able to deal with unexpected situations that require urgent intervention.
STUDY 3	• The impact of donation frequency on the donation amount is contingent on the motivations of individuals to donate. • To reconcile the mixed findings in previous studies by introducing the moderating role of motivations to donate. • A cost–benefit approach can explain most donation decisions. • Donors naturally tend to choose those donation frequencies that maximize perceived value. • Donation options reinforce the tendency among self-oriented donors, while for other-oriented donors the presence of donation options moves them away from the choices that maximize their perceived value.	• To distinguish donors based on their motivations to donate, whether to provide a social benefit or a private benefit. • Fundraisers should promote higher frequencies for self-oriented donors, and lower frequencies for other-oriented donors. • Managers can identify altruistic motivations (when donors volunteer and consent to receiving information from the charity) and selfish (behaviors such as adjustments to the amount donated through extra donations made at specific moments in time) • To appropriately apply donation options to contribute jointly both to the well-being of the donors and to the well-being of the recipients of the aid.

5.3 SOCIAL IMPLICATIONS

Through the development of the three studies, this doctoral dissertation derives important social implications. First, we contribute to the academic field and most importantly, to the business and management domain by providing knowledge about the role of marketing in creating a better world and improving societal outcomes, and its impact on under-researched service actors and stakeholders such as charitable organizations (Cross et al., 2022; Moorman, 2018; Ostrom et al., 2021). By doing this, we have advanced relevant **research priorities** by providing more precise answers to how *marketing activities can influence the livelihood, functioning, and sustainability of the important human systems that are critical for consumer and community welfare* and *how consumers and other stakeholders determine and pursue better outcomes, for example, by improving self-efficacy or other strategies.* In this sense, we offer novel insights into the way charitable organizations can achieve the effectiveness of their fundraising programs, through appropriate donor portfolio management that encourages and maximizes charitable donations and, consequently, the success of their social interventions aimed at contributing to social development and improving the living conditions of the most vulnerable communities.

Similarly, through this doctoral thesis we can respond to questions related to *how and under what conditions marketing can do well by doing good in the areas of consumer and social welfare* and *how charitable donations and other positive consumer behaviors can be encouraged*. In this regard, we identified a number of important behavioral factors that enable us to explain significant differences between donors' motivations, relational and ideological orientations and the consequences on their donation behavior over time. Thus, we have been able to determine specific marketing strategies for different typologies of donors that may encourage prosocial behaviors, and most importantly, further charitable donations.

Second, through the three studies developed, this doctoral thesis contributes to the **United Nations' strategic plan 2030 Agenda and its 17 SDGs** aimed at ending poverty, protecting the planet, and ensuring prosperity within the next few years. In this sense, we offer support to the activity of charities, as essential entities in reducing social inequality and improving the living conditions of the most vulnerable communities, by providing tools and an action plan that allow them to adequately deal with several persistent social problems. With our three studies we help fundraisers to develop appropriate strategies that enable them to carry out initiatives with the greatest social impact. In this way, we offer a number of alternative actions to promote the charitable behavior of both occasional and regular donors, which managers can use to address both long-term problems, such as poverty, hunger or inequality, as well as emergency situations that require rapid and intensive intervention (e.g., COVID-19 or Russo-Ukrainian War).

5.4 GENERAL LIMITATIONS AND DIRECTIONS FOR FURTHER RESEARCH

The present doctoral dissertation developed three studies that represent a further step toward understanding the donation behavior of different types of donors, regarding their relational, political, and self- and other- orientations, within a charitable giving context. These studies, in turn, are subject to some limitations that offer the opportunity to expand knowledge in future investigation. In the following, we detail the most significant limitations, and provide interesting directions for future researchers in an attempt to enrich the link between the literature on business and management and charitable giving and, most importantly, provide substantial practical value from a managerial perspective.

5.4.1 Research environment

The three studies developed in this doctoral dissertation empirically analyzed donation behavior by relying on the donor portfolio database of a single charitable organization. This, therefore, limits the generalizability of the results in several ways. First, charities are organizations that, in general, develop projects aimed at social development and intervene in the most disadvantaged groups by providing the necessary resources to achieve their welfare. Their mission is usually to reduce inequality and poverty (Boenigk et al., 2021; Song, Li, & Sahoo, 2021). However, the specific causes in which they intervene more intensely (i.e., children, refugees, poorest, social, and labor excluded), or the fundraising programs (e.g., membership, emergencies), channels, and communication strategies (e.g., e-mail direct marketing, payment schedules offered, appeal scales on donation amount) used to obtain financial support can differ across charities. Likewise, their donors may also present different characteristics (e.g., type of residential area, aging of the population in the region where donors live, level of foreign population, household income, or cultural traits), thus affecting their donation behavior.

Second, as noted, the study of donation behavior in other nonprofit contexts (e.g., gender inequality, animal abuse, or environmental issues), as well as in other service settings (e.g., membership associations, museums, or sport organizations) is also important, as the audiences donating to these organizations may differ significantly in terms of motivations to donate and beliefs, therefore influencing, the type of fundraising program chosen, or their relational expectations with regard to committing to regular donations over time. Third, focusing on a single organization also leads to the need to take the studies' findings carefully, as more evidence (e.g., more organizations taking part in the study) is needed to ensure the applicability of our practical implications. An aggregated perspective, considering an adequate set of charitable organizations, would certainly help to expand the knowledge of our study and test the generalizability of our findings.

5.4.2 Perceptual data collection

As noted, information on actual behavior has a high practical value for managers, since it allows them to easily classify their donor portfolio, and therefore, design appropriate strategies for each segment. In Study 1 (Chapter II) we provide consenting to direct marketing communications as a key factor for facilitating the identification of individuals who are more receptive to relationship marketing and whom managers can therefore classify as potential long-term donors. Likewise, in Study 3 (Chapter IV), we relied on behaviors, such as agreeing to receive information from the organization, volunteering, or extra donations (both those contributed during the year, and those contributed with the purpose of making adjustments to the amount donated at specific moments in time), to derive variables that could act as proxies for the donors' underlying motives to donate. However, we also encourage using perceptual information that accurately captures and explains how individuals tend to relate to or engage with the organization (i.e., preferences for relational or transactional exchanges), and their underlying motives (i.e., altruistic, and egoistic), as well as the attitudes towards supporting multiple initiatives and the role of the organization in providing social order or reducing inequality, that lead them to commit in the long term to the organization, and provide further donations or choose different payment schedules (i.e., donation frequencies). In addition, in Study 2 (Chapter III) we used aggregated voting results data to derive the political ideology of each individual donor in the portfolio. However, we suggest for future research to measure this aspect through perceptions and attitudes, as well as the positioning of each individual with regard to their left-right orientation.

Although these are costly techniques, and usually applied to a subset of individuals in the donor portfolio, surveys can substantially improve the understanding of donation behavior and allow for proper segmentation, thereby increasing the effectiveness of relationship marketing strategies and optimizing the behavior of the entire portfolio. Future research could explore attitudes toward engaging in different relational and collaborative behaviors (e.g., participation in multiple activities, use of different communication channels). Marketing communications can oftentimes be perceived as intrusive and can drive customers away or even negatively affect performance by reducing their transactions or the money spent (Jones et al., 2015). Therefore, further research should also address these aspects by analyzing attitudes toward receiving marketing communications or sharing personal information, or even test individual differences in the use and adoption of new technologies, so that they can better determine possible barriers or facilitators of relationship marketing effectiveness.

5.4.3 Identifiable and accessible information

A key aspect of this doctoral thesis is that we help practitioners by facilitating the identification and segmentation of their different audiences through the collection of easily identifiable behaviors accessible from their database (Study 1 and Study 3). Likewise, in Study 2 (Chapter 3), we also provide an interesting aspect for the identification of individuals' political ideology by using publicly available data, with which managers can better identify and therefore target their financial supporters. By using public sources, fundraisers may also collect other types of useful information at the individual level (e.g., by matching public information with individuals' addresses) and, thus, offer successful customized communications (Lee et al., 2018). In addition, we encourage further investigation examining additional variables that can be easily identified when individuals provide their contact information, which usually occurs in the early stage of the relationship, when individuals decide to register as members, or when they donate for the first time. Then, fundraisers can obtain further information regarding the type of communications donors wish to receive (e.g., informational, transactional, or collaborative) or the frequency with which they wish to receive it (Zhang, Kumar, & Cosguner, 2017). Similarly, by turning to the databases, further research can also test the moderating impact of transactional information such as paycheck frequency, or the preference of the charitable organization for immediate versus delayed payment schedules, on the influence of temporal framing of donations on the contributions of the regular financial supporters.

Finally, managers can also turn to variable measurement techniques that allow them to develop useful and valid measures for managing their donor portfolio through computerized textual analyses (Pandey & Pandey, 2019). With the emergence of this technique (e.g., Natural Language Processing), together with the increasing availability of big data in organizations (e.g., text- or image-based data), managers can better infer the underlying reasons why donors make contributions to charity, and their preferences for relationship marketing communications, and therefore optimize their efforts in segmentation strategies.

5.4.4 Cross-cultural contexts

As charitable organizations exist and are present in almost every part of the world, a greater understanding of the effects of cultural factors on donation behavior becomes increasingly important (Lee, Seo, & Yoon, 2020; Yang & Liu, 2021). With countries differing greatly in terms of socio-economic development, cultural standards, and political systems (Groskopf, 2016; Jost, 2017), individuals' differences across countries regarding moral values, beliefs, and behaviors are significant (Jost, Federico, & Napier, 2013; Paharia &

Swaminathan, 2019). The three studies developed in this doctoral dissertation rely on socio-demographic, behavioral and political information pertaining to a sample of donors from a charitable organization in a single European country. Even though this charity operates in a similar way to others within the charitable context, its financial supporters clearly do not represent all donors in all charities throughout the world, thus limiting the generalizability of our findings. The divergent views that people from different countries attach to issues such as the causes behind poverty or inequality between groups in society, or the responsibility to help others who are more disadvantaged (Winterich & Zhang, 2014), testify to the strong influence of cultural context on individuals' donation behavior. Therefore, work aimed at providing a deeper understanding of the motivations to donate, or the influence of political orientations on different donation decisions (e.g., frequency of donation or amount contributed) across countries is warranted.

Charities, especially those operating internationally, need to understand how ideas, values, and moral norms differ across cultures and how these cultural differences can affect donor portfolio management and their marketing decisions. For example, cross-cultural research suggests that people from collectivist countries, in comparison with more individualist countries, tend to feel a greater responsibility to help others (Chopik, O'Brien, & Konrath, 2017), thus affecting their motivations (they may be more other-oriented motivated), and their helping behavior. Conducting a cross-cultural study in both individualistic and collectivistic cultures will provide an opportunity to test our findings and help managers to better target their financial supporters and design successful marketing strategies (Lee, Seo, & Yoon, 2020). Related to this, we noted that cultural frameworks can also be used to explain differences in orientation towards long-term relationships with organizations (Chen, Mandler, & Meyer-Waarden, 2021). Future research could, therefore, consider underlying factors explaining differences in attitudes toward sharing personal data or receptiveness toward direct marketing communications across cultures. This, in turn, would help charitable organizations achieve effective marketing practices with appeals aligned with the values of their different audiences.

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La presente tesis doctoral se compone de cinco capítulos redactados en inglés. A continuación, se desarrolla un resumen que presenta la **Motivación** principal que ha llevado al planteamiento del objetivo general y propone una serie de objetivos específicos dirigidos a abordar diferentes desafíos a los que se enfrentan las organizaciones benéficas, a través del desarrollo de tres estudios cuyo contenido también es detallado. Por otro lado, se presentan unas **Conclusiones** que desatacan las principales implicaciones académicas, prácticas y sociales que se han derivado de los tres estudios desarrollados. Igualmente, mencionamos las limitaciones más importantes encontradas en los tres estudios y proporcionamos interesantes líneas de trabajo y direcciones para futuras investigaciones.

MOTIVACIÓN

En la última década, nuestra sociedad ha sido testigo de periodos de inestabilidad social y económica causados por acontecimientos importantes como la Gran Recesión iniciada en 2008, los consecutivos conflictos civiles en los países del Este, el cambio climático acompañado de desastres naturales, o más recientemente, la guerra desencadenada entre Rusia y Ucrania, que han provocado la persistencia de importantes problemas sociales, como la desigualdad, los grandes movimientos migratorios y la pobreza en todo el mundo. Asimismo, la crisis sanitaria provocada por el COVID-19 ha agravado las vulnerabilidades de las comunidades más desfavorecidas y las desigualdades existentes entre diferentes grupos de la sociedad, al aumentar el desempleo global y reducir drásticamente los ingresos de los individuos (Naciones Unidas, 2020). Conscientes de la gravedad de la situación, las instituciones y los expertos mundiales han destacado como una prioridad absoluta para asegurar el bienestar de la sociedad, especialmente de las regiones más desfavorecidas, proporcionando asistencia global y desarrollando un plan estratégico destinado a frenar los efectos negativos de los acontecimientos emergentes en el bienestar común durante los últimos 15 años. Por ejemplo, en septiembre de 2015, la Asamblea General de las Naciones Unidas adoptó la Agenda 2030 destinada a acabar con la pobreza, proteger el planeta y garantizar la prosperidad en los próximos años. En el centro de esta Agenda, se encuentran los 17 Objetivos de Desarrollo Sostenible (ODS), que están dirigidos a todos los actores del planeta, como los gobiernos, la sociedad civil y las organizaciones del sector privado. Asimismo, para hacer frente a los devastadores efectos del COVID-19, las instituciones humanitarias de las Naciones Unidas, junto con la Organización Mundial de la Salud, proponen superar las graves desigualdades sistémicas expuestas por la pandemia mediante la adopción de políticas que aborden los efectos socioeconómicos, humanitarios y de derechos humanos provocados por la crisis (United Nations, 2020).

Como requisito fundamental para la ejecución de este nuevo marco para contribuir al desarrollo social y afrontar cuestiones importantes, se ha hecho un llamamiento a los académicos de la disciplina empresarial y de gestión, como campo de investigación central que se enfrenta a los desafíos de la sociedad, para crear conocimientos que marquen una diferencia positiva ampliando su perspectiva y considerando el impacto del marketing en una variedad de partes interesadas y en el bienestar de la sociedad (Cross et al., 2022; Moorman, 2018). Un claro ejemplo de esto son las crecientes orientaciones para la investigación futura proporcionadas por importantes revistas académicas como el Journal of Marketing, en recientes números especiales, "Better Marketing for a Better World". Aquí se proponen varias prioridades de investigación, relacionadas con las preocupaciones compartidas por los académicos y profesionales del marketing hoy en día sobre el papel del marketing en la creación de un mundo mejor y la mejora de los resultados sociales (Moorman, 2018):

- *¿Cómo influyen las actividades de marketing en la subsistencia, el funcionamiento y la sostenibilidad de los importantes sistemas humanos que son fundamentales para el bienestar de los consumidores y las comunidades?*

- *¿Cómo determinan y persiguen los consumidores, los responsables políticos y otras partes interesadas mejores resultados, por ejemplo, mejorando la autoeficacia, el posicionamiento, la educación u otras estrategias?*

- *¿Cómo y en qué condiciones puede el marketing hacer el bien en las áreas de consumo y bienestar social?*

- *¿Cómo se pueden fomentar las donaciones benéficas, el reciclaje y otros comportamientos positivos de los consumidores?*

Del mismo modo, Chandy et al. (2021) subrayan el actual interés académico por destacar el papel del marketing en la mejora del bienestar de otras partes interesadas e instituciones del mundo, como pueden ser las organizaciones benéficas.

El marketing se ha vuelto especialmente fundamental en el ámbito de las organizaciones benéficas, ya que la recaudación de fondos representa uno de los principales retos en la gestión de estas organizaciones (Helmig, Jegers & Lapsley, 2004). En los últimos 20 años, las estrategias de marketing han adquirido un papel cada vez más importante para los responsables de la recaudación de fondos, dada su necesidad de recaudar recursos suficientes para atender un mayor número de necesidades sociales, y han prestado más atención a aspectos clave relacionados con el valor del donante y la gestión de las relaciones con este, adoptando así un enfoque más relacional en su actividad de recaudación (Bennet, 2006; Sargeant, 2001; Faulkner, Romaniuk, & Stern, 2016; Thomas, Feng, & Krishnan, 2015; Waters, 2011). La investigación de marketing en este contexto es importante porque puede ofrecer valiosas contribuciones prácticas que permiten a las organizaciones benéficas optimizar la gestión de su cartera de donantes y dirigirse al público adecuado (Faulkner, Romaniuk, & Stern, 2016; MacMillan et al, 2005; Ranganathan & Henley, 2008). De esta manera, los gestores pueden lograr relaciones provechosas entre la organización y sus donantes (Bennett & Barkensjo, 2005; Khodakarami, Petersen, & Venkatesan, 2015; Kim, Gupta, & Lee, 2021; Rupp, Kern, & Helmig, 2014), y lo que es más importante, asegurar suficientes recursos monetarios para abordar importantes problemas sociales.

Las organizaciones benéficas desempeñan un papel clave como agentes en el desarrollo de iniciativas cuya principal prioridad es ejercer el mayor impacto social a través de sus acciones (Song, Li, & Sahoo, 2021), dirigidas a contribuir al desarrollo sostenible de la comunidad, a la construcción de una sociedad justa, a la reducción de la desigualdad social y a la mejora de las condiciones de vida de las comunidades más vulnerables (Boenigk et al., 2021). Las organizaciones benéficas también son fundamentales para hacer frente a situaciones de emergencia, como las causadas por catástrofes medioambientales, o las provocadas por enfermedades y pandemias a gran escala (Bin-Nashwan et al., 2020). Además, a través de sus proyectos y de la puesta en marcha de campañas de recaudación de fondos, las organizaciones benéficas promueven comportamientos de ayuda y consiguen niveles significativamente mayores de apoyo financiero entre sus potenciales donantes (Sargeant & Shang, 2011). Por estos motivos, estas instituciones son clave en los procesos de captación de fondos y juegan un papel fundamental en el desarrollo de la sociedad y su bienestar.

Sin embargo, la intensificación de los problemas sociales, junto con la proliferación de organizaciones sin ánimo de lucro y la disminución del apoyo gubernamental, están haciendo que la consecución de la misión de estas instituciones sea más difícil (Arnett et al., 2003; Fang, Fombelle, & Bolton, 2021; Venable et al., 2005). En consecuencia, los responsables de la recaudación de fondos se esfuerzan por gestionar la "doble cuenta de resultados", tratando de equilibrar los recursos financieros que reciben y la misión social que persiguen (Álvarez-González et al., 2017; Dolnicar, Irvine & Lazarevski, 2008; Fairfax, 2004). Ante esto, estas organizaciones dependen fundamentalmente del apoyo de los donantes individuales, reconocidos como su recurso más significativo de ingresos (Ranganathan & Henley, 2008; Sudhir, Roy, & Cherian, 2016). Sin embargo, aunque este apoyo privado representa una gran parte de los fondos recaudados por estas instituciones y está logrando donaciones muy significativas en los últimos años (Giving USA, 2021; Transnational Giving Europe, 2021), se observa una tendencia decreciente entre estas donaciones. Las presiones competitivas por la financiación en este sector (Álvarez-González et al., 2017; Fang, Fombelle, & Bolton, 2021; Venable et al., 2005), ha llevado a los individuos a repartir sus donaciones entre varias organizaciones y causas sociales, reduciendo así el total de donaciones recibidas por una sola organización y creando mayores dificultades financieras que ponen en peligro la ejecución de muchos proyectos sociales, y por lo tanto amenazando la supervivencia de estas organizaciones (Development Initiatives, 2020).

En este contexto, la cartera de donantes adopta un papel esencial para garantizar una financiación estable y sustancial que permita el cumplimiento de los objetivos y la misión de la organización (Bekkers, Gouwenberg & Schuyt, 2020; Drollinger, 2018; Sargeant & Woodliffe, 2007). Implementar un enfoque de gestión de la cartera de donantes se ha convertido en algo esencial para que las organizaciones benéficas desarrollen relaciones exitosas con sus donantes y obtengan su apoyo (AbouAssi, 2013; Khodakarami, Petersen, & Venkatesan 2015). Sin embargo, esto requiere una comprensión adecuada de la base de donantes en términos de los tipos de donantes que proporcionan apoyo, su comportamiento de donación y cómo evoluciona en el tiempo. Esto, a su vez, permitiría a la organización identificar y diseñar las estrategias más adecuadas que maximicen las tasas de retención y los fondos recaudados (Kim, Gupta & Lee, 2021), construyendo así una cartera de donantes estable y con recursos financieros suficientes para asegurar la implementación efectiva de programas que aborden con éxito importantes retos sociales a largo plazo.

Teniendo en cuenta lo anterior, la presente tesis doctoral pretende *aportar un conocimiento exhaustivo de los diferentes tipos de donantes y su comportamiento de donación a lo largo del tiempo para ayudar a las organizaciones benéficas a mejorar la gestión de su cartera de donantes y obtener una mayor y más estable financiación para abordar con éxito sus proyectos sociales*.

Con este objetivo general en mente, esta tesis doctoral se centra en tres retos clave a los que se enfrentan las organizaciones benéficas en su intento de implementar una gestión eficaz de la cartera de donantes. El primero se refiere a la forma en que las organizaciones benéficas deben acercarse a sus donantes, dada la heterogeneidad en las preferencias de los donantes por los diferentes tipos de relaciones (es decir, transaccionales frente a relacionales), y las implicaciones que esto puede tener en la captación de fondos. La segunda tiene que ver con los rasgos personales de los donantes y, en particular, con sus creencias sobre el funcionamiento de la sociedad (es decir, la ideología política), y con la comprensión del impacto que esto tiene en el comportamiento de las donaciones a lo largo del tiempo. El tercero tiene que ver con los donantes regulares (o socios) y se refiere a la frecuencia con la que realizan sus aportaciones en un año, y a las implicaciones que esto puede tener en la cuantía de sus donaciones en períodos posteriores. Estos retos se abordan en tres estudios diferentes, que pretenden aportar conocimientos valiosos y herramientas prácticas para ayudar a las organizaciones benéficas a gestionar eficazmente su base de donantes. Analizamos sucesivamente cada uno de estos retos y los estudios desarrollados para abordarlos.

Desafío 1. Cómo acercarse a los donantes con diferentes preferencias relacionales

La literatura anterior ha subrayado el papel clave de las estrategias de marketing en la promoción de los comportamientos de donación (Khodakarami, Petersen, & Venkatesan, 2015; van Dijk, Van Herk, & Prins, 2019), y la gestión de la cartera de donantes, como herramienta esencial para crear relaciones valiosas y rentables (Drollinger, 2018; Sargeant & Woodliffe, 2007). En este sentido, el marketing relacional se ha postulado como un enfoque directivo predominante a través del cual los gestores pueden lograr mayores tasas de retención, así como mantener o aumentar los fondos recaudados (Camarero & Garrido, 2012; Morgan & Hunt, 1994). Sin embargo, a pesar de esta tendencia a investigar una verdadera relación "ideal", trabajos anteriores han reconocido que no todos los individuos desean relacionarse con las organizaciones y establecer el mismo tipo de implicación con ellas (Dalziel, Harris, & Laing, 2011). Por lo tanto, los gestores deben adoptar un enfoque de gestión dirigido a ***identificar qué tipo de relación es la más adecuada para cada donante y, en función de ello, diseñar estrategias apropiadas que maximicen el valor de cada donante***.

Si bien en trabajos anteriores se ha examinado el papel del marketing relacional en las organizaciones benéficas, así como los determinantes que llevan a los donantes a ofrecer un apoyo futuro contribuyendo a través de cantidades regulares durante largos periodos de tiempo (Bennett & Barkensjo, 2005; Drollinger, 2018; Khodakarami, Petersen & Venkatesan, 2015; MacMillan et al., 2005; van Dijk, Van Herk & Prins, 2019), apenas se ha abordado el enfoque que considera la segmentación de los donantes para identificar qué tipo de relación es la más adecuada para desarrollar con cada donante. Como sostienen Rupp, Kern y Helmig, “la segmentación es un importante prerrequisito para el éxito del marketing relacional y, viceversa, las consideraciones del marketing relacional son el punto de partida de muchos esfuerzos de segmentación” (p. 83). Sin embargo, también señalan que la literatura sobre las organizaciones sin ánimo de lucro apenas ofrece este vínculo, lo que se traduce en un conocimiento inexistente sobre los factores de comportamiento que reflejan las preferencias relacionales de los donantes para con la organización y que identifican qué individuos pueden ser más propensos a adoptar comportamientos a largo plazo y más receptivos a las estrategias de marketing relacional.

Aunque en el ámbito lucrativo, la literatura ha dedicado más atención a las estrategias de marketing relacional y ha identificado factores como indicadores importantes a través de los cuales los individuos muestran una tendencia hacia el comportamiento participativo, y un mayor interés en continuar la relación (Ashley et al., 2011; Brodie et al., 2013; Smit, Bronner, & Tolboom, 2007), la forma en que estos elementos influyen en el comportamiento real de los individuos es todavía escasa.

Teniendo en cuenta lo anterior, hay dos preguntas importantes que siguen sin respuesta: *¿Cómo captar mejor las preferencias de los individuos por las relaciones a largo plazo en un contexto de donaciones benéficas? ¿Cómo afectan las estas preferencias relacionales a los resultados de la organización tanto en términos de compromiso a largo plazo como de fondos recaudados?*

En este sentido, la presente tesis doctoral pretende abordar los siguientes objetivos:

Objetivo de investigación 1. *Identificar las preferencias de los individuos por el marketing relacional analizando su influencia en la construcción de relaciones duraderas y el posterior comportamiento de donación.*

Objetivo de investigación 2. *Analizar el papel del comportamiento de donación anterior y su impacto conjunto con las preferencias por el marketing relacional en las relaciones duraderas entre donantes y organizaciones.*

Para abordar estos objetivos de investigación, se ha desarrollado el **Estudio 1**. En concreto, este estudio investiga el efecto de ofrecer consentimiento para recibir marketing directo (ej. proporcionando información personal de contacto para recibir información y comunicaciones) y analiza hasta qué punto la disposición de los individuos a compartir sus datos de contacto con la organización puede afectar a su decisión de entablar una relación duradera (haciéndose socios). Además, este estudio analiza el comportamiento de donación pasado (es decir, la frecuencia y el importe de las donaciones de periodos anteriores) como factor moderador de esta relación. **El estudio 1** también explora los importes de las donaciones de los individuos que deciden hacerse socios durante el primer año de su afiliación, así como si su consentimiento a recibir comunicaciones ejerce cierta influencia en impulsando estos importes.

Para ello, este estudio desarrolla un marco teórico basado en la literatura sobre el marketing relacional y la teoría del intercambio social (Bowden, Gabbott & Naumann, 2015; Dwyer, Schurr & Oh, 1987; Johnson & Selnes, 2004; Kim, Steinhoff & Palmatier, 2021; Palmatier et al., 2006), contribuyendo por tanto a la comprensión de cuándo las organizaciones benéficas deben desarrollar las relaciones con sus donantes. La literatura de marketing relacional señala claramente la importancia de una comprensión multidimensional de los tipos de relaciones que los individuos pueden establecer con las organizaciones (Palmatier et al., 2006), así como la necesidad de desarrollar estrategias para cada segmento de individuos según sus expectativas relacionales (Dalziel, Harris, & Laing, 2011). De hecho, anteriores trabajos reconocen que las relaciones con los clientes varían en un intervalo que va desde las orientaciones transaccionales a las relacionales (Dalziel, Harris, & Laing, 2011; Palmatier et al., 2006; Witell et al., 2020), donde las relaciones de intercambio abarcan un espectro que va desde los intercambios discretos a corto plazo hasta los intercambios relacionales a largo plazo (Taylor, Donovan, & Ishida, 2014).

Para testar empíricamente los objetivos de este estudio, se utiliza una base de datos procedente de una cartera de donantes de una organización benéfica en un país europeo. Esta base de datos contiene información longitudinal durante un periodo de siete años (2013-2019) sobre diferentes aspectos: comportamentales (la frecuencia de las donaciones y la cantidad donada), relacionales (fecha del primer contacto con la organización, los años aportando donaciones y la disponibilidad o no de información de contacto) e información de registro de los socios que se inscribieron durante el periodo de estudio (es decir, la fecha de registro, el canal de registro, la periodicidad de las donaciones y la cuota periódica de cada socio), así como características sociodemográficas (género y el tipo de zona de residencial) y factores socioeconómicos (los ingresos, obtenidos a partir de una fuente pública que indican la renta neta per cápita por zona residencial).

La metodología empleada en este estudio se basa en la aplicación de un enfoque de corrección en dos etapas de Heckman (1979), dónde se estiman simultáneamente dos modelos (probit y Mínimos Cuadrados Ordinarios, MCO) utilizando el software estadístico Stata (versión 16). Los resultados muestran que los donantes ocasionales que consienten el marketing directo están más dispuestos a entablar relaciones duraderas con las organizaciones benéficas, aunque este efecto es más débil en el caso de los donantes que han contribuido con mayores cantidades de donaciones en el pasado. Además, nuestros resultados revelan que los socios que consienten las comunicaciones de marketing directo proporcionan un mayor apoyo financiero.

Reto 2. Ideología política y donaciones benéficas

Otra cuestión importante, que ha despertado recientemente el interés de los académicos de diferentes disciplinas, es que los ciudadanos están cada vez más divididos tanto social como psicológica y políticamente (Groskopf, 2016; Jost, 2017), aspecto que ha cobrado gran relevancia en el estudio del comportamiento del consumidor y de las donaciones benéficas (Farmer, Kidwell, & Hardesty, 2020; Fernandes et al., 2022; Winterich, Zhang, & Mittal, 2012). Sin embargo, un reto importante para los recaudadores de fondos de las organizaciones benéficas es la aplicación más intensiva, en la gestión de la cartera de donantes, de un enfoque que les ayude a abordar correctamente la tipología de sus donantes y a adaptar los mensajes de comunicación a los diferentes públicos, para maximizar el valor de toda la cartera de donantes.

En los últimos años, la investigación ha dedicado especial atención a comprender mejor cómo la ideología política -es decir, el conservadurismo y el liberalismo – influye en el comportamiento de donación (Farmer, Kidwell & Hardesty, 2020; Kaikati et al., 2017; van Esch, Cui & Jain, 2021). Esto es importante, ya que entender por qué las personas donan en función de cómo entienden el funcionamiento de la sociedad y racionalizan la estructura existente de desigualdades entre grupos puede conducir a la segmentación adecuada y al aumento del comportamiento caritativo (Jost et al. 2003; Paharia & Swaminathan, 2019; Robson & Hart, 2020). Sin embargo, una gran parte de los estudios empíricos consideran la ideología política simplemente como una variable de control y analizan su impacto sobre todo en la cantidad de donaciones contribuidas y el tipo de organización que apoyan los donantes (Bekkers, 2005; Brooks, 2005; Robson & Hart, 2020; Yang & Liu, 2021). De hecho, trabajos recientes han subrayado la necesidad de realizar más investigaciones que exploren en qué condiciones los conservadores y los liberales muestran un comportamiento caritativo y que respondan a preguntas sobre cómo y cuándo cada uno puede ser más generoso, y por lo tanto contribuir más con sus donaciones (Farmer, Kidwell, & Hardesty, 2020; Yang & Liu, 2021). Esto pone de manifiesto la necesidad de nuevos trabajos empíricos que estudien la influencia de la ideología política en el comportamiento de donación desde una perspectiva multidimensional, en la que los individuos se enfrentan a importantes decisiones de donación (por ejemplo, la cantidad y la frecuencia de las donaciones) y a otras decisiones relacionadas con la adhesión a diferentes formas de donación (por ejemplo, la membresía y las donaciones esporádicas en diversas iniciativas y causas sociales; Kim, Gupta & Lee, 2021).

La literatura anterior reconoce que la existencia de varias formas de donación (programas de membresía y programas de donaciones) sugiere que puede haber diferentes motivos relacionados con la forma en la que los donantes entienden el comportamiento de ayuda y cómo asignan su apoyo financiero a la organización y a sus múltiples iniciativas (AbouAssi, 2013; Khodakarami, Petersen & Venkatesan, 2015). Sin embargo, a pesar del amplio uso de diferentes programas de recaudación de fondos en las organizaciones sin ánimo de lucro (Gruen, Summers & Acito, 2000; Kim, Gupta & Lee, 2021), no hay evidencia suficiente sobre sus implicaciones en las decisiones de donación de los individuos.

Por lo tanto, se plantean las siguientes preguntas de investigación ¿Puede la ideología política influir de manera diferente en las decisiones de donación y en la elección de la forma de donación? ¿Cómo afectará la forma de donación elegida las decisiones de donación de donantes con diferentes ideologías políticas?

Al responder a estas preguntas, la presente tesis doctoral pretende abordar dos importantes objetivos:

Objetivo de investigación 3. *Investigar las consecuencias de la ideología política en las diferentes decisiones de donación (frecuencia y cantidad) y formas de donación (membresía y donaciones).*

Objetivo de investigación 4. *Explorar cómo el impacto de la ideología política en las decisiones de donación varía según las diferentes formas de donación.*

Para abordar estos objetivos, se ha llevado a cabo el **Estudio 2**. Este estudio se basa en la teoría de la justificación del sistema para profundizar en la comprensión de los procesos ideológicos y los resultados en el ámbito del comportamiento de ayuda y analizar dos aspectos importantes (i) las decisiones de donación (es decir, la frecuencia y la cantidad de la donación) y (ii) las formas de donación (es decir, la membresía y las donaciones). Este estudio ofrece argumentos elaborados para motivar las hipótesis de investigación sobre cómo la ideología política influye en las decisiones de donación y en la forma de donación elegida, y sobre cómo esta última puede moderar la relación entre la ideología política y las donaciones.

Los problemas sociales son endémicos en la sociedad humana, sin embargo, sus determinantes, o las causas que los originan, son muy variadas dependiendo del punto de vista desde el que los individuos ven y entienden la sociedad y su funcionamiento (Farmer, Kidwell & Hardesty, 2020). En este sentido, la teoría de la justificación del sistema puede explicar la motivación de algunos individuos para defender y justificar la estructura existente de desigualdades entre grupos (Jost et al., 2003), y cómo las personas perciben la responsabilidad de los grupos desfavorecidos en la sociedad (Ho et al., 2012; Lee, Seo, & Yoon, 2020). Las personas que muestran tendencias de justificación del sistema tienden a defender y racionalizar los acontecimientos sociales y económicos existentes (Jost, 2019), lo que les lleva a una motivación para percibir el sistema como justo, legítimo y estable.

Investigaciones anteriores concluyen que las personas tienen diferentes sistemas de creencias que determinan su ideología política y, por lo tanto, sus percepciones sobre la igualdad y las causas que provocan las necesidades y los problemas sociales de algunos individuos, como la pobreza (Paharia & Swaminathan, 2019; Song, Sheinin & Yoon, 2017). Los conservadores tienden a aplicar creencias de justificación del sistema y suelen situar la causalidad en la persona, atribuyendo la pobreza a características disposicionales y a causas internas como la falta de esfuerzo (Lee, Seo & Yoon, 2020; Weiner, Osborne & Rudolph, 2011) y creen que el sistema social es justo y equitativo (Ho et al., 2012). Los liberales, por el contrario, tienden a percibir que las causas estructurales son las responsables de los problemas sociales y atribuyen la pobreza a causas externas como las estructuras y prácticas sociales injustas (por ejemplo, como las oportunidades de empleo injustas; Lee, Seo & Yoon, 2020; Skitka et al., 2002).

Estas diferencias entre conservadores y liberales sugieren que son fundamentalmente diferentes en cuanto a cómo ayudan a los demás y cuándo y por qué pueden ser más generosos (Brooks, 2006; Kaikati et al., 2017; Winterich, Zhang & Mittal, 2012). El presente estudio se centra en dos decisiones principales relacionadas con el comportamiento de ayuda: (1) la frecuencia de la donación y (2) la cantidad de la donación (Fajardo, Townsend, y Bolander 2018). También nos centramos en dos formas de donación: (1) membresía y (2) donaciones (Kim, Gupta & Lee, 2021).

Para abordar los objetivos de investigación planteados anteriormente, el **Estudio 2** utiliza datos correspondientes a una muestra representativa de 7.159 donantes procedentes de una organización benéfica en un país europeo, observados durante ocho años (2013-2020). Estos datos contienen información longitudinal sobre el comportamiento de donación (frecuencia, cantidad donada y forma de donación: membresía y donaciones), sociodemográfica y de ideología política (capturando los resultados de voto de cuatro procesos electorales celebrados en el país de estudio y sus diferentes regiones). La metodología de este estudio emplea el método de regresión *seemingly unrelated regression* (SUREG), para estimar tres ecuaciones simultáneamente en un solo paso (utilizando el software estadístico Stata, versión 16).

Los resultados revelaron que la ideología política influye significativamente en las dos decisiones de donación, mostrando que mientras los liberales donan con más frecuencia, los conservadores donan cantidades mayores. Asimismo, los resultados muestran que la ideología política determina la elección de la forma de donación, siendo los conservadores más propensos a elegir la membresía, en comparación con los liberales. Por último, esta investigación concluye que, al donar bajo membresía, el impacto positivo de una ideología liberal en la frecuencia de las donaciones y el impacto positivo de una ideología conservadora en la cantidad de las mismas se debilita.

Reto 3. Gestión de los calendarios de pago de la cartera de donantes regulares

Dentro del apoyo privado que reciben las organizaciones benéficas, su cartera de donantes regulares (o socios) juega un papel esencial, ya que proporciona un flujo estable de recursos que permite la sostenibilidad de la organización en su desempeño diario (Drollinger, 2018; Sargeant & Woodliffe 2007). Entender su comportamiento de donación a lo largo del tiempo, por tanto, es esencial para diseñar estrategias efectivas dirigidas a construir relaciones más sólidas con ellos y maximizar el apoyo financiero que dan. Uno de los retos más importantes para los recaudadores de fondos con respecto a sus donantes habituales está relacionado con la ***forma de gestionar los calendarios de pago, es decir, cómo programar temporalmente sus donaciones*** (es decir, el nivel de agregación de su contribución anual a través de diferentes frecuencias de donación).

El *temporal reframing* de los pagos (término relacionado con la gestión del calendario de pagos, el cual define las fechas en las que se realizan los pagos de cada cliente y la periodicidad utilizada) se ha hecho popular entre los académicos en el contexto empresarial (Bambauer-Sachse & Grewal, 2011; Hershfield, Shu, & Benartzi, 2020). Sin embargo, poco se sabe sobre la influencia de esta estrategia en el ámbito de las donaciones benéficas. Los trabajos que ofrecen evidencia en este sentido se centran únicamente en los donantes ocasionales (Atlas & Bartels, 2018; Basu, 2021; Gourville, 1998; Sudhir, Roy & Cherian, 2016). Además, el amplio uso de información transversal (a través de diseños experimentales) limita la capacidad de comprender la dinámica potencial de esta estrategia a lo largo del tiempo. Asimismo, aunque el segmento de donantes regulares (o socios) también debe estudiarse desde una perspectiva multidimensional en relación con sus motivaciones para ayudar (Rupp, Kern & Helmig, 2014), sigue siendo necesario comprender mejor los motivos que les llevan tanto a la elección de la cantidad donada como a la frecuencia (o periodicidad) de donación que eligen para contribuir (Atlas & Bartels, 2018).

Por lo tanto, es necesario responder a dos preguntas importantes: *¿Cómo afectarán las diferentes frecuencias de donación a las contribuciones de los donantes regulares a largo plazo? ¿Cómo captar mejor los motivos por los que donan para ayudar a entender la cantidad donada y las preferencias por las diferentes frecuencias de donación?*

En respuesta a estas preguntas, la presente tesis doctoral desarrolla los siguientes objetivos:

Objetivo de investigación 5. *Entender cómo el impacto de las diferentes frecuencias de donación en las contribuciones totales de los donantes regulares varía según las motivaciones para donar (orientadas a uno mismo y a los demás).*

Objetivo de investigación 6. *Analizar los factores internos (motivaciones para donar) y externos (opciones de donación) como impulsores de la frecuencia de donación.*

Para abordar estos objetivos de investigación, se realiza el **Estudio 3**. En concreto, este estudio investiga el impacto de las diferentes frecuencias de donación (es decir, la periodicidad mensual, trimestral, bianual y anual) sobre la cantidad donada. Para comprender mejor este efecto, adoptamos el enfoque de valor percibido en el que los donantes regulares evalúan sus donaciones en función de los costes percibidos (por ejemplo, el sacrificio económico) y los beneficios (es decir, la satisfacción de ayudar a los demás y el bienestar personal) que pueden resultar de sus donaciones (Atlas & Bartels, 2018). De esta manera, proponemos que el impacto de la frecuencia con la que donan es heterogéneo entre los donantes regulares y destacamos la importancia de considerar los motivos que los impulsan a donar: (i) ayudar a los demás (es decir, motivación orientada a los demás) y (ii) obtener un beneficio privado (es decir, motivación orientada a uno mismo). En este estudio también exploramos por qué los donantes regulares eligen diferentes frecuencias de donación (es decir, periodicidad) y nos centramos en factores internos (motivaciones) y externos (opciones de donación incluidas en la solicitud cuando los individuos se registran como socios).

Para el desarrollo del marco conceptual del **Estudio 3**, nos basamos en la literatura sobre *temporal reframing* (Gourville, 1998). Esta literatura se ocupa de comprender las respuestas psicológicas y conductuales de los individuos ante una cantidad de dinero similar que se presenta de una manera más o menos agregada. En el ámbito de las donaciones benéficas, presentar una cantidad de donación similar en diferentes niveles de agregación (por ejemplo, anual, bianual, trimestral, mensual) puede tener consecuencias importantes no solo en los costes percibidos, como se ha destacado en investigaciones anteriores, sino también en los beneficios percibidos asociados a esa donación concreta (Atlas & Bartels, 2018), influyendo así en el valor percibido de la donación y en la cantidad que los individuos estarán dispuestos a donar en períodos posteriores.

El coste de una donación para los individuos implica un sacrificio monetario. La literatura sobre *temporal reframing* sugiere que presentar una cantidad de dinero de una forma menos agregada frente a una más agregada (por ejemplo, mensual frente a anual) influye en las percepciones de la asequibilidad de las cantidades, dando lugar a que los donantes puedan preferir pequeñas cantidades donadas mensualmente en lugar de una gran cantidad agregada donada anualmente. Como se ha notado anteriormente, a través de sus contribuciones, los donantes también pueden obtener diferentes tipos de beneficios: (1) la satisfacción por el bien que las donaciones hacen a los beneficiarios de la organización, y (2) la satisfacción por el bien que las donaciones hacen a los propios donantes (Andreoni, 1989; Cain, Dana, & Newman, 2014; Shang et al., 2020). En este estudio, sostenemos que las diferentes frecuencias de donación pueden afectar a estos dos beneficios de diferentes maneras, las cuales vendrán determinadas por las motivaciones que llevan a los individuos a donar.

Cuando los individuos donan por motivaciones más orientadas a sí mismos – se centran en los beneficios personales como el aumento de la autoestima y el sentido relevante de uno mismo (Shang et al., 2020) y están más interesados en minimizar los costes monetarios derivados de las donaciones (Goeree, Holt & Laury, 2002) –, las frecuencias de donación más altas (ej. periodicidad mensual frente a anual) les pueden permitir obtener un mayor valor percibido de sus donaciones y, por tanto, les puede llevar a donar más. Por otro lado, cuando los individuos donan por motivos orientados a los demás – se preocupan por el bienestar de los demás y pretenden maximizar el impacto de sus contribuciones (Ferguson et al., 2012; Webb, Green & Brashear, 2000), a pesar del sacrificio monetario que suponga –, las frecuencias más bajas de donación (ej. anual vs mensual), les puede llevar a obtener un mayor valor percibido de sus donaciones.

Para testar los objetivos propuestos, en este estudio utilizamos los datos correspondientes a una muestra representativa de 5.168 socios de una organización benéfica de un país europeo. Estos datos contienen información longitudinal durante un periodo de siete años (2013-2019) sobre comportamientos de donación (cantidad donada, periodicidad, contribuciones extraordinarias a diferentes causas de la organización, voluntariado), registro (aceptación de recepción de información y comunicaciones, disponibilidad o no de alternativas de periodicidad y cuotas en el momento de la inscripción como socio) y sociodemográficos (género, ingresos, tipo de zona residencial).

Para capturar las motivaciones para donar, nos basamos en una serie de variables identificadas en la base de datos, las cuales pueden captar los motivos subyacentes de los donantes para donar. En concreto, para capturar la motivación orientada a uno mismo creamos una variable ordinal que podía tomar valores de 0 a 3 en función de si el donante realizó o no los siguientes comportamientos (i) aceptar recibir información, (ii) ser voluntario y (iii) realizar donaciones extraordinarias, todos ellos relacionados con la exhibición de preocupación por el bienestar de los demás (motivación orientada a los demás). Del mismo modo, para captar la motivación orientada a uno mismo, creamos una nueva variable ordinal que podía tomar valores de 0 a 3 en función de si el donante participó o no en los siguientes comportamientos: (i) realizar donaciones extra en los meses de abril y mayo, (ii) realizar donaciones extra en la segunda quincena de diciembre, y (iii) ajustar sus donaciones regulares durante los años 2015 y/o 2016, todas ellas relacionadas con mostrar preocupación por los beneficios personales y fiscales. El enfoque metodológico utilizado aplica el estimador System GMM y una regresión MCO, utilizando el software estadístico Stata (versión 16).

Los resultados revelan que las frecuencias más altas conducen a donaciones más elevadas, aunque este efecto se ve reforzado por las motivaciones orientadas hacia uno mismo y debilitado por las motivaciones orientadas hacia los demás. Además, los resultados sugieren que mientras las motivaciones orientadas a uno mismo llevan a los donantes a elegir frecuencias más altas, las motivaciones orientadas a otros llevan a los donantes a elegir frecuencias de donación más bajas. Los resultados también muestran que las opciones de donación tienen una fuerte influencia en la elección de frecuencias de donación más altas, aunque este efecto es más débil para los donantes orientados a los demás.

CONCLUSIONES

La presente tesis doctoral engloba cinco capítulos, a través de los cuales detalla la motivación (Capítulo 1) que ha llevado al desarrollo de tres estudios de investigación (Capítulos 2, 3 y 4), y a la generación de una discusión (Capítulo 5) con importantes implicaciones que se derivan tanto para el ámbito académico como para la práctica y gestión de las organizaciones benéficas. A continuación, se detallan los principales resultados obtenidos en los tres trabajos empíricos y las implicaciones teóricas y prácticas obtenidas de cada uno.

Implicaciones teóricas

El **Estudio 1** contribuye a la investigación existente que señala la importancia de adoptar un enfoque multidimensional de los tipos de relaciones que los consumidores pueden establecer con los proveedores de servicios y de desarrollar estrategias de segmentación basadas en las expectativas relacionales de estos consumidores (Dalziel, Harris & Laing, 2011; Mazurek & Małagocka, 2019; Palmatier et al., 2006). Trabajos anteriores señalan que el nivel de compromiso que los consumidores desarrollan hacia la organización y su intención de continuar la relación suelen explicarse por la orientación y las actitudes hacia las relaciones con las organizaciones (Bowden, Gabbott, & Naumann, 2015; Dwyer, Schurr, & Oh, 1987; Parish & Holloway, 2010), y la receptividad al marketing relacional y al intercambio de información (Ashley et al., 2011; Bruneau, Swaen, & Zidda, 2018). Sin embargo, se ha encontrado poca evidencia sobre los mecanismos subyacentes que influyen en las decisiones de los individuos para iniciar relaciones más estrechas y estables en el contexto de las organizaciones benéficas. A través de sus resultados, el Estudio 1 revela que los donantes más propensos a consentir el marketing directo (ej., proporcionan información de contacto para recibir información y comunicaciones de la organización) están más dispuestos a entablar relaciones duraderas con las organizaciones benéficas, es decir, es más probable que se vuelvan socios de la organización. Este efecto, sin embargo, es más débil en el caso de los donantes que han contribuido con mayores cantidades de donaciones en periodos anteriores. De esta manera, abordamos las peticiones realizadas por anterior literatura sobre la necesidad de desarrollar más investigación sobre el efecto de la receptividad al marketing relacional en el comportamiento real de los individuos (Ashley et al., 2011; Bruneau, Swaen, & Zidda, 2018) y contribuimos identificando el comportamiento de donación pasado (frecuencia de donación y cantidades donadas en anteriores periodos) como factor moderador. Este resultado subraya la importancia de tener en cuenta otros factores además del comportamiento de donación a la hora de explicar la lealtad y el compromiso de los donantes con las organizaciones benéficas.

Por último, los hallazgos de este estudio revelan que los socios más propensos a consentir las comunicaciones de marketing directo también proporcionan un mayor apoyo financiero (donando mayores cantidades). De esta manera, ampliamos el conocimiento ofrecido por los trabajos anteriores, proporcionando información sobre el vínculo significativo entre las preferencias relacionales de los individuos hacia la organización y el total de cantidades contribuidas.

A través de sus hallazgos, el **Estudio 2** deriva una serie de importantes implicaciones teóricas. En primer lugar, amplía la investigación sobre la ideología política y su influencia en el comportamiento de ayuda. A pesar del resurgimiento de la investigación sobre la orientación política en el ámbito de la caridad (Yang & Liu, 202), se sabe poco sobre cómo la gente ayuda a los demás y cuándo y por qué pueden ser más generosos (Farmer, Kidwell &

Hardesty, 2020). En el presente estudio, cubrimos esta brecha en la investigación demostrando que la ideología política influye significativamente en dos decisiones de donación. En concreto, los hallazgos sugieren que los donantes con una orientación liberal (aquellos que residen en zonas donde predomina una ideología liberal), donan con más frecuencia, mientras que los donantes más conservadores (aquellos que residen en zonas donde el conservadurismo es la ideología predominante), donan mayores cantidades. En este estudio, nos basamos en la teoría de la justificación del sistema para explicar cómo los sistemas de creencias políticas, que llevan a los individuos a tener diferentes percepciones sobre las causas de necesidad y los problemas sociales (Jost et al., 2003), pueden influir en las donaciones benéficas, concretamente en las dos decisiones de donación: la frecuencia de la donación y la cantidad donada. Asimismo, en este estudio también destacamos que analizar las decisiones simultáneas que toman los individuos cuando apoyan a las organizaciones benéficas, es fundamental para entender mejor el comportamiento caritativo. Solo unos pocos trabajos diferencian entre las decisiones de participación y de cantidad (por ejemplo, Fajardo, Townsend & Bolander, 2018; Kim, Gupta & Lee, 2021). Por lo tanto, este estudio proporciona una comprensión más precisa de los efectos de la ideología política en las donaciones y puede ayudar a reconciliar los resultados mixtos encontrados en la literatura anterior.

Los resultados del Estudio 2 también muestran que la ideología política determina la elección de la forma de donación, siendo los conservadores más propensos a elegir la membresía (ej. afiliación como socio), en comparación con los liberales. Por último, este estudio encuentra que, bajo la membresía, aquellos donantes más conservadores, a diferencia de los más liberales, tienden a donar proporcionalmente menos cantidades (en comparación con la media total donada por cada grupo de donantes). Asimismo, bajo la membresía, los donantes más conservadores (a diferencia de los liberales) tienden a donar con mayor frecuencia. Con esto, el presente estudio expande el conocimiento en la literatura sobre ideología política y comportamiento de donación. A pesar del uso generalizado de los diferentes programas de recaudación de fondos ofrecidos por las organizaciones benéficas, se ha prestado poca atención al estudio de los aspectos motivacionales que impulsan las preferencias del donante a la hora de elegir diferentes formas de donación (Kim, Gupta & Lee, 2021; Paswan & Troy, 2004). En este estudio, por lo tanto, ofrecemos evidencia sobre este importante aspecto. Al proponer el papel moderador de la forma de donación, proporcionamos mayor evidencia a la literatura de marketing social y no lucrativo que busca una mejor comprensión de cómo las organizaciones benéficas pueden dirigir el apoyo financiero de sus diferentes donantes (Bennett, 2003; Lee et al., 2018; Wymer & Gross 2021) e identificar estrategias destinadas a maximizar los esfuerzos de recaudación de fondos (Sargeant & Ewing, 2001; Winterich, Mittal, & Aquino, 2013; Winterich, Zhang & Mittal, 2012).

Finalmente, a través del desarrollo del **Estudio 3**, se han derivado importantes implicaciones para los académicos. En concreto, este estudio ofrece una comprensión más completa y precisa de las consecuencias de la frecuencia de las donaciones (ej. periodicidad) en la cuantía de las mismas. Solo unos pocos estudios han investigado el *temporal reframing* (término relacionado con la gestión del calendario de pagos, el cual define las fechas en las que se realizan los pagos de cada cliente y la periodicidad utilizada) de las donaciones y han proporcionado evidencia de efectos tanto positivos como negativos de las frecuencias más altas (desagregando las donaciones en pequeñas cantidades) en las cantidades contribuidas (Atlas & Bartels, 2018; Gourville, 1998; Sudhir, Roy & Cherian 2016). En esta investigación, subrayamos la naturaleza heterogénea de estos efectos y demostramos que el impacto de la frecuencia de la donación en la cantidad donada depende de las motivaciones de los individuos para donar (es decir, motivos altruistas u orientados a los demás, versus egoístas u orientados a uno mismo, Andreoni 1989; Batson & Shaw, 1991). Nuestros resultados muestran que las frecuencias más altas conducen a donaciones más elevadas, aunque este efecto es más fuerte en aquellos donantes con motivaciones orientadas a uno mismo, y más débil para aquellos donantes con motivaciones orientadas a los demás. De esta manera, aportamos nuevas ideas sobre las razones por las que las distintas frecuencias (o periodicidades) influyen de manera diferente en las cantidades donadas, basándonos en un análisis de la evaluación de la relación coste-beneficio y del valor percibido por los individuos al donar. En este estudio, por lo tanto, demostramos que no todos los donantes son igual de sensibles a los beneficios y los costes derivados de sus donaciones, lo que da lugar a diferentes valores percibidos que, en última instancia, pueden explicar los efectos heterogéneos sobre las cantidades donadas.

Dado el papel central que desempeñan las frecuencias de las donaciones en la explicación de las cuantías de estas, el Estudio 3 también indaga en los factores que determinan la elección de frecuencia. Los resultados de nuestro estudio ofrecen una visión novedosa de la forma en que los diferentes donantes eligen la frecuencia de sus donaciones, demostrando que tienden naturalmente a elegir aquellas frecuencias de donación que maximizan el valor percibido. En concreto, en comparación con los donantes orientados a los demás, los donantes orientados a sí mismos son más propensos a elegir frecuencias más altas (ej. periodicidad mensual), en consonancia con nuestra teoría basada en el valor percibido. En este estudio, también es importante destacar que las actividades de marketing que presentan opciones de donación en el momento del registro de los socios pueden alterar las tendencias de los individuos a elegir las frecuencias adecuadas. Mientras que mostrar opciones de donación en el momento de registro refuerzan la tendencia natural de los donantes orientados a sí mismos a elegir frecuencias de donación más altas, para los donantes orientados a otros, la presencia de opciones de donación les aleja de las opciones que maximizan su valor percibido. Al presentar este hallazgo, el presente estudio amplía los trabajos anteriores sobre las consecuencias de las solicitudes de inscripción de socios o de recaudación de fondos para la toma de decisiones (De Bruyn & Prokopec, 2013; Verhaert & Van den Poel, 2012).

Implicaciones prácticas

El **Estudio 1** también cuenta con importantes contribuciones con implicaciones para la gestión. Específicamente, los hallazgos destacan la necesidad de que las organizaciones benéficas reconozcan que existe una parte importante de donantes cuyo objetivo principal es ayudar a través de sus donaciones, pero que no desean comprometerse con las organizaciones de forma colaborativa (Bennett & Barkensjo, 2005; Parish & Holloway, 2010). Por otro lado, hay donantes que, además de sus donaciones, quieren sentirse cerca de la organización y comprometerse con ella más intensamente, a través de múltiples interacciones e intercambios de información (Bennett & Barkensjo, 2005). Por lo tanto, para los responsables de la captación de fondos es imprescindible diseñar estrategias eficaces dirigiéndose a los donantes según sus preferencias relacionales. Para los donantes con actitudes positivas hacia el marketing relacional, los managers de la organización deben comunicar servicios especiales destinados a aumentar la satisfacción y generar mayores niveles de compromiso (por ejemplo, invitaciones a participar en charlas y en subastas benéficas) y diseñar canales de medios de comunicación sociales que permitan relaciones interactivas y comunicación interpersonal – con la organización y otros donantes – (Boenigk & Helmig, 2013). Además, la organización también puede ofrecer diferentes tipos de comunicaciones (por ejemplo, noticias, boletines periódicos, ofertas de cursos o actividades de voluntariado) y la frecuencia con la que envían estas comunicaciones.

El Estudio 1 muestra que los donantes que dan cantidades mayores y que han consentido simultáneamente recibir comunicaciones de marketing directo (ej. han proporcionado dirección de contacto para recibir información y comunicaciones) tienen más probabilidades de convertirse en socios de la organización. Los gestores deberían tener en cuenta estos comportamientos simultáneos de sus donantes y, en consecuencia, desarrollar estrategias que se adapten a estos comportamientos. Aprovechando que estos donantes pueden ofrecer un gran apoyo financiero, los responsables de la captación de fondos podrían utilizar el marketing directo para comunicar las oportunidades de participar en programas de fidelización (Henderson, Beck, & Palmatier, 2011), para que sigan haciendo grandes donaciones en el largo plazo. Esta estrategia, a su vez, puede implementar varios niveles de donación con beneficios crecientes para el socio, un enfoque alineado con la idea de construir relaciones sólidas y de confianza con ellos, y a su vez permite recopilar datos para identificar a los contribuyentes más valiosos (Boenigk & Scherhag, 2014).

Los resultados de este estudio también indican que, una vez se registran como socios, aquellos que comparten información personal a cambio de recibir comunicaciones de marketing son más rentables para la organización (donan mayores sumas de dinero). Mantener la fidelidad de estos grandes donantes se convierte en uno de los retos más importantes para las organizaciones (Drollinger, 2018; Waters, 2008), que deben ser capaces de conseguir altos niveles de satisfacción y confianza entre estos donantes (Ashley et al., 2011; Ponder, Holloway, & Hansen, 2016). Cuando un donante se compromete con la organización, la confianza es uno de los factores más importantes de la relación (Waters, 2009). Para mantener o aumentar este nivel de confianza, los directivos deben recurrir a herramientas de marketing relacional para proporcionar información relevante que refleje la responsabilidad de la organización (Waters, 2009, 2011). Los socios pueden exigir mayor transparencia e información actualizada sobre el trabajo y los resultados de la organización para verificar la eficacia de sus actividades. Asimismo, otro factor importante es la preocupación de los socios por lo que hace la organización con sus donaciones (Waters, 2009). Las estrategias dirigidas a promover la colaboración conjunta entre donante y organización (por ejemplo, reuniones con los directivos con fines de co-creación de valor), además de informar sobre el cumplimiento de sus objetivos y las intervenciones realizadas (Carroll & Kachersky, 2019), contribuyen a la formación de una relación más estrecha y permiten un mejor conocimiento de la organización.

Desde una perspectiva práctica, los resultados del **Estudio 2** ofrecen relevantes implicaciones para los gestores. Un aspecto clave de nuestra investigación es la identificación de la ideología política de los individuos mediante el uso de datos públicos, como una herramienta interesante que puede permitir a los gestores conocer mejor el apoyo financiero de sus donantes. En este sentido, los responsables de la captación de fondos deberían recurrir a fuentes públicas que proporcionen registros de resultados electorales para recopilar información útil a nivel individual y dirigirse eficazmente a su público, a través comunicaciones personalizadas (Lee et al. 2018). Además, también pueden acceder a variables de comportamiento fácilmente observables en sus bases de datos, como la periodicidad utilizada, la cantidad donada o incluso el tipo de iniciativas a las que más ayudan. Las organizaciones benéficas suelen emplear estrategias de captación de fondos de forma universal para todos sus donantes. Nuestros resultados apoyan firmemente que las personas que viven en una zona residencial donde el partido más votado tiene una ideología conservadora, aportan mayores cantidades de donaciones. Es importante destacar que este estudio también ofrece nuevas perspectivas sobre otra importante decisión de donación, la frecuencia con la que los individuos contribuyen, y sugiere que aquellos que viven en zonas donde predomina una orientación liberal tienden a donar con mayor frecuencia.

Los gestores de la recaudación de fondos pueden utilizar nuestros resultados para evaluar mejor sus comunicaciones de marketing cuando se dirigen a sus públicos, enmarcando los mensajes en función de las atribuciones que puedan hacer sobre las causas de los problemas sociales y la forma en que dan a las organizaciones benéficas (Farmer, Kidwell & Hardesty, 2020). Por ejemplo, para los simpatizantes de orientación conservadora, los mensajes deben contener información congruente con sus valores (Septianto, Seo & Paramita, 2022), destacando el importante papel que el comportamiento del individuo desempeña para el cumplimiento de los objetivos de la organización (Das, Kerkhof & Kuiper, 2008) y su subsistencia, y para la protección del sistema social (Matthews, Levin & Sidanius, 2009). Por otro lado, para las personas de orientación más liberal, los directivos deben comunicar mensajes que apelen a la influencia positiva que tienen las donaciones para atender múltiples causas sociales (Chang & Lee, 2010) y que enfaticen la importancia de donar de forma recurrente para reducir la desigualdad y lograr un cambio social que beneficie a toda la sociedad.

Por otro lado, los resultados del Estudio 2 también sugieren importantes implicaciones para los gestores al revelar fuertes preferencias por los programas de membresía (afiliándose como socios), entre las personas que residen en zonas donde predomina una orientación conservadora. Nuestros hallazgos sugieren que, si los responsables de la captación de fondos quieren aumentar su cartera de socios, deberían prestar especial atención a aquellas poblaciones en las que predomina una orientación conservadora. Asimismo, recomendamos que para aquellos con una orientación más liberal – y quizás más propensos a elegir las donaciones esporádicas como forma principal de donación – los gestores diseñen acciones dirigidas a comunicar la disponibilidad de múltiples iniciativas y les ofrezcan la oportunidad de elegir el destino de sus fondos.

Finalmente, al desarrollar el **Estudio 3**, también se han derivado interesantes implicaciones prácticas. En este sentido, este estudio sugiere una oportunidad para que las organizaciones aprovechen la frecuencia de donación y mejoren el valor percibido por los donantes y el posterior compromiso de los socios. Una conclusión importante de nuestra investigación es que frecuencias altas de donación (por ejemplo, periodicidad mensual) no siempre conducen a mejores resultados, como han sugerido estudios anteriores en la literatura sobre el *temporal reframing*. Los hallazgos de este estudio sugieren distinguir a los donantes en función de sus motivaciones para donar, ya sea para proporcionar un beneficio social o un beneficio privado, y que promuevan diferentes frecuencias de donación para estos donantes: frecuencias más altas para los donantes orientados a sí mismos, y frecuencias más bajas para los donantes orientados a otros.

Este estudio también puede ayudar a las organizaciones a identificar las motivaciones de los donantes para donar, basándose en las variables de comportamiento observadas que están disponibles en la base de datos de donantes. En concreto, identificamos una serie de variables que están directamente relacionadas con las motivaciones altruistas para donar, como aceptar recibir información de la organización benéfica o ser voluntario. Del mismo modo, también identificamos una serie de comportamientos que están relacionados con los motivos egoístas para donar. Estos, en nuestro contexto de donación, están vinculados a los beneficios fiscales y, por tanto, comportamientos como los ajustes de la cantidad donada mediante donaciones adicionales realizadas en momentos concretos (cuando los individuos están preparando sus declaraciones de la renta) pueden servir como buenos indicadores de las motivaciones más extrínsecas (o egoístas) que impulsan a algunos individuos a donar. El uso de estas variables puede ayudar a las organizaciones a calibrar mejor las motivaciones subyacentes de los donantes habituales a la hora de contribuir a la organización y, por tanto, a desarrollar actividades de marketing de forma más específica.

Una conclusión importante de este estudio es que los individuos tienden a elegir aquellas frecuencias de donación que maximizan su valor percibido. En particular, nuestro estudio demuestra que presentar opciones de donación en la solicitud (ej. alternativas mostrando diferentes periodicidades o cuotas monetarias) durante el registro de los socios pueden alterar estos efectos: para aquellos orientados a sí mismos, la presencia de opciones de donación refuerza su tendencia a elegir frecuencias más altas, pero para los donantes orientados a otros, la presencia de opciones los desvía de su propensión a elegir frecuencias más bajas. Si bien esto puede erosionar el valor percibido por estos donantes y tener un impacto perjudicial en futuras contribuciones, las organizaciones pueden obtener beneficios a corto plazo si, por ejemplo, necesitan atender problemas sociales urgentes. La conclusión es que esta actividad de marketing, si se aplica adecuadamente, puede contribuir conjuntamente tanto al bienestar de los donantes, al aumentar el valor percibido, como al de los receptores de la ayuda.

Implicaciones sociales

A través del desarrollo de los tres estudios, la presente tesis doctoral obtiene importantes implicaciones sociales. En primer lugar, contribuimos al campo académico y, lo que es más importante, al ámbito empresarial y de gestión, al aportar conocimientos sobre el papel del marketing en la creación de un mundo mejor y la mejora de los resultados sociales, así como su impacto en actores sociales y partes interesadas poco investigados, como las organizaciones benéficas (Cross et al., 2022; Moorman, 2018; Ostrom et al., 2021). De este modo, hemos tratado de abordar las **prioridades de investigación relevantes** al proporcionar respuestas más precisas sobre *cómo las actividades de marketing pueden influir en la subsistencia, el funcionamiento y la sostenibilidad de los importantes sistemas humanos que son fundamentales para el bienestar de los consumidores y de la comunidad, y cómo los consumidores y otras partes interesadas determinan y persiguen mejores resultados, por* *ejemplo, mejorando la autoeficacia u otras estrategias*. En este sentido, ofrecemos conocimiento sobre la forma en que las organizaciones benéficas pueden lograr la eficacia de sus programas de captación de fondos, a través de una adecuada gestión de la cartera de donantes que fomente y maximice las donaciones benéficas y, en consecuencia, el éxito de sus intervenciones sociales dirigidas a contribuir al desarrollo social y a mejorar las condiciones de vida de las comunidades más vulnerables.

Asimismo, a través de esta tesis doctoral también pretendemos responder a las preguntas relacionadas con *cómo y en qué condiciones el marketing puede hacer el bien en los ámbitos del consumo y el bienestar social y cómo se pueden fomentar las donaciones benéficas y otros comportamientos positivos de los consumidores*. En este sentido, identificamos una serie de factores conductuales importantes que nos permiten explicar las diferencias significativas entre las motivaciones, las orientaciones relacionales e ideológicas de los donantes y las consecuencias en su comportamiento de donación a lo largo del tiempo. Por lo tanto, hemos podido determinar estrategias de marketing específicas para diferentes tipologías de donantes que pueden fomentar comportamientos prosociales y, lo que es más importante, más donaciones benéficas.

En segundo lugar, a través de los tres estudios desarrollados, esta tesis doctoral contribuye al **plan estratégico de las Naciones Unidas, Agenda 2030 y sus 17 ODS** dirigidos a acabar con la pobreza, proteger el planeta y asegurar la prosperidad en los próximos años. En este sentido, ofrecemos apoyo a la actividad de las organizaciones benéficas, como entidades fundamentales en la reducción de la desigualdad social y la mejora de las condiciones de vida de las comunidades más vulnerables, proporcionando herramientas y un plan de acción que les permita afrontar adecuadamente diversos problemas sociales persistentes. Con nuestros tres estudios ayudamos a los responsables de la captación de fondos a desarrollar estrategias adecuadas que les permitan llevar a cabo iniciativas con el mayor impacto social. De este modo, ofrecemos una serie de acciones para promover el comportamiento caritativo de los donantes, tanto ocasionales como regulares, que los gestores pueden utilizar para abordar tanto los problemas a largo plazo, como la pobreza, el hambre o la desigualdad, como situaciones de emergencia que requieren una intervención rápida e intensiva (por ejemplo, COVID-19 o la guerra ruso-ucraniana actual).

Principales limitaciones

Entorno de la investigación. Los tres estudios desarrollados en esta tesis doctoral analizan empíricamente el comportamiento de las donaciones apoyándose en la base de datos de la cartera de donantes de una única organización benéfica. Esto, por tanto, limita la generalización de los resultados en varios sentidos. En primer lugar, aunque las organizaciones benéficas son organizaciones que, en general, desarrollan proyectos similares orientados al desarrollo social, las causas específicas sobre las que intervienen más intensamente, o los programas de captación de fondos, los canales y las estrategias de comunicación utilizados para obtener apoyo financiero pueden diferir entre organizaciones. Asimismo, sus donantes también pueden presentar características diferentes (ej. demográficas y socioeconómicas), afectando, por tanto, a su comportamiento de donación. Segundo. Como se ha señalado, el estudio del comportamiento de donación en otros contextos no lucrativos (ej., la desigualdad de género, el maltrato a los animales o las cuestiones medioambientales), así como en otros entornos de servicios (ej., los museos o las organizaciones deportivas) también es importante, ya que los públicos que donan a estas organizaciones pueden diferir significativamente en cuanto a las motivaciones para donar y las creencias, influyendo así en el tipo de programa de captación de fondos elegido, o en sus expectativas relacionales con respecto al compromiso de realizar donaciones regulares a lo largo del tiempo. Por último, el hecho de centrarse en una sola organización también lleva a la necesidad de tomar con cautela las conclusiones de los estudios desarrollados en la presente tesis, ya que se necesita más evidencia (ej., que participen más organizaciones en el estudio) para garantizar la aplicabilidad de nuestras implicaciones prácticas.

Datos perceptuales. Como se ha señalado, la información sobre el comportamiento real tiene un gran valor práctico para los gestores, ya que les permite clasificar fácilmente su cartera de donantes y, por tanto, diseñar estrategias adecuadas para cada segmento. En el Estudio 1 (Capítulo II) aportamos el consentimiento a las comunicaciones de marketing directo como factor clave para facilitar la identificación de los individuos más receptivos al marketing relacional y que, por tanto, los gestores pueden clasificar como potenciales donantes a largo plazo. Asimismo, en el Estudio 3 (Capítulo IV), nos basamos en comportamientos, como la aceptación de recibir información de la organización, el voluntariado o las donaciones extraordinarias (tanto las aportadas a lo largo del año, como las realizadas con el propósito de realizar ajustes en la cantidad donada en momentos puntuales, como en la declaración de la renta), para derivar variables que puedan actuar como indicadores de los motivos subyacentes de los donantes para donar. Sin embargo, también animamos a utilizar información perceptual que capte y explique con precisión cómo los individuos tienden a relacionarse o comprometerse con la organización (las preferencias por los intercambios relacionales o transaccionales), y qué motivos subyacentes (altruistas y egoístas), así como las actitudes hacia el apoyo a múltiples iniciativas y el papel de la organización en la provisión de orden social o la reducción de la desigualdad, les llevan a comprometerse a largo plazo con la organización, y a proporcionar más cantidades donadas o a elegir diferentes calendarios de pago (o frecuencias de donación). Además, en el Estudio 2 (Capítulo III) utilizamos los datos agregados de los resultados electorales para deducir la ideología política de cada donante individual de la cartera. Sin embargo, sugerimos para futuras investigaciones medir este aspecto a través de las percepciones y actitudes, así como el posicionamiento de cada individuo con respecto a su orientación izquierda-derecha.

Aunque se trata de técnicas costosas, y normalmente aplicadas a un subconjunto de individuos de la cartera de donantes, las encuestas pueden mejorar sustancialmente la comprensión del comportamiento de las donaciones y permitir una segmentación adecuada, aumentando así la eficacia de las estrategias de marketing relacional y optimizando el comportamiento de toda la cartera. Por lo tanto, la investigación futura puede explorar las actitudes hacia la participación en diferentes comportamientos relacionales y de colaboración (ej., la participación en múltiples actividades, el uso de diferentes canales de comunicación). Las comunicaciones de marketing pueden percibirse a menudo como intrusivas y pueden alejar a los clientes o incluso afectar negativamente al rendimiento al reducir sus transacciones o el dinero gastado (Jones et al., 2015). Por lo tanto, las investigaciones futuras también deberían abordar estos aspectos analizando las actitudes hacia la recepción de comunicaciones de marketing o el intercambio de información personal, o incluso probando las diferencias individuales en el uso y la adopción de las nuevas tecnologías, para poder determinar mejor los posibles obstáculos o facilitadores de la eficacia del marketing relacional en el contexto de las donaciones benéficas.

Información identificable y accesible. Un aspecto clave de esta tesis doctoral es que ayudamos a los managers facilitando la identificación y segmentación de sus diferentes públicos mediante la recogida de comportamientos fácilmente identificables y accesibles desde su base de datos (Estudio 1 y Estudio 3). Asimismo, en el Estudio 2, también aportamos un aspecto interesante para la identificación de la ideología política de los individuos mediante el uso de datos públicos, con los que los gestores pueden identificar mejor y, por tanto, dirigir sus donaciones. Mediante el uso de fuentes públicas, los responsables de la captación de fondos también pueden recopilar otro tipo de información útil a nivel individual (ej., cotejando la información pública con la dirección de los individuos), y así ofrecer comunicaciones personalizadas exitosas (Lee et al. 2018). Además, animamos a seguir investigando sobre variables adicionales que pueden identificarse fácilmente cuando los individuos proporcionan su información de contacto, lo que suele ocurrir en la etapa inicial de la relación, cuando los individuos deciden registrarse como miembros o cuando donan por primera vez. Entonces, los gestores pueden obtener más información sobre el tipo de comunicaciones que los donantes desean recibir (ej., informativas, transaccionales o de colaboración) o la frecuencia con la que desean recibirlas (Zhang, Kumar & Cosguner, 2017).

Por último, los gestores también pueden recurrir a técnicas de medición de variables que les permitan desarrollar medidas útiles y válidas para gestionar su cartera de donantes a través de análisis textuales informatizados (Pandey & Pandey, 2019). La aparición de esta técnica (ej., el Procesamiento del Lenguaje Natural), junto con la creciente disponibilidad de big data en las organizaciones (ej., datos basados en texto o imágenes), los gestores pueden inferir mejor las razones subyacentes por las que los donantes realizan contribuciones a la organización, y sus preferencias por las comunicaciones de marketing relacional, y por lo tanto optimizar sus esfuerzos en las estrategias de segmentación.

Contextos transculturales. Como las organizaciones benéficas existen y están presentes en casi todo el mundo, cada vez es más importante comprender los efectos de los factores culturales en el comportamiento de las donaciones (Lee, Seo & Yoon, 2020; Yang & Liu, 2021). Dado que los países difieren enormemente en términos de desarrollo socioeconómico, normas culturales y sistemas políticos (Groskopf, 2016; Jost, 2017), las diferencias de los individuos entre los países, en lo que respecta a los valores morales, las creencias y los comportamientos son significativas (Jost, Federico, & Napier 2013; Paharia & Swaminathan, 2019). Los tres estudios desarrollados en esta tesis doctoral se basan en información sociodemográfica, conductual y política perteneciente a una muestra de donantes de una organización benéfica de un único país europeo. Aunque esta organización benéfica funciona de forma similar a otras dentro del contexto benéfico, es evidente que sus donantes no representan a todos los donantes de todas las organizaciones benéficas del mundo, lo que limita la generalización de nuestros resultados. Las opiniones divergentes que las personas de distintos países otorgan a cuestiones como las causas que subyacen a la pobreza o la desigualdad entre grupos de la sociedad, o la responsabilidad de ayudar a otros más desfavorecidos (Winterich & Zhang, 2014), dan fe de la fuerte influencia del contexto cultural en el comportamiento de donación de los individuos. Por lo tanto, se justifica la realización de trabajos destinados a proporcionar una comprensión más profunda de las motivaciones para donar, o la influencia de las orientaciones políticas en las diferentes decisiones de donación (ej., la frecuencia de la donación, o la cantidad aportada) a través de los países.

Las organizaciones benéficas, especialmente las que operan a nivel internacional, necesitan comprender cómo difieren las ideas, los valores y las normas morales entre culturas y cómo estas diferencias culturales pueden afectar a la gestión de la cartera de donantes y a sus decisiones de marketing. Por ejemplo, la investigación transcultural sugiere que las personas de los países colectivistas, en comparación con los países más individualistas, tienden a sentir una mayor responsabilidad para ayudar a los demás (Chopik, O'Brien, & Konrath, 2017), lo que afecta a sus motivaciones, y a su comportamiento de ayuda. La realización de un estudio transcultural tanto en culturas individualistas como colectivistas ofrecerá la oportunidad de poner a prueba nuestros hallazgos y ayudará a los directivos a orientar mejor sus ayudas económicas y a diseñar estrategias de marketing exitosas (Lee, Seo, & Yoon, 2020). En relación con esto, observamos que los marcos culturales también pueden utilizarse para explicar las diferencias en la orientación hacia las relaciones a largo plazo con las organizaciones (Chen, Mandler, & Meyer-Waarden, 2021). Por lo tanto, la investigación futura podría considerar los factores subyacentes que explican las diferencias en las actitudes hacia el intercambio de datos personales con la organización o la receptividad hacia las comunicaciones de marketing directo entre culturas. Esto, a su vez, ayudaría a las organizaciones benéficas a lograr prácticas de marketing eficaces con mensajes alineados con los valores de sus diferentes públicos.

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