Public Perception Survey on Social Enterprises

Presented by

DBS Foundation

Updated August 2020

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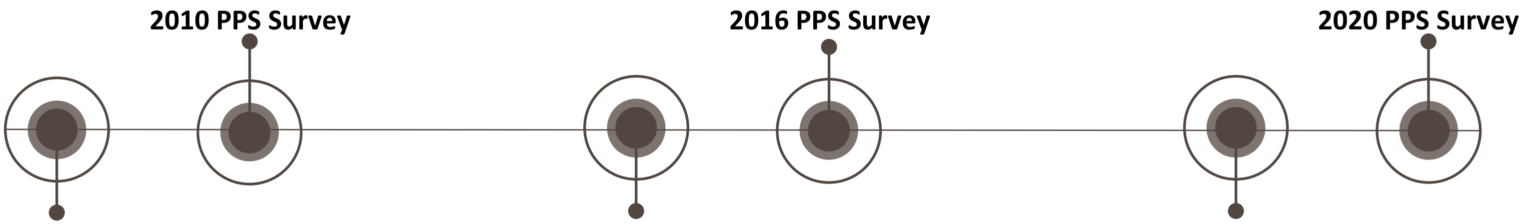
Introduction

Since the early 2000s, Singapore's Social Enterprise sector has evolved substantially. While initially seen as alternatives to providing employment for disadvantaged Singaporeans, the sector is now a complex ecosystem of small businesses, social franchises, policy makers, service providers, capacity, network and fund providers, and research institutes (raiSE, 2017). These changes have continued beyond the 2016 Public Perception Survey (PPS), which was conducted by ACSEP.



2009 - Social Enterprise Association (SEA), was set up to promote social entrepreneurship through public awareness and encouraging partnerships across key stakeholders (raiSE, 2017).

2009 - Asia Centre for Social Entrepreneurship & Philanthropy (ACSEP) was formed to gain understanding and consolidate impactful practice in social entrepreneurship and philanthropy in Asia (raiSE, 2017).

2015 - raiSE, Singapore Centre for Social Enterprise was formed from through the efforts of MSF, NCSS, SEA and Tote Board, as a sector developer that nurtures, raises awareness and supports Social Enterprises in Singapore (raiSE, 2017).

Ongoing Programmes & Events

- President's Challenge Social Enterprise Networking Event - a prestigious award by the President's Office to outstanding businesses and their partners within the Social Enterprise sector in Singapore (raiSE, 2020).
- LeapForGood - a programme designed to help aspiring social entrepreneurs move from ideas to real and sustainable business solutions around specific emerging social needs (raiSE, 2019).
- FestivalForGood – launched in 2016, this two-day festival aims to raise public awareness and support for local social entrepreneurs (raiSE, 2017).

Recap of Survey in 2016 & Key Learnings

01 Increase in awareness and buying from Social Enterprises

From 2010 to 2016, there has been a large increase in awareness and buying from Social Enterprises.

02 Quality and Uniqueness over Philanthropy

As compared to 2010, in 2016, Individuals are increasingly looking at intrinsic qualities of goods and services (e.g. price, quality, uniqueness) when considering to purchase from Social Enterprises, and relying less on supporting social causes as a motivation for purchasing.

03 Non-Buyers* are a resilient group

The increase in the number of Buyers* from 2010 to 2016 appears to come from the conversion of Ready-Buyers* into Buyers*. Non-Buyers remain a resilient group.

*Buyers are defined as individuals who have purchased from Social Enterprises, Ready-Buyers are individuals who have not purchased from Social Enterprises but intend to do so in the next 6 months, and Non-Buyers are individuals who have not bought from Social Enterprises and do not intend to do so in the next 6 months. For more information on the definition of this segment, click here

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Moving into 2020

Beyond tracking awareness levels from the 2016 survey, Blackbox has identified key areas of analysis:

1. Beyond awareness, how well does the public **understand and recognise** Social Enterprises?
2. In terms of public perception, where do Social Enterprises **stand in relation to Businesses and Charities?**
3. How has **Buyer, Ready-Buyer and Non-Buyer behaviour changed** since 2010 and 2016?

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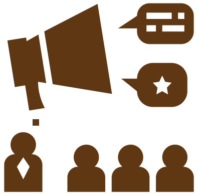
About the Study

raiSE has appointed Blackbox Research to carry out a Public Perception Study of Social Enterprises (hereafter referred to as SEs) in Singapore. The study was conducted in March to April 2020 among 2,033 respondents

Research objectives as below:



Understand **public awareness and understanding** of SEs **since 2016**.

Understand **buying behaviour** its impact on their **strategic marketing**.

Understand **key trends** for SEs in the Singapore and how that may translate into **business opportunities**.

Understand how **various programmes** to **increase visibility on SEs** have contributed to awareness.

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Findings from the 2020 PPS – Trends from 2016 & What's new in 2020

Increase in awareness of SEs; room for improvement in older individuals

- Awareness of SEs has increased, from 65% in 2016 to 72%* in 2020.
- More than half (57%) of respondents are aware of SEs in 2020.
- Older respondents (≥50 years) are significantly less aware as online channels reach them at a lower rate.

Improvements in identifying SEs

- Ability to correctly identify two or more organisations as SEs has improved from 29% in 2016 to 49% in 2020.
- SEs were clearly differentiated from Charities and Traditional Businesses^
- SEs were identificed more closely with attributes that involve both financial and social activities^

Increase in individual buyers; Individuals and corporations have different considerations

- An increase in Buyers from 35% in 2016 to 49% in 2020; conversion from Ready-Buyers.
- Top 2 considerations when purchasing goods and/or services from a SE:
  - Public: Price and Quality in 2020, an increase from 2016.
  - Corporations: Social causes above price and quality when it comes to engaging SEs.

*The 2020 data was weighted for an apple to apple comparison. | ^Based on correspondence analysis

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Findings from the 2020 PPS – Expectations & Perceptions of SEs

Potential for SEs to contribute to social and Environmental needs

- <u>Employment opportunities for vulnerable groups</u> were publicly perceived as having the highest gap in importance and satisfaction.
- Beyond social needs, the public felt that environmental needs required focus too. Sustainable usage of items (<u>i.e. recycling/upcycling and reducing single-use items</u>) and big picture climate issues (<u>reducing carbon footprint, climate change)</u> had the highest gap in importance and public satisfaction.

SE model is seen as a solution to address social issues

- Almost all respondents agree (<u>95%</u>) that SEs are a good way to address social issues.
- Three quarters of working adults (<u>76%</u>) agreed that Businesses should address social issues through a SE model.
- This difference in support from the public and support from working adults suggests that there might be pockets of reservations when it comes to businesses adopting a SE model. Further research is required to address the concerns of these corporations.

Recommendations in Moving Forward – Social Enterprises

Communicate and highlight competitive price and quality

- Consumers are being more discerning. Communication and advertising strategy should focus on the price competitiveness and quality of their products.
  - In 2020, considerations of price and quality have increased and are the top two considerations for Buyers, Ready-Buyers and Non-Buyers where social goals were the top consideration in 2016.

Use online stores to make purchasing easy for ambivalent individuals

- SEs can consider to open and online stores/bookings to increase ease and accessibility of purchasing goods and services.
  - In Ready-Buyers, ambivalence is the top reason for not buying from SEs.
  - Amongst individuals aged 25 to 49 (who were previously identified as the buyer market for SEs), ambivalence is also their top reason.

More visibility of SE membership

- There is a proportion of respondents who are Buyers but are not aware that the organisations they are buying from are SEs.
- SEs should increase the visibility of their SE status by making it clear in their branding, profile, and online channels.
  - The BusinessForGood logo is a potential avenue to indicate one's status as a SE. However, awareness and understanding of the logo needs to be increased first.

Recommendations in Moving Forward – raiSE

Continue awareness and publicity

- Awareness is a crucial step in understanding and buying from Social Enterprises. Respondents who are aware of Social Enterprises are significantly more likely to be Buyers. Additionally, amongst non-buyers, lack of awareness is the top reason for not buying from Social Enterprise prior to the survey.
- Given that the public's top expectation for raiSE is to increase awareness of Social Enterprises, raiSE needs to continue efforts in publicising Social Enterprises, as organisations with twin drivers of social and financial value.

Step up publicity of the BusinessForGood logo

- Given the low awareness and understanding of the BusinessForGood Logo, raiSE should intensify communications to publicise the logo and what it means.
  - A suggestion to use the logo as a marker in SE's products and services.
- More efforts to be done among older (50+ years) individuals and Small Medium Enterprises (SMEs)

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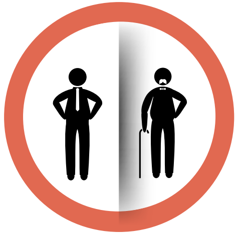
Recommendations in Moving Forward – Segmented Marketing Strategy

Individuals vs. Corporations



Young vs. Old

- SEs should emphasize their competitive goods when engaging with individuals; then highlight opportunities for social good when engaging with Businesses.

  - **Individuals** appear to engage with SEs to fulfill a desire/need, as price and quality of goods are their primary consideration.

  - Meanwhile, **corporations** appear to engage with SEs as a way of fulfilling their social responsibility, hence social goals are their primary consideration.

- Higher awareness amongst younger than older individuals.

  - **Younger:** Awareness can be converted to buying behaviour, by increasing ease of purchase and communicating competitive price and quality of goods.

  - **Older:** raiSE should employ traditional media (print, broadcast) given that the internet is significantly less effective in reaching them to increase the awareness as first step.

Research Methodology & Design

In this section, we examine how the 2020 survey has evolved in terms of:

1. Questionnaire Design and Pilot Testing
2. Research Design and Methodology
3. Demographic Composition of Sample

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Extensive efforts were taken to design the questionnaire and validate via Pilot Testing.

Questionnaire

Blackbox and raiSE worked together to refine the questionnaire for the 2020 survey. Key questions were kept constant from the previous questionnaire to track changes since 2016, and new questions were asked, and additional analytic models were employed to gain insights into Singapore's SE Sector.

Pilot Testing

Subsequently, a pilot test of 20 interviews were conducted, upon which the questionnaire was validated and further refined before official fieldwork was launched.

Research Design & Methodology

While 2016 employed a completely offline, face to face interview methodology, the 2020 survey employs a hybrid methodology of both online surveys and face to face interviews.

2016

Face to Face Methodology

Interviewers conducted face to face interviews with members of the public at the Central Business District. A total of 1,888 responses were collected (Lam & Zhang, 2016).

2020

Hybrid Methodology – Online and Face to Face

Responses from individuals aged 18 to 49 were collected via online data panel (n=1,340), while respondents aged 50 and above were collected via Face to Face interviews (n=693). A total of 2,033 responses were collected.

From Blackbox's experience, the younger age group has a higher response rate due to their familiarity with online platforms, while a face to face methodology was more suitable to the older age group who might not be familiar with online surveys.

Research Design & Methodology

Given the differences in Methodology, Blackbox has taken measures in our research design to ensure the comparability of data from 2016 to 2020 using the following measures:

1. Quotas were set for 2020 to ensure that the overall sample is representative of the demographics of the national population.
    - However, the 2016 survey had a higher proportion of respondents aged 18 to 29, its findings are more representative of Singapore youth's awareness of SEs (Lam & Zhang, 2016). Given the need to ensure representation of the Singapore public's opinion, while ensuring comparability to the 2016 survey, we have followed age distribution according to Singapore's population (as per Singstat), then subsequently boosting the younger age group with more survey responses.
    - Given the face to face interview and random sampling method employed in 2016, together with the quotas in place in 2020, the results are comparable after taking into consideration the difference in age groups.
2. Quality Control Checks for both online and offline fieldwork were conducted to ensure that responses were valid.

Demographic Breakdown in 2020 and 2016

The exact differences between the 2020 and the 2016 survey, and their proximity to the national demographics are shown in the tables below.

<table>
<tr><th>AGE</th><th>Singstat %</th><th>2020</th><th>2016</th></tr>
<tr><td>18 - 29</td><td>20%</td><td>20%</td><td>68%</td></tr>
<tr><td>30 - 39</td><td>18%</td><td>23%</td><td rowspan="2">26%</td></tr>
<tr><td>40 - 49</td><td>19%</td><td>23%</td></tr>
<tr><td>50 - 59</td><td>19%</td><td>16%</td><td rowspan="3">6%</td></tr>
<tr><td>60 - 69</td><td>21%</td><td>14%</td></tr>
<tr><td>70 - 74</td><td>3%</td><td>4%</td></tr>
</table>

GENDER	Singstat %	2020	2016
Male	49%	50%	44%
Female	51%	50%	56%

<table>
<tr><th>DWELLING TYPE</th><th>Singstat %</th><th>2020</th><th>2016</th></tr>
<tr><td>HDB 1/2/3</td><td>24%</td><td>20%</td><td rowspan="4">NA</td></tr>
<tr><td>HDB 4</td><td>33%</td><td>36%</td></tr>
<tr><td>HDB 5</td><td>26%</td><td>27%</td></tr>
<tr><td>Condo/Landed</td><td>17%</td><td>17%</td></tr>
</table>

Total Sample
n=2,033

Demographic Composition of Sample

The total distribution of respondents in 2020 (n=2,033) is more representative of the general population breakdown compared to 2016, to better understand the sentiments of the general population, while continuing to track progress from the 2016 survey.

Additionally, since individuals aged 25 to 49 were identified as Buyers and potential Buyers in the previous report, we have also analysed their responses as an aggregate (n=1,172) to tease out insights into their motivations and behaviour, compared to the general population.

18 to 24 Main
n=168

25 to 49 Main
n=772

25 to 49 Booster
n=400

25 to 49 Sample
n=772+400
=1,172

50+ Main
n=693

General Population Sample
n=168+772+693
=1,633

Total Sample:
n=168+772+693+400
=2,033

Please note that unless otherwise mentioned, results reported are from the Total Sample, n=2,033

Awareness & Understanding of Social Enterprises

In this section, we examine the public's awareness and understanding of SEs, and changes from 2016.

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Summary

01 Improvement in Awareness; a gap emerges between Younger & Older Individuals

When the general population data in 2020 was weighted for an apple to apple comparison with 2016, awareness increased from 65% to 72%. Increase in awareness can be attributed to raiSE's digital marketing campaigns, which has a higher reach amongst the younger age group and is less effective amongst those aged 50 and above. For these older individuals, traditional media and word of mouth is more effective.

At an overall level, more than half (57%) are aware of SEs.

02 Improvement in Identifying of SEs

More respondents could correctly identify more than 2 SEs. This increase seems to come from respondents who could correctly identify only 1 SE previously, indicating an improvement in their ability to identify SEs.

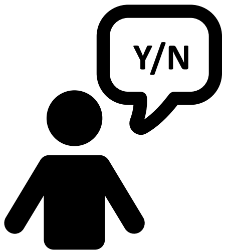
03 Social Goals crucial in understanding and identifying SEs

When it comes to understanding and identifying SEs, social goals were the top selected response for both questions. This indicates that the public depend on their knowledge of the social goals of an organisation when it comes to identifying SEs. To improve identification, SEs should intensify publicity of its social goals and how business resources are devoted to these goals.

Awareness: Unaided vs Aided

Depending on one's exposure to SEs, respondents have varying levels of awareness. To assess the levels of awareness of SEs, two types of awareness questions were asked. Firstly, an unaided awareness question, where respondents were simply asked if they have heard of "Social Enterprises". Subsequently, respondents were shown a preamble explaining what SEs are. The preamble serves as an aid to jog their memory. After this preamble, the second awareness question, aided awareness was asked. These two questions enables us to assess the level of familiarity they have with SEs.

Unaided:
"Have you heard of the term "Social Enterprise(s)"?

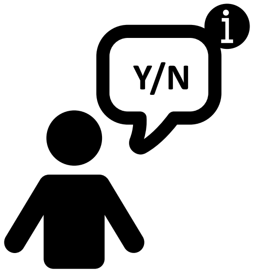


Preamble used:

A Social Enterprise is a business with a social objective. It uses business practices to achieve a social mission in a financially sustainable manner.

One example is a delivery services company that hires ex-offenders and persons with disabilities. The aim is to provide employment for them through specialised training. Another example is a company that hires and trains underprivileged women with the skills to brew coffee in specialty cafes. The aim is to provide them with specialised skills in coffee-brewing to improve their employability and income. A third example is a company that provides linguistic programmes that enhances school readiness and educational outcomes for children of disadvantaged families at a subsidised rate. The aim is to level the playing field for children of disadvantaged families.

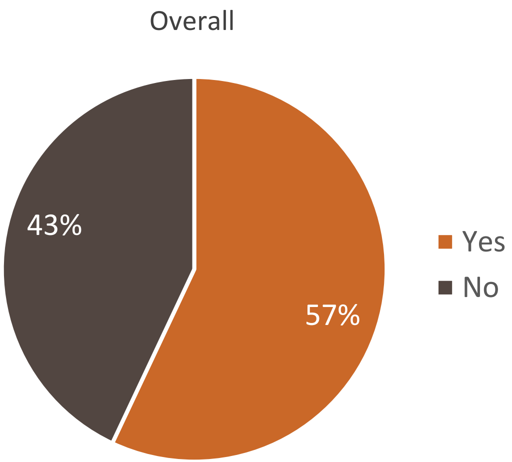
Aided:
"Do you now recall hearing the term "Social Enterprise(s)" prior to the survey?

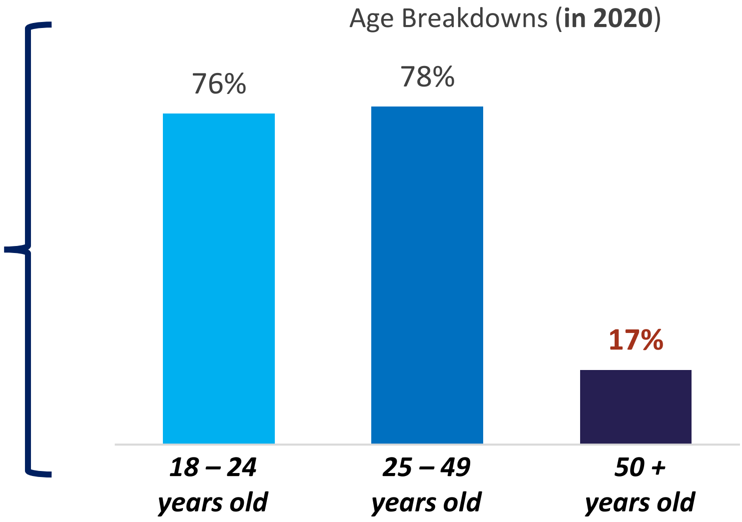


Unaided Awareness of SEs

At unaided level, more than half of respondents have heard of the term SEs.
When looking at awareness levels by age, there is a sizeable gap in awareness amongst younger and older respondents. A large majority of respondents who are younger than 50 years have heard of SEs. Meanwhile, amongst respondents aged 50 and above, less than 2 in 10 have heard of SEs.

A1. Have you heard of the term "Social Enterprises"?
% Yes





Numbers in red denote that the segment is significantly lower than other segments

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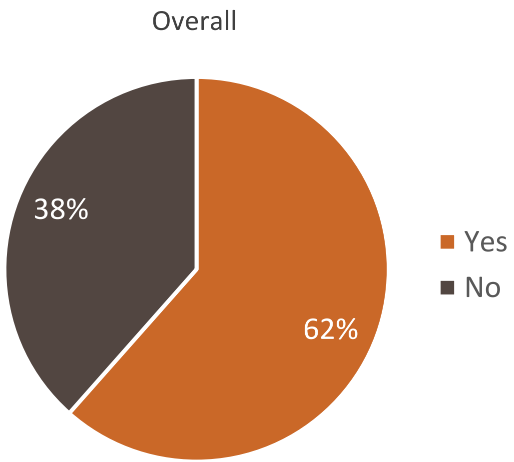
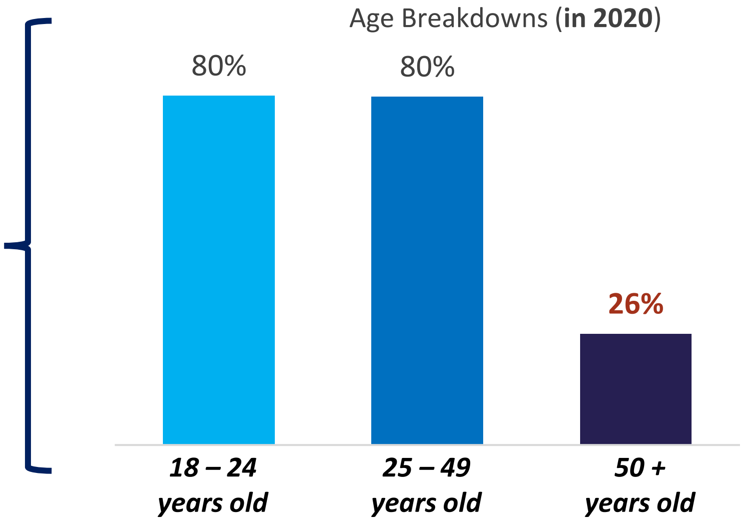
Aided Awareness of SEs

At an aided level, more than 6 in 10 are aware of SEs, indicating that a small proportion of respondents are aware of SEs after some clarification. The similar levels of aided and unaided awareness indicates a strong recognition of the term "Social Enterprise".

A2. After reading the information shared about "Social Enterprises", do you now recall hearing the term "Social Enterprise(s)" prior to the survey?
% Yes



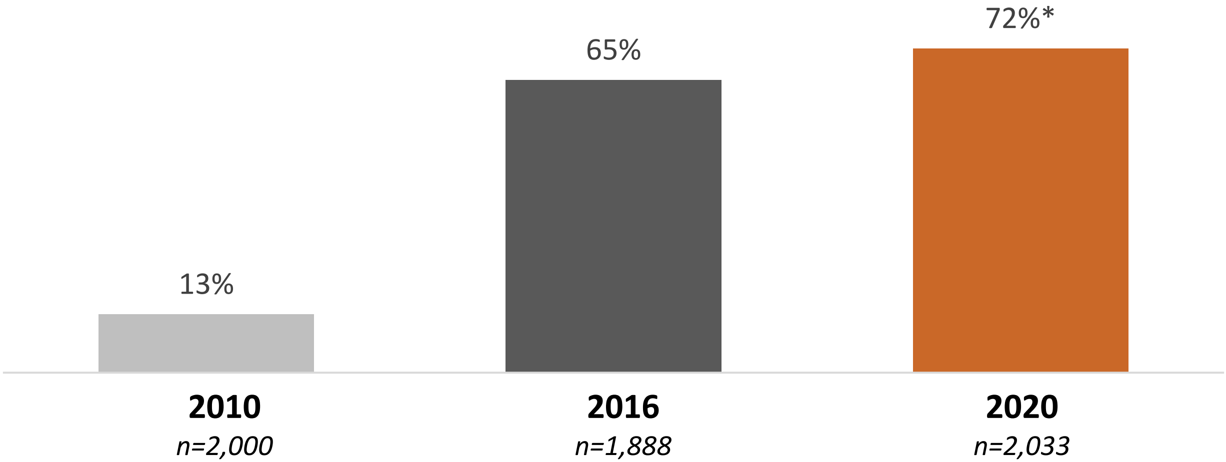


Numbers in red denote that the segment is significantly lower than other segments

How has awareness of SEs changed since 2016?

To track changes from 2016 while ensuring a fair comparison of the results, the data in 2020 was weighted by age, gender, and nationality (recall that 2016's data had a predominance of younger respondents (68% were aged 18 to 29), while 2020's data is more aligned with general population figures).
After weighting, the data shows that there has been an increase in unaided awareness of SEs in the past 4 years, indicating growing awareness of SEs.

A1. Have you heard of the term "Social Enterprises"?
% Yes



Weighted by age, gender and nationality with 2016's survey sample.

Note that in 2016, only an unaided awareness question was asked to respondents.

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Source of Awareness

After the awareness questions, respondents were asked to identify which media channels were the source of their awareness. By identifying the relevant media channels and trending the results, we can see how media reach has changed over time and identify gaps in reaching certain demographics.

The 2020 survey shows that internet platforms not only remained as the top channel through which the public heard about SEs, they also further increased by 10%-points compared to 2016. The increase can be attributed to the various digital marketing campaigns conducted by raiSE (2018).

A3. From which of the following media channels do you generally hear about "Social Enterprise(s)"?

	2010	2016	2020
1	Broadcast media (42%)	Internet (64%)	Internet (75%)
2	Print Media (34%)	Word of Mouth (49%)	Word of Mouth (47%)
3	Word of Mouth (25%)	Print Media (30%)	Broadcast Media (43%)

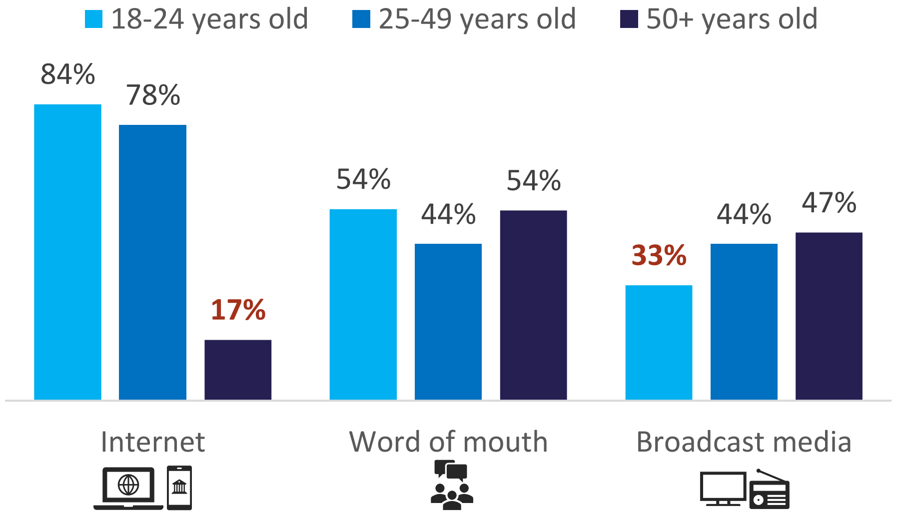
Click here for the full ranking of media channels in 2020's main sample

Click here for the full ranking of media channels in 2020's 25 to 49 sample

Gaps in Online Channels

While the internet is the top source of awareness of SEs, a closer analysis by age reveals that this is true for respondents below the age of 50. Older respondents are significantly less likely to hear about SEs on the internet compared to their younger counterparts. The significantly lower awareness levels of those aged 50 and above can be attributed to the increasing use of digital platforms as a source of awareness, but older respondents are not using these digital platforms. For respondents older than 50, word of mouth (54%), and traditional media (broadcast media (47%) and print media (43%)) are more effective channels. This calls for targeted marketing strategies for different segments of the population.

A3. From which of the following media channels do you generally hear about "Social Enterprise(s)"? (in **2020**)



Numbers in red denote that the segment is significantly lower than other segments

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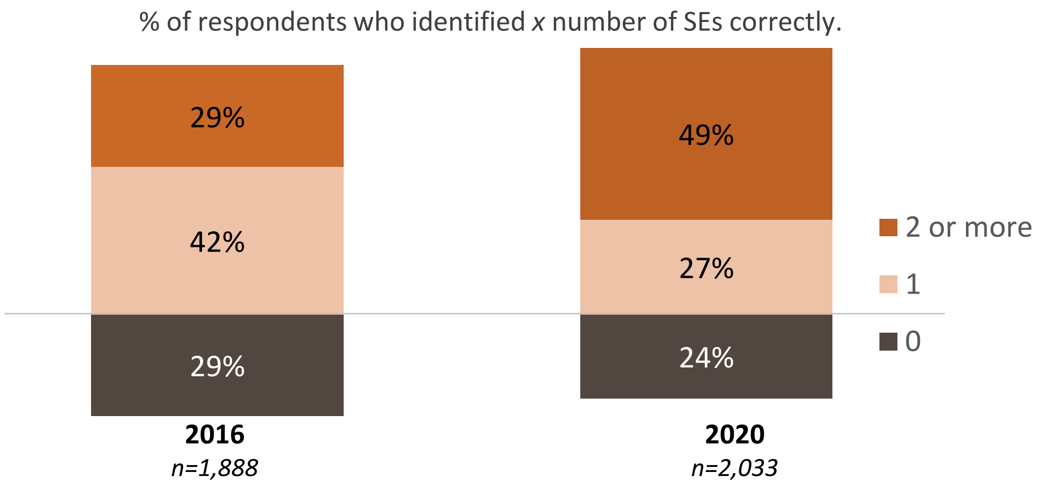
Identification of SEs – Changes since 2016

Going beyond awareness of SEs, how has the public's ability to identify SEs changed since 2016? Respondents were given a list of seven organisations and asked to categorise them as either: (1) a SE, (2) a Charity, or (3) a Business. One point is awarded each time a respondent correctly identified a SE.

There is a notable increase in the proportion of respondents who can identify 2 or more SEs, from 29% in 2016 to 49% in 2020. This increase seems to come from those who could identify only one SE previously. This indicates that amongst those who could identify only one SE in 2016, their ability to identify SEs has improved.



*Do note that there are different demographic composition of survey respondents in 2016 compared to 2020. 2016 had a higher proportion of respondents aged 18 to 29, while the 2020 survey results are more representative of the general population. For more specific age breakdowns, please refer to this slide. Please compare 2016 and 2020 with these demographic differences in mind.

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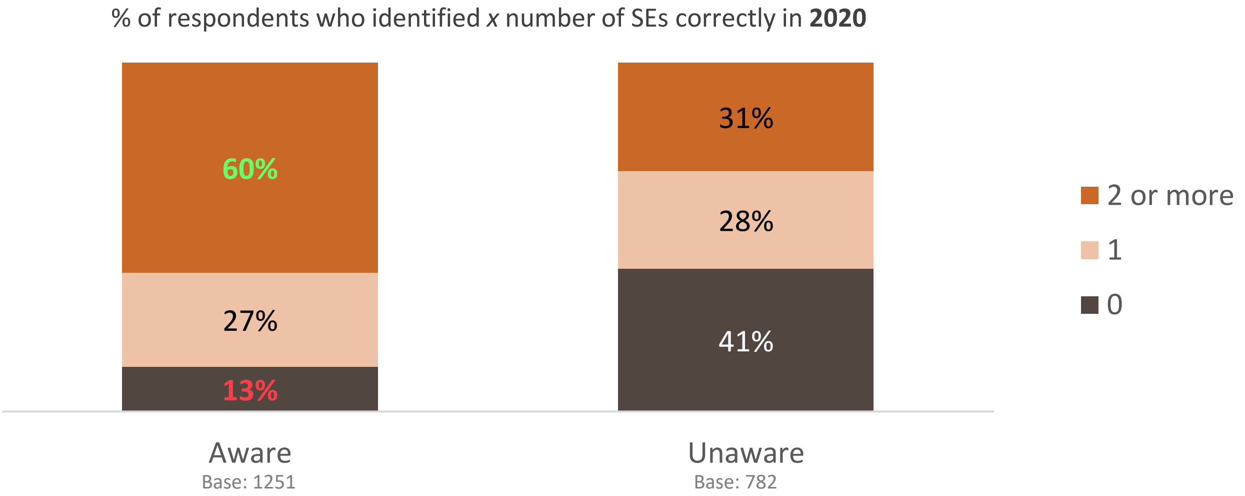
Impact of Awareness on Ability to Identify SEs

Taking a closer look at the 2020 results, how does ability to identify SEs vary across respondents who are **aware**, versus those who were **unaware** of SEs? The data was segmented into these two groups, and scores were tabulated to show how many SEs they could identify.

The results show that aware respondents are significantly more likely to correctly identify 2 or more SEs compared to respondents who were unaware. This points to awareness as a crucial factor in one's proficiency at correctly identifying SEs.



Numbers in red denote that the segment is significantly lower than other segments

Numbers in green denote that the segment is significantly higher than other segments

Social goals crucial in Understanding & Identifying SEs

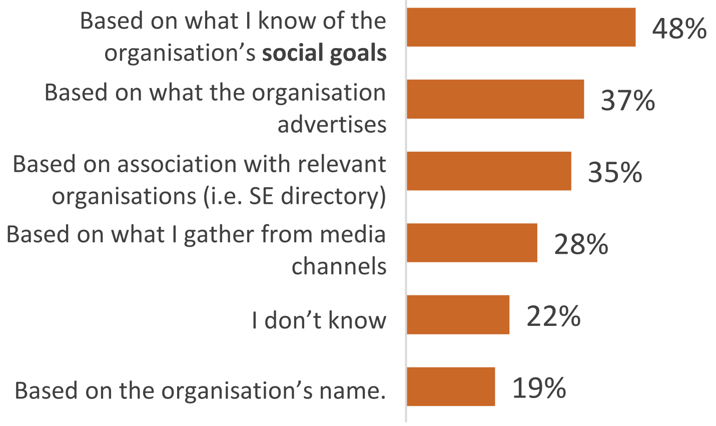
Beyond questions of awareness and identification in previous surveys, the 2020 survey delved into the public's thought processes when understanding and identifying SEs. Respondents were given a variety of attributes in questions A4 and A5 (see below) and asked to select the relevant options that applied to them.

The results show that **social goals** play a crucial role in understanding and identification, since social goals emerge as the most popular understanding of SEs, and the top method of identifying an organisation as a SE. To improve the public's identification of SEs, SEs should heavily publicise its social goals and how its resources are allocated to meeting it.

A4. What do you **understand** from the term "Social Enterprise" ?

n=2,033

A5. How do/would you **identify** an organisation as a Social Enterprise?

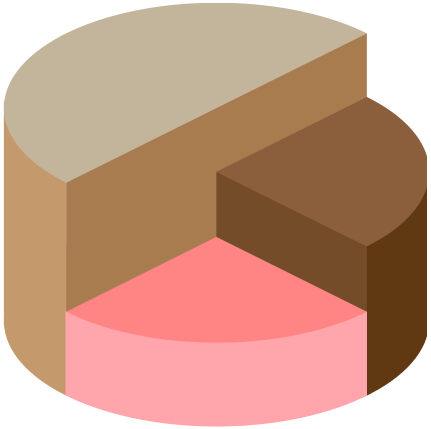


n=2,033

Charity, Business, or SE?

In balancing social goals and offering goods and services, SEs often find themselves being compared to Charities and Businesses.

How does the public view the differences between SEs, Charity and Businesses – as Organisations and the goods/services they offer?



Attributes of Social Enterprises, Businesses & Charities

In this section, we examine how SEs stand in relation to Businesses & Charities in terms of:

1. Characteristics of each organisation
2. Goods and services offered by each organisation

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Summary

01 Clear Differentiation of SEs

There is a clear differentiation of SEs from Charities and Businesses, in terms of attributes of each organisation, as well as attributes of the goods and services purchased from each organisation.

02 SEs more closely associated with both social and financial value

When it comes to attributes of each organisation, attributes of balancing business needs and social goals are more closely associated with SEs compared to Charities and Businesses (i.e. "This organisation practices CSR“; "This organisation balances between making social profits and solving social problems; "This organisation takes business actions that are in line with its social goals.”)

Comparison with Charities & Businesses using Correspondence Analysis

With an increasing awareness, SEs find themselves being compared against Charities and Businesses. The table below shows the similarities and differences in these three types of organisations.

Organisation	Charities/NPOs	SEs	Businesses
Primary Objective	Social Value	Social Value	Financial Value
Means of Achieving Objective	Donations	Sales of Goods and Services	Sales of Goods and Services

Despite SEs having twin drivers of achieving social impact, while also achieving financial returns, the Singapore public has previously mistaken SEs as Charities (raiSE, 2018), with the 2016 survey revealing that respondents in the past have associated SEs with donations (Lam & Zhang, 2016). Since then, raiSE has increased efforts to raise awareness of SEs' products and service, and distinguishing SEs from Charities is one of their key messages (raiSE, 2018).

Considering the previous confusions with Charities, Blackbox has proposed a Correspondence Analysis tool in the 2020 survey, which uses attributes and characteristics to visualise how the public sees SEs in relation to Businesses and Charities.

Attributes of Organisations – Question Structure

To visualise public perception of SEs in relation to Charities and Businesses, we asked respondents to select attributes that they associate with Charities and/or SEs, and/or Businesses. Two correspondence analysis were conducted, firstly for organisational attributes, and secondly, for goods and services produced by each organisation. The table below shows the questions and organisational attributes asked to respondents.

A6. For each characteristic listed below, please choose the appropriate types of organisations amongst the given options, to the best of your understanding.
(Respondents can select multiple options (Charities, SE, Business) for each attribute.

Attributes	Charities	SEs	Businesses
This organisation has clear social goals to solve social problems.			
Social goals are the core mission of this organisation.			
This organisation earns most of its revenue from selling goods and/or services.			
This organisation is or plans to be profitable.			
This organisation takes business actions that are in line with its social goals.			
This organisation balances between making profits and solving social problems.			
This organisation practices corporate social responsibility (CSR)			

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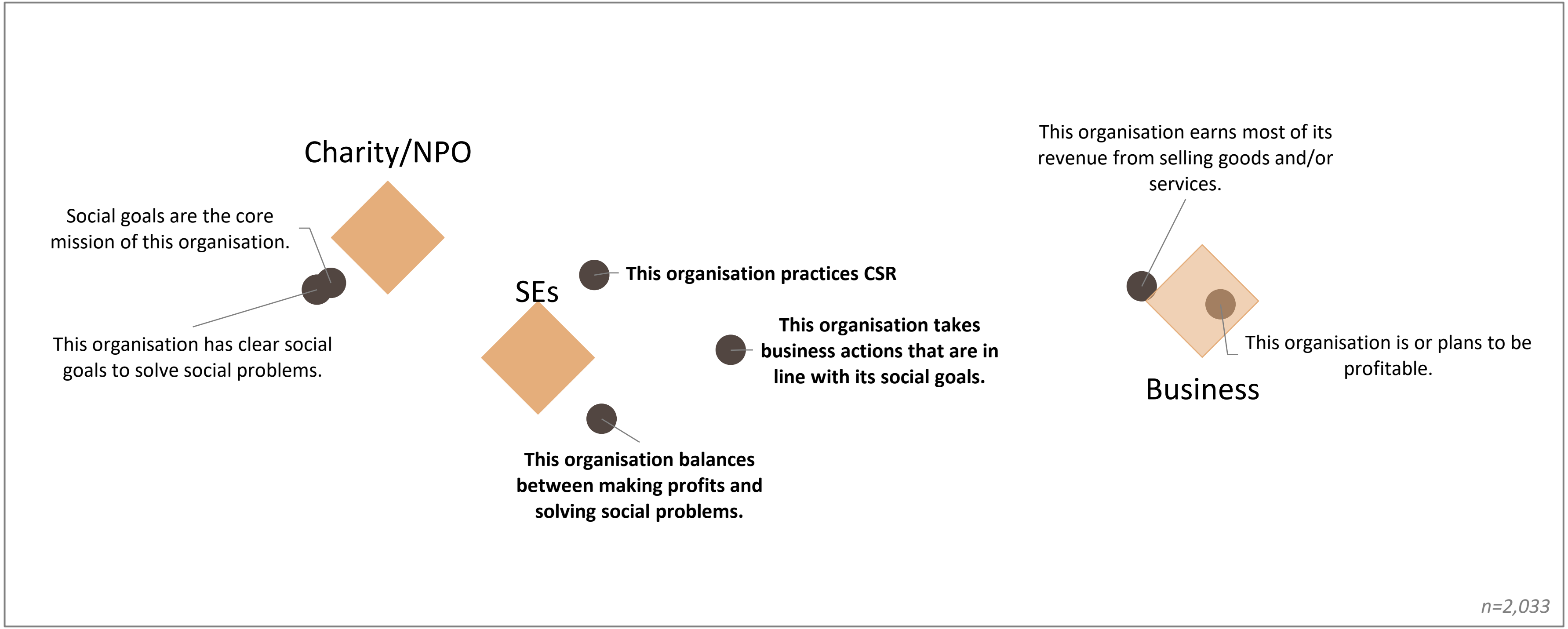
Attributes of Organisations – Correspondence Analysis

The results show that respondents clearly differentiated Charities/NPOs, SEs and Businesses from each other in terms of the attributes of each organisation. Additionally, SEs are more closely associated with attributes that involve balancing business needs and social goals.



*Please note that Correspondence Analysis shows the **relative** association of attributes compared to Charities and Businesses.

Click here to return to the Executive Summary

Attributes of Goods & Services – Question Structure

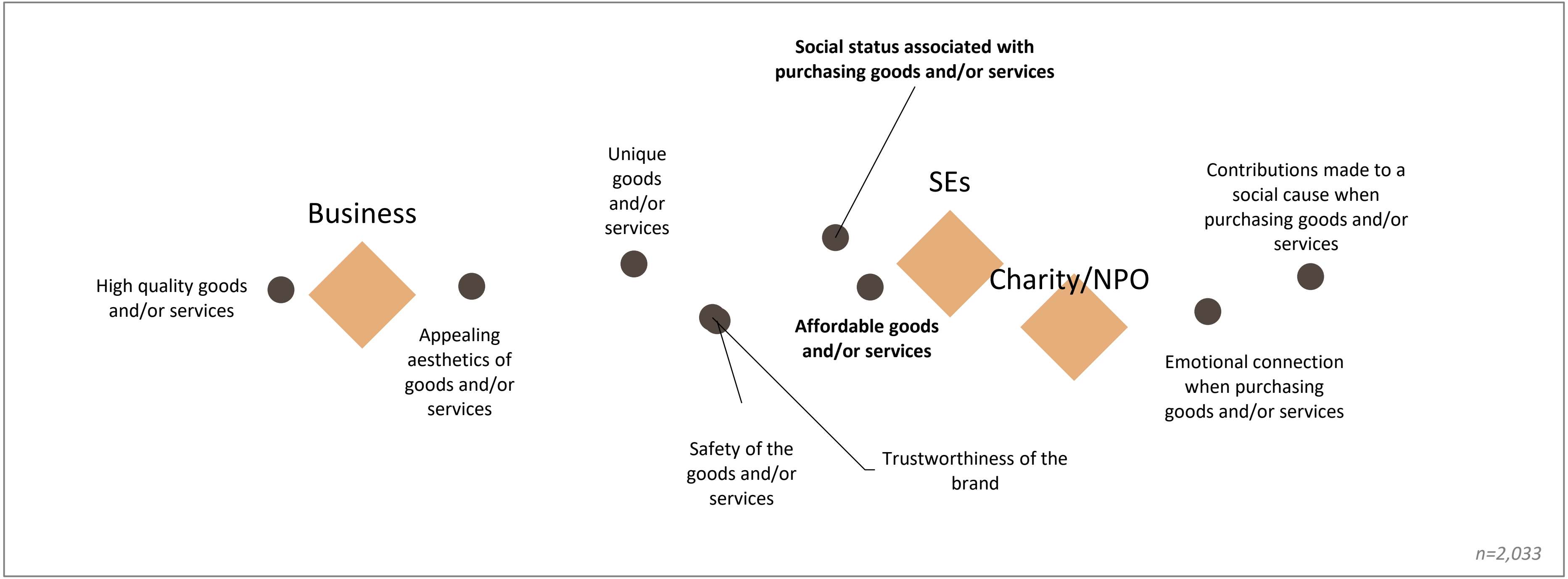
To assess what kind of attributes are associated when purchasing goods and services from charities, SEs, and businesses, respondents were asked to select attributes that they associate with the goods and services provided by Charities and/or SEs, and/or Businesses. The table below shows the questions and attributes of goods and services that were asked to respondents.

C4. For each attribute listed below with regards to purchasing goods and/or services, please choose the most appropriate category amongst the given options.

Attributes	Charities	SEs	Businesses
Affordable goods and/or services			
High quality goods and/or services			
Unique goods and/or services			
Appealing aesthetics of goods and/or services			
Social status associated with purchasing goods and/or services.			
Trustworthiness of the brand/organisation			
Safety of the goods and/or services			
Emotional connection when purchasing goods and/or services			
Contributions made to a social cause			

Attributes of Goods & Services – Correspondence Analysis

The results show that respondents clearly differentiated Charities/NPOs, SEs and Businesses from each other in terms of the goods and services offered by each type of organisation. Additionally, SEs are more closely associated with social status and affordable goods and services.



*Please note that Correspondence Analysis shows the **relative** association of attributes compared to Charities and Businesses.

To buy? Or not to buy?

Given the attributes associated with goods and products offered by SEs, what are the considerations when deciding to buy from SEs?

Buying Behaviour

In this section, we examine Buyers, Ready-Buyers and Non-Buyers – and their motivations and barriers to buying from SEs.

Click here to return to the Index

Summary

01 Continued conversion of Ready-Buyers to Buyers

Continuing from trends in 2016, there is an increase in the proportion of Buyers, that appears to come from the continued conversion of Ready-Buyers to Buyers.

02 Non-Buyers remain resistant.

The proportion of Non-Buyers remain resistant. Given that respondents who are aware of SEs are significantly less likely to be Non-Buyers, raising awareness is a crucial avenue for converting Non-Buyers to Ready-Buyers or Buyers. For those aged 25 to 49, additional efforts must be made to address their ambivalence and passivity in buying from SEs.

03 Increase in Intrinsic Qualities as a Consideration

Price and Quality have become top considerations for purchasing from SEs. There is a decline in “Believing in their (SE’s) social mission” as a consideration when buying from SEs.

Individual Behaviour

Buyers, Ready-Buyers & Non-Buyers

To assess how buying behaviour has evolved since the 2016 survey, we evaluated the buying behaviour of respondents and their future intention to buy from SEs. Three groups were identified: Buyers, Ready-Buyers, and Non-Buyers. Their definitions can be seen in the table below:

Buyers

Previously purchased from SEs

Ready-Buyers

Have not bought from SEs, but intend to do so in the following six months

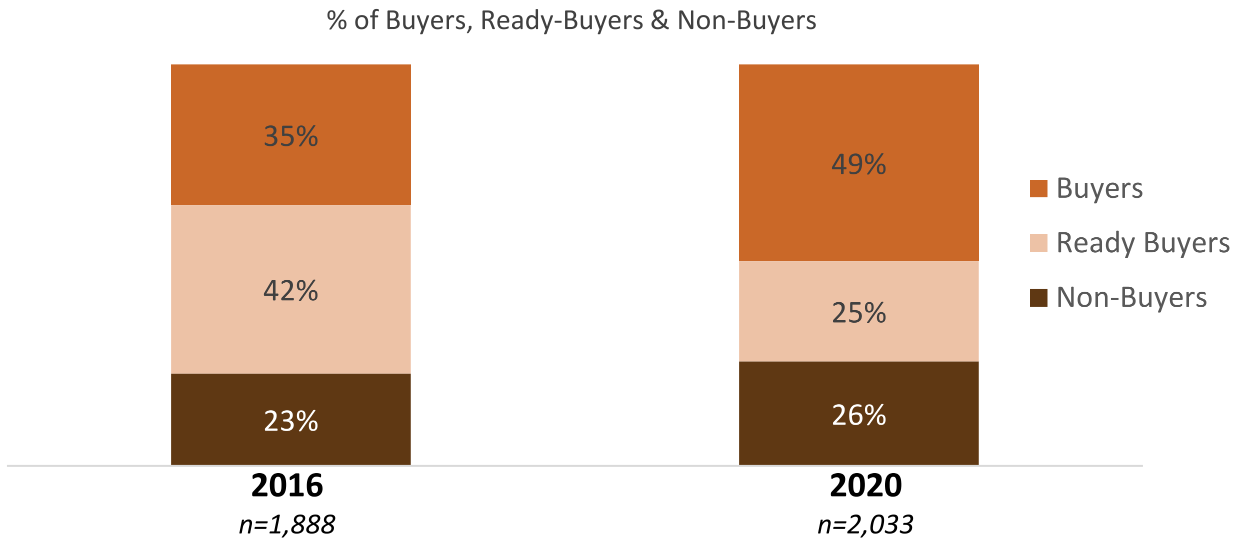
Non-Buyers

Have never bought from SEs and do not intend to do so in the following six months

Click here to return to Recap of 2016 findings

Buyers, Ready-Buyers & Non-Buyers Breakdown

Survey results in 2016 found that there was an increase in buyers from 2010, and this increase seems to come from the conversion of ready-buyers to buyers. The 2020 results show that this trend has continued. From 2016 to 2020, there is an increase in the number of Buyers from SEs, and this increase seems to come from the conversion of Ready-Buyers to Buyers, as seen from the decline in Ready-Buyers from 2016. This indicates that efforts to convert Ready-Buyers into Buyers have been successful.



*Do note that there are different demographic composition of survey respondents in 2016 compared to 2020. 2016 had a higher proportion of respondents aged 18 to 29, while the 2020 survey results are more representative of the general population. For more specific age breakdowns, please refer to this slide. Please compare 2016 and 2020 with these demographic differences in mind.

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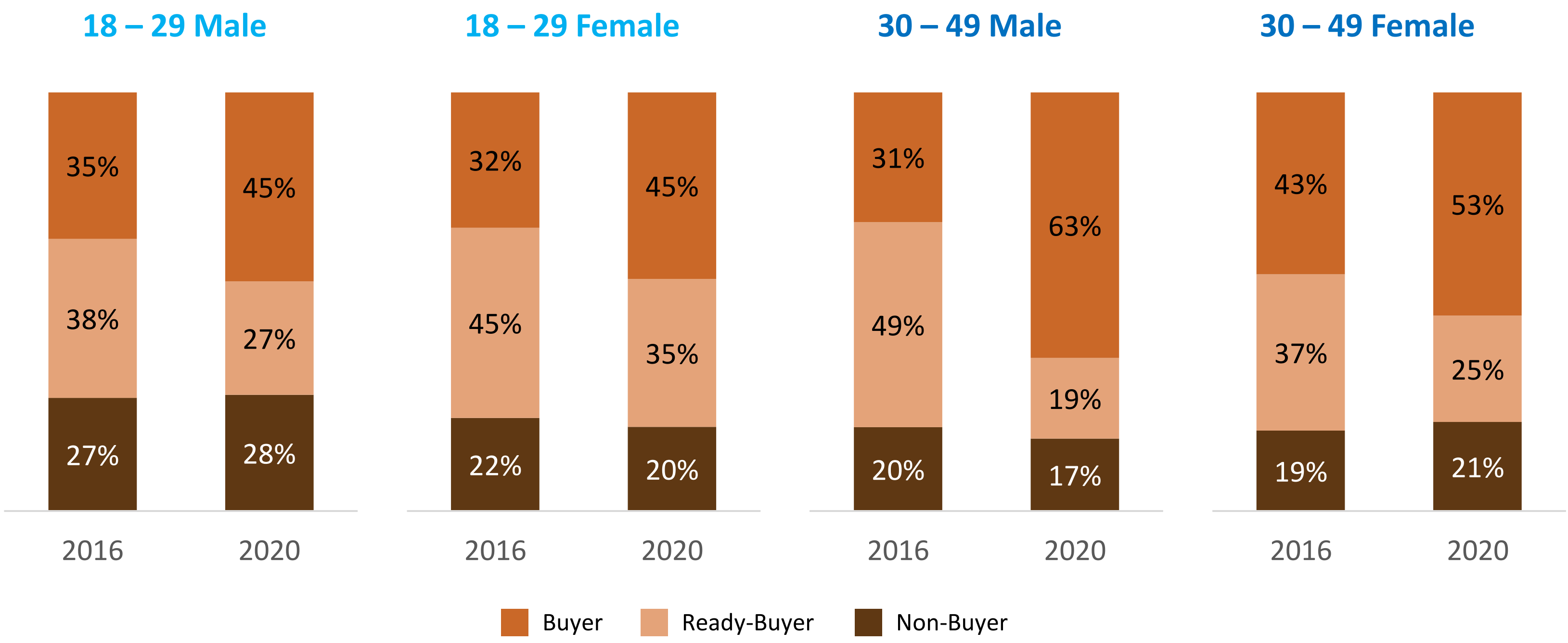
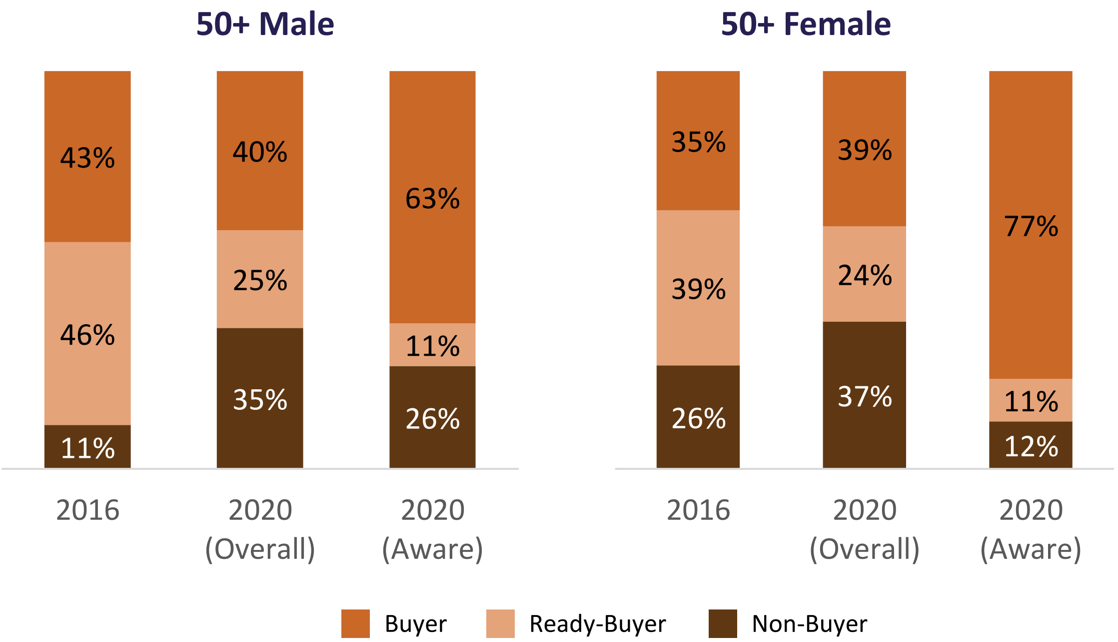
Buyers, Ready-Buyers & Non-Buyers below 50 years

For respondents aged 18 to 49, there appears to be conversion of Ready-Buyers to Buyers across age and gender groups.



Buyers, Ready-Buyers & Non-Buyers above 50 years

For respondents aged 50 and above, there is an increase in the proportion of Non-Buyers, and this seems to come from Ready-Buyers lapsing into the Non-Buyers group. This can be attributed to the low awareness of SEs as previously mentioned. Notably, amongst respondents who are aged 50 and above and are aware of SEs, they are more likely to be Buyers and less likely to be Non-Buyers. This points to the crucial role of awareness in shifting buyer behaviour, even amongst older individuals.



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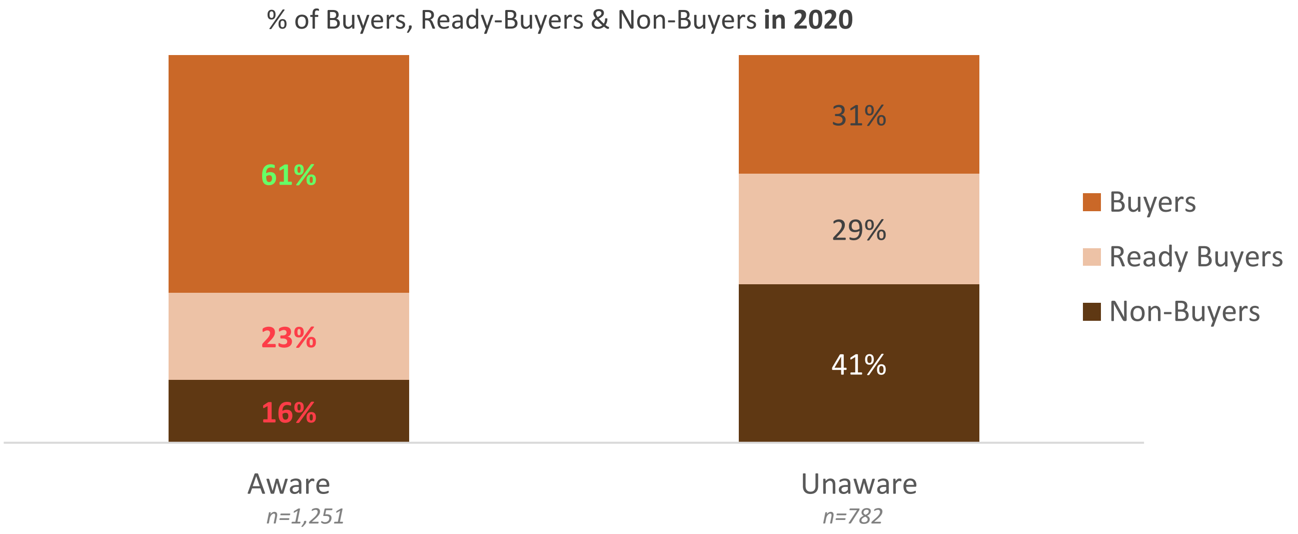
Click here to return to Recommendations (raiSE)

Impact of Awareness on Buyer Behaviour

Taking a closer look at the 2020 survey, how does buyer behaviour differ when comparing respondents who are **aware**, versus those who were **unaware** of SEs? After calculating the breakdown in buyer behaviour, the results were segmented into aware versus unaware respondents.

The results show that aware respondents are significantly more likely to be Buyers, and significantly less likely to be Non-Buyers. Given that the proportion of non-buyers in 2016 and 2010 has been resilient, and respondents who are aware are significantly less likely to be non-buyers, raising awareness is crucial in nudging Non-Buyers and increasing the proportion of Buyers.



Numbers in red denote that the segment is significantly lower than other segments

Numbers in green denote that the segment is significantly higher than other segments

Click here to return to Recommendations (raiSE)

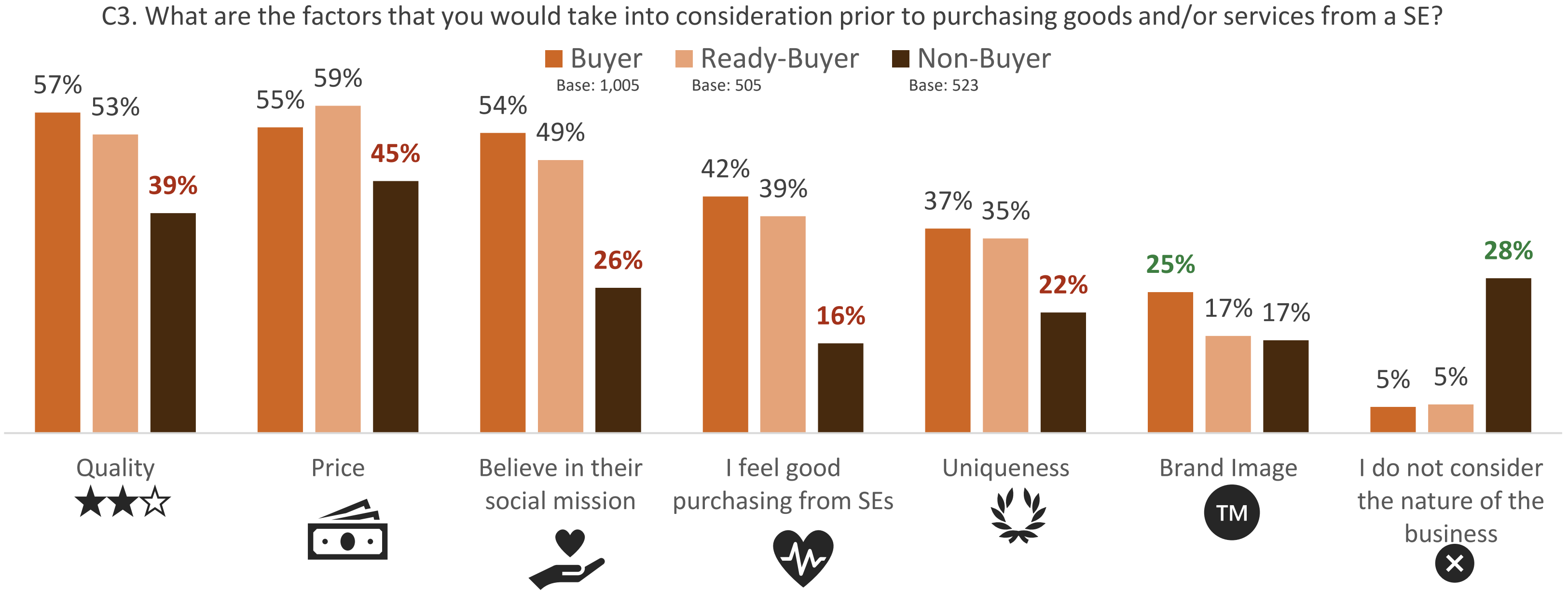
Unaware Buyers

While awareness plays a crucial role in buying behaviour, we found that a small proportion of respondents have bought from SEs and were not aware that they did so until they were informed of SEs during the survey. This indicates that more can be done for SEs to publicise their status as a SE.

Not aware & have not bought **29%** 43% of these respondents are Ready-Buyers	**Not aware & have bought** **14%**
Aware & have not bought **21%** 58% of these respondents are Ready-Buyers	**Aware & have bought** **36%**

Considerations when Purchasing from SEs

To nudge Ready-Buyers and Non-Buyers into the Buyers segment, it is crucial to understand one's considerations when it comes to purchasing from SEs, for each group. Notably, Price is the top consideration for Ready-Buyers and Non-Buyers, while Quality is the top consideration for Buyers. To nudge Ready-Buyers and Buyers, SEs should communicate how the price and quality of their goods and services are competitive with other firms in the market.



Numbers in red denote that the segment is significantly lower than other segments

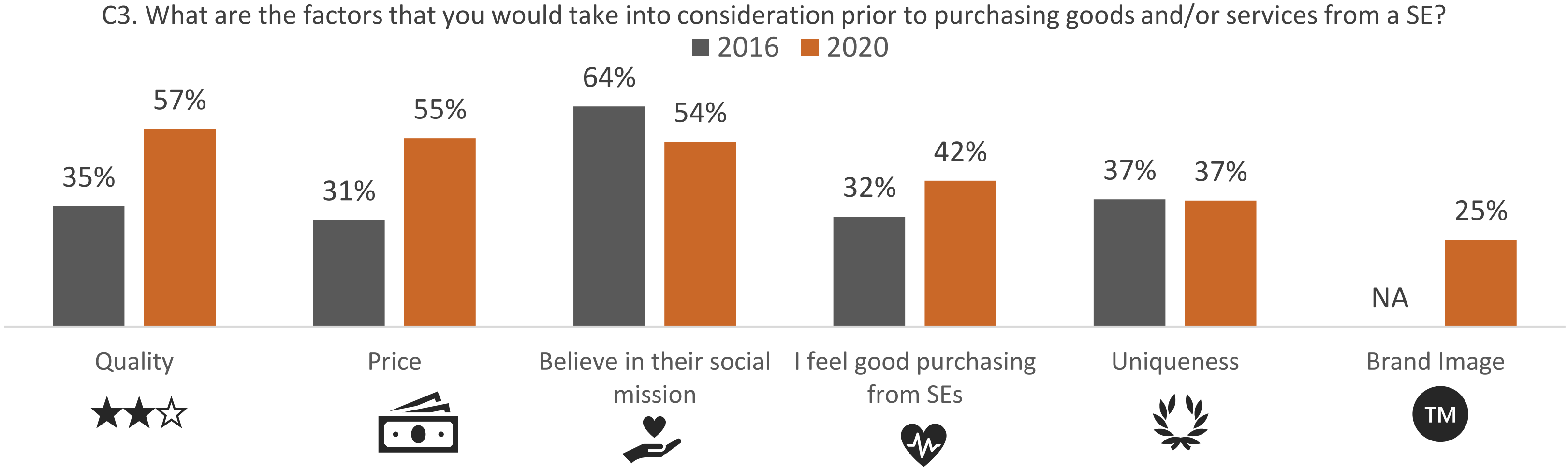
Numbers in green denote that the segment is significantly higher than other segments

Click here for a ranking of what was bought from SEs
Click here to return to the Executive Summary
Click here to return to Recommendations (Segmented Marketing Strategy)

Buyers' Considerations when Purchasing from SEs

How has motivations amongst buyers changed since 2016? The 2016 survey revealed that Buyers consider social missions and uniqueness of goods to be their top two considerations.

The 2020 results show that Buyers are increasingly considering quality and price, such that these are the top two considerations when purchasing goods and services from a SE. Believing in the social mission of the organisation has declined, while uniqueness of goods has remained the same. This indicates that Buyers are becoming more discerning when purchasing from SEs, looking at the qualities of the goods and services before considering the SE's social mission.



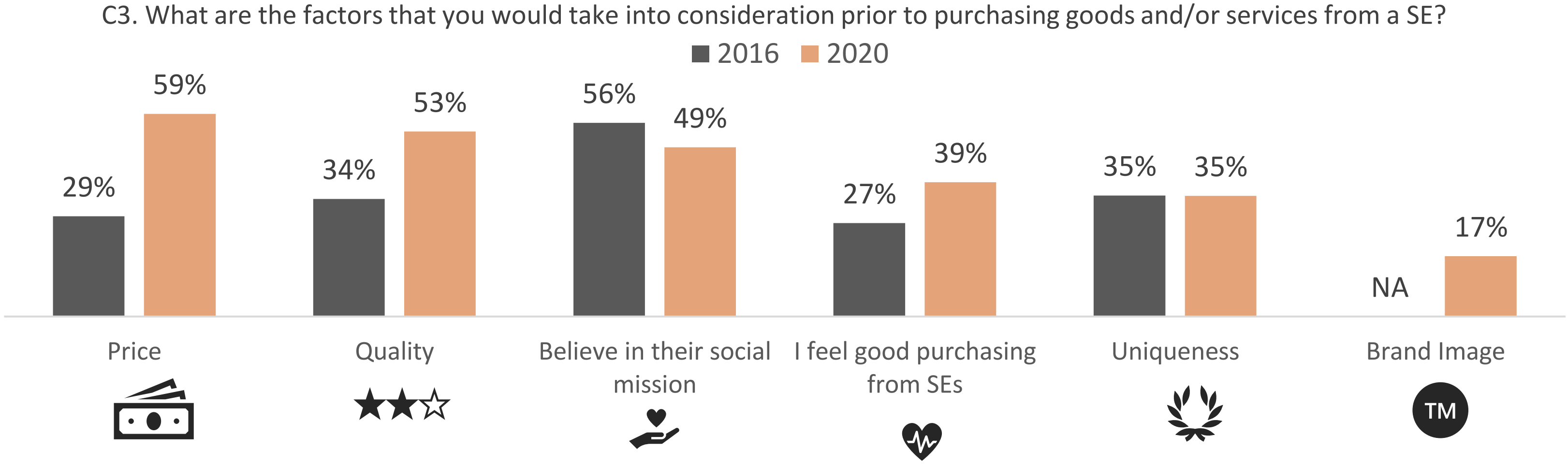
*Do note that there are different demographic composition of survey respondents in 2016 compared to 2020. 2016 had a higher proportion of respondents aged 18 to 29, while the 2020 survey results are more representative of the general population. For more specific age breakdowns, please refer to this slide. Please compare 2016 and 2020 with these demographic differences in mind.

Click here to return to Recommendations (SEs)

BLACK BOX

Ready-Buyers' Considerations when Purchasing from SEs

A similar trend is observed when comparing factors of consideration for Ready-Buyers in 2016 and 2020: price and quality have increased, to become the top two factors of consideration when purchasing from SEs in 2020. A notable difference is that Ready-Buyers are most concerned about price, whereas Buyers are looking at quality. To convert the Ready-Buyers into Buyers, SEs should communicate how price competitive their products are compared to other organisations.



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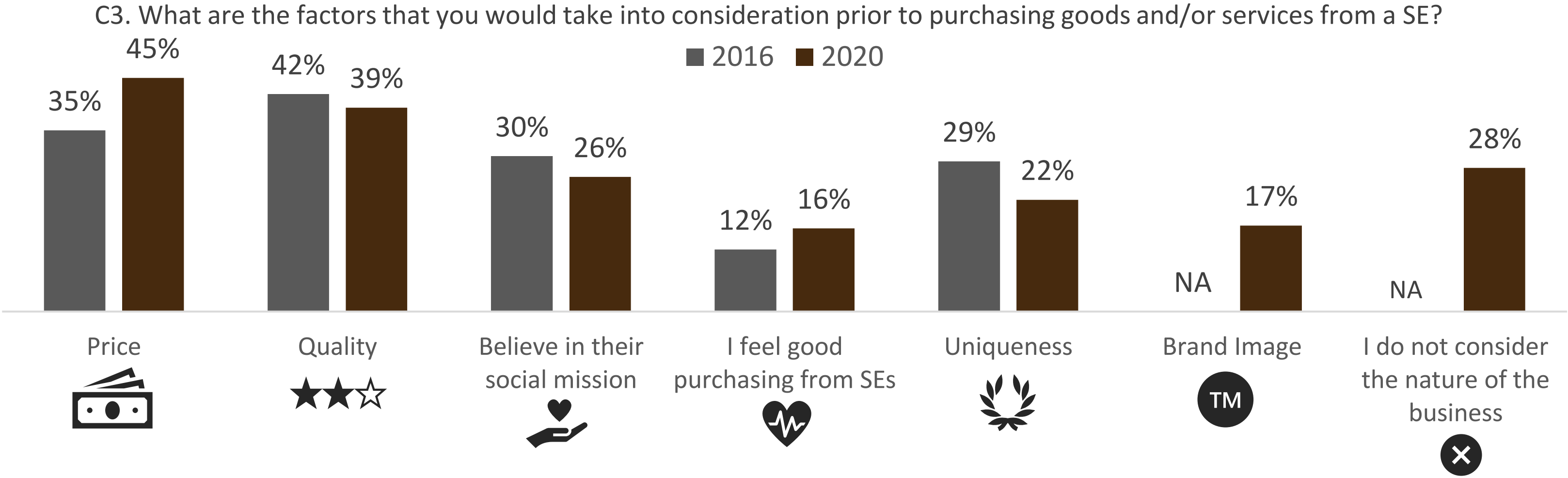
Click here to return to Recommendations (SEs)

Non-Buyers' Considerations when Purchasing from SEs

Similarly with Ready-Buyers, Price and Quality of products are the top considerations when purchasing from SEs. Notably, these are the only two factors of consideration that ranked higher than "I do not consider the nature of the business". This indicates that there is room to nudge Non-Buyers into Ready-Buyers and Buyers, through price and quality of goods and services.



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Click here to return to Recommendations (SEs)

Top Barriers when purchasing from SE

To nudge Ready-Buyers and Non-Buyers into the Buyer category, it is vital to understand the barriers they face when purchasing from SEs. An open-ended question was asked, firstly, to respondents who have never bought from SEs, and secondly, for respondents who do not intend to buy from SEs in the next six months.
The results show that ambivalence is the top reason cited amongst ready-buyers for not buying from SEs before, and ambivalence is also the top reason why Non-Buyers do not intend to purchase from SEs in the future. They are willing to support SEs but will not go out of their way to search for an SE. This indicates that after raising awareness, SEs should also increase visibility and opportunity for these individuals to be exposed to SEs to increase the likelihood of purchasing.

In 2020:	Top reason for not buying from SE **before***		Top reason for not buying from SE **in the future**
	Ready-Buyers *n=505*	**Non-Buyers** *n=523*	**Non-Buyers** *n=523*
1	Ambivalence (32%)	Lack of Awareness (24%)	Ambivalence (13%)
2	Lack of Awareness (27%)	Ambivalence (14%)	They do not offer anything I need/want (10%)
3	Don't know which company is a SE (9%)	Don't know which company is a SE (8%)	Not enough money (6%)

* At an overall level (both Ready-Buyers and Non-Buyers), Lack of awareness was the top reason for not buying from SEs prior to the survey (26%), followed by Ambivalence (23%).

Click here to return to Recommendations (SEs)
Click here to return to Recommendations (raiSE)
Click here to return to Recommendations (Segmented Marketing Strategy)

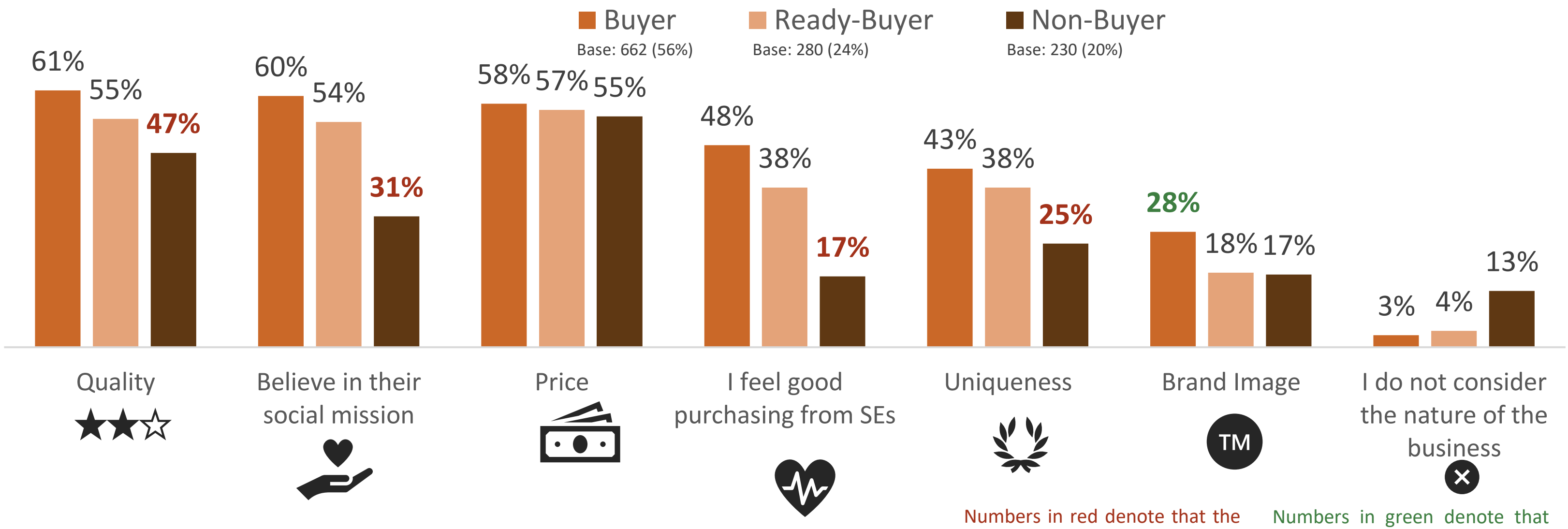
The 2016 report identified **the Ready-Buyer market** to predominantly consist of individuals aged **25 to 49**. Consequently, a booster sample was conducted to investigate their buying behaviour with regards to goods and services from SEs.

All respondents aged 25 to 49 were aggregated and analysed for insights into their buying behaviour.

Considerations when Purchasing from SEs [25 to 49]

Similarly to the overall sample, Ready-Buyers and Non-Buyers in the 25 to 49 age group, have price and quality as their top two considerations when purchasing from SEs.
Notably, believing in the SE's social mission is higher for Buyers in the 25 to 49 age group. However, for Ready and Non-Buyers, social mission is considered behind price and quality.

C3. What are the factors that you would take into consideration prior to purchasing goods and/or services from a SE? (in **2020**)



Numbers in red denote that the segment is significantly lower than other segments

Numbers in green denote that the segment is significantly higher than other segments

Click here to return to Recommendations (Segmented Marketing Strategy)

Barriers to purchasing from SE [25 to 49]

When it comes to barriers in purchasing from SEs, ambivalence emerged as the top reason amongst Ready-Buyers and Non-Buyers the 25 to 49 age group. Ambivalence is also a notable reason for not buying from SEs in the future, as it emerged as the second most cited reason. SEs must intensify their efforts at exposure and visibility when nudging Ready-Buyers and Non-Buyers, especially for the 25 to 49 age group.

In 2020:	Top reason for not buying from SE **before**		Top reason for not buying from SE **in the future**
	Ready-Buyers *n=280*	**Non-Buyers** *n=230*	**Non-Buyers** *n=230*
1	Ambivalence (31%)	Ambivalence (18%)	They do not offer anything I need/want (13%)
2	Lack of Awareness (18%)	Lack of Awareness (17%)	Ambivalence (10%)
3	Don't know which company is a SE (13%)	They do not offer anything I need/want (11%)	Not enough money (7%)

[Click here to return to Recommendations (SEs)](#)
[Click here to return to Recommendations (Segmented Marketing Strategy)](#)

Differences between Total Sample and 25-49 Sample

Now that we have explored two different groups (total and 25 to 49 age group), the table below summarises the differences in buying behaviour.

Ready-Buyers and Non-Buyers from the Total Sample and 25 to 49 Sample have price as their top consideration, therefore communicating the price and quality competitiveness of goods and services should be the top priority for SEs to increase the proportion of buyers.

While a lack of awareness is the top reason for not buying from SE before amongst non-buyers in the total sample, ambivalence is the top reason for both non-buyers and ready buyers aged 25 to 49. When targeting these individuals aged 25 to 49, marketing strategies should consider their ambivalence and take steps to address it.

	Total Sample Findings			25 to 49 Sample Findings		
Top Considerations when buying	Buyer: 1. Quality (57%) 2. Price (55%) 3. Social Mission (54%)	Ready-Buyer: **1. Price** (59%) **2. Quality** (53%) 3. Social Mission (49%)	Non-Buyer: **1. Price** (45%) **2. Quality** (39%) 3. Don't consider the nature of the org (28%)	Buyer: 1. Quality (61%) 2. Social Mission (60%) 3. Price (58%)	Ready-Buyer: **1. Price** (57%) **2. Quality** (55%) 3. Social Mission (54%)	Non-Buyer: **1. Price** (55%) **2. Quality** (47%) 3. Social Mission (31%)
Top reason for why they have not purchased from SE before	-	Ambivalence	Lack of Awareness	-	Ambivalence	Ambivalence
Top reason for why will not purchase from SE in the future	-	-	Ambivalence	-	-	They do not offer anything I need/want

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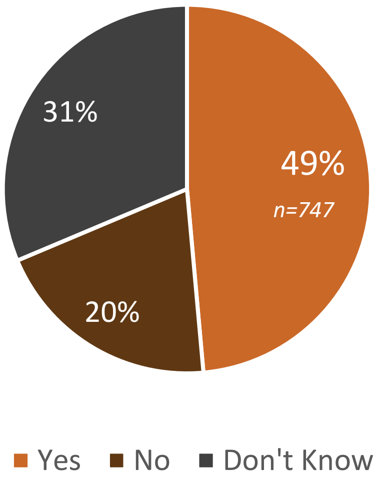
Organisation Behaviour

Do note that this is a perception survey, and findings in this section relate to working adult's **perception** of an organisation's engagement with SE.

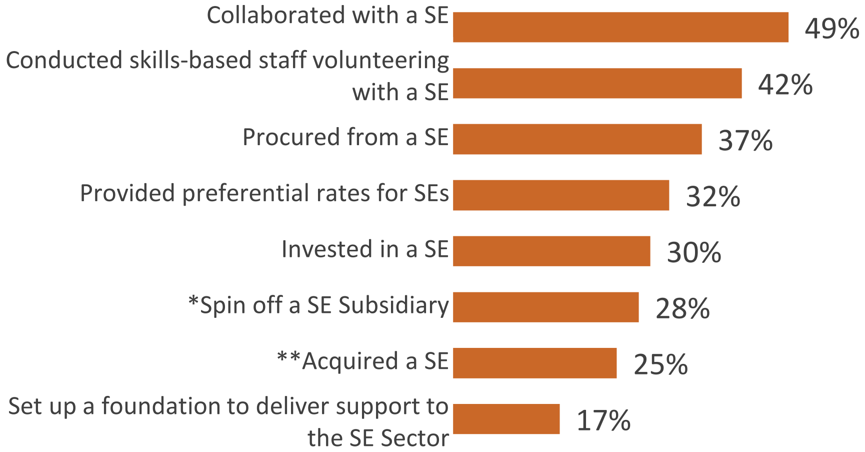
Public Perception of Corporate Engagement with SE

Beyond a B2C (Business to Consumer) study in 2016, a B2B (Business to Business) section was added in the 2020 survey. Amongst the total sample, working adults were asked additional questions on their company's engagement with SEs. These working adults were asked if they were aware that their organisation has prior engagements with a SE. Almost half of working adults are aware that their organisation has prior engagements, and the most popular type of engagements are collaborating and conducting staff volunteering.

C5a. To the best of your knowledge, has your organisation engaged with SEs before?



Those who are employed
n=1,538



Those who are employed in organisations that have engaged SEs before
n=747

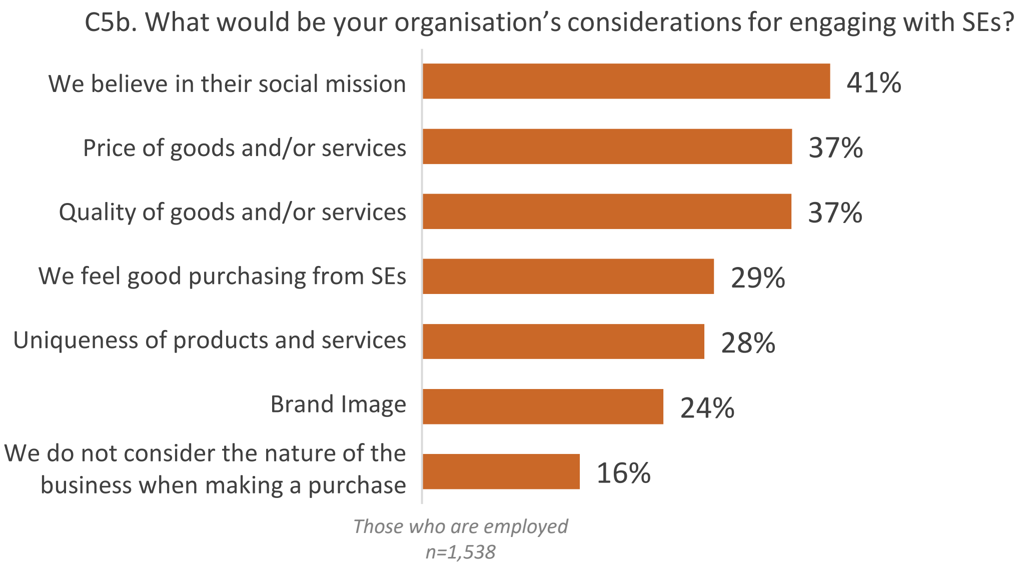
Do note that this is a public perception survey, and findings in this section relate to working adults' **perception** of an organisation's engagement with SE and does not necessarily reflect an organisation's engagement with SEs..

*Spin off a SE subsidiary – where a company sets up a new company that is majority owned.

**Acquired a SE – where a company purchases another company through acquiring majority of shares.

Organisation's Considerations for engaging SEs

Working adults perceive that their organisation considers the social mission of a SE above the price and quality of goods and services. Notably, this is different compared to individual buyer behaviour (where price and quality came first before social mission). When engaging with Businesses, SEs should shift their focus to their social mission and social value.



Do note that this is a public perception survey, and findings in this section relate to working adults' **perception** of an organisation's engagement with SE and does not necessarily reflect engagement with SEs. A more targeted survey needs to be conducted to validate these findings.

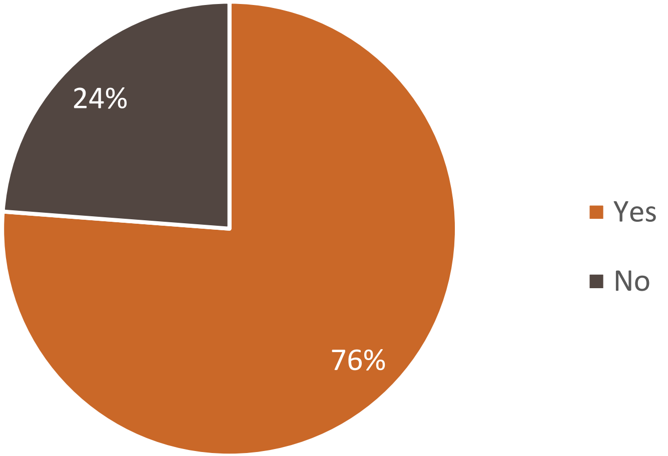
[Click here to return to the Executive Summary]

[Click here to return to Recommendations (Segmented Marketing Strategy)]

SE as a Business model

3 in 4 respondents who are employed agree that businesses and corporations should address social issues through a SE model. This indicates an initial strong support amongst working adults for using a SE model in addressing social issues.

C5c. Do you think that business/corporations should address social issues through a SE model?



Those who are employed
n=1,538

Do note that this is a public perception survey, and findings in this section relate to working adults' **perception** of an organisation's engagement with SE and does not necessarily reflect engagement with SEs. A more targeted survey needs to be conducted to validate these findings.

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Moving Forward

Beyond a competitive product/service, SEs must also meet the evolving needs of society.

What does the public expect of SEs, and are they satisfied with current efforts in Singapore in achieving Social Good?

Gaps in satisfaction can point to opportunities for SEs to provide a service and serve society.

Expectations of Social Enterprises

In this section, we examine the public's expectations: which social needs should be addressed and how much resources SEs should allocate to their social mission.

Click here to return to the Index

Summary

01 Vulnerable groups perceived as most urgent

Respondents felt that bread and butter issues for vulnerable communities require the most focus in Singapore. These issues include employment opportunities and skill and development training.

02 Recycling and Reducing use of products perceived as most urgent

With regards to environmental issues, respondents felt that changing individual behaviour regarding single use items was most urgent. Particularly, respondents saw the need to recycle and upcycle items, as well as reduce single use items. Half of respondents who felt these issues were urgent were satisfied with current efforts in addressing these concerns, which SEs can potentially bridge.

03 At least half of resources to be devoted to Social Goals

Respondents felt that SEs should allocate at least half of its resources towards its social mission while maintaining business viability.

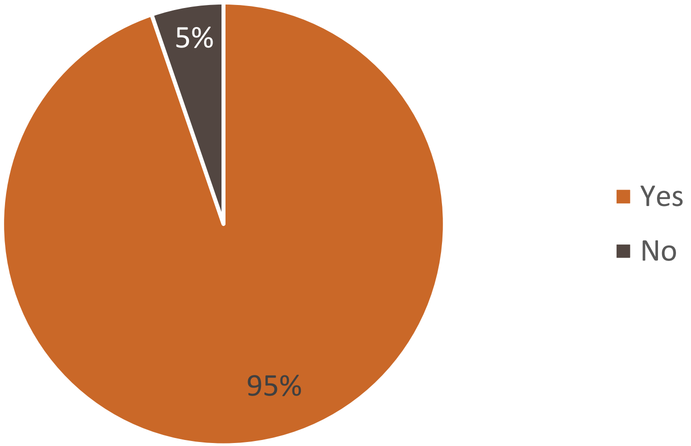
04 Higher public support for SEs compared to Corporations

Finally, most agree that the SE Model is a good way to solve social issues, while a lower proportion of workers and employers agree that businesses should adopt a SE model. There is potential reservations workers and employers have in adopting a SE model.

SEs as a Solution

To assess public sentiments about SEs and their role in solving social issues, a question was posed to all respondents. Almost all respondents agree that SEs **are a good way** to address social issues, which is higher than the agreement amongst working adults on whether a SE model **should** be used (76%). This indicates that although there is strong support, there might be some employees and employers who have reservations about their businesses adopting a SE model.

B1. In your opinion, do you think that SEs are a good way to address social issues?

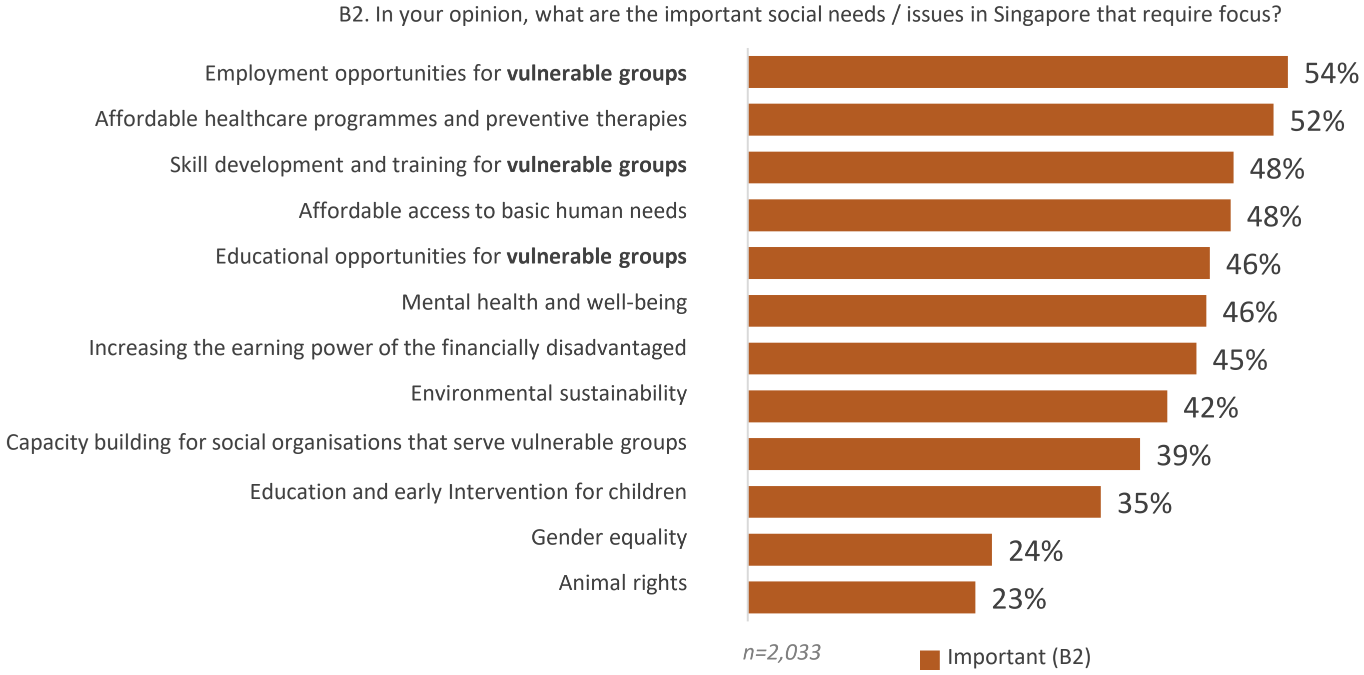


n=2,033

Click here to return to the Executive Summary

Important Social Needs

To get a pulse of what the public believes are important social needs in Singapore, respondents were presented a list of prominent social issues in Singapore and asked to select which issues they felt required focus. Vulnerable groups emerged as an important issue that respondents felt required focus, particularly employment opportunities and skill development.



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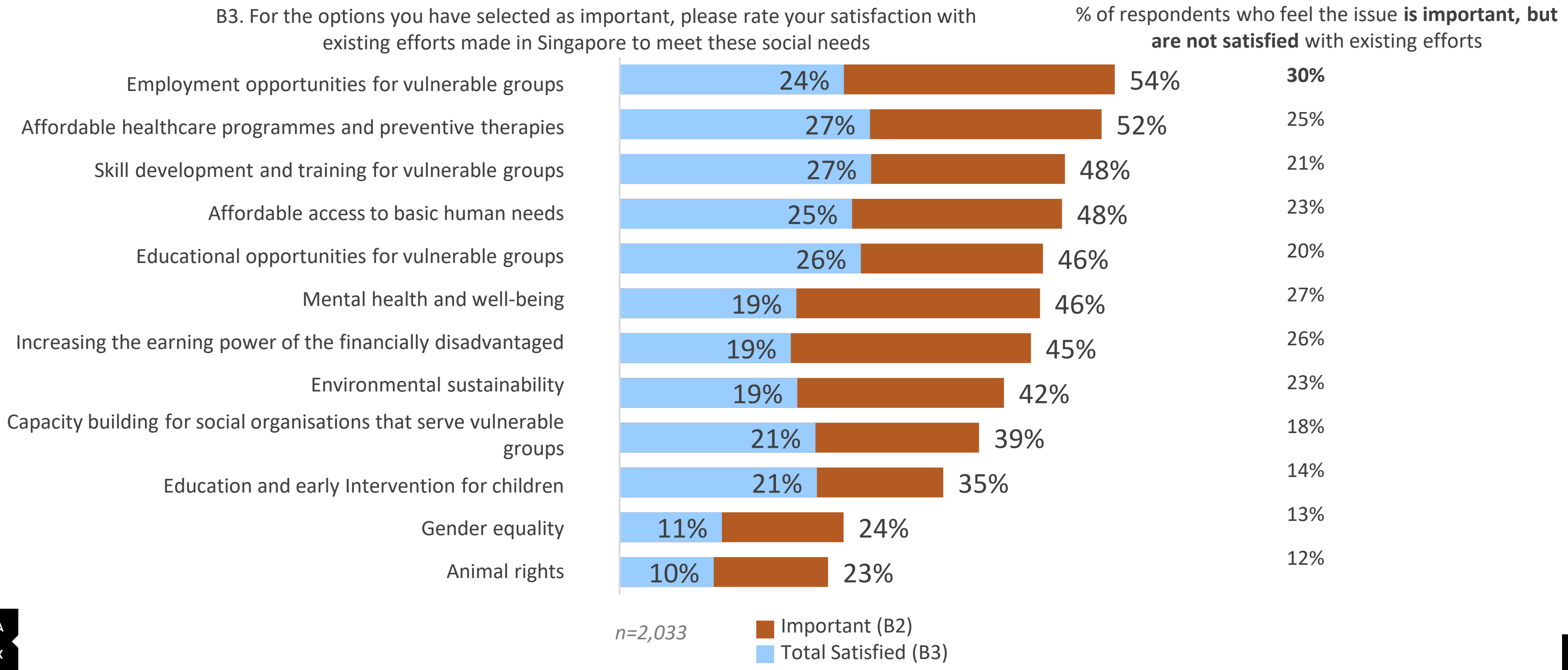
Satisfaction with Important Social Needs

In terms of **needs-gap** (respondents who feel an issue is important but are not satisfied with existing efforts), employment opportunities for vulnerable groups has the highest proportion of respondents who felt the issue is important but are not satisfied with existing efforts. SEs should offer employment opportunities for vulnerable groups given the gap in satisfaction in this area.



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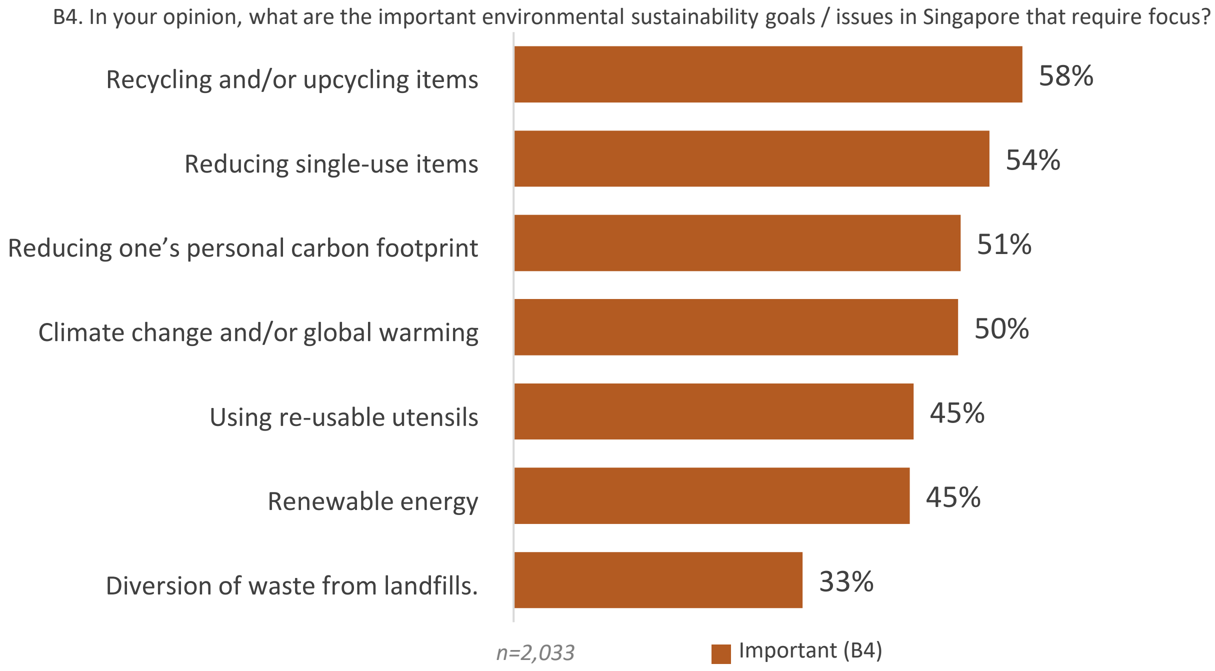
Important Environmental Needs

With increasing attention being paid to climate change and how individuals could play their part in mitigating it, an additional question on environmental needs was asked to respondents. Sustainable usage of items (i.e. recycling/upcycling and reducing single-use items) emerged as the most important environmental goals in Singapore that required focus.



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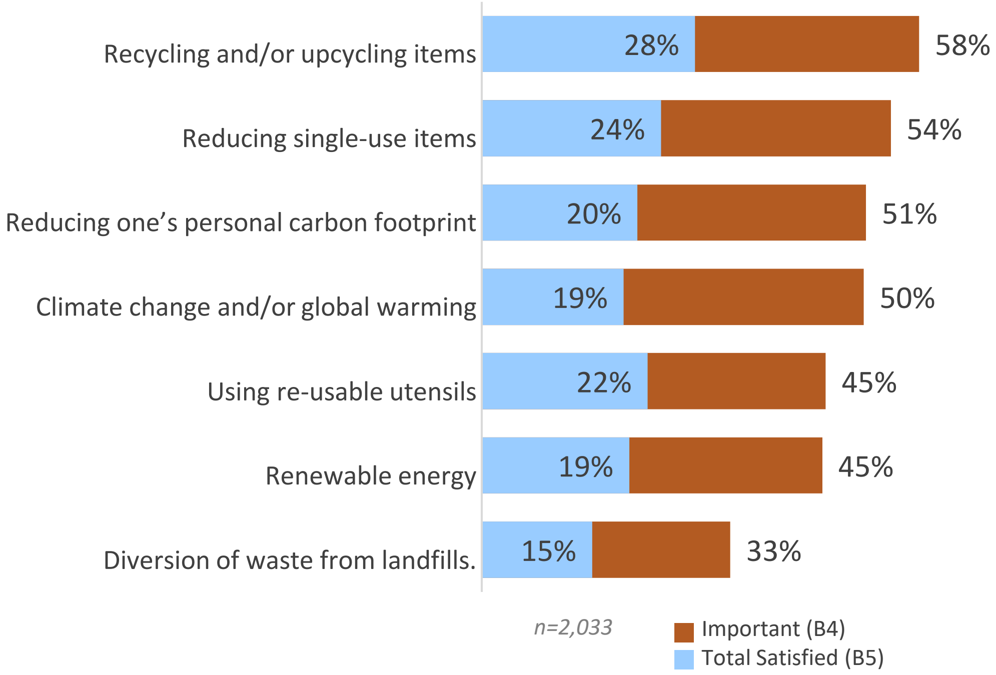
Satisfaction with Important Environmental Needs

Almost one third of respondents feel that recycling and reducing items, reducing one's carbon footprint and climate change are important goals, but are not satisfied with existing efforts in Singapore to address these goals. These four areas are potential avenues for SEs to provide goods/services while addressing environmental goals.

B5. For the options you have selected as important, please rate your satisfaction with the existing efforts made in Singapore to meet these environmental sustainability goals



% of respondents who feel the issue **is important, but are not satisfied** with existing efforts
30%
30%
31%
32%
23%
26%
18%

[Click here to return to the Executive Summary]

How much resources should go to Social Missions?

Respondents were asked how much resources a SE should allocate to its social mission while maintaining business viability. This was asked to gauge public expectations of SEs when it comes to achieving both social and financial value.
The results show that the average proportion (mean) given by respondents is 62.3%, and The most cited value (mode) is 50%. This indicates that respondents expect at least half of a SEs' resources should be allocated towards its social mission. This could serve as a potential benchmark for SEs to quantify their efforts towards serving it social mission while maintaining business viability.

B6. In your opinion, how much resources (time, effort, revenue, profits) do you think a SE should allocate towards its social mission while maintaining business viability?

MEAN

62.3%

62.3% is the average of all values given by respondents

MODE

50%

50% is the value most frequently given by respondents

All Together Now

As the sector developer and membership body of SEs, raiSE has a vital role to play in charting the future of Singapore's SE Sector.

What then, are public perceptions and expectations of raiSE?

Perceptions & Expectations of raiSE

In this section, we examine the public's perceptions and expectations of raiSE

Click here to return to the Index

Summary

01 Improvement in Awareness of raiSE

Awareness of raiSE increased, from 27% in 2016 to 35% in 2020. Awareness levels are much higher amongst younger respondents: in the target group of 25 to 49 years, almost half (47%) are aware of raiSE. Internet channels are the highest source of awareness.

02 Expectations for raiSE to increase public awareness

When asked what raiSE should do to better help SEs in Singapore, the top expectation (62%) was to increase public awareness for SEs. Other expectations include providing support and shared services (49%), as well as funding (48%)

03 Further promote BusinessForGood logo via Online Channels

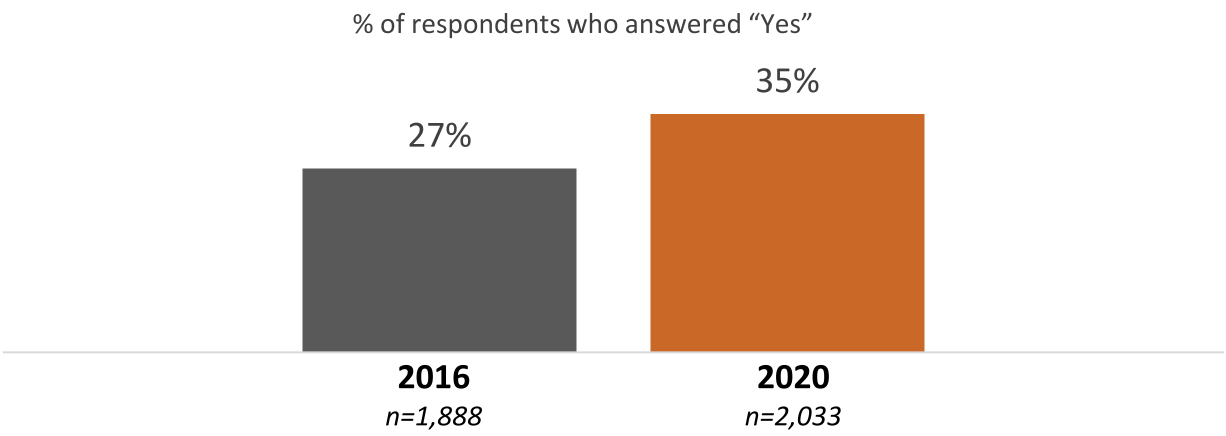
1 in 5 respondents are aware of the BusinessForGood Logo, and there is room for improvement in raising visibility and understanding of the logo. Awareness efforts should be targeted at older and non-working individuals. For working adults, awareness efforts should be targeted at those working in SMEs.

Awareness of raiSE

As a membership body for SEs in Singapore, raiSE contributes heavily to the SE sector in increasing awareness, providing training and funds. Public awareness of raiSE as a sector developer and membership body is useful to show the support that is available to SEs, which may encourage aspiring individuals to form SEs of their own.

The results show that at an unaided level, awareness has increased from 27% in 2016, to 35% in 2020.

D1. Before this survey, have you heard of "raiSE" or "Singapore Centre for Social Enterprise?"



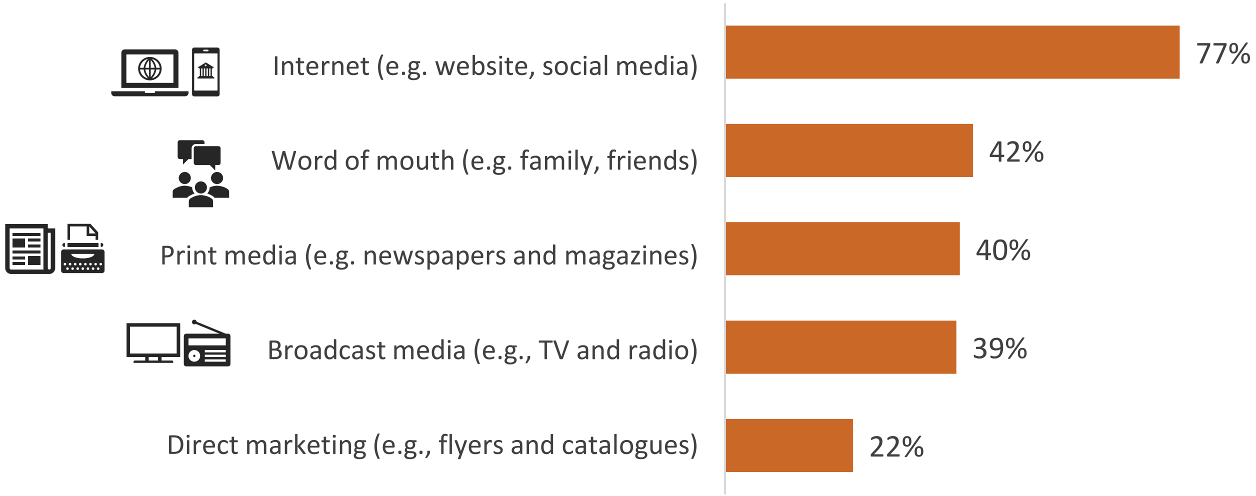
*Do note that there are different demographic composition of survey respondents in 2016 compared to 2020. 2016 had a higher proportion of respondents aged 18 to 29, while the 2020 survey results are more representative of the general population.

When the 2020 survey data was **weighted** by age, gender and nationality to have an apple to apple comparison with 2016, awareness of raiSE is at **45%.** Amongst the **25 to 49 sample,** awareness of SEs is at **47%**

Media Channels

Amongst respondents who have heard of raiSE, their top cited channel is the internet. This could be attributed to the various digital marketing campaigns (raiSE, 2018), similar to media channels from which respondents were made aware about "Social Enterprise(s)".

Asked to respondents who answered "Yes" in D2.
D3. From which media channels have you heard of "raiSE"?

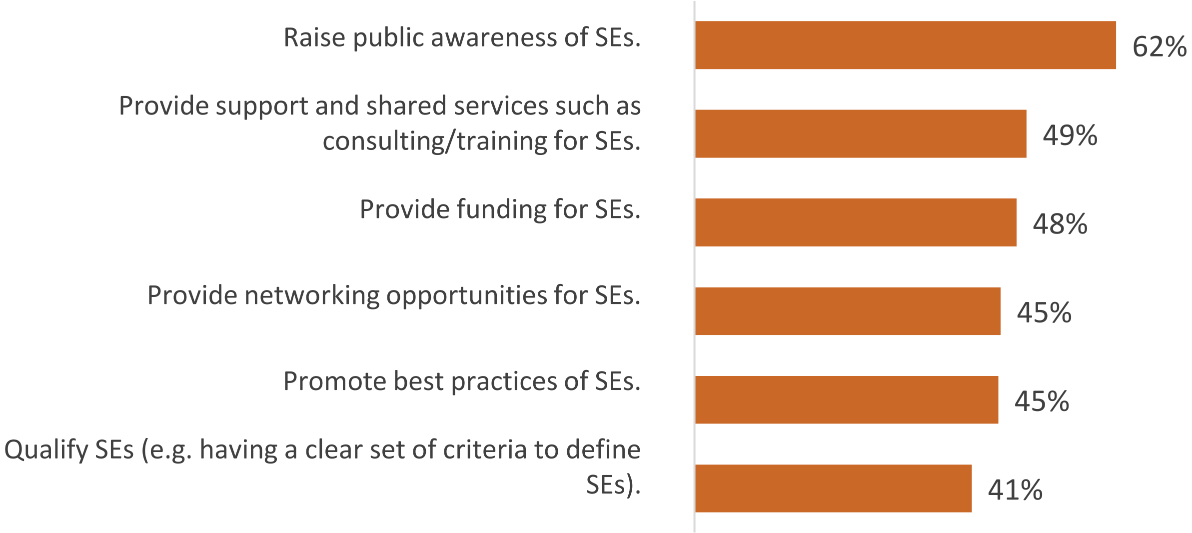


Those who have heard of raiSE at an aided level
n=671

Expectations of raiSE

Going beyond the 2016 survey, we asked what respondents expected from raiSE to better support SEs in Singapore. The top answer selected was raising awareness of SEs. Given that awareness is the top reason for not buying from SEs before, it is evident that there is still a gap in awareness that respondents are expecting to be bridged. raiSE should therefore focus on its communications and marketing, to introduce SE as a model, as well as various SEs in Singapore that are accomplishing social goals while producing financial value.

D4. What do you think raiSE should do to better support SEs in Singapore?



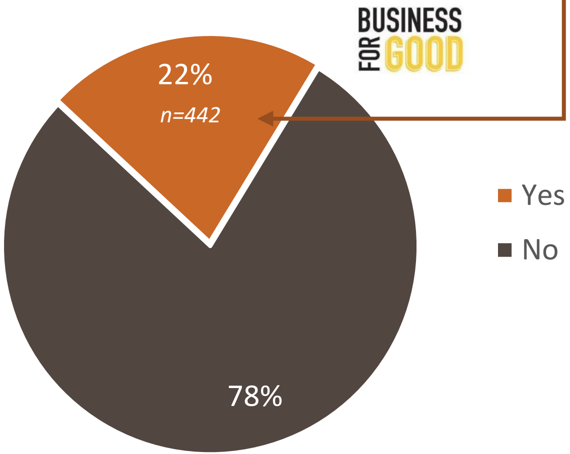
n=2,033

BusinessForGood Logo

The BusinessForGood Logo was introduced in 2016 (raiSE, 2017) to aid the public in identifying raiSE's SE members. Respondents were shown the BusinessForGood logo and asked if they have seen it. Respondents who have seen the logo were asked an additional question on what they think the logo means.

The results show that 22% of respondents have seen the Business for Good Logo. Amongst these respondents, the top understanding the logo is "organisations with this logo adhere to sustainable practices". More efforts need to be concentrated on raising public awareness and understanding of the logo, such that it could be used to publicly identify SE members.

D5. Have you seen the logo below?



n=2,033

Asked to respondents who answered "Yes" to D5.
D5a. What do you think this logo means?

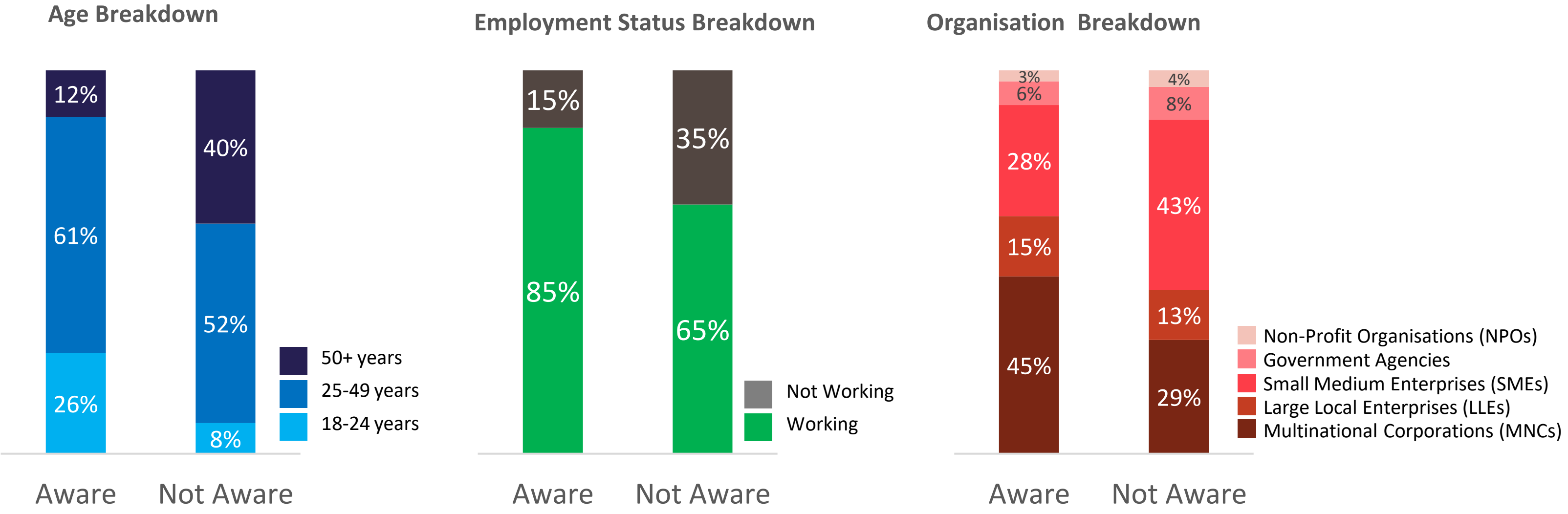
Those who have seen the Business for Good Logo n=442

Click here to return to Recommendations (raiSE)

Target Groups for publicising the BusinessForGood Logo

Comparing the demographic composition of individuals who were aware versus unaware of the BusinessForGood Logo, we found that there is a higher disparity in awareness levels amongst the older (50+ years) individuals. Among working adults, we found a higher proportion of individuals working in Small Medium Enterprises (SMEs) were unaware of the logo. raiSE should intensify publicizing the logo to SMEs since awareness is lacking amongst individuals working in this group.

D5. Have you seen the logo below?

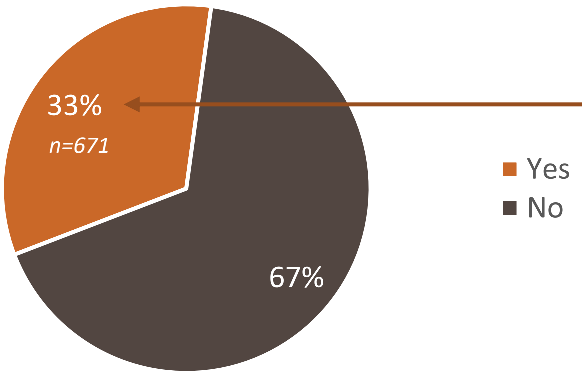


[Click here to return to Recommendations (raiSE)]

Awareness of DBS supporting SEs

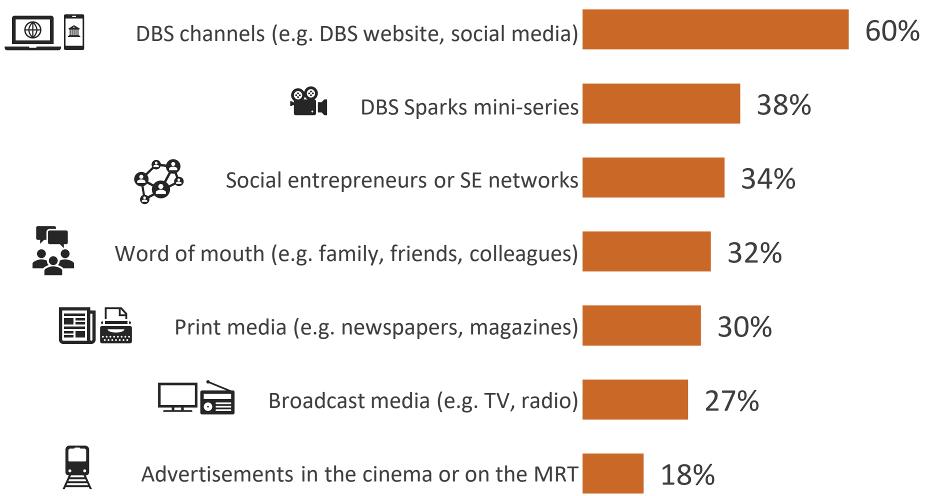
Established in 2014, DBS Foundation works towards building a more inclusive Asia by championing social entrepreneurship. DBS Foundation encourages the development of businesses for good by identifying, nurturing and scaling SEs through its flagship grant programme and capacity building efforts.
The 2020 survey shows that 1 in 3 respondents are aware that DBS supports SEs. The top media channels through which they gain this awareness are the DBS website and DBS social media platforms.

D7. Have you heard of DBS supporting SE?



n=2,033

D8. From which channel(s) have you heard of DBS supporting SEs?



References

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BLA
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Appendix

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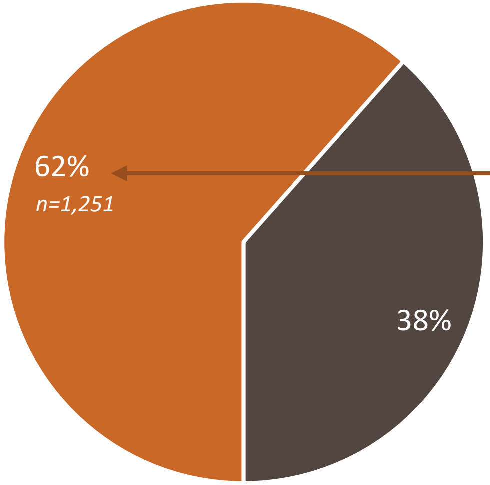
Media Channels

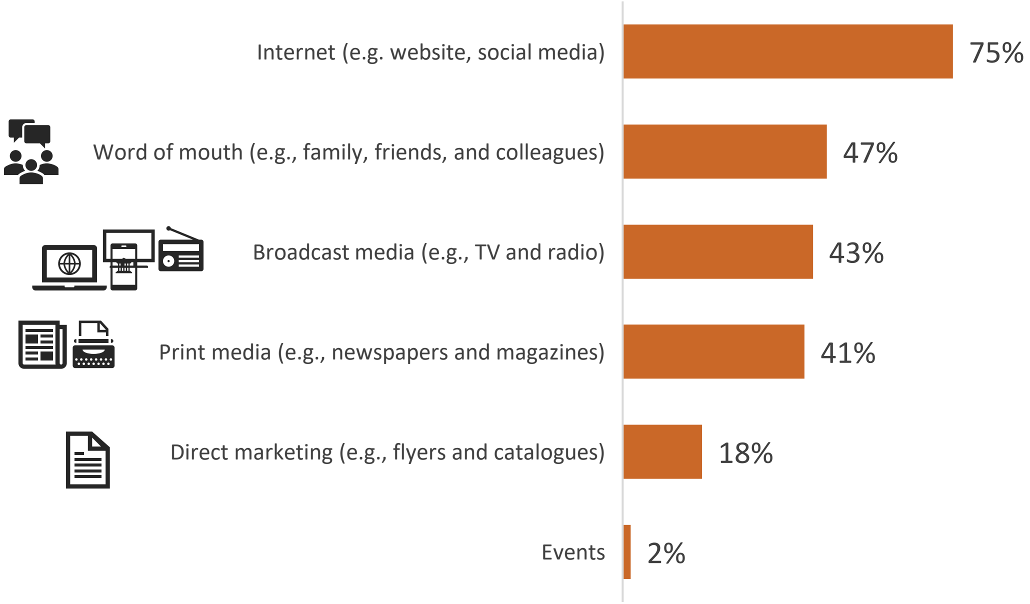
75% of respondents who have heard of SEs at an aided level did so through the Internet.

A2. After reading the information shared about 'Social Enterprises', do you now recall hearing the term?



n=2,033

For respondents who answered "Yes" in A2.
A3. From which of the following media channels do you generally hear about "Social Enterprise(s)"?



Respondents who said "Yes" in A2
(i.e. have heard of Social Enterprises at an aided level)
n=1,251

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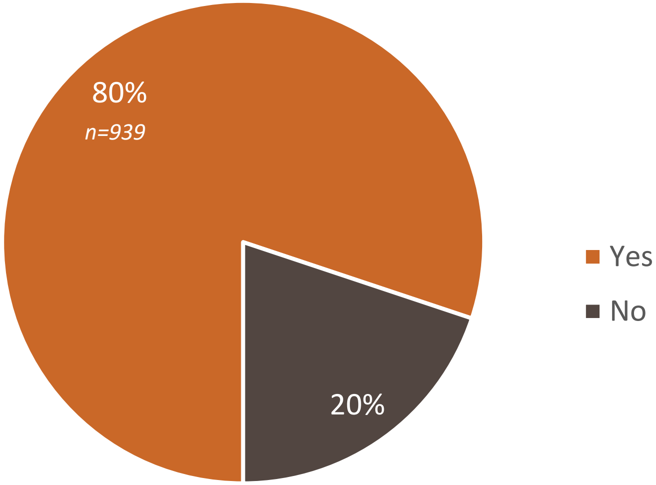
Media Channels [25 to 49 Sample]

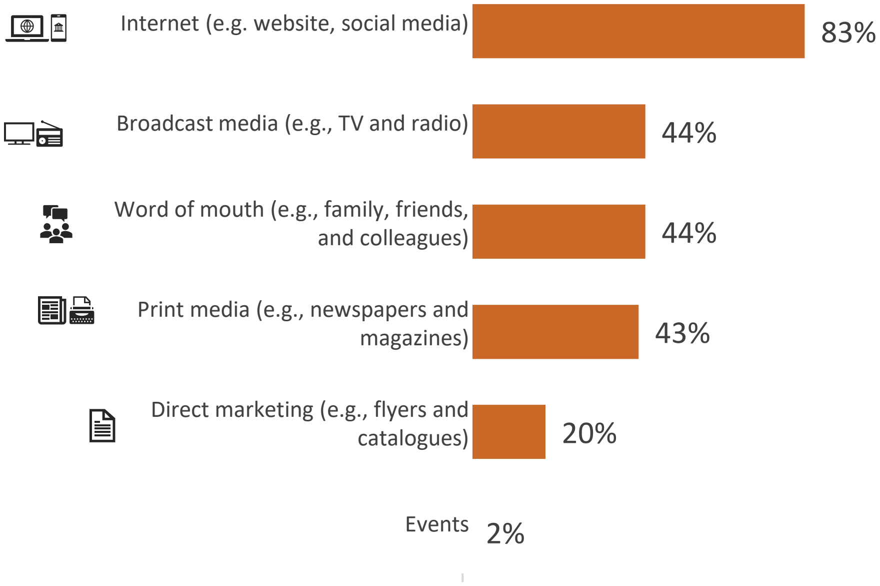
83% of respondents in the 25 to 49 Sample who have heard of “Social Enterprises” at an aided level did so through the Internet.

A2. After reading the information shared about ‘Social Enterprises’, do you now recall hearing the term?



25 to 49 Age Group
n=1,172

A3. From which of the following media channels do you generally hear about “Social Enterprise(s)”?



25 to 49 Age Group who have heard of Social Enterprises at an Aided Level
n=939

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Top Goods/Services from SE

When asked what was purchased from SEs, and what one intends to purchase, the top item was food.

	C1. Yes. If yes, what have you purchased? **Top goods/service bought**	C2. What do you intend to purchase? **Top goods/service intended**
1	**Food (31%)**	**Food (24%)**
2	**Daily Necessities (12%)**	**Daily Necessities (11%)**
3	**Groceries (10%)**	**Depends, if they have what I want/need (8%)**

Those who have bought from SE n=1,005

Those who intend to buy from SE in the next 6 months n=1,429

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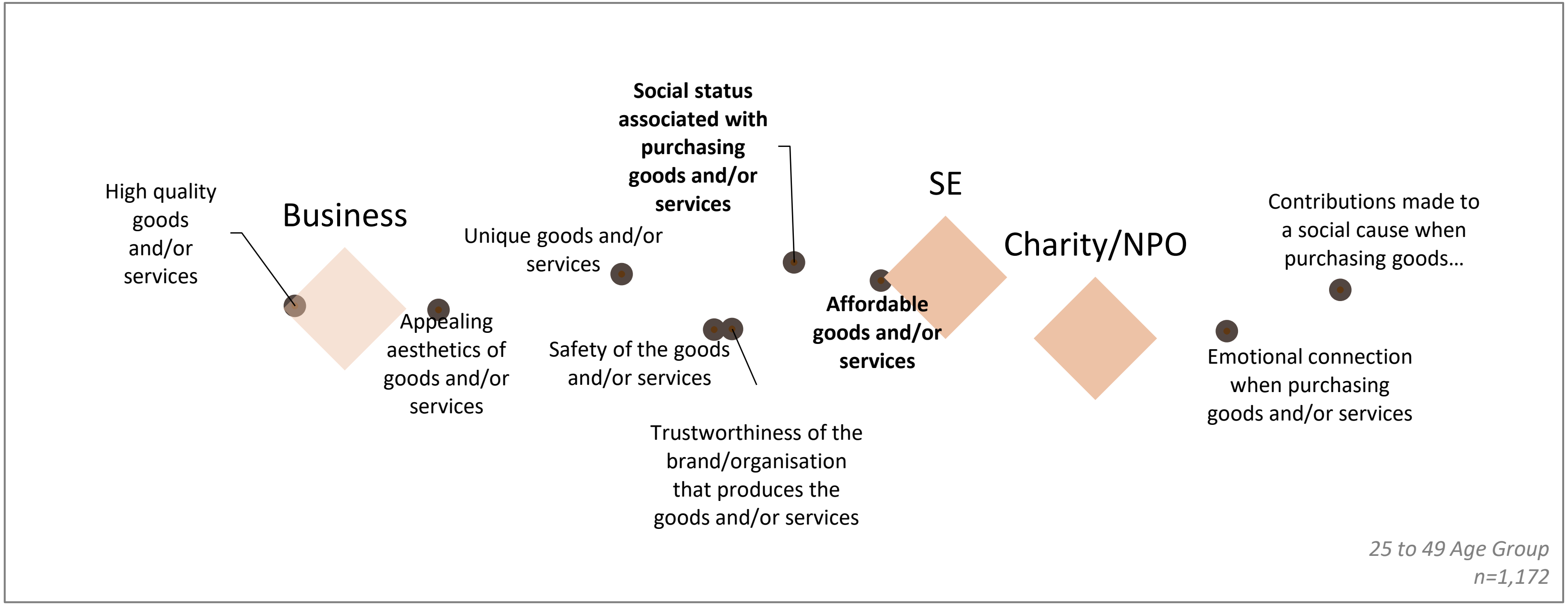
Attributes of Goods & Services – Correspondence Analysis [25 to 49]

Similarly with the total sample, Correspondence analysis amongst respondents aged 25 to 49 show that respondents clearly differentiated Charities/NPOs, SEs and Businesses from each other in terms of the goods and services offered by each type of organisation. Additionally, affordability and social status are more closely associated with SEs compared to Charities and Businesses. Since price is a top consideration for Ready and Non-Buyers in the 25 to 49 age group, efforts should intensify on the affordability of goods and services of SEs.



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