2019 Taiwan Social Innovation Survey

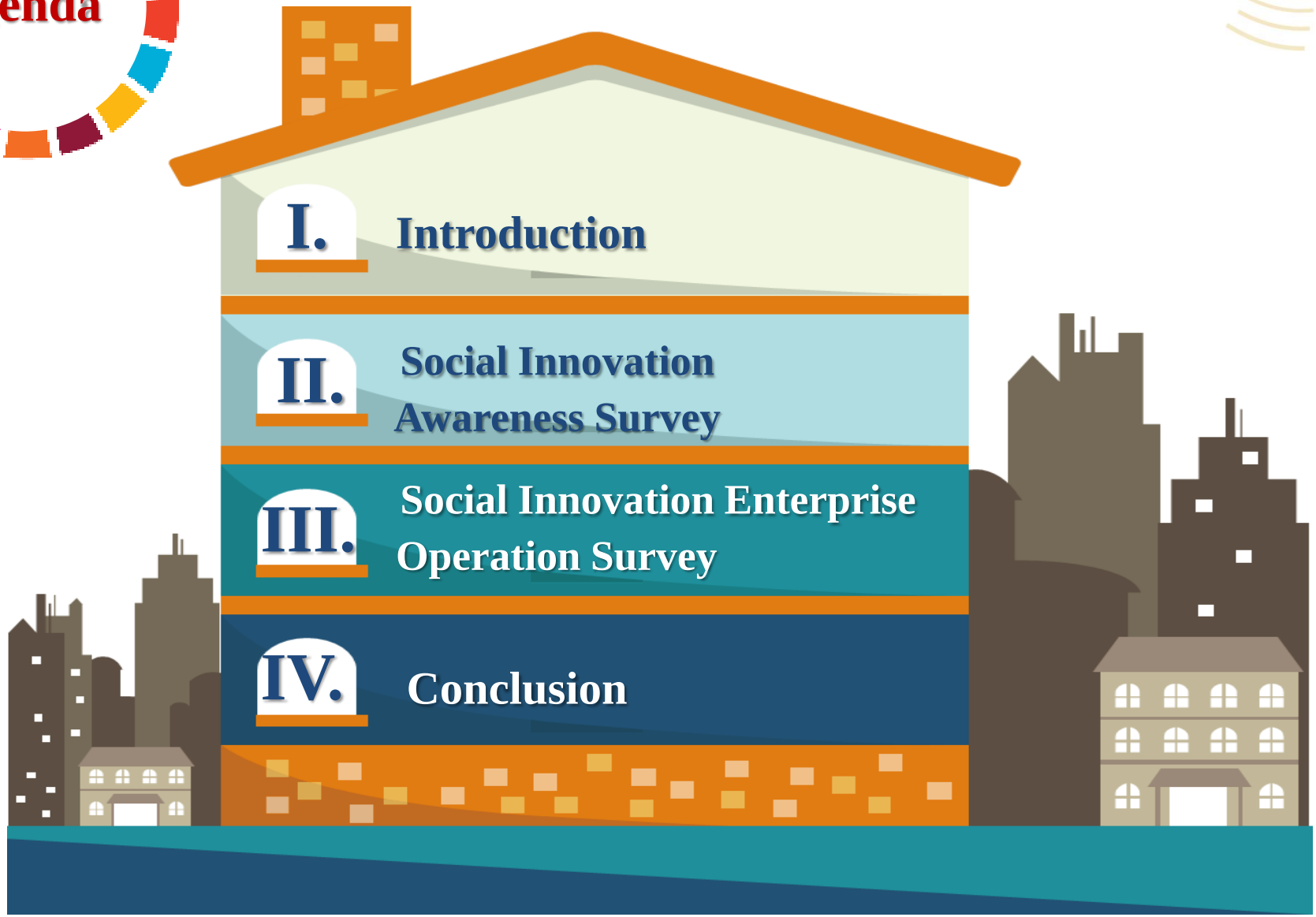
Advised by: 經濟部中小企業處 SMALL AND MEDIUM ENTERPRISE ADMINISTRATION MINISTRY OF ECONOMIC AFFAIRS

Implemented by: 台灣經濟研究院 Taiwan Institute of Economic Research

星展銀行 DBS

聯合報系 願景工程 努力讓台灣更好

Agenda


I. Introduction
II. Social Innovation Awareness Survey
III. Social Innovation Enterprise Operation Survey
IV. Conclusion

I. Introduction

- **Social enterprises**, in recent years, have received international attention. The public and private sectors in Taiwan have also actively participated in this trend and surveys on people's awareness have been conducted in 2015 and 2017, respectively.
- In response to the 2015 **UN Sustainable Development Goals (SDGs)** and Taiwan's adoption of the **Social Innovation Action Plan** in 2018, the survey this time included relevant questions.
- This year (2019), the **Social Innovation Survey** conducted surveys on both the public and social innovation enterprises in order to understand **the awareness of the general pubic**, and **the current operational status of related organizations**.

	Awareness Survey on the General Public	Operation Survey on Enterprises
■ Subject	People over the age of 20	**Organization owner** or **chief manager**, with 65% companies and 35% NPOs.
■ Survey Design	■ Social Enterprises ■ Social Innovation ■ SDGs	■ General Information ■ SDGs ■ Management and Operational Status ■ Operational Challenges and Needs
■ Sampling Design	Nationwide residential telephone numbers are adopted as the population to conduct stratified random sampling, and variables such as regions (counties and cities), and age distribution are controlled.	All **561** social innovation organizations in Taiwan.
■ Effective Sample Size	**2,144**	**297**

II. Social Innovation Awareness Survey

1 Social Enterprises

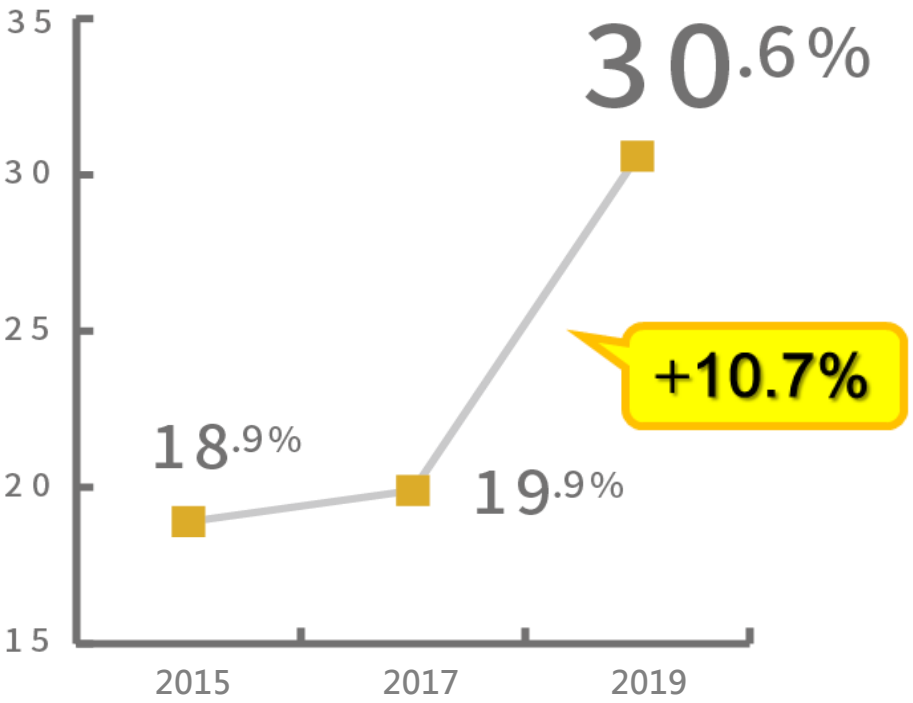
2 Social Innovation

3 Sustainable Development Goals (SDGs)

II. Awareness Survey (1/7)

1. Social Enterprises (1/3)

The awareness of social enterprises has reached a record high, over 30 percent of the public have heard of the term.



Awareness comparisons over the years.

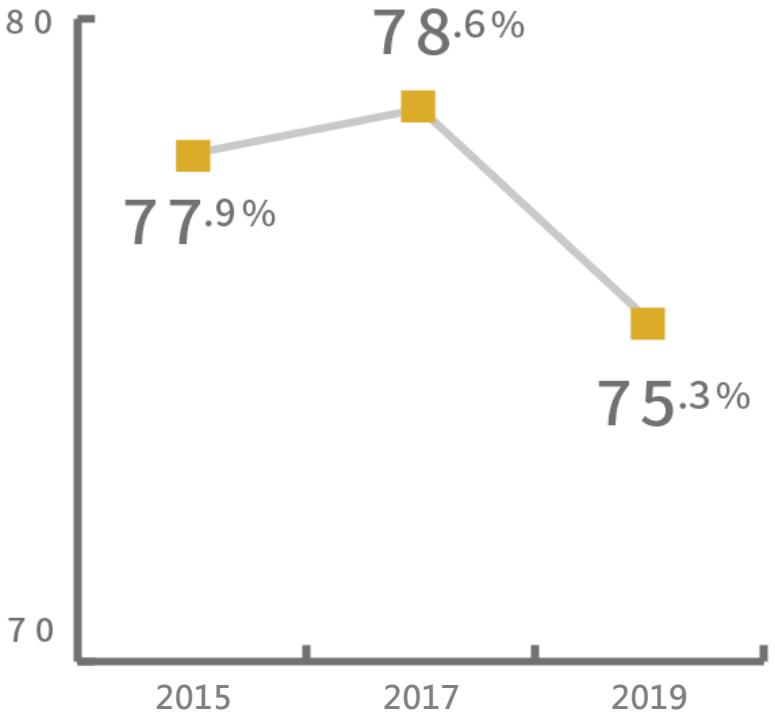
- **Compared to the 19.9% two years ago, the awareness of social enterprises of the Taiwanese public has significantly increased.**

Q: Have you ever heard of the term "social enterprises"?

II. Awareness Survey (2/7)

1. Social Enterprises (2/3)

More than three-quarters of the public support the social enterprise concept.



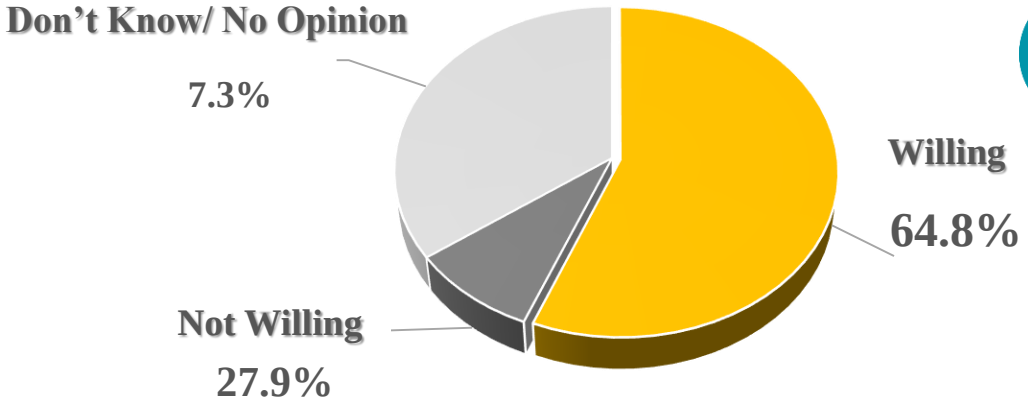
Concept recognition comparisons over the years

- **After explaining the meaning of social enterprises, more than three-quarters of the people agree with the concept of social enterprises, but it was still a 3.3 percent drop compared to the recognition ratio two years ago, which is worth pondering over.**

II. Awareness Survey (3/7)

1. Social Enterprises (3/3)

Nearly half of the public are willing to pay more for social enterprise products or services, and more than 60% of the people are willing to recommend social enterprise products or services.



- After understanding the operational model of social enterprises, **64.8%** of the public will recommend their products or services to families and friends.
- Further exploration of price acceptance in different groups found that **younger people** with **higher education level** are more willing to pay **higher** prices for social enterprise products.

Q: If social enterprise products or services cost more than similar products, are you still willing to pay for it?

II. Awareness Survey (4/7)

2. Social Innovation (1/2)

The public's awareness of "social innovation" is less than 20%.

- Approximately **17.8%** of the public in Taiwan **have heard of the term "social innovation"**. The awareness is lower than that of the term "social enterprises".
- Among them, the awareness in **central and southern Taiwan** is higher, and people know the term via **television** and **the Internet**.

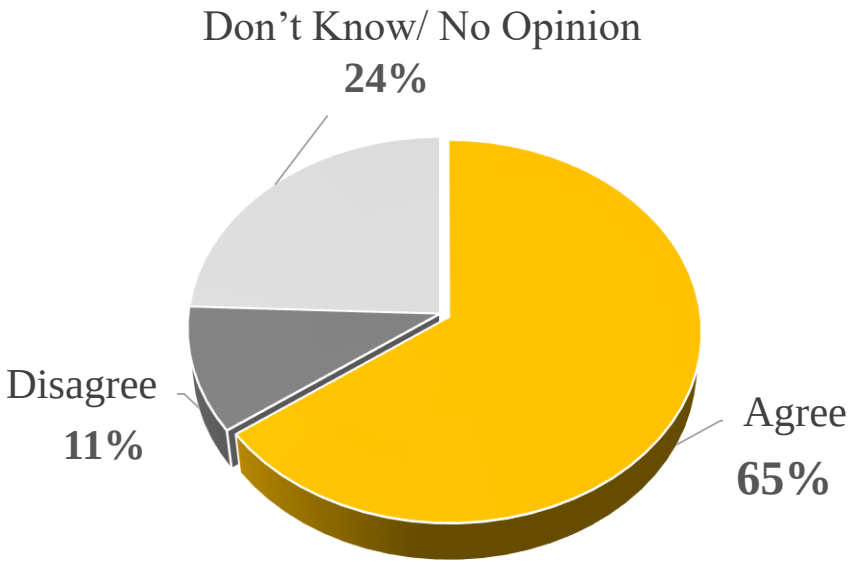
17.8%

II. Awareness Survey (5/7)

2. Social Innovation (2/2)

After explanation, approximately 65% of the public agree with the concept of social innovation.

- Recognition of social innovation in Taiwan is **as high as 65%**, and the disagreement rate is only at around 11%.
- People that recognize the concept tend to be **young** (20-29 years old) and **highly educated** (college or above).

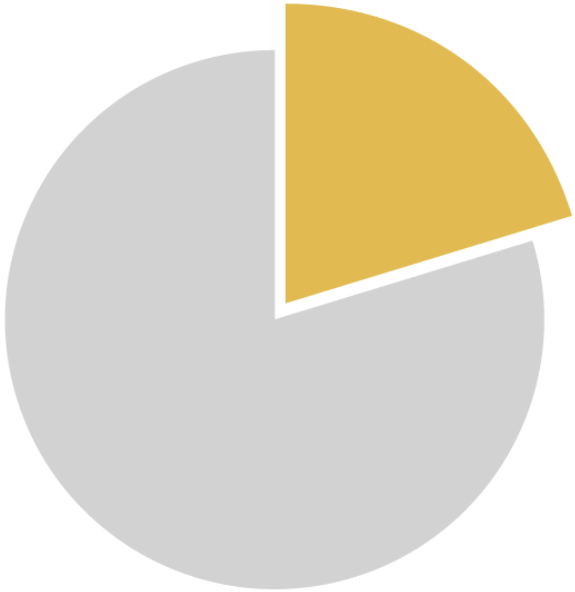


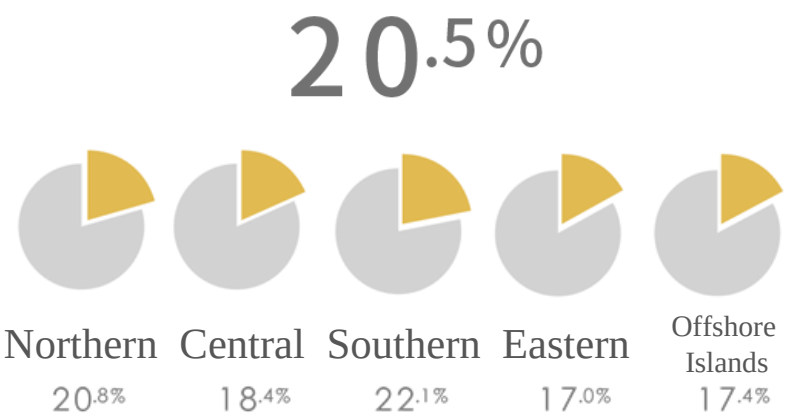
II. Awareness Survey (6/7)

3. SDGs (1/2)

Approx 20% of the public have heard of the Sustainable Development Goals (SDGs) set out by the United Nations.

- **The public's awareness of SDGs is close to that of social innovation, and people that have heard of the term tend to be young (20-29 years old) and highly educated (college and above), with a higher percentage in the north and the south.**

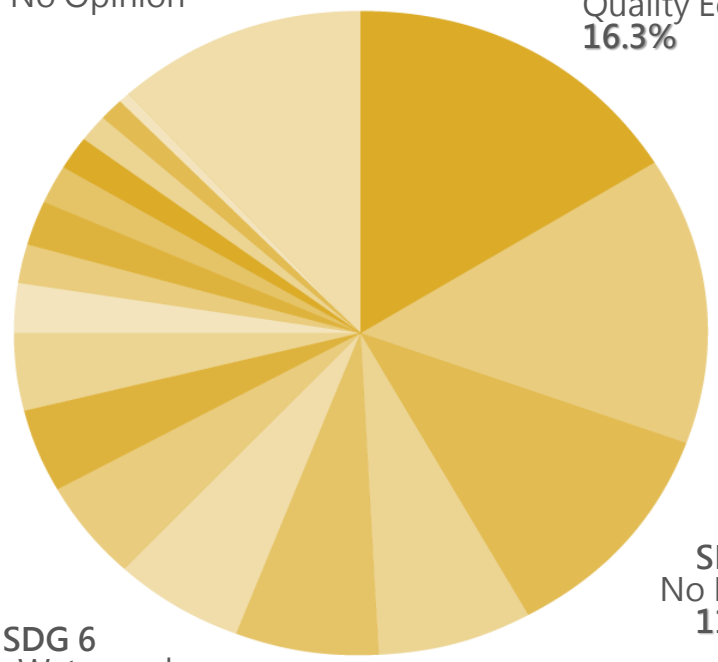




II. Awareness Survey (7/7)

3. SDGs (2/2)

The public believes that the top three SDGs in Taiwan urgently needed to be solved are "SDG 4 Quality Education", "SDG 8 Decent Work and Economic Growth", and "SDG 1 No Poverty".



16.3% **14.3%** **11.4%**

SDG 13 Climate Action 4.9%
SDG 10 Reduced Inequalities 4.2%
SDG 12 Responsible Consumption and Production 3.8%
SDG 5 Gender Equality 2.5%
SDG 2 Zero Hunger 2.2%
SDG 11 Sustainable Cities and Communities 2.2%
SDG 9 Industry, Innovation and Infrastructure 1.8%
SDG 7 Affordable and Clean Energy 1.8%
SDG 16 Peace, Justice and Strong Institutions 1.3%
SDG 15 Life on Land 1.2%
SDG 17 Partnerships for the Goals 0.4%

III. Social Innovation Enterprise Operation Survey

1 General Information

2 SDGs

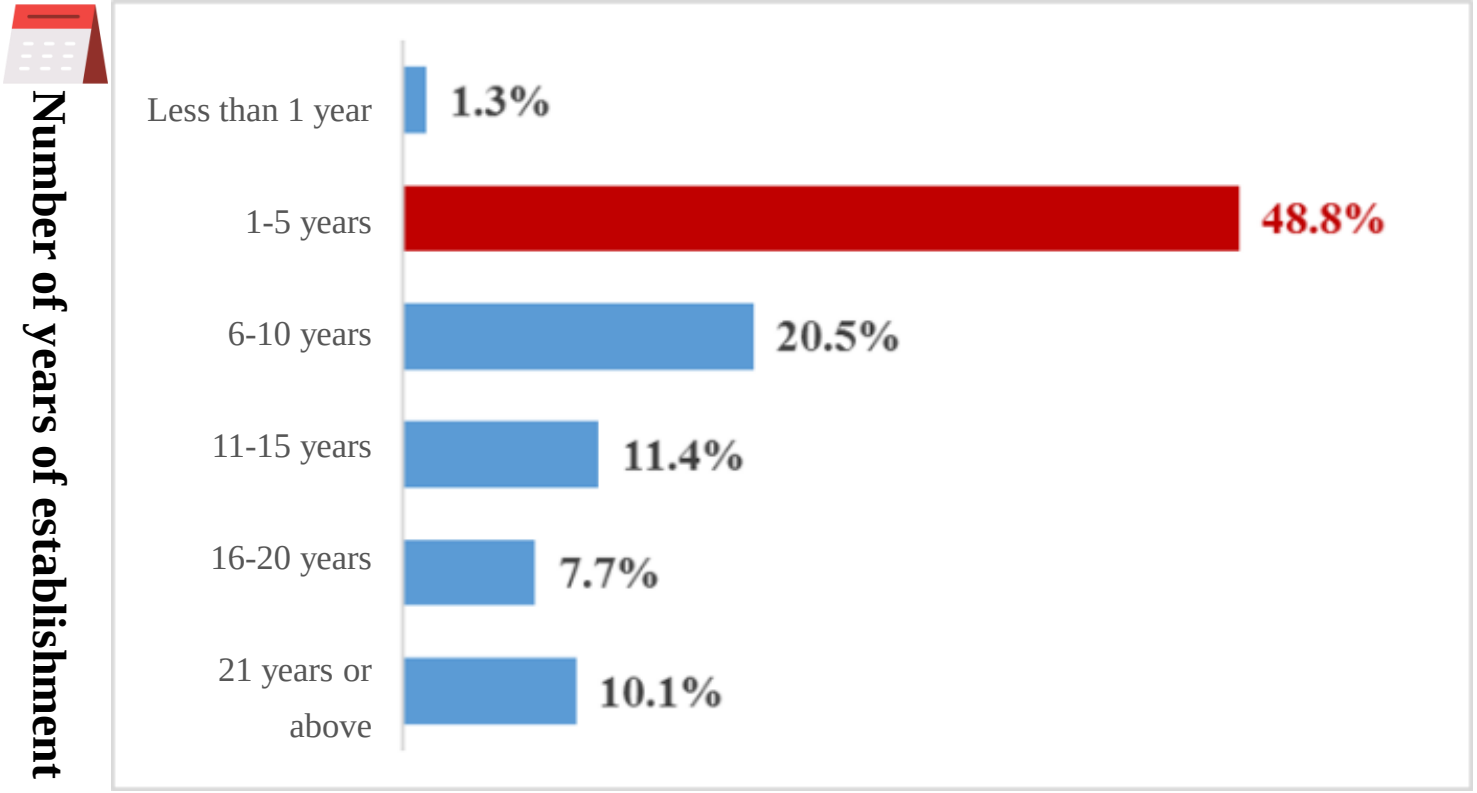
3 Management and Operational Status

4 Operational Challenges and Needs

III. Enterprise Operation Survey (1/11)

1. General Information (1/2)

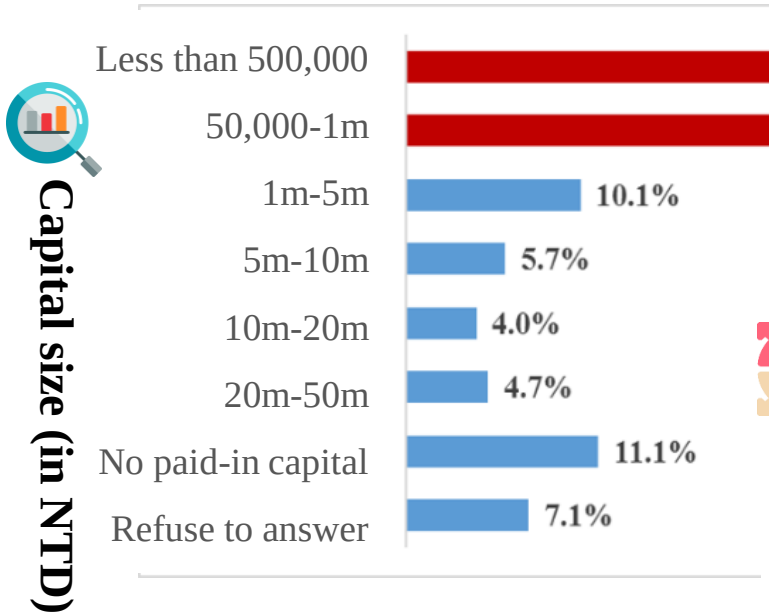
The majority of social innovation organizations are companies and were established for less than 5 years.

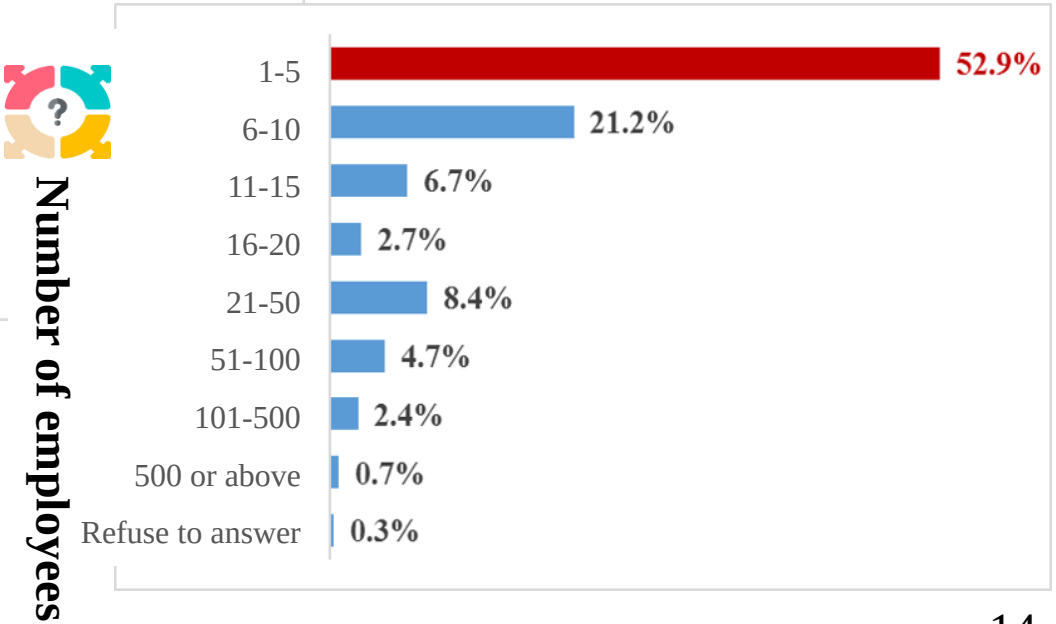


III. Enterprise Operation Survey (2/11)

1. General Information (2/2)

The majority of social innovation organizations have a capital of less than 1 million NTD and less than 5 employees.

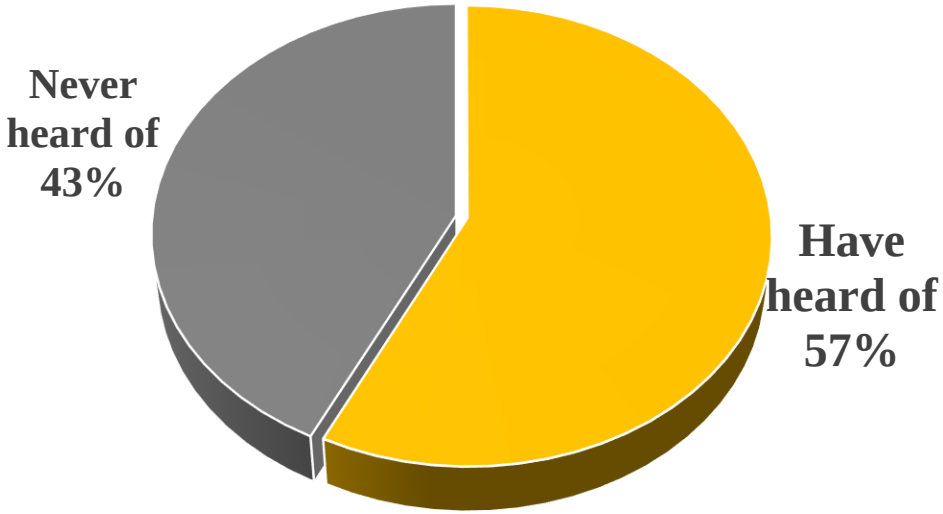




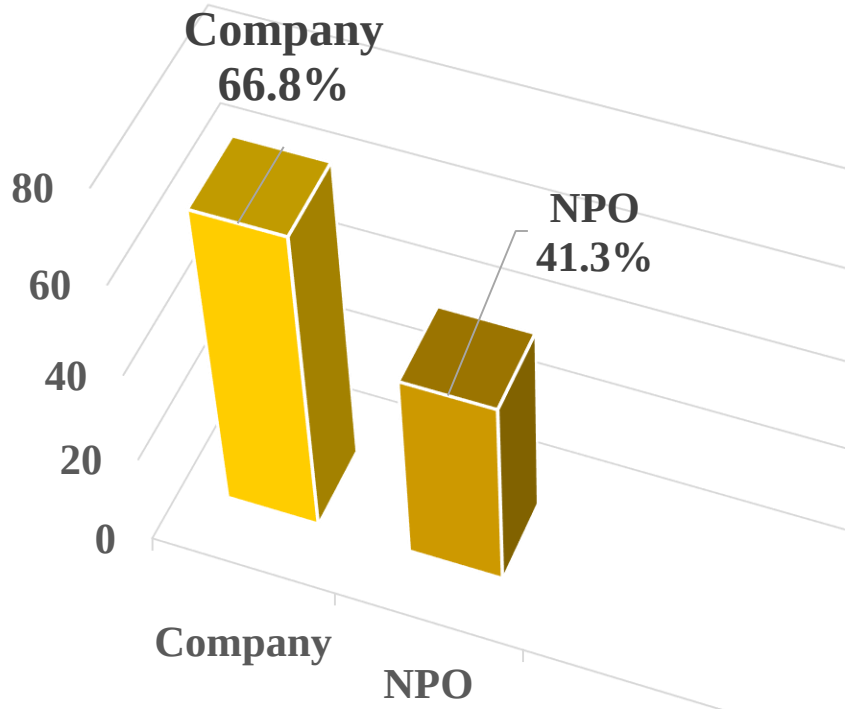
III. Enterprise Operation Survey (3/11)

2. SDGs (1/3)

Over half of the social innovation organizations have heard of SDGs.



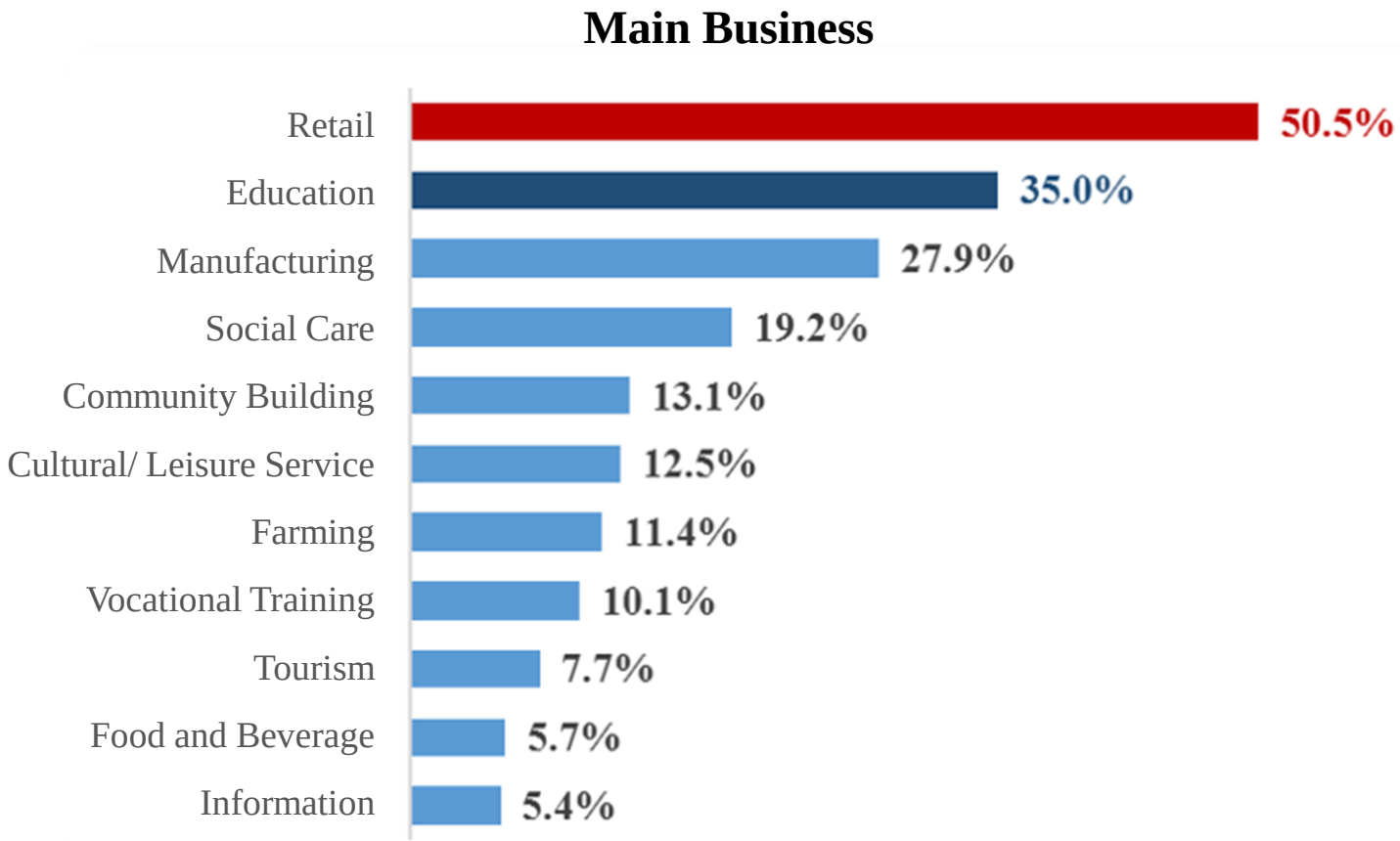
In terms of organization types, more **companies** have heard of SDGs than non-profit organizations.



III. Enterprise Operation Survey (4/11)

2. SDGs (2/3)

The main business of social organizations is retail, followed by education.



III. Enterprise Operation Survey (5/11)

2. SDGs (3/3)

Issues regarding **the elderly** gain more attention whereas **companies** pay attention to **ecological** issues as well.

Focused Issue	
The Elderly (25.6%)	
Organizational Type	
Company	**NPO**
The Elderly (24.4%) Eco-system (23.3%)	The Elderly (27.9%)

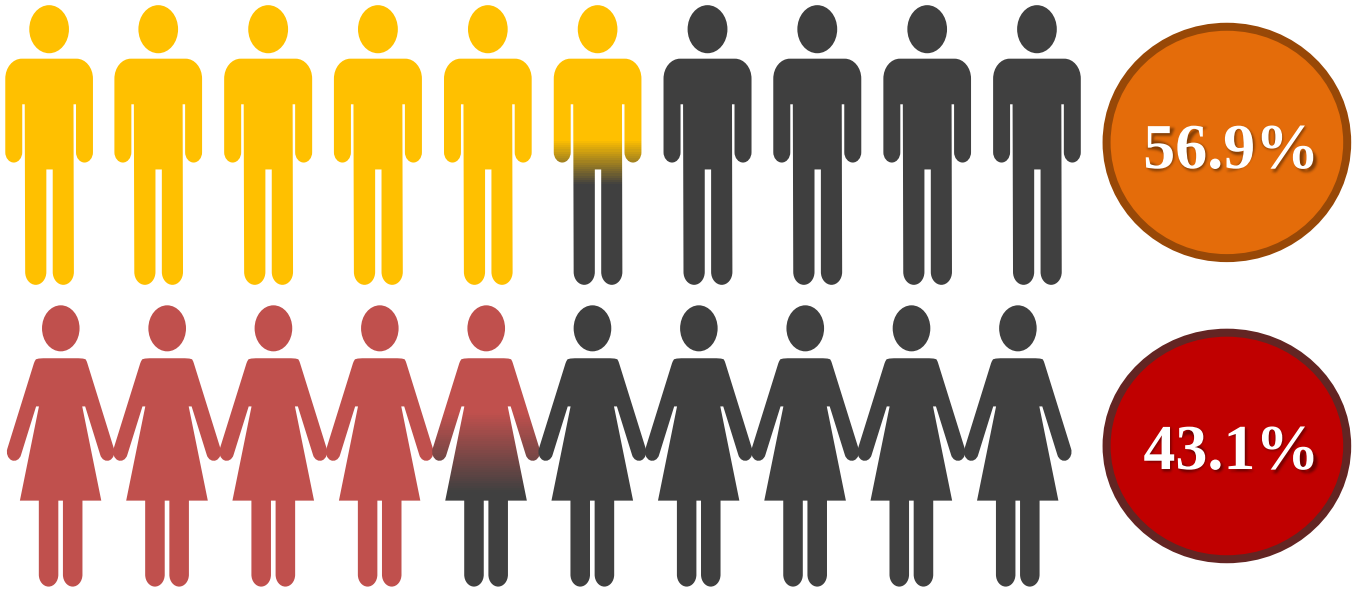
Among all SDGs, "**SDG 4 Quality Education**" is the most focused goal while companies also focus a lot on goals such as "**SDG 3 Good Health and Well-Being**" and "**SDG 12 Responsible Consumption and Production**".

Focused Goal				
SDG04 Quality Education (36.0%)				
Organizational Type				
Company			**NPO**	
(35.7%)	(32.6%)	(31.8%)	(51.2%)	(37.2%)

III. Enterprise Operation Survey (6/11)

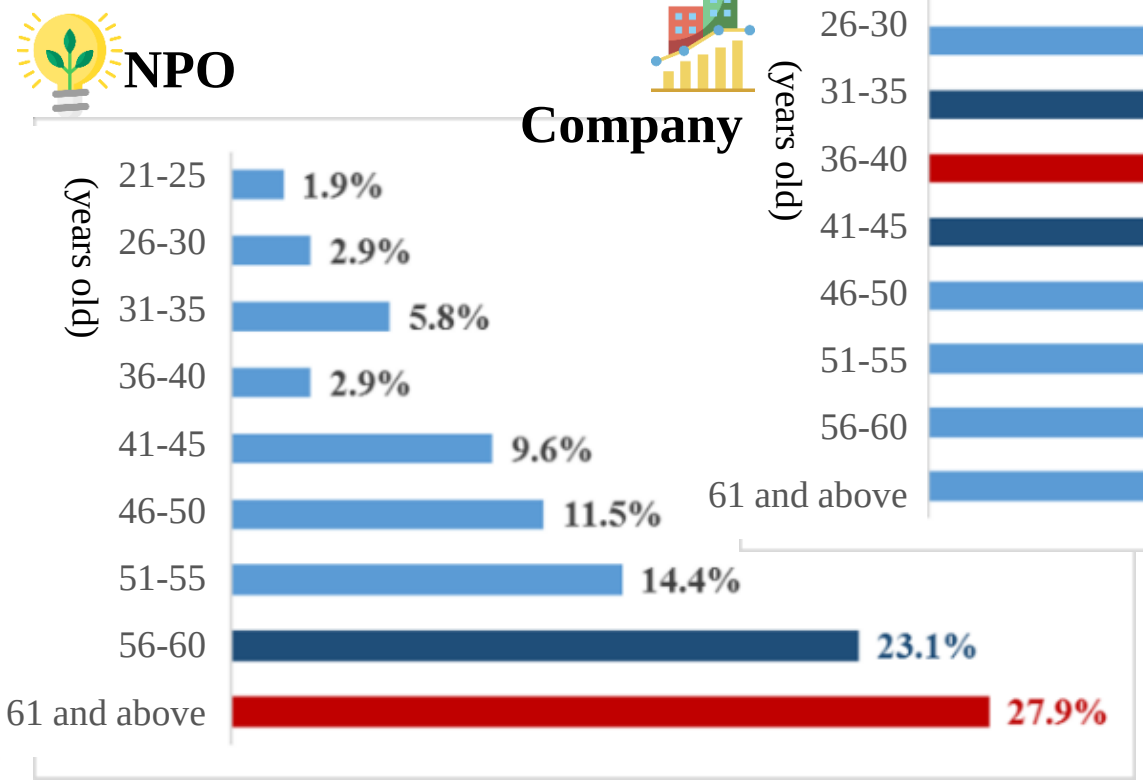
3. Management and Operational Status (1/4)

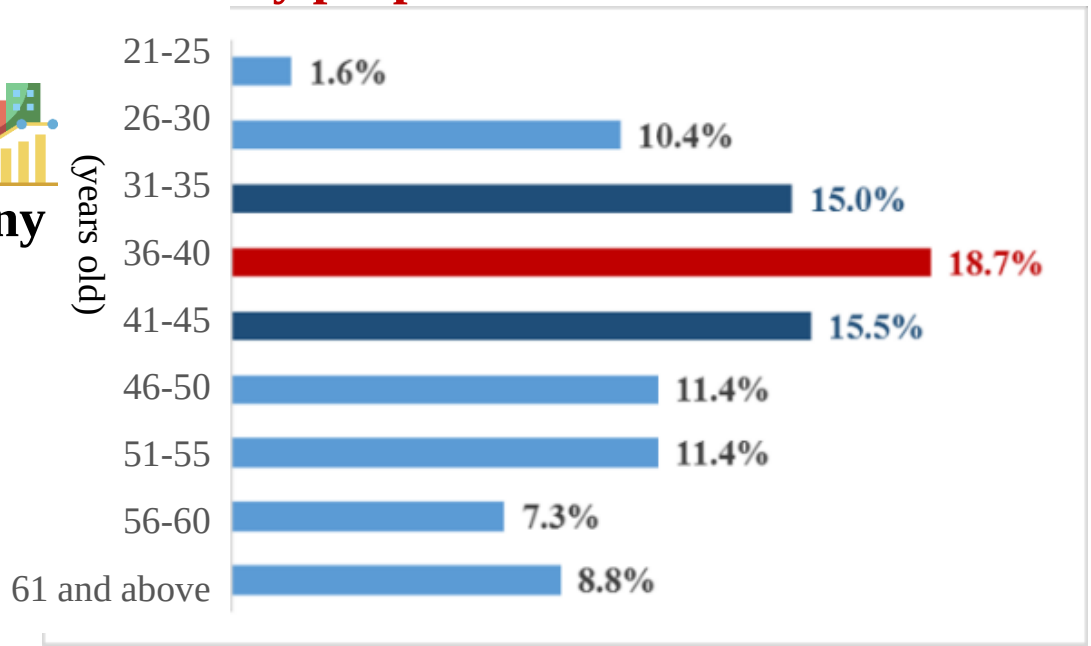
43.1% of the founders of social innovation organizations are female, higher than the 36.4% in small and medium enterprises in Taiwan.



3. Management and Operational Status (2/4)

In terms of age distribution, company founders are mainly young adults, and the founders of non-profit organizations are mainly middle-aged and elderly people.



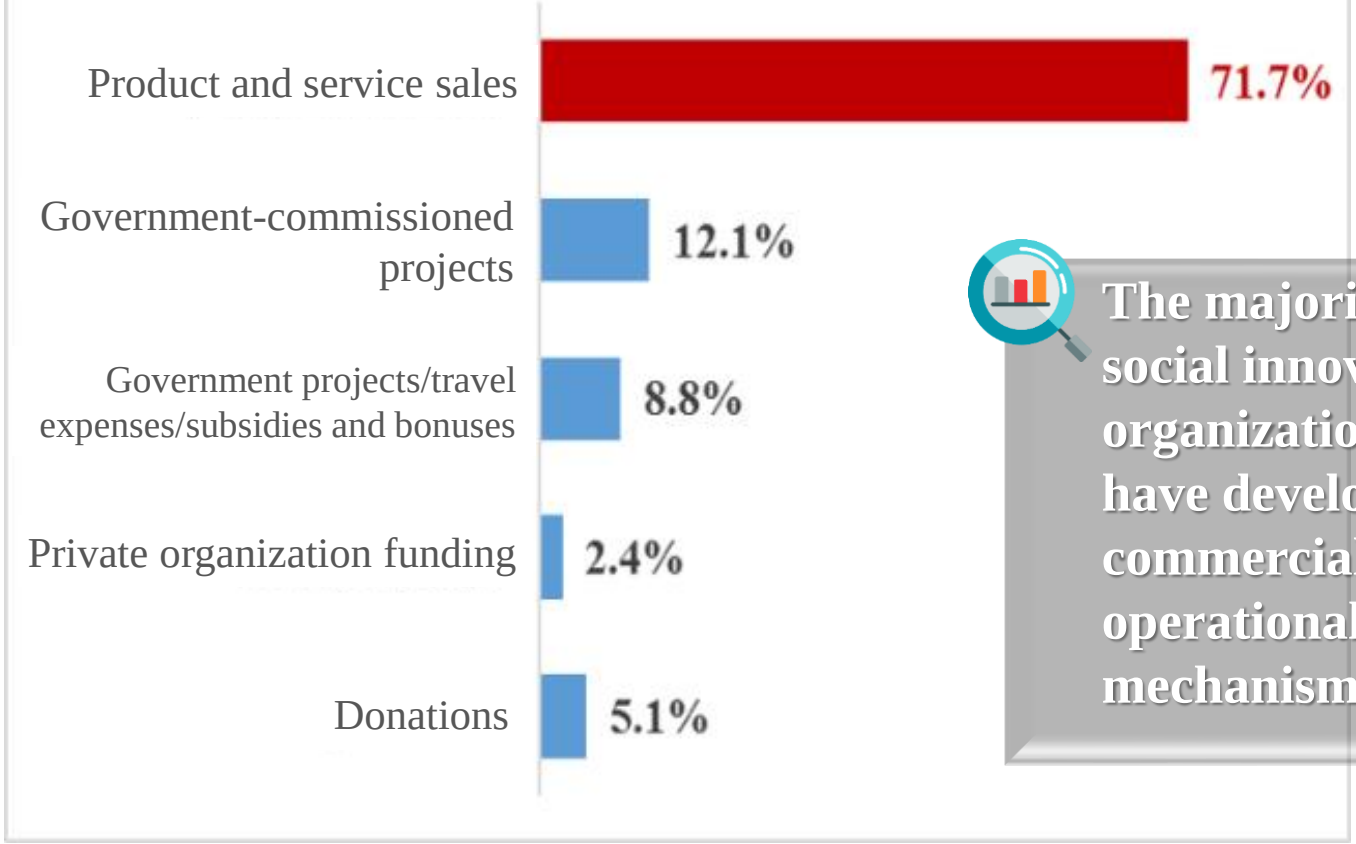


III. Enterprise Operation Survey (8/11)

3. Management and Operational Status (3/4)

The main sources of revenue for social organizations are sales of products and services.

Sources of revenue



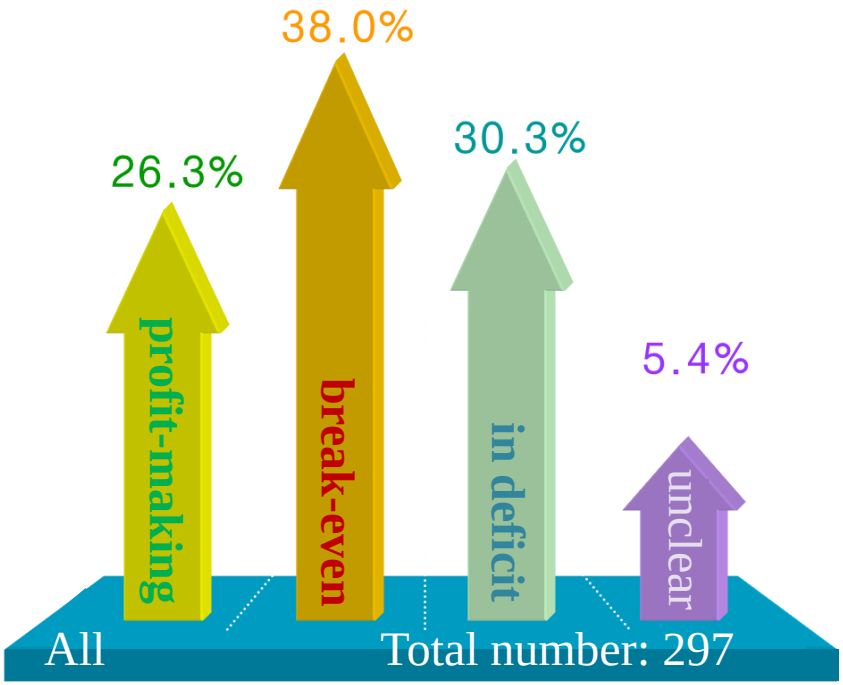
The majority of social innovation organizations have developed commercialized operational mechanisms.

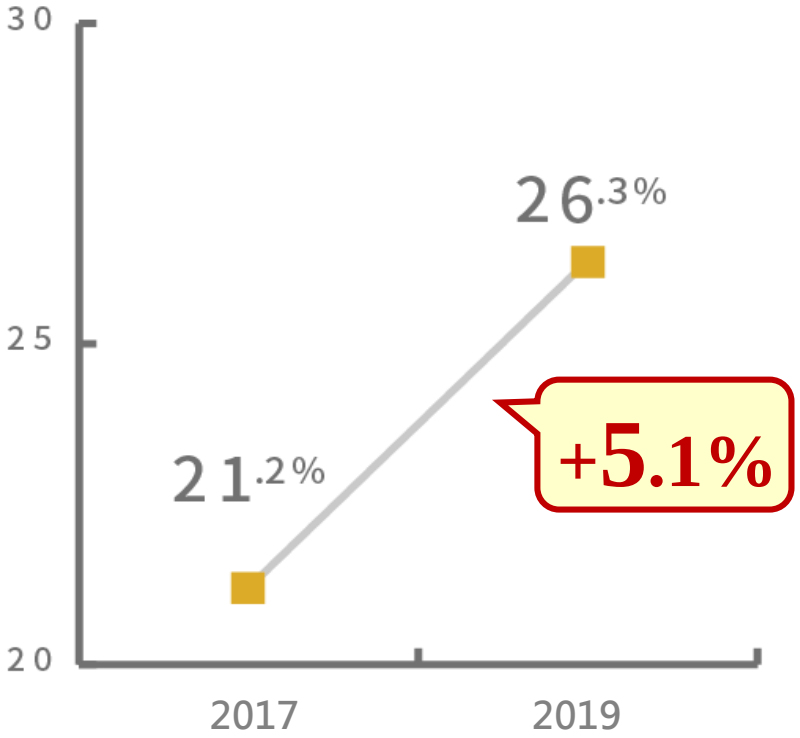
III. Enterprise Operation Survey (9/11)

3. Management and Operational Status (4/4)

26.3% of the social innovation enterprises responded that they are making a profit and 38% responded that they have maintained breaking even.

The proportion of enterprises **making a profit has risen slightly**.

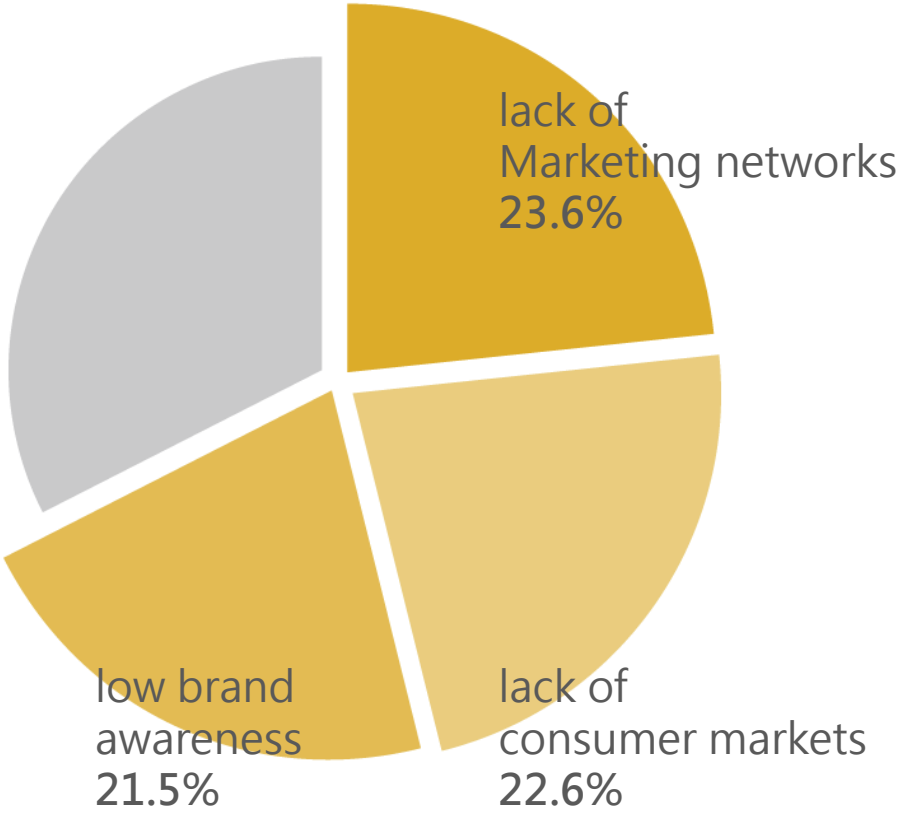




III. Enterprise Operation Survey (10/11)

4. Operational Challenges and Needs (1/2)

In terms of operational challenges, the main challenges of social innovation organizations are lack of marketing networks, lack of consumer markets, and low brand awareness.



III. Enterprise Operation Survey (11/11)

4. Operational Challenges and Needs (2/2)

In terms of policy needs, over half of the social innovation organizations suggested that the government enhance the public's awareness of social innovation.

The survey on social innovation awareness also showed that the public has an insufficient understanding of "social innovation".

IV. Conclusion (1/2)

Social Innovation Awareness Survey

1. The awareness of social enterprises has reached a record high of 30.6%.
2. The awareness of social innovation is not very high, but many people support its concept.
3. The public thinks that “SDF 4 Quality Education”, “SDG 8 Decent Work and Economic Growth”, and “SDG 1 No Poverty” are the most urgent goals in Taiwan.

IV. Conclusion (2/2)

Social Innovation Enterprise Operation Survey

1. Social innovation organizations are mostly new and small-scale organizations.
2. The proportion of female entrepreneurs in social innovation organizations is higher than the average.
3. More than half of the organizations know about SDGs and focus on education issues.
4. The proportion of profit-making social innovation organizations is increasing.
5. Social innovation organizations face challenges in marketing, markets, and branding.

Thanks for your attention!

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