

Charitable Triad Theory: How donors, beneficiaries, and fundraisers influence charitable giving

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Abstract

Nonprofits address some of the world's most pressing problems, and many rely on donations to fund their essential work. Nonprofit marketers are, therefore, tasked with promoting charitable giving. Research on giving has largely focused on identifying the characteristics that make people generous but has generated inconsistent findings, suggesting important moderators that are not well understood. Moreover, there is not yet an overarching theory to help integrate the vast and interdisciplinary literature. To address this, we propose Charitable Triad Theory, a new theory of giving with three key tenets: First, giving is triadic because the characteristics of three actors—donors, beneficiaries, and fundraisers—influence charitable decisions. Second, the characteristics of each of the three actors may be necessary but not sufficient to promote giving. Third, giving is relational because interactive relationships between the triad determine charitable choices. A systematic review of 1337 empirical articles published between 1980 and 2020 helps evidence seven key propositions of the theory, which articulate the ways in which donors, beneficiaries, fundraisers, and the dyadic and triadic relationships between them, can affect charitable behavior. We end with a research agenda outlining specific suggestions for future research on (a) the neglected fundraiser and (b) how beneficiaries influence giving.

KEYWORDS

charitable giving, donor behavior, fundraising, nonprofit marketing, theory

1 | INTRODUCTION

In 2020, Americans donated \$471 billion to charitable organizations (Giving USA, 2021). These charities and nonprofits are tasked with addressing some of the world's most pressing problems. Whether trying to cure cancer, protecting human and animal rights, caring for the sick or elderly, or advocating for the environment, charities are critical to the functioning of human society. Most nonprofits rely on voluntary

financial contributions to achieve their social goals, and it is the task of nonprofit marketers to secure these donations. Understanding how to target potential donors and communicate with them most effectively is, therefore, an essential task for nonprofit marketers and fundraisers.

Evolutionary theories for human altruism—including reciprocity, reputation-seeking, and cultural group selection—understand altruism to be dyadic (i.e., involving two actors; Fehr & Fischbacher, 2003). There is a help giver (e.g., donor) and a help receiver (e.g. beneficiary),

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and these approaches have identified different motives for helping different kinds of beneficiaries (i.e., kin vs. non-kin others; Ashton et al., 1998). In the modern world, however, donors can help many different beneficiaries, including those far outside their immediate communities. To facilitate helping, potential donors receive information about a vast array of potential beneficiaries. Such information is distributed by intermediaries (i.e., fundraisers), which are often large organizations whose entire existence is predicated on successfully mediating help between donors and beneficiaries. The existence of professional fundraising is a relatively modern phenomenon, which has not yet been factored into theories of prosocial behavior. This current article directly addresses this theoretical deficit by generating a new theoretical framework designed to understand one specific form of prosocial behavior: charitable giving, or the voluntary contribution of money to nonkin others (Bekkers & Wiepking, 2011).

Research about who gives to charity, under what conditions, and why they choose to do so, has been ongoing for decades. Parallel literatures exist in diverse disciplines, including marketing, psychology, economics, and nonprofit studies. Yet to date, no integrative model of donor psychology exists that combines these siloed research streams into an overarching theory to guide fundraising research and practice. The conceptual models that do exist are generally bounded to particular contexts or perspectives, such as major giving (Knowles & Gomes, 2009; McLoughlin, 2017), conspicuous giving (Ellingsen & Johannesson, 2011; Grace & Griffin, 2006), or impact philanthropy (Duncan, 2004).

Two important exceptions and integrative reviews warrant mention: Bekkers and Wiepking's (2011) review highlighting eight key mechanisms that drive charitable giving and Sargeant's (1999) model of donor behavior. Both articles review and integrate literature from diverse fields of research, and each has made a valuable contribution to scholarship on charitable giving. Yet neither of those articles considered together all three of the key actors involved in giving contexts: donor, beneficiary, and fundraiser. By neglecting to consider all the actors that influence donor decisions, research has thus only uncovered a partial view of the psychology of giving. Further, a great wealth of new evidence exists that can inform our understanding of donor decision making.

The purpose of this article is to put forward a new, integrative theoretical framework to explain charitable giving: the Charitable Triad. In brief, we argue that charitable giving is triadic and relational. Rather than a dyadic exchange between only a donor and beneficiary, giving is actually *triadic* because the characteristics of three actors—donors, beneficiaries, and fundraisers—influence charitable decisions. Giving is also *relational* because charitable choices are influenced by interactions between the characteristics of the three actors. The triadic nature of giving has face-validity and it would, therefore, be easy to discount the theoretical novelty and value of Charitable Triad Theory. However, this is the first integrated theory of giving that explicitly considers all three actors (i.e., donor, beneficiary, and fundraiser). We will demonstrate how charitable giving research has (a) typically focused on only one actor out of the triad (i.e., the donor) and (b) focused primarily on direct effects, rather than considering how the nature of influence is likely interactive (i.e., the effect of characteristics of one actor depends critically on the

characteristics of the other two actors). Charitable Triad Theory makes this point explicit for the first time.

The current article contributes to the literature on charitable giving, fundraising, and nonprofit marketing in three key ways. First, we put forward a new theory for understanding charitable giving, which integrates evidence from diverse research disciplines into a coherent theoretical framework that can guide researchers and practitioners alike. We also evidence seven propositions generated by this theory. Second, we summarize the results of a systematic review of the last 40 years of research on charitable giving and fundraising. A systematic review is most valuable when a critical mass in the amount of research available for synthesis has been reached and when literatures have traditionally been fragmented or siloed (Davies, 2000; Tranfield et al., 2003). In our case, we identify 1337 empirical articles published across diverse disciplines, including psychology, marketing, economics, sociology, management, and nonprofit studies. We use our review to map the evidence (and gaps) regarding the propositions generated by Charitable Triad Theory. This exercise allows us to provide a bird's-eye view of a research area that spans multiple decades and disciplines, consolidating existing evidence, and identifying future research opportunities. Third, we present a research agenda based on this triadic theory, which can orient the field toward the future. We also articulate boundary conditions of the theory and potential applications within nonprofit marketing practice and for allied literatures on crowdfunding, cause-related marketing, and other forms of prosocial behavior.

The structure of the article is as follows. First, we provide an overview of the key tenets of Charitable Triad Theory, including conceptual definitions. Next, we outline the method employed to identify the literature that is used to evidence the novelty and value of the triadic theory. Then, we elaborate evidence—drawn from the systematic review—for each of the seven propositions of the theory. This review demonstrates two key points that highlight the value of the triadic approach to understanding giving. First, Charitable Triad Theory can effectively map and integrate a broad range of findings from diverse disciplines. Second, though the three actors have been previously identified as important, there have been vast asymmetries in the attention paid to donors, beneficiaries, and fundraisers. Three-quarters of relevant studies focused on identifying characteristics of donors that make them generous, while far fewer have looked at beneficiaries, fundraisers, and dyadic or triadic relationships. After spotlighting these gaps and summarizing evidence for the seven theoretical propositions, we outline a research agenda oriented around the components of the model that currently have the least empirical support. Finally, we discuss applications and boundary conditions of Charitable Triad Theory.

2 | KEY TENETS OF CHARITABLE TRIAD THEORY

The key insight of Charitable Triad Theory is that charitable giving is a *triadic* phenomenon. In other words, three actors are involved: the donor, the beneficiary, and the fundraiser. Collectively, we refer to these three actors as the Charitable Triad.

Donors are entities that voluntarily contribute money to beneficiaries or to organizations that serve beneficiaries. Donors can include individuals, foundations, governments, and corporations. For the purposes of this article, however, we use donor to refer to an individual who voluntarily contributes their own money to benefit someone or something outside of their immediate family. Our focus is on consumer behavior in the charitable domain and our analysis, therefore, examines the psychology and behavior of the individual donor. Donations from individuals also represent a very large share of all nonprofit funding in many nations (e.g., in the USA, UK, and Australia; ACNC, 2020; Giving USA, 2021; NCVO, 2020).

Beneficiaries are entities that benefit in some way from a donor's contribution. Beneficiaries may be individual or, more commonly, groups of entities (e.g., cancer patients, a specific community in northern Vietnam, abandoned dogs, or the ecosystem on the Great Barrier Reef). Our focus here is on the intended end-users of the funds: those who receive the benefits funded by the donation. In other words, charities themselves are not beneficiaries but rather intermediaries between donors and intended beneficiaries.

Fundraisers are entities that exist to raise money from donors for beneficiaries. They may be individuals, but are more commonly organizations. Charities and nonprofits generally exist either substantially or exclusively to raise money for and deliver benefits to some beneficiary group. As such, when we talk about fundraisers we mean both the nonprofit organization itself—who uses their brand to fundraise with marketing campaigns via channels like TV, direct mail, and digital—and also the individuals who work or volunteer for the organization and fundraise through channels such as face-to-face, door-to-door, and telemarketing. Thus, the term fundraiser is intended to encompass both individuals and organizations. Where necessary, we will delineate this distinction.

The key tenets of Charitable Triad Theory are as follows. First, giving is *triadic* because the characteristics of three actors—donors, beneficiaries, and fundraisers—influence charitable decisions. Second, the characteristics of each of the three actors may be necessary *but not sufficient* to promote charitable giving. Third, giving is *relational* because interactive relationships between the triad determine charitable choices. In other words, donors may give (or fail to give) because of: (1) their own characteristics; (2) characteristics of the beneficiary in question and/or of the person or organization asking for donations; or (3) the interactive (dyadic and triadic) relationships among these three actors. *Dyadic* here means involving two of the Charitable Triad actors (i.e., donor, beneficiary, fundraiser), while *triadic* means involving all three actors. These key tenets are elaborated further in seven testable propositions (summarized in Figure 1 and Table 1), which will be discussed below.

The key implication is that charitable giving cannot be effectively understood with reference to any of the three Charitable Triad actors in isolation; instead, we need to examine the unique constellations among the three interconnected actors. Charitable Triad Theory is, therefore, strongly aligned with the perspectives of organizational configurations and complex causality, which argue that antecedent conditions are neither necessary nor sufficient but instead that

outcomes depend on multiple, interconnected causes and diverse possible causal pathways (Furnari et al., 2021; Meyer et al., 1993; Woodside et al., 2018). Similarly, we propose that supportive characteristics of donors may be insufficient to promote giving, that charitable outcomes depend on a unique constellation of characteristics and relationships between the three actors, and that there are multiple pathways through which donations can be promoted.

2.1 | Triadic relationships: An illustrative example

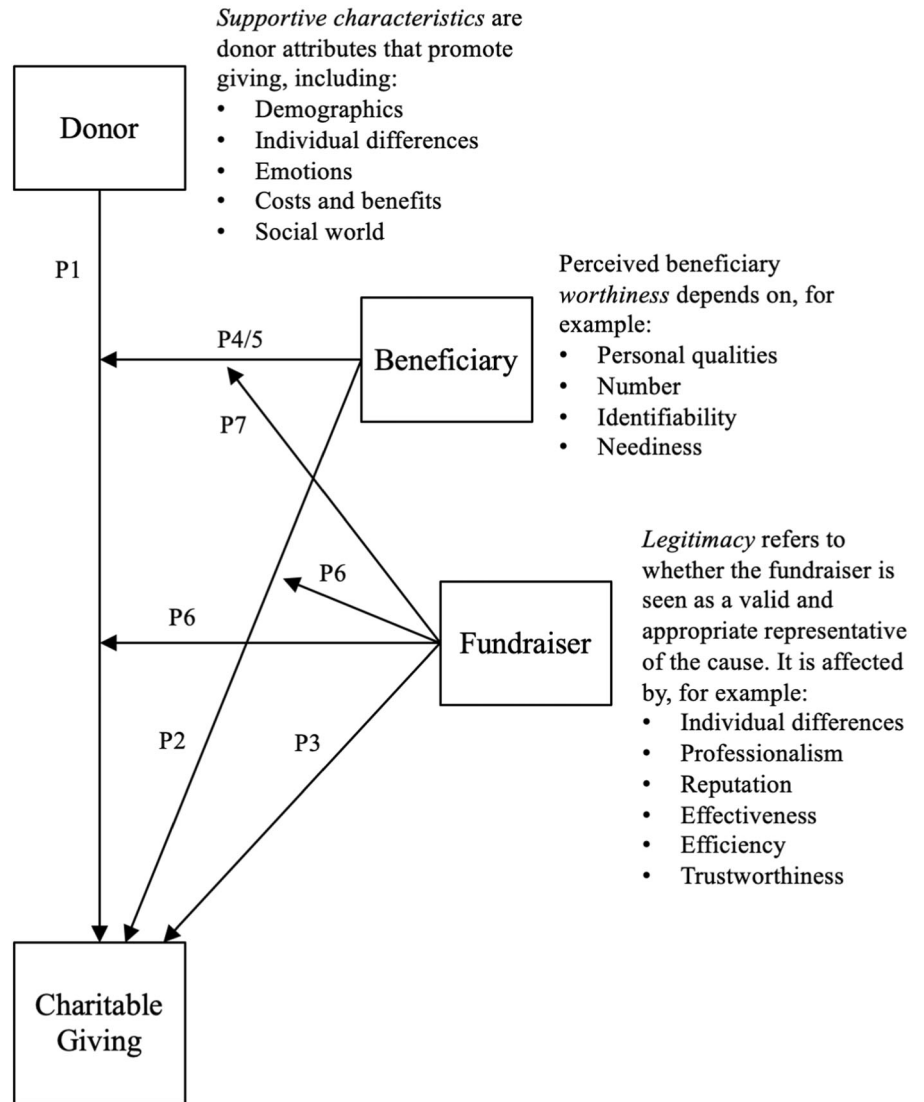
To illustrate how the triadic approach can advance our theoretical understanding of charitable giving, we offer an illustrative example. Let us consider the triadic interaction between the reputational concerns of the donor, the group identity of the beneficiary, and the efficacy of the fundraising organization. In general, opportunities to enhance the donor's reputation, beneficiary groups that are valued by society, and fundraiser effectiveness should all independently promote giving (Bekkers & Wiepking, 2011; Chapman et al., 2020). However, dyadic relationships may change the nature of these effects. When a donor is concerned about the reputational consequences of their gift, they may be especially *unlikely* to give to beneficiaries which are not valued by society (e.g., stigmatized groups). However, the reverse is true when the beneficiary group is positively valued: donors who care about their reputations will be more likely to give (or will give more) to valued groups. A triadic interactive relationship is also possible. The contradictory effects of reputation-seeking may be further exacerbated by fundraiser efficacy: a donor concerned about reputation will be even more motivated to give to benefit valued groups if the nonprofit is known to be effective. However, efficacy may not influence reputationally-motivated donors to give to stigmatized groups if they have already determined that giving to such groups would harm their reputation. This single example illustrates how Charitable Triad Theory can nuance our understanding of the psychology of giving. Many other types of triadic relationships are also possible, as elaborated below.

3 | METHOD

This is a theoretical article: we present a new theoretical framework for understanding charitable giving, called Charitable Triad Theory. In deciding how to structure this article, we took inspiration from Paul and Mas (2020). We also conducted a systematic review of the interdisciplinary literature to test the evidence base for the novelty and value of the Charitable Triad approach, and specific propositions of the triadic theory. The systematic review allows us to: (1) provide a comprehensive overview of the scholarship on charitable giving, (2) illustrate the ways that both characteristics of actors and the relationships between them can influence charitable giving, and (3) identify important gaps and future directions.

A very large number of articles were identified by our review ($N = 1337$), making it impractical to cite and discuss each paper. In the

FIGURE 1 A conceptual diagram of the propositions generated by Charitable Triad Theory, with key conceptual definitions. Definitions of example constructs are provided in the main text of this article



sections that follow, therefore, we discuss categories of articles, using selected articles to assess evidence for the seven propositions of Charitable Triad Theory. Summary data is based on reading titles and abstracts, while information presented in support for the propositions is based on reading full articles. Further details of the corpus of literature and topics covered are also published online in supplementary materials made available on the Open Science Framework (OSF <https://osf.io/g2ta5/>).

3.1 | Searches

Given the sheer volume of research on charitable giving, we conducted searches using the two largest multidisciplinary academic databases—*Scopus* and *Web of Science*—to generate a large corpus of research on charitable giving. Search results and screening are summarized in Figure 2 and further details of the methodology can be found on the OSF. Briefly, searches using the terms “charitable giving”, donat*, fundrais*, or philanthrop* were run on title, abstract,

and keywords. Searches were performed on 16 January 2020 and identified 9855 unique articles that were published between 1980 and 2020 (4538 from *Scopus* and 7216 from *Web of Science*, with 1899 duplicate records across both databases). Articles were screened based on title then abstract to exclude conference abstracts and “grey literature” (i.e., published without peer-review), any articles not reported in English or published before 1980, articles that did not include data (e.g., reviews, theories, historical accounts, economic models), and articles relating to organizational donors (e.g., foundations, corporations), nonfinancial donations (e.g., time, blood, organs, in-kind), or exchange-based giving (e.g., cause-based marketing, charity auctions). All types of data were retained, including correlational, experimental, archival, and qualitative data. Studies could capture charitable giving in diverse ways, including self-reported or objective giving (dichotomous or continuous), willingness to give, giving intentions, donor retention, donor preferences, bequests, major gifts, and fundraising outcomes. After screening, 1337 articles remained for analysis. This article database is also available on the OSF.

TABLE 1 Key tenets and propositions of charitable triad theory, with example hypotheses to stimulate future research

Tenets and propositions	Actor(s)	Example hypotheses	Suggested methods
Tenet 1: Giving is triadic: Characteristics of three actors—donors, beneficiaries, and fundraisers—influence charitable decisions			
Proposition 1: Supportive donor characteristics are necessary but not sufficient to promote charitable giving	Donor (D)	H1: Donors high in Belief in a Just World will donate less H2: Donors high in machiavellianism will be less likely to donate, except where they can earn strategic benefits	Survey Survey; Experiment
Proposition 2: Beneficiaries perceived as worthy of care will elicit greater levels of charitable support than those deemed unworthy	Beneficiary (B)	H3: Female (vs male) beneficiaries will elicit more donations because they are stereotyped as higher in warmth H4: Children (vs adults) will elicit more donations because they are perceived as worthier of care	Qualitative; Experiment; Archival; Conjoint Qualitative; Experiment; Survey; Archival
Proposition 3: Fundraisers that are perceived to be more legitimate will raise more money	Fundraiser (F)	H5: Women, older people, and religious people will raise more money because they are seen as more legitimate agents of prosocial exchange H6: Fundraisers who express sadness when sharing beneficiary stories will raise more money because they are perceived as more legitimate	Qualitative; Experiment; Archival Qualitative; Experiment
Tenet 2: Characteristics of the three actors may be necessary but not sufficient to promote charitable giving			
Tenet 3: Giving is relational: Interactive relationships between the triad determine charitable choices			
Proposition 4: Beneficiaries who are similar to donors are generally more likely to generate donations	D-B Dyad	H7: Donors who identify more with their gender will show a stronger preference for supporting beneficiaries of the same gender H8: Humans who have stronger identification with other animals will donate more to animal protection charities	Survey Survey
Proposition 5: Dissimilar beneficiaries may receive aid if there are strategic interests for the donor or the donor's group	D-B Dyad	H9: Patriots will endorse foreign aid spending if it is positioned as being a way to advance national interests and communicate power H10: Animal beneficiaries will be favored over humans for donors higher in misanthropy	Experiment; Survey Survey; Experiment
Proposition 6: Fundraisers that are aligned with either donors or beneficiaries will be more successful, and those aligned with both will be especially successful	D-F or B-F Dyad	H9: People will donate more to help beneficiaries with cancer when the fundraiser has personal experience with cancer H10: Religious donors will give more through fundraising charities aligned with their own faith group (vs secular organizations or organizations affiliated with other faith groups)	Experiment Experiment
Proposition 7: The unique interaction between the particular donor, beneficiary, and fundraiser will determine both whether or not a donation will be made and the value of donations	D-B-F Triad	H11: People high in empathic concern will be especially likely to favor needy beneficiaries; and, for those who give, fundraiser trustworthiness will influence donation value H12: Fundraiser efficacy will not affect donation decisions for donors who care about their reputations and therefore have chosen not to give to devalued beneficiary groups	Survey Experiment

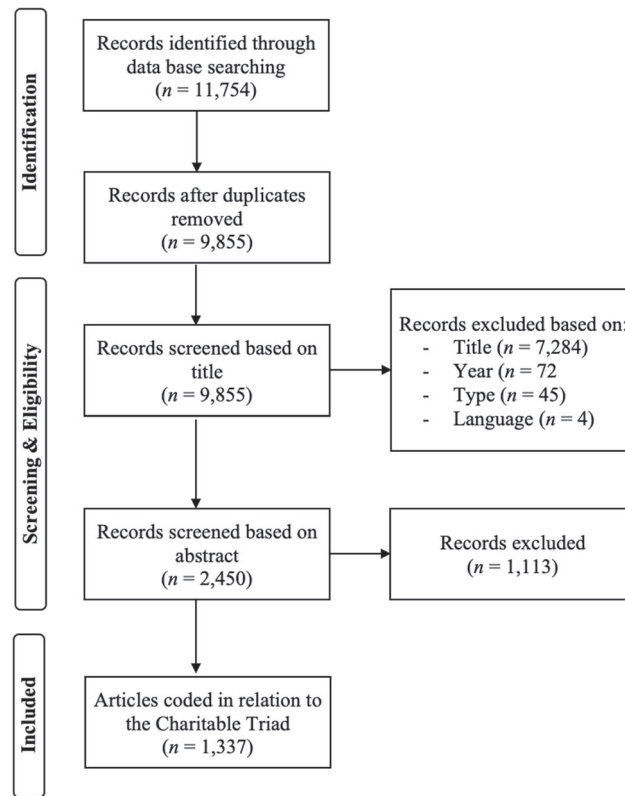


FIGURE 2 Flow diagram of the literature search and exclusion process, adapted from the PRISMA (Moher et al., 2015).

3.2 | Coding and analysis

We coded the final sample into categories representing the Charitable Triad actors and their relationships. Coding was based on the content of abstracts only. Articles that took an approach to understanding giving based on characteristics of the donor were coded as “Donor”. Likewise, articles that examined characteristics of the “Beneficiary” or “Fundraiser” were coded accordingly. Articles that considered two or more of the actors interactively were coded into categories based on the appropriate dyad or triad. Coding categories were not mutually exclusive. Instead, it was possible for the same research to consider characteristics of both the donor (e.g., gender) and of the beneficiary (e.g., need). Studies were only coded as dyadic or triadic when they considered the way that characteristics of two or more actors interacted (e.g., if women give more than men to beneficiaries that have greater need), or when they actively considered whether relationships between two or more actors (e.g., shared identity) influenced giving. Descriptive results of the coding—including the numbers of articles that have taken each approach, where they have been published, and when—are reported below.

4 | CHARITABLE TRIAD THEORY: PROPOSITIONS AND EVIDENCE

In this section, we assess the evidence for the novelty and value of the triadic approach, as well as for the seven formal propositions of Charitable Triad Theory. Selected literature is cited to support the propositions and to identify gaps. Further detail about the full corpus is available on the OSF.

4.1 | Preliminary findings: The need for a triadic theory of giving

The 20 most cited articles in the corpus are summarized in Table 2. These represent the most impactful empirical studies published on charitable giving and fundraising in the last 40 years that were identified by our search protocol. These articles illustrate the interdisciplinary nature of scholarship in this field, coming from Economics, Psychology, and Marketing. The wider corpus ($N = 1337$ articles) also included publications in specialty Nonprofit Studies journals, as well as Management and Sociology journals (see also Figure 3).

First, we note that the Charitable Triad usefully captures and describes the majority of the existing research in the field. Overall, 87% ($n = 1169$) of the articles could be coded into the Charitable Triad categories. Articles that could not be coded in relation to the Charitable Triad studied marketing tactics in isolation from the parties involved (e.g., compliance techniques; Hsee et al., 2013; Liu & Aaker, 2008) or looked at broader contextual influences on giving (e.g., seasonal or temperature effects; Ekström, 2018; Rai et al., 2017). The fact that most evidence can be coded in relation to the Charitable Triad Theory indicates the value of an integrative framework: although a triadic theory of giving has not been formally articulated until now, scholarship over time has, broadly speaking, identified the three actors and their relationships as important.

That said, the data show vast asymmetries in attention paid to the three actors, as illustrated in Figure 4. The literature on charitable giving and fundraising has been growing rapidly, but with an accentuating relative emphasis on donors. Considering only the articles that can be understood using the triadic approach, we found that three-quarters of the articles (75%) considered giving from the perspective of the donor, compared to 15% that considered the fundraiser and just 8% that considered the beneficiary. Of those that studied characteristics of fundraisers, most (87%) studied characteristics of fundraising organizations; only 22 published articles considered the role of individual fundraisers.

Even more stark was the relative deemphasis on relationships between the actors. Only 11% of articles considered interactions between the characteristics of different actors. Of those, most considered relationships between the donor and either the beneficiary ($n = 70$) or the fundraiser ($n = 61$), again highlighting the predominance of donor-centric research. To date, research has largely neglected how the relationship between the fundraiser and the beneficiary ($n = 2$) or how triadic relationships between the three actors together ($n = 2$) can influence giving.

In Table 3, we present a more granular view of these articles and the topics and approaches that have been used to understand the three actors and their relationships. On the OSF we also present a summary of each of these areas of research and provide citations for every article coded into each category. Overall, the evidence paints a clear picture and demonstrates two key points. First, Charitable Triad Theory can integrate the existing interdisciplinary evidence into an overarching theoretical framework. Second, there are striking gaps in our knowledge of charitable giving as a triadic phenomenon that need to be filled.

4.2 | Key findings: Evidencing the propositions of Charitable Triad Theory

Charitable Triad Theory consists of seven overarching propositions (summarized in Table 1) for the ways that donors, beneficiaries, and fundraisers influence giving; individually and in combination. The first three propositions (Propositions 1–3) identify the independent effects that each of the three actors have on giving. Propositions

4–6 describe the way dyadic relationships between the actors can affect giving. Finally, Proposition 7 represents the heart of Charitable Triad Theory, describing the triadic interactionist nature of giving. Below we use the results of the systematic review to elaborate and evidence these propositions.

4.2.1 | Donors

The first proposition generated by the theory is grounded in an obvious assertion that has ample empirical support: certain donor characteristics increase the possibility that a charitable gift will be made. For example, people higher in empathy, with greater wealth, or who trust nonprofits more are all more likely to give (Chapman, Hornsey, & Gillespie, 2021; Kim & Kou, 2014; Wiepking & Bekkers, 2012). These are examples of supportive donor characteristics. However, we contend that understanding the donor is not sufficient; rather considering beneficiaries, fundraisers, and the interactive relationships between the three actors in the Charitable Triad are also critical.

Proposition 1. Supportive donor characteristics are necessary but not sufficient to promote charitable giving.

There is ample evidence that certain types of people are more generous than others. Donor behavior is influenced by characteristics like sociodemographics, individual differences, costs and benefits, emotions, and the donor's social world. For example, women, older people, and those with higher incomes and more education are all more likely to give to charity and are more generous when they do so (e.g., Christensen et al., 2016; De Wit & Bekkers, 2016; Piper & Schnepf, 2008). People who are higher in empathy, trust, and religiosity are also more likely to be donors (e.g., Chapman, Hornsey, & Gillespie, 2021; Glanville et al., 2016; Kim & Kou, 2014; Nguyen & Wodon, 2018). Donors can be motivated by the possibility of receiving emotional benefits (O'Brien & Kassirer, 2019) or material rewards (e.g., thank you gifts or tax rebates; Duquette, 2016; Holmes et al., 2002). Donor emotions also influence giving, including guilt, compassion, gratitude, anger, happiness, disgust, regret, and sadness (e.g., Basil et al., 2008; Chapman et al., 2022; Kemp et al., 2013; Liang et al., 2016; Polman & Ruttan, 2012). Finally, people's identities influence their giving decisions (e.g., Chapman et al., 2020; Kaikati et al., 2017; Kessler & Milkman, 2018), especially when their identities evoke supportive social norms (e.g., Croson et al., 2010; Latour & Manrai, 1989; Nook et al., 2016). Thus, the presence of supportive donor characteristics makes it more likely that a donation will be made.

Although certain donor characteristics are associated with giving, the nature of these relationships are not consistent: none of these associations remain the same (i.e., positive vs. negative vs. no association) under all conditions. To illustrate these inconsistencies, we considered the five most commonly studied sociodemographic predictors of giving: gender, income and wealth, age, religiosity, and

TABLE 2 Most cited empirical articles on charitable giving published in between 1980 and 2020

Article	Focus				Citations					
	Discipline	Donor	Beneficiary	Fundraiser	Dyadic	Triadic	Key finding	Google scholar	Web of science	Scopus
Ariely et al. (2009)	Economics	*					Monetary incentives are more effective in promoting prosocial effort in private (vs. public) settings.	1907	645	NA
Grant (2008)	Psychology		*				Telephone fundraisers with higher prosocial and intrinsic motivation raise more money because they make more calls.	1830	712	766
Twenge et al. (2007)	Psychology	*					People who feel socially excluded donate less money.	1555	606	649
Verplanken & Holland (2002)	Psychology	*					When primed to focus on the self, people for whom altruistic values are more central to their self-concept are more likely to donate.	1439	579	658
Eckel & Grossman (1998)	Economics	*					Women, on average, donate twice as much as men in double-anonymous dictator experiments.	1216	431	463
Eckel & Grossman (1996)	Economics		*				People donate more in anonymous dictator games when they know the recipient is an established charity vs. an anonymous student.	1212	423	449
Small et al. (2007)	Psychology			*			Donors who are thinking more analytically give less to identifiable victims but do not give more to statistical victims.	1048	444	NA
DellaVigna et al. (2012)	Economics	*					Some donors give due to social pressure rather than altruistic concern, and will therefore avoid being asked if they can.	1041	331	341
Twenge et al. (2012)	Psychology	*					Concern for others (including charitable donations) has declined slightly from baby boomer to GenX to Millennial generations.	855	235	316
Shang & Croson (2009)	Economics	*					Social information about other people's donations increases donations to a public radio appeal, especially among new (vs. returning) members.	804	285	311
Houston (2006)	Public Admin	*					Government, nonprofit, and for-profit employees are all equally likely to donate money to charity.	650	295	305
Karlan & List (2007)#	Economics						Matching grants (where donations are amplified by matched contributions from another source) increase both funds raised and response rates in direct mail fundraising appeals.	641	228	245
List & Lucking-Reiley (2002)#	Economics						Seeding (i.e., initial) donations and refund policies both increase donations to fundraising appeals.	612	209	231
Andreoni & Payne (2003)	Economics		*				Charitable organizations that receive government grants reduce their fundraising efforts and therefore raise less money through private donations.	607	194	221
Okten & Weisbrod (2000)	Economics		*				Receiving funding from other sources does not generally reduce the donations an organization receives and often increases it.	600	238	248

(Continues)

TABLE 2 (Continued)

Article	Discipline	Focus				Citations				
		Donor	Beneficiary	Fundraiser	Dyadic	Triadic	Key finding	Google scholar	Web of science	Scopus
Small & Verrochi (2009)	Marketing		*				People give more to help a child that looks sad (vs. happy or neutral).	562	229	255
Liu and Aaker (2008)#	Marketing						People are more willing to donate money when they were first asked how much time (vs. money) they were willing to give.	483	193	204
White & Peloza (2009)	Marketing	*					Other-benefit (vs. self-benefit) appeals are more effective when donors are primed to have reputational concerns (i.e., when they are publicly accountable for their choices).	478	237	245
Falk (2007)	Economics	*					Donors are more likely to give when they receive a gift in a fundraising appeal.	471	162	182
Lee et al. (1999)	Psychology	*					People's perceived expectations, parental modeling, personal norms, past behavior, and role identity all help explain their donation intentions.	463	208	217

Note: A * is used to indicate which aspect of the triad each article focused on. Articles marked with a # could not be categorized with reference to the Charitable Triad. These articles represent the top cited articles identified by our systematic review, which was conducted in January 2020. Citations were captured in January 2022.

education. These sociodemographics are widely believed to impact giving and are, therefore, included as control variables in many studies. For each article that mentioned one of these sociodemographics in its abstract, we coded the observed effects reported in the article. As can be seen in Figure 5, all of these associations are volatile: sometimes falling one way, sometimes the other, sometimes being nonsignificant, and sometimes returning contradictory effects. For example, 35% of the studies found that women gave more than men, while 29% found no difference in giving between men and women, and 8% found that men gave more than women. Over a quarter of studies (28%) even found such inconsistencies within their data.

Other donor characteristics are also volatile. Some examples: donors' responsiveness to tax incentives varies substantially across charity sub-types (e.g., Duquette, 2016). Anger is not associated with giving in general (Kayser et al., 2010) but does promote giving to politicized causes (van Doorn et al., 2017). And identities are particularly effective when the beneficiary shares an important identity with the donor (e.g., Chapman et al., 2020; Charnysh et al., 2015).

Inconsistencies in observed patterns of association (as illustrated in Figure 5) reinforce the notion of complex causality (e.g., Furnari et al., 2021) and suggest that other factors moderate the effects of these donor characteristics (see also Hampson et al., 2021; Simpson et al., 2018). We propose that beneficiaries, fundraisers, and especially the relationships between the three actors can also influence donor decisions. In other words, supportive donor characteristics are necessary *but not sufficient* for understanding donor behavior.

4.2.2 | Beneficiaries

Our second proposition is intuitive, and also has significant empirical support:

Proposition 2. Beneficiaries perceived as worthy of care will usually elicit greater levels of charitable support than those deemed unworthy.

Some beneficiaries are more likely to receive help than others. For example, charities supporting children and animals are particularly popular (Chapman et al., 2020), while charities supporting offenders and prostitutes are comparatively unpopular (Body & Breeze, 2016). Thus, regardless of who is asked to donate, some beneficiary characteristics lead to greater fundraising success than others.

We label the constellation of beneficiary factors that elicit greater support as 'worthiness'. A range of factors appear to contribute to perceptions of beneficiary worthiness. For example, beneficiaries who are younger, more attractive, and perceived as warm receive more help (e.g., Cryder et al., 2017; Cuddy et al., 2007; Johansson-Stenman & Martinsson, 2008). On the other hand, beneficiaries who are perceived to be responsible for their fate are

FIGURE 3 Disciplinary focus of the journals where articles on charitable giving and fundraising identified by our review have been published ($N = 1337$)

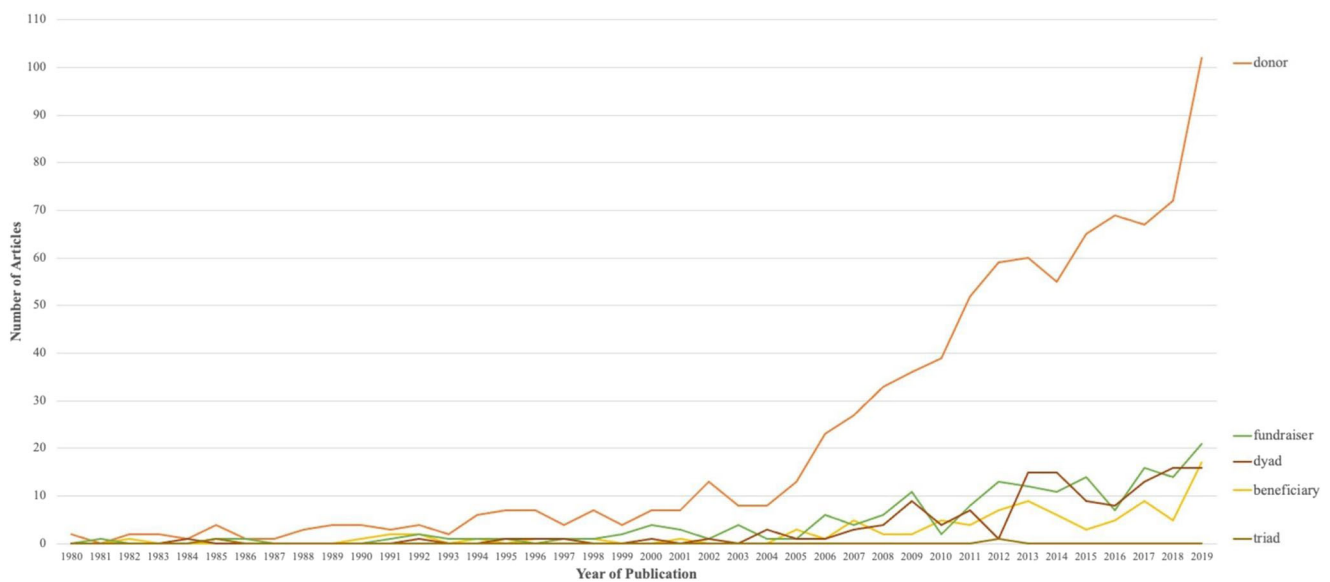
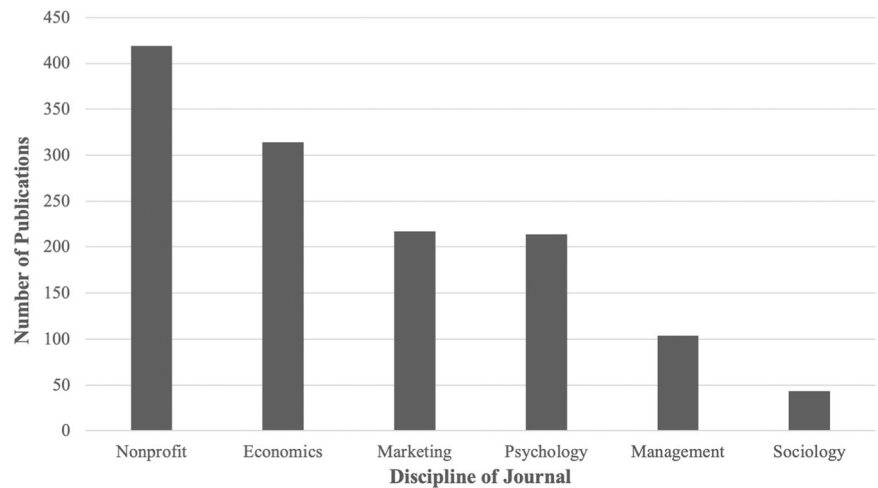


FIGURE 4 Literature on charitable giving has been growing rapidly in recent years, but has tended to approach giving from the perspective of the donor, rather than the perspective of the beneficiary, fundraiser, or by taking a dyadic or triadic perspective

helped less (e.g., Loseke & Fawcett, 1995; Zagefka et al., 2011), possibly due to donors' belief that the world is fair and just (see Lerner, 1980). Finally, beneficiaries that are demonstrably more needy elicit the greatest levels of support (e.g., Leeuwen & Wiepking, 2012; Zagefka et al., 2012).

The way that the beneficiary is presented in a fundraising campaign also influences giving responses. Research on the identifiable victim effect demonstrates that including a named and pictured beneficiary leads to greater fundraising success than talking about beneficiaries in the abstract (e.g., Lee & Feeley, 2016; Small & Loewenstein, 2003; Small et al., 2007). Paul Slovic's work on psychic numbing also shows that—counterintuitively—people donate more when fewer beneficiaries are impacted (Slovic et al., 2017; Slovic, 2007). Thus, the number and identifiability of beneficiaries may contribute to perceptions of their worthiness.

Overall, beneficiary characteristics and the ways that beneficiaries are presented in appeals both impact giving: beneficiaries that are perceived as more worthy will generally elicit greater support. However, neediness does not always affect donations (Clark et al., 2018) and may sometimes even have detrimental effects on giving (Hansen et al., 2014). Further, identifiable victim effects may only occur only when donors are temporally or socially close to the beneficiary (Ein-Gar & Levontin, 2013). Thus, the effects of beneficiary worthiness also depend on characteristics of and relationships with both donors and fundraisers, as we discuss below.

4.2.3 | Fundraisers

Fundraisers are the ones asking for money. Donors rarely give to charity without being asked (Bryant et al., 2003) and generally

TABLE 3 Detailed view of how articles have been coded in relation to the Charitable Triad constructs and key streams of research within each area

Charitable triad	Brief description or examples	Number	Percentage
Donor		880	75%
Socio-demographics	e.g., gender, age, wealth, religiosity, education, political affiliation, ethnicity	309	
Individual differences	e.g., empathy, dispositional trust, values, personality traits	202	
Social groups	How donors are influenced by their social groups; e.g., identity, social networks, norms, reputation, audience	185	
Costs & benefits	Benefits the donor receive for giving or costs they incur; e.g., material benefits, tax incentives, warm glow	115	
Actions	How other actions that the donor take can influence giving choices; e.g., past giving, moral licensing, civil participation	76	
Emotions	e.g., fear, disgust, guilt, happiness	60	
Motivations	Considers diverse donor motivations for giving	44	
Morality	e.g., moral foundations, moral identity	28	
Altruism	Considers whether or not donors are motivated by disinterested concern for others	16	
Nonspecific	Abstract focused on donor but specific constructs not mentioned	17	
Other	Various donor-oriented constructs that were mentioned rarely; e.g., mortality salience, neurological factors, sources of income	92	
Beneficiary		94	8%
Personal qualities	e.g., demographics, attractiveness, emotions	22	
Worthiness & blame	e.g., deservingness, worthiness, perceived responsibility	18	
Number & identifiability	Considers how the number of victims and how identifiable they are influence giving	14	
Neediness	Degree of need that the beneficiaries experience	12	
Other	Various beneficiary-oriented constructs that were mentioned rarely; e.g., type of disaster, cause, political candidate experience	34	
Fundraiser		173	15%
<i>Individual</i>		22	2%
Personal qualities	e.g., demographics, attire, emotions	9	
Celebrities	Considers the role of celebrity endorsement in promoting giving	6	
Professional aspects	e.g., training, incentives, actions they take	4	
Other	Other individual fundraiser-oriented constructs that were rarely mentioned	2	
<i>Organization</i>		151	13%
Funding sources	Considers effects of receiving funds from other sources, including government (i.e., crowding out), major donors, and corporations	46	
Reputation	e.g., trustworthiness, age, size, reputation for quality, accountability practices	36	
Impact & effectiveness	Considers how the impact the organization has for beneficiaries influences giving decisions	16	
Efficiency & overheads	Considers how the ratio of donations that are spent on fundraising or overheads influences giving	16	
Marketing	e.g., branding, communication style, spending on fundraising	15	
Other	Other fundraiser-oriented constructs that were rarely mentioned; e.g., location, University's sports team performance, industry	41	
Dyadic		132	11%
<i>Donor-Beneficiary</i>		70	6%

TABLE 3 (Continued)

Charitable triad	Brief description or examples	Number	Percentage
Relationship	e.g., shared identity, liking, similarity	29	
Preferences	Donor chooses beneficiary	11	
Other	Other donor-beneficiary interactive effects; e.g., donor moral identity & beneficiary responsibility, donor benefits & beneficiary need, or donor attachment style & identifiable victims	32	
<i>Donor-Fundraiser</i>		61	5%
Relationship	e.g., shared identity, relationship, similarity	29	
Trust	Donor trusts or is loyal to the fundraiser	14	
Other	Other donor-fundraiser interactive effects; e.g., donor commitment & fundraising overheads, donor identification & fundraiser reputation, or donor benefits & fundraiser efficacy	22	
<i>Fundraiser-Beneficiary</i>		2	0%
Triadic		2	0%
Articles relevant to the Charitable Triad		1169	

Note: Definitions of example constructs are provided in the main text of this article. Categories are not mutually exclusive, .

beneficiaries do not ask for themselves. Being asked to give predicts both the likelihood and value of charitable gifts (Andreoni et al., 2017; Wiepking, 2007), highlighting the important role that the fundraiser plays. As noted earlier, we use the term fundraiser to refer both to the individual asking for donations on behalf of a charity (i.e., peer-to-peer, face-to-face, or telephone fundraisers) and to the fundraising organization itself.

We propose that characteristics of both individual and organizational fundraisers can influence donation responses, in particular because of their perceived legitimacy:

Proposition 3. Fundraisers that are perceived to be more legitimate will usually raise more money.

We define legitimacy as a higher order construct relating to whether a fundraiser (individual or organization) is seen as a valid and appropriate representative of the cause (see also Suchman, 1995). Various factors may contribute to perceptions of fundraisers' legitimacy. For individual fundraisers, appearance, professional training, and experience with the cause could all promote legitimacy. For organizational fundraisers, perceptions of legitimacy could be influenced by their track-record for impact, branding, reputation, and general trustworthiness.

As Table 3 illustrates, comparatively little is known about how the characteristics of individual fundraisers may enhance or inhibit their effectiveness. Fundraisers are more successful if they are physically attractive (Landry et al., 2006; West & Brown, 1975), well dressed (Levine et al., 1998), and professionally trained (Rum & Wright, 2012). Celebrity endorsement can also promote donation intentions, especially when there is perceived to be a fit between the celebrity and the charity they endorse (Ilicic & Baxter, 2014; Wheeler, 2009). These characteristics help make fundraisers seem more

legitimate: whether because of their appearance (e.g., well dressed), professionalism (e.g., well trained), or fit with the cause (e.g., well suited to advocate).

Charitable organizations themselves are the fundraisers that donors are most likely to come into contact with: via TV ads, billboards, radio ads, and direct mail. In these cases, it is the brand that does the asking. A number of characteristics of fundraising organizations have been shown to influence charitable giving, and we propose that these organizational characteristics also promote a sense of legitimacy.

Perceptions of fundraising legitimacy can be promoted by the organization's effectiveness (impact on the cause; e.g., Bodem-Schrotgens & Becker, 2020; Smith & McSweeney, 2007; Wiepking et al., 2012), efficiency (percentage of funds that go toward charitable projects compared to marketing and overheads; e.g., Gneezy et al., 2014; Tinkelman & Mankaney, 2007), alternative sources of funds (e.g., government grants; De Wit & Bekkers, 2017), and reputation based on factors like size, perceived quality, brand image, accreditation status, or trustworthiness (e.g., Bennett & Gabriel, 2000; Chapman, Hornsey & Mangan, Gillespie, et al., 2021; Hornsey et al., 2021; Sarstedt & Schloderer, 2010; Stebbins & Hartman, 2013).

As can be seen, characteristics of fundraisers—whether they are individuals or organizations—that make them seem more legitimate will enhance their fundraising success. Once again, however, the fundraising characteristics associated with giving have returned inconsistent results. For example, some studies have shown that charity effectiveness and efficiency are relatively unimportant in determining gifts (e.g., Berman et al., 2018; Chapman et al., 2019; Ryazanov & Christenfeld, 2018; Saxton & Wang, 2014). Fundraiser legitimacy may, therefore, usually promote giving but its importance may depend on the particular donor or beneficiary in question (see Karlan & Wood, 2017), as we discuss below.

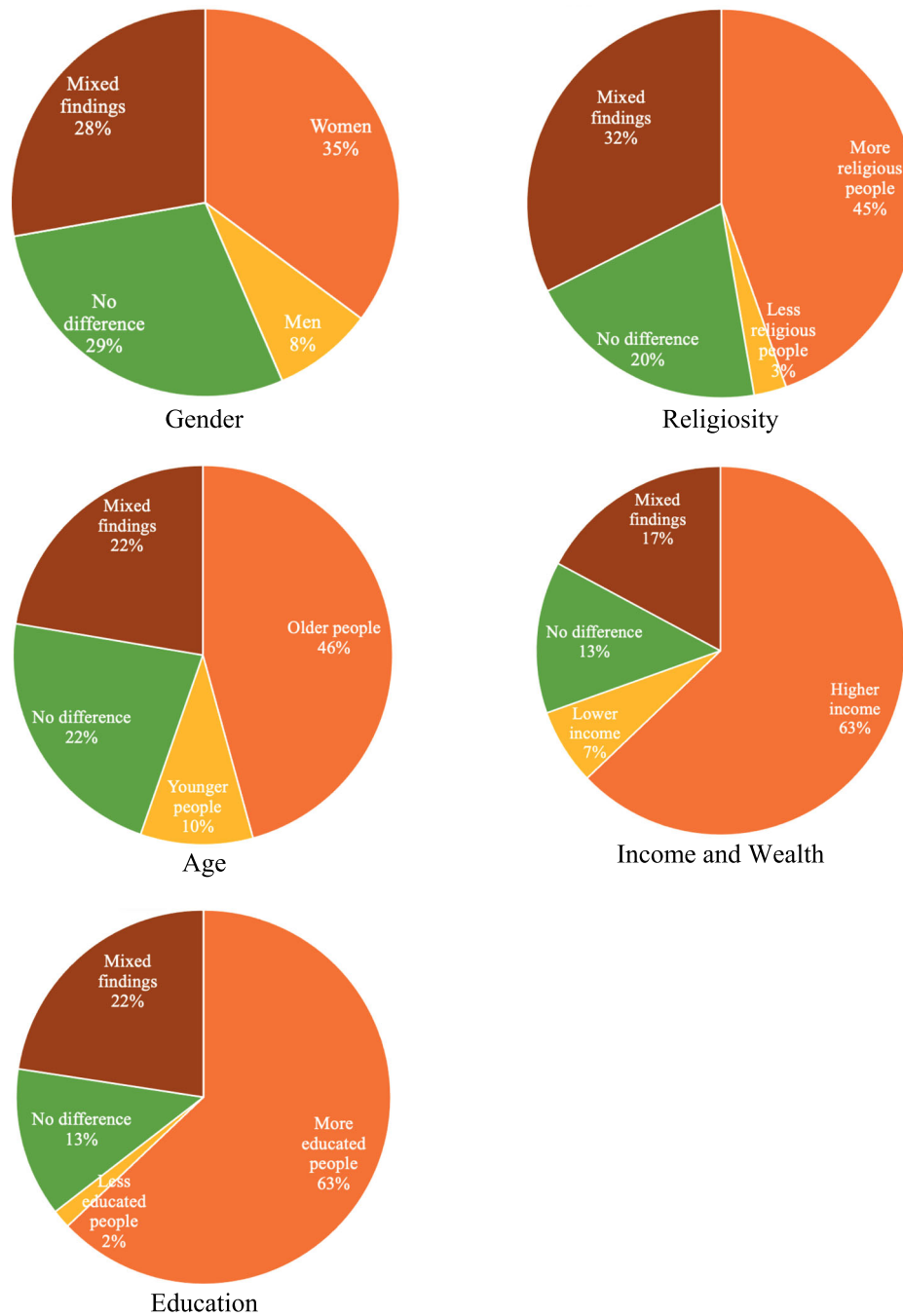


FIGURE 5 Who gives more to charity? Breakdown of observed effects across studies considering the effects of gender ($n = 108$), income and wealth ($n = 105$), age ($n = 94$), religiosity ($n = 74$), and education ($n = 62$) on charitable giving.

4.3 | Dyadic relationships between the actors

Above we have reviewed evidence to demonstrate two essential points. First, characteristics of donors, beneficiaries, and fundraisers can *each* influence charitable giving (supporting P1–3). Second, inconsistent effects highlight the need to examine the actors interactively: that is, to consider how characteristics of one actor can affect the relative influence of a characteristic of another actor. This highlights the importance of considering the dyadic and triadic relationships between the three actors. Below

we review the existing evidence for the interactive propositions of Charitable Triad Theory.

4.3.1 | Donor-beneficiary dyad

Different donors are attracted to different charities (e.g., Casale & Baumann, 2015; Chapman et al., 2018; Neumayr & Handy, 2019). Thus, who gives (donor) depends on who will receive (beneficiary). The nature of relationships between donors and beneficiaries can,

therefore, affect giving outcomes. Both similar and dissimilar beneficiaries may receive help under different conditions:

Proposition 4. Beneficiaries who are similar to donors are generally more likely to generate donations.

Overall, donors may prioritize helping donors that are similar to them in some way. A sense of similarity could be promoted by any form of commonality between the donor and the beneficiary. For instance, people give more to help beneficiaries that live near them (Erlandsson et al., 2017; James & Zagefka, 2017) or share an important identity with them (e.g., Chapman et al., 2020; Grimson et al., 2020; Levine & Thompson, 2004). Bekkers (2010) even found that simply having a name that starts with a phonetically similar initial as the beneficiary can increase donations.

Yet, although donors may prefer helping similar beneficiaries, they may sometimes also give to dissimilar beneficiaries:

Proposition 5. Dissimilar beneficiaries may receive aid if there are strategic interests for the donor or the donor's group.

Helping dissimilar beneficiaries can sometimes be done for strategic reasons, such as to benefit the donor's group (Hopkins et al., 2007; van Leeuwen, 2017) or to maintain or establish dominance over another group (Nadler, 2002, 2016). For example, when their national identity is threatened people give to help beneficiaries in other countries as a way to restore group-esteem or positive distinctiveness (van Leeuwen & Harinck, 2016; van Leeuwen, 2007). Further, some high status people help to assert their power over others or keep other groups down (Halabi et al., 2008; Nadler & Chernyak-Hai, 2014). Thus, dissimilar beneficiaries may receive help when there are benefits or reputational rewards for the donor.

4.3.2 | Donor-fundraiser dyad

In addition to the characteristics of each actor, relationships between actors can influence giving. We propose that relational alignment between fundraisers and both donors and beneficiaries can affect donation decisions:

Proposition 6. Fundraisers that are aligned with either donors or beneficiaries will be more successful, and those aligned with both will be especially successful.

Alignment in the form of relationships between donors and fundraisers have been demonstrated to affect giving. When the donor trusts the fundraising organization, they are more likely to donate (e.g., Chapman, Hornsey, & Gillespie, 2021; Sargeant & Lee, 2004). Relationships of similarity or shared identity between donors and fundraisers can also impact giving (e.g., List & Price, 2009): giving is promoted when donors identify with the fundraising organization (e.g., Boenigk & Helmig, 2013), when donors like the fundraiser or

share social ties with them (e.g., Meer, 2011), or when a consequential bond exists between donor and fundraiser (Shaker & Nelson, 2021). People also give more when asked by people that they are personally close with (e.g., Scharf & Smith, 2016). In sum, a donation appears to be more likely when donors and fundraisers align by, for example, sharing priorities or having existing relationships.

4.3.3 | Fundraiser-beneficiary dyad

Very little is known about the way fundraisers and beneficiaries interact to influence giving. Our systematic review uncovered just two relevant articles. One quasi-experiment showed that University fundraisers who had met beneficiaries of the fellowship they were raising money for succeeded in raising more donations than fundraisers who had had no contact with beneficiaries (Grant, 2008). A second study of stores that fundraise for causes showed that people donated more at checkout if they experienced great service from the fundraising store, but this effect was attenuated when shoppers were asked to give to victims of tragedies rather than to social causes (Obeng et al., 2019). These two studies show that dynamics between fundraisers and beneficiaries can influence charitable giving, despite the question being largely neglected to date.

4.4 | Triadic relationships between the actors

The final proposition of our model represents the heart of the triadic approach, but is also the one with the least empirical support to date; a deficit that we hope this article will motivate scholars to soon rectify:

Proposition 7. The unique interaction between the particular donor, beneficiary, and fundraiser will determine both whether or not a donation will be made and the value of donations.

Our review uncovered just two studies that considered the full triad of actors in unison. Yinon and Sharon (1985) used a $2 \times 2 \times 2$ design to simultaneously consider the effects of donor, beneficiary, and fundraiser religion. They found a significant three-way interaction such that Jewish donors were more likely to donate to non-Jewish beneficiary families if they were solicited for donations by a Jewish fundraiser. More recently, Zagefka and colleagues (2012) demonstrated another three-way interaction, this time between perceived social norms (donor), neediness (beneficiary), and impact (fundraising organization). They found that the neediness of beneficiaries only promoted giving when donors perceived high organizational impact and low social norms for giving. These two studies show the value of examining how the unique constellation of donor, beneficiary, and fundraiser characteristics interact to influence donation decisions. However, with only two studies having considered triadic relations in giving, future research is needed to

illuminate and understand the many inconsistencies observed for the direct and dyadic effects outlined above.

5 | RESEARCH AGENDA

Results of the systematic review support the overarching tenets of Charitable Triad Theory. Characteristics of all three actors can influence donor behavior; both directly, and especially in interaction. The review also uncovered clear gaps in current knowledge and opportunities for future research on the triadic nature of giving. In this section, we discuss some of the theoretical implications of the model and outline suggested avenues for future research informed by our triadic theory. Many of these ideas remain to be tested.

5.1 | The neglected fundraiser

One key theoretical contribution of Charitable Triad Theory is to focus attention on the role of the fundraiser. As mentioned in the introduction, theories of altruism understand it to be dyadic: involving a help giver and a help receiver (Fehr & Fischbacher, 2003). In our terms, these approaches consider the dyadic relationships between donors and beneficiaries. However, in the modern world, organizational fundraisers exist to facilitate large-scale helping, often between donors and beneficiaries that are geographically or socially separated. Theories have not yet grappled with the way these intermediaries may affect consumer behavior in the charitable domain. Our triadic theory draws attention to the neglected fundraiser and offers a new theoretical approach to understanding charitable giving that actively considers the three key actors involved in any giving exchange: donor, beneficiary, and fundraiser.

Fundraisers—and especially their relationships with the other actors in the triad—are understudied. We see vast opportunity to improve understanding of charitable giving by generating empirical evidence based on an interactionist approach that considers fundraisers as key agents of prosocial exchange. In particular, we see three key areas for future scholarship on the role of fundraisers in charitable giving contexts: (1) understanding what makes *individual fundraisers* effective, (2) exploring *dyadic relationships* between fundraisers and the other two actors, and (3) testing interactive *triadic relationships* between the full Charitable Triad.

5.2 | Individual fundraisers

Traditionally, charities fundraised through broad, mass market channels like TV, radio, and print, or via branded direct mail. However, more personalized channels of recruitment and solicitation are now becoming normative. Face-to-face, door-to-door, and

telephone fundraising are popular methods of nonprofit marketing and each requires an interaction between an individual fundraiser (as a representative of the charity) and a potential donor (Sargeant & Kähler, 1999). Social media interactions around charitable causes and peer-to-peer fundraising have also increased, meaning more and more people are being asked to give by people they know personally (Lucas, 2017). These changes necessitate a refocus on the psychological impacts of individual fundraisers' characteristics and actions.

There is little research investigating what makes individual fundraisers successful. Limited work points to the roles of personal attractiveness and motivation (e.g., Barasch et al., 2016). Individual fundraisers who are perceived to be legitimate may also elicit more donations. Such evaluations may come from external markers: for example, women, older people, and religious people may all be perceived to be higher in warmth or empathy and, therefore, seen as more legitimate fundraisers. It is possible that fundraisers from these groups could be more successful, perhaps because they would be perceived as legitimate agents of prosocial exchange. Likewise, emotional displays such as being visibly moved by the plights of beneficiaries when sharing their stories may enhance giving by promoting perceptions of warmth or morality. Qualities such as age, social status, race, emotion expression, professionalism (vs. volunteerism), incentive levels, and experience may also be low-hanging fruit that remain to be tested systematically.

Diverse research approaches could be applied to studying what makes individual fundraisers effective. Archival analyses can use the characteristics of individual face-to-face or peer-to-peer fundraisers to predict recorded fundraising outcomes. Experimental approaches—whether online or in the field—can also be employed to assess causality and the mechanisms through which influence occurs.

5.3 | Dyadic relationships

How the characteristics of the fundraisers interact with the characteristics of the other actors will also be important to understand. For example, do people give more to fundraisers who belong to the beneficiary group? Do extraverted donors respond more willingly to solicitation from friends and colleagues? Do donors with higher moral identity put more stake in the fundraising organization's reputation? And how might the effects of an organization's sources of funds depend on the beneficiary group they support? It is possible, for example, that the crowding out effect (where government funding reduces private donations) is attenuated for beneficiaries with extensive need, while the importance of impact may be accentuated for organizations serving needier beneficiaries.

For a fundraiser to be effective, perhaps they should be aligned either with the donor or the beneficiary (i.e., by sharing a common identity or relationship of trust). If they are related to the donor—as a friend, colleague, or family member, for example—they are more likely to garner support, and also if they share a visible and important

identity with the potential donor. Fundraisers who are dissimilar from the donor may still be successful when they are seen as aligned with the beneficiaries—when they are similar to or have close experience with the people that will receive the care. Experimental methods and choice-based conjoint modeling may be especially well placed to tease apart the relative importance of characteristics of fundraisers and the other two actors.

5.4 | Triadic relationships

Only two studies have yet considered the full Charitable Triad. Thus, many opportunities exist for examining the triadic nature of giving. We expect that the effects of alignment between donors and both beneficiaries and fundraisers will be additive: more layers of alignment may enhance giving outcomes. As a hypothetical example, when a mother of a differently-abled child is soliciting funds for a disability charity from another mother, she will be more successful than if her child was not differently-abled or if the potential donor was not a mother. It may also be that a meaningful interaction between any one of the dyads will be enough to elicit a donation, but the third actor will determine the size of the donation. For example, empathic concern may motivate a donor to help children in distress overseas when asked. The donor will give because they feel the suffering of those needy beneficiaries and are motivated to respond. However, the donor may give twice as much when asked by Oxfam than when asked by Save The Children (for example), if they perceive Oxfam to be higher in trustworthiness. These ideas remain to be tested.

As with other configurational and complexity-based approaches to understanding causal relationships (Furnari et al., 2021; Meyer et al., 1993; Woodside et al., 2018), there are almost infinite possibilities for the study of triadic relations in charitable giving. As a starting point, future research may wish to consider the interactions between the same characteristic within each actor in the triad, such as the effects of donor, beneficiary, and fundraiser religion (as per Yinon & Sharon, 1985); this approach will help to determine whether effects of particular characteristics are merely additive or interactive. Alternatively, research may wish to consider unique interactions between different characteristics of the three actors, such as the hypothetical example involving the donor's reputational concerns, the beneficiary group's social value, and the fundraising organization's efficacy that was discussed at the start of this article. Ideal methods to determine the effects of interactive relationships within the Charitable Triad include experiments (see Zagefka, 2018 for some methodological suggestions) and choice-based conjoint modeling, which would allow for consideration of attributes at the beneficiary and fundraiser level while also measuring relevant donor characteristics.

Experimental and choice-based techniques will be valuable to the extent that category memberships within the triad are discrete (i.e., when entities are either donor or beneficiary or fundraiser). In reality, boundaries between the actors may not always be absolute. For

example, some beneficiaries may also choose to fundraise for the cause, some donors may be prior beneficiaries, and certain donors may also elect to fundraise for the cause as well as give. Future research may consider applying methods associated with fuzzy set theory (Zadeh, 1965) to account for such overlap.

5.5 | How beneficiaries influence donor choices

The majority of research has considered giving from the donor's perspective, while the impact of beneficiary characteristics has been relatively neglected. Huge opportunities exist to understand how the beneficiaries highlighted in fundraising campaigns—the way they are visualized, the emphasis on their warmth versus competence, and whether they share identities with donors or fundraisers—can influence donation responses. The images used in real-world fundraising campaigns imply a number of assumptions about who is more likely to elicit funds: children, people of color in developing countries, those with the appearance of innocence and vulnerability, and visible marks of deprivation, desperation, or negative emotion (e.g., Bhati & Eikenberry, 2016; Breeze & Dean, 2012; Burman, 1994). Yet many of these assumptions have not been tested empirically. We hope that future research will consider the ways that beneficiaries are visualized and how different donors respond to those depictions, especially when they are embedded in campaigns from different types of nonprofit organizations.

Our review highlights how similarities between donors and beneficiaries can promote giving (e.g., Chapman et al., 2020; James & Zagefka, 2017). However, dissimilar beneficiaries may receive aid if there are strategic interests in helping them for the donor or the donor's group. Individual donors may be motivated by personal interests—reputational rewards or the desire to assert dominance—to give to dissimilar others, especially when they have an audience and when the beneficiary is positively valued by their group. Such strategic giving would most likely occur with particular combinations of donors (high status or high identifiers) and beneficiaries (needy, stereotypical, low status, visible). In particular, low status beneficiaries that do not challenge the donor's group position in the hierarchy may be those most likely to be helped by strategic high-status donors.

We encourage future research to consider beneficiaries as key actors that affect charitable behavior. Archival analyses can consider how the characteristics of the “hero” beneficiaries that serve as the face of fundraising appeals may influence fundraising outcomes, and how characteristics of the donors responding to campaigns and the fundraising organizations that develop the campaigns may moderate the effects of different beneficiary characteristics. Experimental approaches could be used to zero in on the mechanisms through which particular beneficiary characteristics exert their influence on donor decisions. Finally, qualitative methods could be used to understand the perspectives of the beneficiary: what are their needs and goals within the charitable exchange, and whether those needs are being met.

6 | APPLICATIONS AND BOUNDARY CONDITIONS

Charitable Triad Theory has been developed to explain the psychology of charitable giving. As we have shown, this triadic theory has illuminated aspects of consumer charitable behavior that have not previously been researched in depth. In addition to these theoretical implications (and associated opportunities for future research), the Charitable Triad approach has other applications and also several boundary conditions. Below we discuss the links with existing interdisciplinary theories, how the triadic lens may offer insight into related topics in psychology and marketing, the boundaries or limitations of the theory, and key managerial implications.

6.1 | Connections with existing theories

A strength of Charitable Triad Theory is that it draws together insights—empirical and theoretical—from diverse disciplines to generate a novel theoretical framework that is bounded to a particular context: donor behavior and charitable giving. There exist important synergies between Charitable Triad Theory and existing theories that have been generated and applied in other contexts, which warrant analysis. *Just World Theory* (Lerner, 1980) proposes that some people are motivated to perceive the world as a fair and just place. This has implications for the way that beneficiaries may be evaluated, including whether they are perceived to be worthy of care. According to the theory, people higher in Just World Beliefs might assume that victims are in some way responsible for their suffering (if not, the world could not be perceived as fair) and, therefore, are less worthy of receiving help. *Social Identity Theory* (Tajfel, 1981) and *Self-Categorization Theory* (Turner et al., 1987) both highlight how the social groups people belong to can critically influence their attitudes and behavior. The social identity approach has also demonstrated strong favoritism for helping others that belong to one's social groups. Identification is, therefore, a key form of similarity and alignment that can occur within dyads or the full triad, although not the only form. Finally, Proposition 5 (dissimilar beneficiaries may be helped for strategic reasons) is strongly supported by past theorizing on intergroup helping relations. *The Intergroup Helping Relations as Status Relations theory* (Nadler, 2002) has generated considerable research to demonstrate that people sometimes help people in other groups as a way to assert their dominance and keep the beneficiary group in a low status position. Similarly, van Leeuwen's (2017) *Strategic OUTgroup Helping (SOUTH) model* also proposes strategic reasons for intergroup helping, including as a way to restore group pride. In sum, Charitable Triad Theory is supported by existing theory and evidence but also goes further: offering a new theoretical framework and research agenda specifically for philanthropy and nonprofit marketing scholarship.

6.2 | Implications for allied literatures

Charitable Triad Theory may also be generative in understanding other forms of prosocial behavior, such as giving time, blood, and organs. We expect that similar propositions could be relevant for these areas of study, but that the magnitude of effects may differ. For example, volunteering research suggests that people give time for different reasons than they give money: they are more likely to be motivated by self-enhancement concerns such as the desire to feel important (Clary & Snyder, 1999). Donor characteristics may, therefore, be especially important in determining volunteer decisions. Blood donation agencies frequently stress the beneficiary when communicating with donors, despite evidence suggesting the organization itself (in its role as blood collector agency) is a key factor in success (Healy, 2000). Donations of gametes (i.e., eggs and sperm) are often motivated by the altruistic disposition of the donor (Svanberg et al., 2012). On the other hand, living organ donations are usually exchanges between donors and beneficiaries who are very close (usually partners or family members; Hyde & White, 2009). All these findings illustrate how Charitable Triad Theory will be broadly relevant to other forms of donor behavior, yet may operate in ways that require elaboration for each context.

Another domain of possible application is crowdfunding. Crowdfunding shares common features with charitable giving: individuals make voluntary contributions to help fund projects, whether they be charitable or commercial (Ordanini et al., 2011). Contributors also appear to be motivated by prosocial motives when helping to fund campaigns (Dai & Zhang, 2019). In some cases, crowdfunding is indistinguishable from peer-to-peer fundraising, where individuals raise money for charitable causes through their social networks (Chapman et al., 2019; Scharf & Smith, 2016). In such cases, the Charitable Triad would apply in full: with individual fundraisers soliciting funds from donors on behalf of a beneficiary organization. However, it is also common that individuals or organizations set up crowdfunding pages for their own purposes. In such instances, the fundraiser is also the beneficiary and the full Charitable Triad would not apply. Nonetheless, the evidence relating to the donor-beneficiary dyad—which especially suggests that identity dynamics are important—could be constructively applied to the crowdfunding domain.

Finally, cause-related marketing is another area of scholarship that may benefit from applying insights from the Charitable Triad. Cause-related marketing links corporate charitable contributions to product sales (Varadarajan & Menon, 1988). Cause-related marketing may also be understood as a triadic process: a consumer purchases a product from a company in part to contribute to a beneficiary cause. Thus, instead of the donor-fundraiser-beneficiary dynamic that we have discussed in this article, the triad would consist of consumer-company-cause. Dyadic influences are well established in the cause-related marketing literature. Scholars have already evidenced the importance of “fit” between the company or its product and the cause in question (Simmons & Becker-Olsen, 2006; Vanhamme et al., 2012; Varadarajan & Menon, 1988). Various consumer characteristics

have also been shown to affect the success of the initiative (He et al., 2016; Kim & Johnson, 2013; Koschate-Fischer et al., 2012); and selecting causes that are meaningful to the target consumers—or allowing them to select the cause—also enhances program success (Lichtenstein et al., 2004; Robinson et al., 2012). These findings echo the importance of triadic relationships. It seems likely, therefore, that application of the triadic approach to understand how dynamics between consumer, product, and cause affect purchase intentions will improve the efficacy of cause-related marketing.

6.3 | Boundary conditions

Charitable Triad Theory has been developed and evidenced by a systematic review of published, peer-reviewed literature on charitable giving. This review identified 1337 articles published over 40 years in diverse disciplines. Nevertheless, elements of the protocol and potential biases of the author team may have influenced which evidence has been cited. For example, disciplines that are not typically indexed in Scopus or Web of Science, which use search terms not included in our review, or which conceptualize or critically analyze philanthropy without reliance on data may not be represented. Relevant work from disciplines like philosophy, religious studies, and sustainability studies may be underrepresented (e.g., Aristotle, 2001; HH Dalai Lama, 2012; Jain et al., 2019). Likewise, important data that has been published before 1980 (e.g., Dichter, 1971), outside of the peer-review process (e.g., Science of Generosity Initiative, 2022), or in languages other than English have not been included. Finally, the authorship team may have shown an implicit bias toward their own disciplines (marketing, social psychology, and nonprofit studies) when electing which articles to engage with in the narrative review sections of this paper. We invite future researchers from allied disciplines to use, augment, and critique Charitable Triad Theory from their unique perspectives.

Charitable Triad Theory focuses here on the three key actors in giving contexts—donor, beneficiary, and fundraiser. We believe these are the most critical actors to study in the first instance, as our review has highlighted a lack of research on triadic relations in giving. Nevertheless, there are other actors that can also influence giving outcomes, including philanthropy brokers, board members, foundations, governments, the media, and regulators (e.g., Chapman et al., 2022; De Wit & Bekkers, 2017; Williamson et al., 2021). We invite scholars to theorize and test the roles these other actors play in giving and to examine how they may further influence the roles and relationships among the Charitable Triad.

6.4 | Managerial implications

Charitable Triad Theory proposes that interactive relationships between donors, beneficiaries, and fundraisers determine charitable choices: if a donor gives, why, and how much. While it is not always possible for marketers to influence the nature of relationships between donors, beneficiaries, and fundraisers, there are some factors that lie within

nonprofit managers' control. For example, managers may strive to hire individual fundraisers who share identities with key donor segments or who are personally aligned with the organization's key beneficiaries. Alternatively, marketers could try to cultivate a brand personality that aligns with the target market (e.g., highlighting shared values or shared geographic identities) or with the beneficiary group (e.g., a nurturing personality when serving children). It may also be beneficial to incorporate a peer-to-peer fundraising program into the marketing strategy. Peer-to-peer programs leverage the power of relationships by seeking support through volunteer fundraisers' existing social networks.

By adopting a fundraising approach that is guided by a triadic understanding of the psychology of giving, nonprofit marketers will develop a more nuanced understanding of the attitudes, preferences, and behavior of their consumer base. Charitable Triad Theory positions charitable giving as a deeply social phenomenon and asserts the value of understanding the interpersonal and intergroup psychology involved in giving exchanges. If implemented through brand cultivation, staff recruitment, donor segmentation, and marketing campaign planning, Charitable Triad Theory can help increase nonprofit marketing effectiveness. Nonprofits that fundraise effectively will, in turn, be able to do more good in the world and help ensure the legacies of their essential social and environmental work.

7 | CONCLUSION

In this article, we have outlined a new theory of charitable giving, which argues that charitable behavior can best be understood with reference to three key actors—donor, beneficiary, and fundraiser—as well as the relationships between this “Charitable Triad.” Our systematic review of the literature demonstrates that the three actors do influence giving, independently and in unison. However, there is still much to be understood, especially regarding the critical role of the fundraiser, the way beneficiaries shape donor decisions, and the influence of triadic relationships between the three actors. We hope that research directions outlined in this article will stimulate innovative and fruitful new lines of empirical enquiry about the triadic nature of charitable giving.

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CONFLICT OF INTEREST

The authors declare no conflict of interest.

DATA AVAILABILITY STATEMENT

Supplementary data supporting this article are available online on the Open Science Framework: <https://osf.io/g2ta5/>

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