Applying insights from behavioural economics to increase volunteering

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Towards a
National Strategy
for Volunteering

Volunteering
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The Volunteering Research Papers aim to capture evidence on a wide range of topics related to volunteering and outline key insights for policy and practice. The Volunteering Research Papers are peer reviewed, and insights will directly inform the development of the National Strategy for Volunteering.

The Volunteering Research Papers are an initiative of the National Strategy for Volunteering Research Working Group.

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Applying insights from behavioural economics to increase volunteering

Professor Swee-Hoon Chuah[1]

Key insights

- Behavioural economics incorporates insights from psychology to understand why people behave the way they do.
- In terms of charitable behaviour, the psychological factors that drive people include:
    - their emotions;
    - the mental shortcuts they use to make decisions; and
    - their propensity to adhere to social norms.
- An understanding of these factors allows the design of effective solutions based on these factors to encourage an increase in charitable behaviour.
- To increase volunteering, some recommended solutions include:
    - appealing to emotions by focusing on one specific, identifiable beneficiary of the help and weaving a vivid narrative around them;
    - leveraging on mental shortcuts by changing the default in organisations so that employees need to opt-out of volunteering instead of opt-in to it; and
    - describing the social norm with messages indicating that “people like you” typically volunteer.
- Further research is required to test the recommended solutions for evidence of effectiveness, by using experiments and/or randomised controlled trials.

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Introduction

In Australia currently the demand for volunteers outstrips supply. The already falling national volunteering rate was exacerbated by COVID-19 in 2020[2]. As volunteer shortage is an issue rooted in human behaviour[3], a solution may lie in behaviour change. Policies to bring about behaviour change can be based on: legislation; market-based price tools such as taxes and subsidies; and/or behavioural insights.

Legislation causes behaviour change via mandates and prohibitions. Price tools induce economically rational behaviour change by manipulating costs and benefits. To illustrate, the biggest reasons for Australians not volunteering is the lack of time[4]. A policy solution based on legislation would be requiring employers to incorporate volunteering opportunities during work time, and one based on price would be providing tax relief to volunteers for their time. An (economically) rational agent would respond to these incentives.

This research paper focuses on policies based on behavioural insights, which apply insights from behavioural economics and psychology to address behaviours that deviate from rational economic predictions and cannot be (adequately) addressed by the other two.

The rest of the paper proceeds as follows. In section 2, we introduce behavioural economics. In the extant literature, there is limited research which applies behavioural insights to volunteering. In section 3, we seek to address this gap by drawing upon wider research where behavioural insights is applied to charitable giving. Based on this, we then identify policy and practical implications for volunteering in section 4. Section 5 concludes with a discussion of limitations, gaps in knowledge and future research possibilities.

2 The national rate of volunteering fell from 36% in 2010 to 29% in 2019. During COVID-19 in 2020, 66% of volunteers stopped volunteering. As we learn to live with COVID-19, volunteering has not fully recovered, with only 21% of people volunteering formally at the start of 2021. Yet the demand for volunteers has increased, with 56% of volunteer organisations reporting that they need more volunteers. Source: Volunteering Australia 2022 https://www.volunteeringaustralia.org/wp-content/uploads/VA-Key-Volunteering-Statistics-2022-Update.pdf.

3 We acknowledge that there are external factors which cause this shortage, including type of sector, but in this research paper, we focus on behavioural factors.

4 In particular, cannot fit in around paid work (31%) and around family and caring responsibilities (22%). Source: Volunteering Australia 2021 https://www.volunteeringaustralia.org/wp-content/uploads/VA-Volunteering-and-the-Ongoing-Impact-of-COVID19-14-May-2021.pdf

Behavioural economics

Behavioural economics is the branch of economics which studies how people *actually* behave. This contrasts with traditional economics (on which price tools are based) which *assumes* that people are completely rational and will behave in ways which maximise their self-interested objectives. While this assumption rendered people predictable on paper, what was predicted increasingly clashed with how people were found to behave in real life. This led to the development of behavioural economics, with its agenda of enriching economics by incorporating psychological insights to explain how people actual are.

In their book *Nudge* [5], Nobel laureate Richard Thaler and Cass Sunstein argue that being aware of the psychology underlying people's behaviour will serve to improve policy design. Policies informed by behavioural insights (henceforth, BI-policies) are those where the choice architecture (decision context) is designed to gently steer people's behaviour into a certain direction. For example, people have a psychological tendency to conform to social norms. BI-policies can leverage this insight by using messages such as "Most people in this neighbourhood participate in community clean-ups to tackle waste. Come join your neighbours" to encourage more people to volunteer[6].

Unlike taxes and subsidies, BI-policies do not change prices by making products or services more expensive or cheaper. Unlike mandates and prohibitions, BI-policies do not force or remove choice. In the example above, people are not forced to participate, there are no penalties if they choose not to. As such, a strength of BI-policies is that they are lighter in touch compared to more traditional policies. They are also more cost-effective. A message based on descriptive social norms is cheaper to implement than providing tax relief or monitoring compliance.

Applying behavioural insights to charitable behaviour

With a few notable exceptions[7], there has been little application of behavioural insights to volunteering. As such, we draw upon the wider literature which applies behavioural insights to charitable giving to address this gap. This can be justified by the existing evidence which shows an overall positive relationship between volunteering and charitable giving[8]. For example, Tiehen[9] reports a positive association between

5 Thaler & Sunstein, 2008
6 e.g. Cialdini, 2003
7 e.g., BIT, 2020 and Fujiwara et al., 2018
8 See Hill, 2012 for a review of the evidence
9 Tiehen, 2001

contributing money and contributing time, with volunteering as a proxy for an underlying philanthropic taste. In another example, there is evidence of a "civic core" where 8% of the population contribute 40% of all charitable giving and 49% of all volunteering[10].

Below we outline some of the main psychological factors and cognitive biases that can influence giving.

The dual-process model of human cognition

People have two modes of processing information[11]:

- Experiential (*System 1*) – rapid and automatic, using emotion and intuition for more immediate responses; and
- Analytical (*System 2*) – conscious and deliberate, using logic and reasoning for delayed responses.

In their everyday lives, people mostly utilise System 1, saving System 2 for more complex tasks. As such, people are biased against tasks that require conscious effort. So rather than deliberate on a situation, people often act based on their emotions. Their actions stem from the strength of their responses - positive or negative – towards some stimuli and are made intuitively based on these spontaneous reactions[12].

Some related research findings:

- In appeals, vivid stories are more persuasive compared to statistical facts as they evoke stronger mental imagery and have stronger intuitive appeal[13];
- People are entranced by a specific, identifiable victim who is made into a cause. They give more to an identifiable rather than statistical victim[14];
- When shown photographs or silhouettes of beneficiaries, people are twice more likely to give when viewing the former than the latter[15].

Bounded rationality

People have limited information and limited cognitive abilities and, as such, are not capable of making maximising decisions[16]. Instead, they rely on mental shortcuts (heuristics) to simplify decision making. These result in quick and satisfactory decisions

10 Mohan and Bulloch, 2012
11 Kahneman, 2011
12 Small et al., 2007
13 Das et al., 2008
14 e.g., Kogut and Ritov, 2005
15 Genevsky et al., 2013
16 Simon, 1972

but can be prone to errors and biases[17]. Some relevant biases include:

Status quo bias

People tend to stick with the status quo[18] because it involves less mental effort than considering other options. In situations where there is not an existing pattern of behaviour, the default option is commonly used to guide choices.

For example:

- When a retail group changed the default of its employee payroll giving scheme from opt-in to opt-out for new users, enrolment increased from 6% to 49%[19].

Present bias

Intertemporal decisions are those where the decision maker makes value comparisons between immediate and delayed outcomes. The rate at which people are willing to trade immediate for delayed outcomes declines with time[20]. In other words, people prefer short term gains over longer-term ones.

For example:

- Monthly donors to a large charity gave significantly (32%) more when asked to increase their contributions in two months' time, compared to when asked to do so immediately[21].

Framing effect and loss aversion

People's judgment of alternative courses of action is affected by the way the choice is presented, particularly whether the outcome is presented as a loss (negative) or a gain (positive). This is because people are loss averse – they treat losses more seriously than equivalent gains[22].

For example:

- In focus groups carried out in the U.K., young people indicated that they were triggered to volunteer by the threat of a negative event if they failed to act, such as the removal of local amenities, rather than the opportunity for improvements if they did[23].

17 e.g., Hammond et al., 1998
18 Samuelson & Zeckhauser, 1988
19 U.K. Behavioural Insights Team (BIT), 2013
20 Laibson, 1997
21 Breman, 2011
22 Kahneman and Tversky, 1979
23 Foley and Griffiths, 2011, p. 36

Cognitive overload

People suffer from overload when they are provided with too much information they cannot easily process. An example is the choice paradox, where people's ability to reach a decision decreases with the number of options they are presented with[24]. Cognitive overload coupled with the bias against conscious effort cause a tendency towards inertia. As such, any minor inconvenience can lead to procrastination or failure to act.

Some examples of related research findings:

- Potential donors who feel they lack information are more likely to not donate than to seek out information themselves. As such, providing information about the uses of funds positively impacts giving[25];
- People who received solicitation letters accompanied with pre-filled bank transfer forms and the option to give via credit cards were 26% more likely to give compared to those who only received the letters[26].

Social influences

Instead of being self-interested, people are social creatures who take others into account when making decisions. People are inequality-averse[27], reciprocal[28] and altruistic[29]. They also rely on social cues to guide their actions, the most powerful of which is the perceived social norm. We observe what others do and try to do the same, especially if these people are similar to us, as this strengthens the peer effect[30]. People also care about how they compare to others and want to be better[31].

Some examples of related research findings:

- Significantly more employees at a bank donated their day's salary to charity when they received a personalised email and/or some sweets from their CEO, compared to a generic email[32];
- Adding the sentence: "Many of our customers like to leave money to a charity in their will" made people 43% more likely to give, compared to just a plain ask[33];

24 Lyengar and Lepper, 2000
25 e.g., Jackson and Mathews, 1995
26 Rasul and Huck, 2010
27 Fehr and Schmidt, 1999
28 Falk and Fischbacher, 2006
29 Andreoni, 1989
30 e.g., Cialdini et al., 2006
31 Festinger, 1954
32 BIT, 2013
33 BIT, 2013

- Revealing that other donors share similar characteristics – for example, gender[34], first names[35] or fellow alumnus[36] - increased the likelihood of giving;
- Telling people: "We had another [person]; they contributed $300" increased average donations by 12%, compared to just a plain ask[37].

Self-image and identity

People act in accordance with the way they see themselves and/or how they would like others to see them. Most would like to see themselves and/or be seen by others as altruistic, with strong social values. Encouraging them to identify with a social cause can increase giving. Giving in such situations creates the association between the self and the cause, such that they internalise the act of giving - this becomes part of who they are[38].

Some examples of related research findings:

- Blood donors develop an altruistic self-image as a result of continued donation[39];
- When people were told: "You are a generous person. I wish more people I met were as charitable as you", they gave 71% more than those who were not told the same[40].

Implications for policy and practice

Given the evidence that charitable giving and volunteering share an underlying philanthropic and/or "civic" core, we have critically analysed the literature from charitable giving above in order to apply these insights to volunteering. Below we recommend some potential BI-policies to increase volunteering, based on this careful analysis.

We adopt the EAST framework developed by the Behavioural Insights Team (BIT)[41] which sets out four principles: *To encourage a behaviour, make it Easy, Attractive, Social and Timely.*

34 Croson and Shang, 2011
35 Burger et al., 2004
36 Meer and Rosen, 2011
37 Shang and Croson, 2013
38 Koo and Fishbach, 2016
39 Piliavin and Callero, 1991
40 Kraut, 1973
41 BIT, 2014

Making it *easy*

This addresses the barriers to volunteering that result from cognitive overload, inertia and the status quo bias. Some recommendations:

Simplify information

Information on volunteering should be provided simply and unambiguously, using headlines, pictures (not too many words) and in small chunks at a time.

Reduce inconveniences and red tape

Authorities should make it as painless as possible for volunteers to meet requirements relating to background checks, occupational health and safety and insurance. For example, pre-filled application forms and streamlined processes.

Reduce choice overload

Potential volunteers have reported being overwhelmed by too many different options. A solution would be to provide people with a smaller number of default choices[42], presented as “most in need of help”.

Opt-out instead of -in

Organisations can make enrolment in volunteering activities the default option for new employees, who can opt-out if they are not keen.

Help form a habit

Where the status quo is to not volunteer, shift the inertia with measures that help people embed volunteering into their everyday routines[43]. For example, regular reminders via sms: “Don’t forget to join us this weekend for community clean-up”. Habit formation is particularly relevant for volunteering where the decision to engage takes places repeatedly.

Making it *attractive*

This can influence people’s behaviour because many decisions are made automatically, in the moment. Our System 1 is susceptible to things that are salient, novel and appealing, including appeals to our self-image. Some recommendations:

Appeal to emotions

Use emotional appeals in volunteer recruitment campaigns: focus on one specific, identifiable beneficiary, show their photograph, and weave a vivid narrative around them and their need.

42 BIT, 2020
43 *ibid*

Ensure positive experiences

People decide whether to continue volunteering based on the experience they had doing it. Their memories will be based on highlights *during* the experience and at the *end* of it (the peak-end effect). If these are positive, they will most likely return[44].

Attract attention

People react to things that draw their attention, for example, handwritten notes, vivid colours, small gifts, scarcity, gamification, etc. If providing information, do so in a tangible and relatable manner, so that people can imagine what it means. For example, "If all households in [*local area*] would volunteer to [*action*] it would save the economy enough money to fund [*social issue/number*] for a year"[45].

Personalise messages

The mention of our own name draws us in and makes the consequences detailed in the message directly relevant[46]. Personalisation will also reinforce a person's self-image as an altruistic person.

Foster a sense of community and identity

Make volunteering a part of people's self-identity. Previous research with front line workers shows that affirming belonging reduces resignations[47]. Current volunteers can share their experiences amongst each other to cultivate a sense of belonging to the community[48].

Making it *social*

This taps on the fact that we are social creatures. Some recommendations:

Describe the social norm

Use messaging to make people perceive volunteering as the social norm, especially in their neighbourhood or workplace. The knowledge that most others who are similar to them volunteer will motivate people to do the same.

Use an appropriate messenger

The identity of the messenger matters as it influences the importance people place on the message. If the messenger is someone people can identify with and/or trust, it will be taken more seriously. For example, feature a well-liked local or colleague or an expert in the field.

44 Fujiwara et al., 2018, p.7
45 e.g., Linder et al., 2018
46 BIT, 2014, p.21
47 Linos et al., 2022
48 BIT, 2020

Provide comparisons

Leveraging on people's need to be better than others, comparisons can be drawn to better performing peers. For example, providing feedback to people on the number of hours they spent volunteering in a particular period, compared to the neighbourhood average or the workplace average.

Draw on reciprocity

People tend to return kindness. Recruitment messages can highlight the contribution of others to motivate people to sign-up. For example, remind people of the incredible work that doctors and nurses are doing for the community, and identify them specifically as the beneficiaries of the help[49].

Making it *timely*

There is often a gap between intention and action due to inertia and present bias. For example, a person may intend to volunteer but keeps putting it off. This addresses such barriers. Some recommendations:

Encourage commitment

People tend to honour the commitments they have made, especially if made publicly and to someone they value. Volunteer organisations can encourage friends, family members or co-workers to volunteer for activities together. People are more likely to follow through if failure to do so lets others down.

Get timing right

The salience of particular causes will be heightened at different junctures[50], so timing matters. Just like gyms boost their campaigns during New Year, campaigns to recruit volunteers should be made to coincide with relevant events. For example, for environmental organisations, on World Environment Day or after environmental disasters.

Conclusion

We have reviewed the literature on behavioural insights as applied to charitable giving and based on that, recommended some BI-policies to increase volunteering. While such policies are low-cost and light-touch compared to traditional policies, they are not without limitations. Firstly, they are not suited for all circumstances. In particular, they will not work on those who have already consciously decided not to volunteer. Secondly, some have argued that BI-policies are manipulative as they tap on people's psychology.

49 *ibid*

50 e.g., Slovic, 1987

However, in a large study conducted by Sunstein et al.[51], people are generally supportive of such policies if they are transparent, and their outcomes are consistent with people's values. Being steered towards volunteering will not be controversial as it is widely viewed as the right thing to do[52]. Finally, BI-policies do not address the structural impediments to volunteering, e.g., social institutions which limit opportunities for engagement. Responsibility for these lies with government.

The main knowledge gap where BI-policies are concerned is their effectiveness over the longer term and at scale, all of which still need to be evaluated[53]. In the case of volunteering, such policies are particularly relevant to get sign-ups, as such decisions only need to be made once. For sustained volunteering, repeated interventions may be required. Most of the research findings informing this paper come from studies conducted in America and Europe. Arguably Australia shares the same psychological underpinnings and cultural values, but behaviour is very much also dependent on place. As such, there are gaps in knowledge in terms of behavioural insights applied to volunteering in the Australian context. For instance, recent catastrophic fires and floods may moderate Australian responses to BI-policies.

Future research possibilities lie in investigating the Australian context, in particular, what psychological factors motivate or hinder Australian volunteering, and does it differ across different causes and segments of the population. Once these have been identified, appropriate BI-policies can be designed targeted to address these factors. To facilitate evidence-based policy, future research can also test these policies for effectiveness using framed-field experiments or randomised controlled trials.

51 Sunstein et al., 2019
52 Cotterill et al., 2012
53 see List, 2022

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