Asia-Pacific is home to 55 percent of the world’s young people, or over 660 million youth.

Entrepreneurship offers a route through which young people can create jobs for themselves and their peers and drive inclusive growth and sustainable development.

Growing numbers of young people in Asia-Pacific opt to take this path, and youth-led small and medium-sized enterprises, startups and social enterprises make a vital contribution to the economic and social fabric of the region.

However, even under normal circumstances, youth entrepreneurs face serious headwinds. Their nascent businesses have limited cash reserves and assets, and few mechanisms to withstand shocks.

This research, conducted by the Youth Co:Lab under the sponsorship of UNDP and the Citi Foundation, reveals how the first year of the pandemic magnified these vulnerabilities and challenged youth entrepreneurs to their limits. 92 percent of young entrepreneurs have been negatively impacted.

At the same time, the research demonstrates how youth-led enterprises proved their agility and resilience—not only in overcoming threats, but in offering innovative solutions to support their communities.

From protecting livelihoods and access to critical goods, enhancing services for vulnerable groups, to advancing mental health and combating misinformation—youth-led enterprises rapidly pivoted their business models to address the challenges of the pandemic.

Rather than simply providing a safety net during the crisis, these young entrepreneurs offer solutions that go beyond recovery and are helping to create more resilient and sustainable societies.

Youth Co:Lab’s research reveals how important support from local and national governments and many other stakeholders has been to these enterprises over the past year, and how important this support will remain.

Young people are uniquely qualified to play a role in our recovery from COVID-19, because they have the greatest stake in the decisions made today, which will determine the future they inherit.

To ensure lasting recovery, COVID-19 strategies must incorporate funding and support for the youth entrepreneurs who are shaping the future of their communities.

We hope that the findings of this report will serve to galvanise actions by governments, the private sector, civil society, the UN system and development partners across Asia-Pacific.

Let’s step up our support for young entrepreneurs, and help them lead the way in our journey through recovery and beyond!

Kanni Wignaraja  
Assistant Secretary-General,  
Assistant Administrator and  
Director of the Regional Bureau for Asia and the Pacific, UNDP

Peter Babej  
CEO, Asia Pacific Citi
While youth-led enterprises demonstrate their capacity to reach vulnerable groups, they themselves are vulnerable and in need of support. One year into the pandemic, 39 percent have received no form of financial assistance. The types of support in highest demand are grants and in-kind resources; and technical advice related to digital solutions, marketing, and trade intelligence.

In the face of these threats, young entrepreneurs have proven their agility and resilience. Four strategies have been key. As digital natives, young entrepreneurs have been quicker to make the switch from physical shopfronts to online marketplaces: 92 percent have increased their use of mobile or digital solutions. Tapping into strong networks, 68 percent have entered new partnerships. 70 percent have implemented financial coping strategies to protect their liquidity. And 86 percent have innovated: from launching new products and services, to transforming their operating models.

COVID-19 recovery strategies should prioritise measures to build the resilience of young entrepreneurs and to harness their strengths. Young entrepreneurs offer the types of innovative solutions and inclusive organisations that we need at the centre of our efforts to build forward better.
ACKNOWLEDGEMENTS

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ABOUT THE RESEARCH

BACKGROUND
Youth Co:Lab directly supports young entrepreneurs in Asia-Pacific to scale their impact, while working with governments and other ecosystem partners to strengthen the enabling environment for youth entrepreneurship across the region.

From this vantage point, since the initial outbreak of COVID-19, we were in a position to see how youth-led enterprises in Asia-Pacific were being impacted by the crisis. At the same time, we were able to witness first-hand how young entrepreneurs stepped up to play a leading role in the response and recovery.

In March 2020, as the Asia-Pacific region was experiencing the cascading effects of the outbreak of the pandemic and resulting lockdowns, we conducted a rapid response survey to assess how young entrepreneurs were being impacted, and how they were responding.

The results of our rapid survey revealed a troubling picture of how the crisis was exacerbating youth-led enterprises’ pre-existing vulnerabilities, and threatening their survival.

At the same time, the survey revealed how young entrepreneurs in Asia-Pacific were already demonstrating extraordinary leadership on the frontlines of the COVID-19 crisis. We learnt how they were rapidly adapting their business models and deploying their capabilities, energies, and ingenuity to support their communities to respond to challenges brought on by the pandemic.

The results of the March 2020 survey guided our programming and policy work over the year that followed. Through the results, we were able to identify the types of support in highest demand. We worked with Youth Co:Lab partners to connect young entrepreneurs to funding and technical assistance, and to influence programmatic and policy responses to support youth-led enterprises.

ONE YEAR ON SURVEY
One year on from the March 2020 survey, while some countries were tentatively reopen, others were entering second or third waves. Across the region, the pandemic context and the recovery continued to present pressing challenges for youth-led enterprises. We therefore determined to conduct a One Year On survey.
The follow-on survey was driven by our recognition that youth-specific vulnerabilities and needs are too often not being incorporated into the design of COVID-19 recovery strategies. Furthermore, while young leaders have a huge contribution to make in the recovery, their contribution is currently not being fully realised across Asia-Pacific.

SURVEY METHODOLOGY AND OUTREACH
Relative to the 2020 survey, the One Year On survey was a more in-depth assessment designed to collect quantitative and qualitative data on channels and magnitude of impacts, coping strategies, responses and solutions, innovations and opportunities catalysed, and outlook prospects.

The survey contained 40 questions, including multiple choice and open text. The full survey questionnaire and more information on the survey methodology are available in the Appendix.

The One Year On survey was open online from 22nd February to 21st March 2021. The survey was disseminated via a social media campaign, to Youth Co:Lab cohorts of young entrepreneurs, and by UNDP country offices and Youth Co:Lab partners.

The survey was made available online in English, Korean, Mandarin Chinese, and Bengali versions. In addition, Youth Co:Lab focal points provided support to young entrepreneurs in translation of the survey in Thailand and Viet Nam, among other countries.

Respondents were free to respond to the survey anonymously, or to provide their enterprise name and email if they wished to receive access to follow-on support and information. 90 percent of respondents opted to provide their enterprise name.

After data cleaning and removal of invalid responses, 376 survey responses from 30 countries and territories in Asia-Pacific were included in the final quantitative and qualitative analysis.

The sections that follow present the survey results. Section 1 presents analysis of the profile of the enterprises who responded to the survey. Sections 2–5 present the survey results and findings according to the four lines of enquiry above, (see Research Framework) while recognising the interlinkages between them.

In addition to analysing results for the full dataset of responses, the survey results are also explored according to specific lenses, in particular: by gender, by sub-region, and by years of operation.
In this chapter, we present analysis of the profile of the enterprises who responded to the survey.

The charts presented in this chapter are available to explore on Youth Co:Lab’s website.
ENTERPRISE LOCATIONS
Following data cleaning, the final sample of completed survey responses comprises 376 youth-led enterprises operating in 30 countries and territories across Asia-Pacific. Figure 1 displays the countries and territories of operation of the enterprises.1

As shown by Figure 1 and Figure 2, there is a diverse regional spread of enterprises represented: 37 percent are based in South Asia, 33 percent are based in South-East Asia, 25 percent are based in East Asia, and 5 percent are based in the Pacific. Compared to regional population weighting, South-East Asia is slightly over-represented in the sample and East Asia is slightly under-represented. Individual country response rates do not necessarily align with population weightings.

1. Enterprises operating in more than one market were asked to select their primary market of operation.
LEADERSHIP DEMOGRAPHICS

As founders/owners were requested to respond to the survey on behalf of their enterprise, respondent gender and age data is used as a proxy for data on enterprise leadership.

60 percent of respondents identify as male, 39 percent identify as female, 0.8 percent identify as other, and 0.3 percent preferred not to answer the question (see Figure 3). The overrepresentation of male-led enterprises in the sample is driven by responses from South Asia, which we would expect given the lower representation of women in business leadership.

In terms of the age of enterprise leadership, the distribution skews slightly older, as shown by Figure 4. 65 percent of respondents are 26–35 years old. However, a significant number of enterprises are led by younger entrepreneurs: 35 percent of respondents are 18–25 years old.

TARGET GROUP

Survey outreach was targeted to young entrepreneurs in Asia-Pacific:

- **Young**: Given the differences in national definitions of ‘youth’ across the region, we adopted the age range of 18–35, while collecting disaggregated data within this range.

- **Entrepreneur**: We sought responses from those who own and/or lead an enterprise or social enterprise, encompassing differences in organisation type and legal status.

- **Asia-Pacific**: The full list of countries and territories for which survey responses were accepted can be found in the Appendix.
The majority of the enterprises surveyed are early stage. As can be seen in Figure 5, 72 percent of enterprises are in their first three years of operation, while only 28 percent have been in operation for four years or more. This is expected given that the survey is targeted at youth-led enterprises, and given that Youth Co:Lab supports many startups and social enterprises from ideation stage.

A small minority — 6 percent — of enterprises are less than one year old, meaning they started operations since the outbreak of the pandemic. In some cases, the business opportunity arose specifically as a result of the pandemic. This sub-sample is explored further below.

As shown by Figure 6, the enterprises operate in a wide range of sectors. The six sectors from which we received the most responses were: education/skills (17 percent), agriculture and fishing (12 percent), information communication technology (ICT) (10 percent), health (9 percent), wholesale and retail trade (9 percent), and arts, entertainment, and recreation (8 percent). This reflects a high concentration in service sectors.

The vast majority, or 88 percent, of respondents self-identified their business as a ‘social enterprise’, as shown by Figure 7. Given the lack of agreed definition of social enterprise across the region, the question was left deliberately broad.²

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² The question was worded as follows: “Do you consider your enterprise to be a ‘social enterprise’? Broadly speaking, social enterprises seek to generate a positive impact on society by offering services or products that answer unmet needs or by offering different solutions to social challenges.”
The high proportion of social enterprises was in line with our expectation, given the broad definition used and the fact that Youth Co:Lab cohorts comprise young entrepreneurs who are seeking to achieve social impact. At the same time, through survey outreach, we were also interested to hear from young entrepreneurs who did not necessarily self-identify as social entrepreneurs.

Unless otherwise noted, results presented in the sections that follow refer to the full dataset. When specified, results are presented by gender, by sub-region, or by age of the enterprise. Where relevant, we compare with data and insights from our March 2020 rapid response survey.
IMPACTS
In this chapter, we present our results and analysis on the channels of primary and secondary impact of the pandemic on youth-led enterprises in Asia-Pacific over the past year.

The charts presented in this chapter are available to explore on Youth Co:Lab’s website.
how youth-led enterprises have had to contend with challenges across multiple fronts. Firstly, the pandemic has limited access to customers and has contracted demand. At the same time, it has upended the workplace and the workforce. The crisis has disrupted supply chains and raised costs of production. It has also stalled progress in administrative business and access to partners. Finally, the economic shock has reduced enterprises’ access to credit and investment.

We find that, as a result of these challenges, 92 percent of enterprises surveyed have been negatively impacted by COVID-19. To contend with these challenges, 85 percent of enterprises have had to take actions to shrink their business model or limit their growth to protect their survival.

As a result of these primary and secondary impacts, the majority of enterprises report troubling headline outcomes. 57 percent of enterprises saw their sales decrease compared to the previous year, while 59 percent saw their cash flow decrease. 51 percent had to partially or fully close at some point because of COVID-19, while 21 percent had to lay off staff or reduce staff hours or wages.

OUR RESULTS REVEAL
Overall, we found that 92 percent of enterprises have been negatively impacted by COVID-19. We sought to investigate how youth-led enterprises had been negatively impacted by the pandemic. We assessed different channels of impact. Specifically, we looked at challenges across the following five areas, while recognising the close interlinkages between them:

1. **Customers**: reduced opportunities to market products or services to customers, and reduced consumer demand due to the economic shock.

2. **Finance and investment**: reduced access to credit and reduced access to outside investment in the enterprise.

3. **Supply chains**: disruptions to supply chains and logistics, barriers to or higher costs of accessing inputs, and disruptions to or higher costs of distribution.

4. **Operating environment**: disruptions to or higher cost of utilities, disruptions to access to permits, licences, etc., and reduced access to partners or business networks.

5. **Workplace and workforce**: factors such as the need to reduce the number of staff in the workplace, as well as employee absence, sickness, care burden or mental health issues.

We find that the majority of enterprises have had to contend simultaneously with challenges across multiple different fronts (See Figure 8).

**IMPACTS OF THE CRISIS**

- **Primary impacts**: 92 percent of enterprises have been negatively impacted by COVID-19.
- **Secondary impacts**: 85 percent of enterprises have had to take actions to shrink their business model or reduce their growth as a result of negative impacts of the pandemic.
- **Cashflow**: 59 percent of enterprises saw their cash flow decrease as a result of COVID-19.
- **Sales**: In the first year of the pandemic, 57 percent of enterprises saw their total annual sales decrease compared to the previous year, by an average decrease of 54 percent.
- **Closure**: 51 percent had to partially or fully close at some point because of COVID-19, for 18 weeks on average. Enterprises in **South Asia** are most likely to have had to close (59 percent), while enterprises in East Asia are least likely to have had to close (44 percent).
The most common challenge that enterprises experienced is challenges related to customers, with 83 percent being negatively impacted. Meanwhile, 60 percent of enterprises experienced challenges related to their workplace and workforce, 60 percent experienced challenges related to their operating environment, 47 percent experienced challenges related to access to finance and investment, and 40 percent experienced challenges related to their supply chains.

Our quantitative and qualitative data reveal how these different channels of impact interact with and compound each other, setting off chain effects (see quote above). As a result of these challenges, enterprises may have to take corrective action (see below).

Looking in granular detail at specific challenges that enterprises faced within the categories above, the five most common were: reduced opportunities to market products and services to customers (59 percent); reduced consumer spending power (48 percent); reduced access to partners and business networks (40 percent); reduced access to outside investment (39 percent); and worse mental health among staff (37 percent).

“Due to lockdown, I had to go back to my hometown. This meant I lost a great number of sales as I didn’t return immediately to Suva where I carry out my business. Then, due to the lack of cash flow I had coming in, I had to relocate my premises, which meant I lost even more customers.”

— Young entrepreneur in Fiji
SECONDARY IMPACTS

To contend with the COVID-induced challenges outlined above, we found that 85 percent of enterprises have had to take actions to shrink their business model or limit their growth to protect their survival.

We assessed different ‘survival strategies’ grouped across the following areas:

1. **Shrink the business model**: strategies such as scaling back product or service offer, cancelling orders with suppliers, or reducing distribution and sales channels.
2. **Increase debt**: delaying the payment of bills, increasing borrowing.
3. **Delay investments in the enterprise**: delaying investments or the hiring of new staff.
4. **Lay off staff or reduce staff hours or wages**: let staff go, reduce staff wages or hours, or reduce compensation of management.

Of those who implemented survival strategies, the most common survival strategy that enterprises have had to adopt is to delay investments in the business (71 percent). 68 percent of enterprises have had to shrink their business model — for example by reducing their product or service offering.

OUTCOMES

As a result of these primary and secondary impacts of the pandemic, the enterprises surveyed report troubling headline outcomes in terms of closure, sales, cash flow, and staffing, with only a small sub-sample registering an increase in sales and cash flow.

CLOSURE

51 percent of enterprises have had to either partially or fully close at some point as a result of COVID-19, for 18 weeks on average.

Enterprises in South Asia are most likely to have had to partially or fully close at some time (59 percent), whereas enterprises in East Asia are least likely to have had to close (44 percent). This is in line with our expectation, as among the sub-regions East Asia had the least protracted lockdowns.

Women-led enterprises are less likely to have had to partially or fully close at some time as a result of COVID-19 (43 percent), than male-led enterprises (55 percent). The incidence of closure for social enterprises versus non-social enterprises are not statistically different.

SALES

In the first year of the pandemic, 57 percent of enterprises saw their total annual sales decrease compared to the previous year. Enterprises were asked to compare their total annual sales from Feb 2020–Jan 2021 inclusive, to their total annual sales from Feb 2019–Jan 2020. The Sales question excluded those where the comparison was not possible, i.e., those who were not operational in the previous year or did not yet have sales revenue.
to the previous year, by an average decrease of **54 percent** (See Figure 11).

Meanwhile, **23 percent** of enterprises report that their total sales increased compared to the previous year, by an average increase of **102 percent**. This suggests that just under a quarter of those for whom the sales comparison was possible registered rapid growth during the pandemic.

For **20 percent** of enterprises, their sales remained approximately the same.

**60 percent** of women-led enterprises report that their sales decreased, compared to **56 percent** of male-led enterprises. However, the difference is not large, and the result is reversed for cash flow (see below).

**CASH FLOW**

In addition to asking about the impact of COVID-19 on sales, we also asked about the impact of COVID-19 on cash flow over the past year. This broader measure could encompass other forms of cash flow beyond sales revenue and enterprises where an annual sales comparison was not possible.

**59 percent** of enterprises report that their cash flow has **decreased** as a result of COVID-19. Meanwhile, **24 percent** of enterprises report that their cash flow has **increased** (either slightly or substantially), while **16 percent** report that their available cash flow has **remained the same** (See Figure 12).

**57 percent** of women-led enterprises report that their cash flow decreased, compared to **60 percent** of male-led enterprises. However, the difference is not large, and the result is reversed for sales (see above).

Social enterprises are slightly less likely than non-social enterprises to have seen their cash flow decrease. **59 percent of social enterprises** saw their cash flow decrease as a result of COVID-19, compared to **66 percent of non-social enterprises**. This could be because many of the social enterprises were in a position to respond to needs resulting from COVID-19 and saw demand for their services.

**STAFFING**

**21 percent** of enterprises had to lay off staff or reduce staff hours or wages as a result of COVID-19. Given the magnitude of the crisis, the fact that the majority of enterprises have managed to not lay off staff or to reduce staff hours or wages could be considered a positive indication of resilience.

Relative to adult-led enterprises, youth-led enterprises have certain characteristics that make them vulnerable to a crisis — such as more limited assets and fewer mechanisms to withstand shocks. The results presented in this chapter reveal how the cascading effects of the pandemic have challenged youth-led enterprises on multiple fronts.

In the next chapter, we explore the agile and innovative strategies that youth-led enterprises in Asia-Pacific have implemented to respond to these challenges.
RESPONSE STRATEGIES

In this chapter, we present our results and analysis on the strategies that youth-led enterprises in Asia-Pacific have implemented in response to the crisis to support their survival and growth.

The charts presented in this chapter are available to explore on Youth Co:Lab’s website.
that, while youth-led enterprises have certain vulnerabilities, they also possess many strengths that have made them resilient in the face of the pandemic.

Firstly, youth-led enterprises are agile. 87 percent have pivoted their business strategy in response to COVID-19.

Secondly, youth-led enterprises are innovative. 86 percent have developed innovations in response to the crisis: from launching new products or services; to transforming their operating model.

In the face of threats to their survival, young entrepreneurs have demonstrated their resilience. Four strategies have been key, and are explored in detail in this chapter:

1. Adapting business model to respond to needs brought on by the pandemic and the recovery
2. Maximising digital and mobile solutions
3. Pursuing financial coping strategies
4. Harnessing partnerships and networks
• Agility: 87 percent of enterprises have changed their business strategy in response to COVID-19.

• Innovation: 86 percent have developed innovations in response to the crisis. These include new products or services, and innovations in their business processes and structure.

• Financial coping strategies: 70 percent have implemented financial coping strategies to manage cash flow issues resulting from COVID-19.

• Partnerships and networks: 68 percent of enterprises have entered into new partnerships as a result of COVID-19.

• Digital solutions: 92 percent have implemented mobile or digital solutions in response to COVID-19. Compared to pre-pandemic, 77 percent have increased their level of digitisation.
YOUTH-LED ENTERPRISES ARE AGILE
We find that 87 percent of enterprises have changed their business strategy as a result of COVID-19, while only 13 percent have not changed their business strategy (see Figure 13). 46 percent changed their strategy slightly, while 41 percent changed their strategy significantly. Broadly speaking, we find that the enterprises surveyed have adapted their business strategy in the following ways:

1. Shifting existing products or services to new modes of delivery
2. Launching new products or services
3. Adapting products or services to respond to needs arising from the pandemic and the recovery

Social enterprises and non-social enterprises were equally likely to have changed their strategy. Women-led enterprises were almost just as likely as male-led enterprises to have changed their strategy (85 percent compared to 88 percent).

However, male-led enterprises were more likely to report that their strategy had significantly changed, whereas women-led enterprises were more likely to report that it had slightly changed. This may reflect substantive differences in response, or it could simply reflect differences in how female and male entrepreneurs characterise their responses.

YOUTH-LED ENTERPRISES ARE INNOVATIVE
We find that 86 percent have developed innovations in response to the crisis.

As can be seen from Figure 14, 38 percent have developed new services and 31 percent have developed new products. Meanwhile, some enterprises have innovated their operating model: with new processes, systems, or structures. These types of innovations are not mutually exclusive, but rather closely interlinked.

ADAPTING BUSINESS MODEL TO RESPOND TO NEEDS BROUGHT ON BY THE PANDEMIC AND THE RECOVERY
As outlined above, 87 percent of youth-led enterprises have changed their business strategy in response to COVID-19.

We find that many youth-led enterprises have adapted their business model to respond to trends and needs emerging as a result of the pandemic. A number of key demand trends emerge from our analysis:

- Solutions to protect access to goods and services in the context of disrupted supply chains e.g. through new platforms for marketing and distribution or through local production
- Digital, mobile, or ‘socially distanced’ solutions
- Solutions to support access to information
- Solutions to support access to services
- Solutions to support business continuity and business development
- Solutions to address social issues generated or exacerbated by the pandemic
HASU is a social enterprise providing the first app for health, exercise, entertainment and learning for those aged 50+ in Viet Nam. For HASU, COVID-19 brought about a change in customer behaviour, where seniors were much more open to trying the app technology.

FUWA, a biotech company in Viet Nam producing cleaning products from organic waste, moved their sales and distribution channel online, and were able to reach many more customers than previously.

SURI, an ethical skincare company based in West Sumatra, Indonesia, reached new customers through expanding their use of e-commerce and digital marketing.

**SECTION 3: RESPONSE STRATEGIES**

- Solutions to support access to entertainment, arts, recreation, and social connection
- Solutions with a positive environmental and/or social impact
- Solutions to support vulnerable groups

In particular, due to the nature of their business models and existing capabilities, we find that many youth-led social enterprises and startups were well positioned to respond to the needs of their communities arising as a result of the pandemic.

Through leveraging and pivoting their business models to rapidly respond to this demand, they also helped to safeguard their survival and growth.

Crucially, these business models are not just relevant for the pandemic context. We find that the youth-led enterprises surveyed are offering solutions with long-term potential beyond recovery.

These solutions are explored in detail in Section 4 below.

**MAXIMISING DIGITAL AND MOBILE SOLUTIONS**

As digital natives, global research suggests that young entrepreneurs may find it easier than adult entrepreneurs to adapt to online ways of doing business. We find that young entrepreneurs have been quick to make the switch from physical shopfronts to online marketplaces and to launch new digitally enabled products and services.

Overall, we find that 92 percent of youth-led enterprises have implemented mobile or digital solutions to respond to COVID-19. In addition, compared to pre-pandemic, 77 percent of enterprises report that they have increased their level of digitisation overall (see Figure 18).

For 13 percent of enterprises, their level of digitisation remained the same. From the qualitative analysis, we find that some of the enterprises surveyed were already at a high-level of digitisation pre-pandemic and were able to capitalise on the acceleration of this trend in their operating environment and use it to expand their market. For example, HASU.

Decreases in digitisation relate to cases where there were challenges in accessing...
TECHGEEKS, a Bangladeshi startup, previously specialised in hardware product innovation, developing devices such as intelligent air purifiers. Due to COVID-19, their research and development process was temporarily paused. To stay afloat and utilise resources effectively, TechGeeks began to develop software products using digital collaborative tools. In the process, they developed a new capability, and now have a new line of products and an expanded market.

UNIDESK is a social enterprise that provides a career counselling platform for young people in Pakistan. With the outbreak of COVID-19, Unidesk digitised the modules they were previously delivering in schools and colleges and launched an online digital skills training programme. Students have become more accustomed to online learning, and Unidesk have expanded their customer base.

TIFFIN AND MORE is a food delivery service based in Bhutan. Previously, the owner managed a restaurant catering to tourist customers. With the outbreak of COVID-19, she closed the restaurant and switched to launching a food delivery service through a purely online platform.

Based on our analysis of both quantitative and qualitative data, four key trends emerge regarding how youth-led enterprises have leveraged digitisation in their response to the pandemic:

1. **Digitising internal systems** to enable staff to work remotely and to support business continuity.

2. **Transferring marketing and sales of existing products from offline to online channels** e.g. from physical shopfronts to selling via online marketplaces.

3. **Shifting delivery of services from offline to online modalities** and launching new products or services using digital solutions.

4. **Leveraging existing digital technology solutions to respond to needs generated by or exacerbated by the pandemic** and support the recovery.

**Digitising internal systems**

With the onset of partial or full lockdowns, we find that 88 percent of enterprises implemented actions to support their staff to work remotely.

Such actions included: digitising systems for record-keeping, customer relationship management, accounting, or inventory; and expanding the use of online platforms for communication, collaborative working, and task or project management.

In addition, many youth-led enterprises have increased the use of mobile or digital channels for day-to-day business operations such as banking, accessing information, or applying for services.

Since the outbreak of COVID-19, 43 percent have accessed information online or over the phone that they previously accessed in person, while 40 percent have applied for a service online or over the phone that they previously accessed in person. 27 percent have increased their use of mobile or internet banking.

**Transferring marketing and sales to online channels**

In response to COVID-19, many of the youth-led enterprises surveyed quickly expanded their use of online marketing and sales channels.

We find that 71 percent of enterprises increased their use of social media or digital marketing. Meanwhile, 48 percent of enterprises increased their use of e-commerce and e-payment channels or platforms. Finally, 39 percent increased their use of digital business-to-business solutions.

In many cases, new sales channels have helped to expand access to new markets, and such channels have become permanent. For example, FUWA and Suri (left).

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**Figure 19:**

*Mobile or Digital Solutions*

- Social media or digital marketing
- E-commerce channels
- Accessed information online / over the phone
- Applied for a service online / over the phone
- Digital business-to-business solutions
- Digital financial products or services

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<th>Number of Responses</th>
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<td>0 20 40 60 80 100 120 140 160 180 200 220 240</td>
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necessary technical or human resource capacity during the pandemic, or where operations had to be put on hold.

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In many cases, new sales channels have helped to expand access to new markets, and such channels have become permanent. For example, FUWA and Suri (left).
In some cases, due to the impact of the crisis on the operating context, youth entrepreneurs shut down their former businesses and switched to purely online channels. For example: Tiffin and More (above).

Shifting delivery of services from offline to online modalities and launching new products or services
The analysis reveals that digitisation has not merely been a short-term business continuity strategy.

The pandemic has led many youth-led enterprises to shift product and service development and delivery from offline to online modalities. This may have begun as a temporary measure. However, in the process, many youth-led enterprises have developed entirely new product or service lines and have fundamentally reshaped their business models. For example: TechGeeks, Unidesk and Airlift (above).

Leveraging digital technology to respond to needs arising from the pandemic
Prior to the pandemic, many youth-led enterprises were already leveraging digital technologies to offer products and services that answer unmet needs or provide new solutions.

Our research finds that, in particular, many youth-led social enterprises have harnessed these digital technologies to respond to needs generated by or exacerbated by the pandemic, and to support the pathway beyond recovery, to more resilient, inclusive, and sustainable societies.

Many examples across a range of thematic areas are provided in Section 4 below. Here we provide one thematic example: several of the social enterprises surveyed are leveraging digital technologies to expand inclusive service delivery and strengthen social contracts for recovery and beyond. For example: GoodGovPH and Center for Entrepreneurship and Innovation (left).

Pursuing financial coping strategies
We find that 70 percent of enterprises have implemented strategies to manage cash flow issues resulting from COVID-19.

Of those who implemented financial coping strategies, the most common is taking out loans, followed by informal borrowing from family or friends (See Figure 20).

Harnessing partnerships and networks
Our One Year On research emphasises the role that partnerships and networks have played in supporting youth-led enterprises’ resilience and growth over the year. Young entrepreneurs have connected with partners to access support and to co-design strategies and solutions.

Overall, we find that 68 percent of enterprises have entered into new partnerships as a result of COVID-19.

Figure 21 shows the different types of organisations that youth-led enterprises have entered into partnerships with. The most common is non-profit organisations, at 24 percent. Second is community groups, at 20 percent. And third is local government, at 16 percent.
These results reflect the fact that the majority of the enterprises surveyed are social enterprises who have played a key role in community response and developing locally-relevant, grassroots solutions.

Broadly speaking, partnerships are concentrated around the following areas of collaboration:

- Development of new products or services
- Marketing and distribution
- Financing, resource-sharing, and cost-sharing
- Outreach and support to vulnerable groups

Youth-led enterprises have been effective in harnessing partnerships to support their communities to address challenges brought on by the pandemic. Many examples are provided in Section 4 below. Here, we provide just a few examples: iFarmer, Trinity Academia, and TEEK TAKA (right).
SOLUTIONS
In this chapter, we analyse the strengths of young entrepreneurs and social entrepreneurs that made them well placed to play a leading role in COVID-19 response and recovery.

We present a snapshot of youth-led solutions from across the region that have helped to address challenges brought on by the pandemic and support an inclusive and sustainable recovery.

The charts presented in this chapter are available to explore on Youth CoLab’s website.
how youth-led startups and social enterprises across Asia-Pacific have made a significant contribution to COVID-19 response and recovery.

74 percent of youth-led enterprises surveyed have contributed to COVID-19 response and recovery efforts, either through providing resources to support relief efforts, or developing solutions to support their communities and societies.

Youth-led startups and social enterprises were among the first responders in deploying their capabilities, ingenuities, and energies to mitigate the socio-economic impacts of COVID-19. They demonstrated their agility in rapidly developing solutions to respond to needs arising from the pandemic.

More than simply providing a safety net during the crisis, many youth-led enterprises offer models of the types of innovative solutions and inclusive organisations that we need to build forward better from COVID-19.
• 74 percent of youth-led enterprises have contributed to COVID-19 response and recovery, either through providing resources, or through developing solutions to support response and recovery.

• Resources: 50 percent of enterprises have made resources e.g. staff time, financial resources, donations, equipment, or space available to support COVID-19 relief efforts.

• Solutions: 68 percent of enterprises have developed solutions designed to support their community or society to mitigate the impacts of COVID-19 and promote recovery.
RESOURCES

At one level, we assessed whether youth-led enterprises had provided financial or in-kind resources to support COVID-19 relief in their community.

We found that 50 percent of enterprises (53 percent of women-led enterprises and 46 percent of male-led enterprises) had made resources such as staff time, financial donations, in-kind donations (e.g., food packages or personal protective equipment), assets, equipment, space, or platforms available to support COVID-19 response efforts. See the examples of The Hub Pacific and Dulwa (right).

SOLUTIONS

We then assessed whether youth-led enterprises had developed solutions designed to support their community or society to mitigate the impacts of COVID-19 and promote recovery.

We found that 68 percent of the enterprises surveyed had developed solutions to support COVID-19 response and recovery. 73 percent of women-led enterprises and 64 percent of men-led enterprises report that they have developed COVID-19 response and recovery solutions.

Based on analysis of qualitative responses, solutions span the following, interconnected categories:

1. Solutions to support access to goods and services, such as new platforms for marketing and distribution or promoting domestic production.
2. Solutions to raise awareness, promote access to information, and combat misinformation.
3. Solutions to support access to services e.g. education, healthcare, transport, waste.
4. Solutions to protect livelihoods in the crisis and beyond recovery.
5. Solutions to support business continuity and business development.

6. Solutions to support vulnerable groups.

7. Solutions to address social needs generated by or exacerbated by the pandemic e.g. mental health issues, domestic violence.

8. Solutions to support access to entertainment, arts, recreation, and social connection.

9. Solutions to support crisis management and response.

10. Solutions to promote good governance and citizen engagement.

We find that young social entrepreneurs possess a set of characteristics that made them well-placed to play a leading role in response and recovery efforts. These strengths include:

- **Reach:** Many youth-led social enterprises serve vulnerable groups. They are close to the communities they serve, have a detailed understanding of their needs, and occupy a position of trust. As a result, they were able to reach groups who may otherwise have been left behind.

- **Agility:** Youth-led startups and social enterprises are generally small and nimble. They are experienced in launching, testing, and refining products or services to respond to user needs. This meant they were agile in pivoting their business models in response to the crisis.

- **Innovation:** Youth-led startups and social enterprises draw on mechanisms that encourage innovation. They are also effective in surfacing grassroots, frugal innovations. They may be more able to use digital platforms and to anticipate trends.

- **Collaboration:** Social enterprises are usually able to draw on diverse revenue streams and enter different forms of partnerships. They were able to collaborate with public, private, and civil society organisations in solutions to COVID-19.

These strengths are represented in the youth-led enterprises identified through our research. In this chapter, we present a snapshot of solutions from across Asia-Pacific. More youth-led solutions are available to explore on Youth Co:Lab’s [website](#).

Crucially, these business models are not just relevant for the pandemic context. Youth-led social enterprises offer examples of the kinds of innovative solutions and inclusive organisations that we need to transition beyond COVID-19 recovery, to more inclusive and sustainable societies.
**NAME:** MONER BONDHU

Moner Bondhu is a mental healthcare social enterprise that provides affordable and accessible counselling services in Bangladesh. Initially the pandemic posed a significant threat to their survival, as all in-person activities were suspended. However, the team anticipated the greater need for their services during the crisis. In just a few days, they established a free 24/7 tele-video counselling hotline. From March to December 2020, Moner Bondhu provided counselling to over 18,000 people from across Bangladesh.

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**NAME:** TEACH IT

Teach It is an Edutech startup seeking to reduce educational inequality in Bangladesh. Teach It offers an e-learning platform that enables students to learn and empowers instructors to share their knowledge. When schools in Bangladesh were closed due to the pandemic, Teach It supported teachers to provide free, live classes to primary school students. Through the provision of online infrastructure, Teach It provided high-quality engaging learning content that reached nearly one million people via Facebook, helping students to continue their education.

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**NAME:** QI MING

Qi Ming is a social enterprise which uses technology and user-centric design to break down barriers for the visually impaired community. Qi Ming offers a range of innovative and affordable products that have supported learning, communication, entertainment, and travel for over 150,000 visually impaired people in China. In response to COVID-19, Qi Ming developed a programme of audio materials and over 100 online events to help visually impaired people learn about COVID-19 prevention measures and support.

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**NAME:** BHUTAN SMART SHOP

Bhutan Smart Shop seeks to grow Bhutan’s agribusiness and improve the efficiency of food supply chains by connecting local producers to customers through an online platform. When ‘stay home’ orders were put in place, Smart Shop began delivering locally grown vegetables directly to people’s doors. Beyond immediate needs of the pandemic, Smart Shop’s platform is creating demand for agricultural produce from all over Bhutan and increasing food self-sufficiency.

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**NAME:** KLEMBOX

KlemBox is a social enterprise providing innovative STEAM education to enable Cambodian schoolchildren to develop the skills and confidence for real world problem-solving. KlemBox’s affordable DIY toolkits enable students to learn by doing through practical applications, while aligned with the Cambodian national curriculum. With the increase in remote learning due to COVID-19, KlemBox provided kits to students for STEAM learning at home, with the support of interactive digital resources.

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**NAME:** DEAF CONSULTANCY PACIFIC

Deaf Consultancy Pacific (DCP) is a social enterprise that empowers the Deaf community in the Pacific by supporting key institutions across the region to provide Deaf-inclusive services. Since the outbreak of COVID-19, DCP has used its platform to enable the Deaf community to access information and support by translating COVID-19 announcements into sign language and launching information and awareness-raising campaigns.
**NAME:** DOKI EARTH  
**NAME:** SA PEREMPUAN PAPUA  
**NAME:** DEMILAUT  
**NAME:** STELLA  
**NAME:** SILVERY NANOS  
**NAME:** SILVERY NANOS

**JAPAN**

**NAME:** DOKI EARTH
doki Earth is a social enterprise which provides urban consumers with healthy, organic food delivered directly from farmers, and collects biowaste from consumers which is returned to the farm and composted. Throughout the pandemic, doki Earth has prevented 5,750 tons of plastic waste from ending up in landfill and created income generating opportunities for 47 women.

**INDIA**

**NAME:** THE FUSION HUB
The Fusion Hub is a social enterprise working to upcycle and recycle waste materials and provide solutions to Fiji’s growing waste problem, while also creating decent work for Fijian women. With the tourism sector being their main market, the pandemic initially hit the Fusion Hub hard. They pivoted to focus on addressing the increase in plastic waste stemming from COVID-19 and transformed themselves into a zero waste company. The Fusion Hub has prevented 5,750 tons of plastic waste from ending up in landfill and created income generating opportunities for 47 women.

**NAME:** SILVERY NANOS
Silvery Nanos is a startup which aims to protect public health by providing affordable and effective sanitation solutions. Silvery Nanos supplies its products to municipal corporations, government agencies and large companies. Since the outbreak of COVID-19, Silvery Nanos has innovated a shielding spray called Hapishield, an antibacterial nanotechnology product, to reduce virus transmission.

**NAME:** DEMILAUT
DemiLaut is a social enterprise which empowers traditional artisan fishing communities and promotes sustainable fishing and food security. With the onset of COVID-19, fishers had to reduce the number of people on their boats and struggled to market their products. DemiLaut’s solution has enabled the fishing communities they support to increase their productivity, digitise their trade, use cold chain management to reduce wastage, and connect to customers via e-commerce. To date, DemiLaut has supported the livelihoods of over 30 fishing families while promoting marine sustainability.

**MALAYSIA**

**NAME:** STELLA
STELLA is a social enterprise that offers a platform for young people in Lao PDR to drive solutions for social impact. In the first national lockdown, STELLA created an online learning and mentoring programme for young people. STELLA is now working with partners and youth leaders in the South of Laos to support migrant workers who have been forced to return due to the pandemic to develop new skills, find work and reintegrate into communities.

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Binheyo was established in 2020 in response to concerns during the pandemic regarding food security in the Maldives, a country which imports most of its food. Binheyo is investing in growkits and expertise to support a network of urban micro farmers. Binheyo aims to be able to guarantee the purchase of the farmers’ produce and to make fresh, nutritious local ingredients available to customers.

E’hee is a telehealth startup that aims to enable inclusive healthcare access across the Maldives. The idea for E’hee was borne out of the COVID-19 crisis, with the goal to establish a platform where patients could access healthcare remotely without risking infection. Beyond COVID-19, telehealth offers huge potential for the Maldives, as the country’s dispersed geography creates barriers to healthcare access. As telehealth is new to the Maldives, E’hee is working with the Ministry of Health to establish the regulatory framework. In the meantime, E’hee is providing an information platform for health promotion.

Himalayan Innovations is a social enterprise that provides affordable solar energy to remote areas of Nepal. With the outbreak of COVID-19, Himalayan Innovations made its manufacturing facility available to produce protective equipment. Its solar generators were also made available to health facilities to ensure uninterrupted power supply. Himalayan Innovations also launched a new solution called Gaunbata, leveraging its network of female sales agents to connect smallholder producers to market in spite of restrictions.

Daastan is a modern book publishing company which upskills authors and provides them with livelihood opportunities through an online marketplace. To raise awareness and promote action on specific topics, Daastan organises thematic writing challenges. Recognising the higher risks to sexual and reproductive health due to the lockdown, Daastan launched a writing challenge on this topic. The published stories and action platform helped to raise awareness, reduce stigma, and connect readers to sources of support.

Pink Skills & Training Centre supports entrepreneurship and empowerment of the Transgender community in Pakistan. Since the outbreak of COVID-19, Pink has launched an e-commerce platform and provided a range of services and support to Trans entrepreneurs to respond to the economic shock, and to build micro-businesses that can grow in the recovery.
**PHILIPPINES**

**NAME:** GoodGovPH

GoodGovPH is a youth-led movement for good governance in the Philippines. Recognising that many vulnerable citizens were not receiving aid that they were eligible for during the pandemic, GoodGovPH launched Bantay, a welfare assistance chatbot, to enable Filipinos to access information on their entitlements. During the pandemic and beyond, GoodGovPH is seeking to make accountable and efficient service delivery a norm.

**NAME:** AI4GOV

AI4GOV is a social enterprise in the Philippines that uses automation and machine learning solutions to enable participatory governance and responsive public service delivery. AI4GOV collaborated with the Department of Health and other stakeholders to develop a COVID-19 digital triage, public health information, and contact tracing system. Through AI chatbots on Facebook and Viber, Filipinos can access the latest COVID-19 information, assess their risk, report misinformation, and have their queries answered. The citizen reports are linked to local governments for quick action and the application was integrated into the National COVID-19 ICT ecosystem to enable analytics and predictive modelling.

**NAME:** Coronamap

Coronamap is a web-based map visualisation tool providing real-time contact tracing information across the Republic of Korea. The first of its kind in the country, Coronamap uses public datasets supplied by central and local governments while operating through servers provided by private ICT companies. As of late 2020, Coronamap had accumulated 44 million views and 14 million users. Post-pandemic, the founder plans to leverage the map-based technology developed through Coronamap to support access to information on other social issues.

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**NAME:** AI4GOV

**SAMOA**

**NAME:** DamoGO

DamoGO is a social impact startup that works to tackle food waste by providing a mobile application to enable retailers and farms to sell their unsold food and produce at a discount before it gets thrown away. DamoGO was preparing to expand beyond Korea and launch in Indonesia when the pandemic began. In response, they re-purposed their platform to add a sharing function to facilitate donations and people-to-people exchange of sanitiser, masks and other relief goods.

**NAME:** EI8HT SPORTS

EI8HT SPORTS is a social enterprise that produces and sells sportswear with Pacific flair and promotes mental health and women’s empowerment in Samoa, Fiji, Australia, and New Zealand. With the outbreak of COVID-19, EI8HT SPORTS set up a ‘Zooming In’ series, interviewing young people on the strategies they are using to protect their own mental health and the mental health of their communities. In a time of social isolation, EI8HT SPORTS leveraged their platform to provide young people with a valuable source of connection and support.

**NAME:** Skilio

Skilio is an AI-powered soft skills development platform which empowers educational institutions to capture and track the soft skills development of their students. By using the application, youth can better understand, develop and communicate their soft skills, which are needed in the current and future workplace. During the pandemic, Skilio leveraged its platform and network to match young people displaced by COVID-19 to work with local companies on short-term projects.

**NAME:** SKILIO

**SINGAPORE**
SNAPSHOT OF SOLUTIONS

SINGAPORE

NAME: CALM COLLECTIVE
Calm Collective is a social enterprise providing a community for good mental health across Asia. Calm Collective was founded in April 2020 during Singapore’s COVID-19 circuit breaker. Initially, the team began hosting free virtual events to support their community, and with the high demand for their services this quickly grew into a business. Calm Collective is providing a platform and a network to support mental health and well-being well beyond the pandemic.

SRI LANKA

NAME: WALASMULLE GOVI SEWA
Walasmulle Govi Sewa is a social enterprise supplying agricultural inputs and services in Kirama, Sri Lanka. As most of their customer base are older farmers, when the pandemic hit they were not able to grow through online sales channels alone. Instead, Walasmulle Govi Sewa established a greenhouse to increase their own agricultural production and supply local supermarket chains. Over the past year, the Government of Sri Lanka launched a campaign to create one million home gardens and established export agriculture zones. Walasmulle Govi Sewa took advantage of these developments to sell seeds, plants, and services to households, and thereby managed to expand their sales.

THAILAND

NAME: PRISM
Prism is a social enterprise that provides a free and anonymous online platform for the LGBTIQ+ community. Since COVID-19, Prism’s user base has tripled as people experience higher rates of isolation. Prism has been able to provide a safe space to support LGBTIQ+ people facing mental health challenges. Prism’s capacity to provide support and connection to a group experiencing higher rates of marginalisation will be critical in the recovery and beyond.

VIET NAM

NAME: HASU
HASU is a social enterprise that supports physical and mental health and social well-being of the elderly in Viet Nam. Through HASU’s easy-to-use mobile application, seniors can access health advice, learn online, exercise, meditate, connect with friends and meet new people. Recognising the challenges caused by the pandemic, HASU partnered with Vietnam Association of the Elderly, Viet Nam Women’s Union to provide 25,000 premium accounts and consultations (value of $250,000) to women in COVID-19 affected cities. The pandemic has led to increased adoption of mobile technology among seniors.

TIMOR-LESTE

NAME: TIMOR MIE
TIMOR MIE is a social enterprise in Timor-Leste which seeks to address malnutrition and promote domestic agriculture by producing nutritious and local alternatives to imported dried noodles. TIMOR MIE has remained open throughout the pandemic. Beyond supplying regular customers, TIMOR MIE was contracted to supply its locally produced moringa, sweet potato and pumpkin noodles to vulnerable communities in Timor-Leste as part of a food basket project implemented by UNDP and funded by the Asian Development Bank and the Japanese Government.

In this chapter, we present our results and analysis on the types of support that youth-led enterprises have received over the first year of the pandemic, their further support needs, and their outlook ahead.

The charts presented in this chapter are available to explore on Youth Co:Lab’s website.
that youth-led enterprises have accessed a range of forms of financial and non-financial support from different sources to support their survival since the outbreak of the pandemic. However, the types of support that they have received have not always aligned with their support needs.

Moreover, our results reveal significant variation across the region in youth entrepreneurs’ assessment of the ease of accessing information and support as well as the effectiveness of their governments’ recovery strategies.

Young entrepreneurs also reflect on the outlook ahead and their capacity to recover from the crisis. They identify multiple vulnerabilities that they have in relation to adult-led enterprises, as well as multiple strengths.

COVID-19 recovery strategies must prioritise measures to harness these sources of strength and address these sources of vulnerability.

Otherwise, we risk losing the youth-led enterprises that we need at the centre of our efforts to build forward better.
FINANCIAL SUPPORT RECEIVED
We find that 61 percent of enterprises have received some form of financial support in response to the COVID-19 crisis, while 39 percent have received no form of financial support.

With regards to the types of financial support received, the most common form of financial support received is grants or cash transfers. The second most common is tax relief, and the third most common is utility or rent subsidies (see Figure 23).

Youth entrepreneurs are split on the extent to which financial support measures have been adequate in supporting their enterprise to manage the impacts of COVID-19. 39 percent of respondents feel that financial support has been inadequate, 29 percent are neutral, and 32 percent feel that financial support has been adequate (see Figure 24).

In addition to assessing the support that youth-led enterprises have received to date, we also asked which forms of financial support would be most helpful to the enterprises to recover from COVID-19 (see Figure 25).

By a significant margin, the results show that the type of financial support in highest demand is grants or cash transfers, which also aligns with the support that was most received. The type of support in second highest demand is in-kind resources – for example staff, space, or equipment.

Government procurement schemes are also in high demand, however as shown in Figure 23, very few youth-led enterprises have accessed government procurement schemes. Tax relief is viewed as relatively helpful, but it ranks lower in terms of demand compared to the rate of access.

Overall, these results suggest that youth entrepreneurs are looking for direct forms of support, such as sources of cash flow or in-kind resources, above indirect measures.
Figure 23: Financial Support Received

Figure 24: Adequacy of Financial Support

Figure 25: Financial Support Needs
Non-financial support
Youth-led enterprises have been more likely to access non-financial advice than financial support. 84 percent of enterprises have received some form of non-financial support in response to the crisis, whereas only 16 percent have not received any form of non-financial support.

The most common types of non-financial support received are advice related to technology or digital solutions, closely followed by advice related to marketing and branding, and advice related to financial planning and management (see Figure 27).

We also assessed which types of actors have provided enterprises with the most effective non-financial support since the outbreak of COVID-19. Family and friends are ranked as most helpful, followed by non-government organisations, followed by individual mentors. Local government is ranked fourth, and national government fifth. (See Figure 26).

We asked which forms of non-financial support would be most helpful to the enterprises to recover from COVID-19 (see Figure 28). The areas in highest demand — advice related to technology or digital solutions and advice related to marketing or branding — match with the areas where youth-led enterprises have been able to access support (see Figure 27).

Two areas that are highly ranked in terms of demand but are ranked lower in terms of support accessed are support related to trade and market intelligence (ranked third) and support related to business matching or accessing new markets (ranked fourth). This suggests that youth-led enterprises are looking to pivot to access new markets, and that support actors should step up provision in this area.

Table 1

According to young entrepreneurs surveyed:

**Strengths of youth-led enterprises**

- More agile, quicker to react and make decisions
- Greater willingness to taking risks
- Smaller businesses, greater flexibility to pivot
- Ability to predict future trends and opportunities and reach next generation
- More creative and innovative, open to new ideas
- More energetic
- More optimistic, likely to see opportunity
- More empathetic, greater capacity to tackle social problems
- More tech-savvy, receptive to technological change
- More user-centric, quicker to respond to new demands
- Faster learners
- Frugal: able to test solutions better, faster, and cheaper
- Longer time horizons, more aligned with the SDGs and consumer demands
- Greater integrity

**Strengths of adult-led enterprises**

- Businesses are more diversified, with different revenue streams
- Businesses are more likely to be formal, easier to access support
- Greater access to financial resources
- Experienced, track record of responding to challenges in the past
- More insurance mechanisms to draw upon
- Greater access to financial services
- Stronger brand
- Wider and deeper networks to partners with a range of types of expertise
- Personal connections with government and senior officials — ‘friends in high places’
- Personal savings and assets
- More experience in financial planning and management
- Stronger cash flow
- In-house expertise to pivot into different areas
- More assets, equipment, land, property
Figure 26: Effectiveness of Organisations Providing Non-Financial Support

- Family / friends: 95
- Non-governmental organisations: 91
- Individual mentors: 80
- Local government: 64
- National government: 60
- Business membership organisations: 57
- International organisations: 49
- Academic institutions: 34
- Investors / funders: 29
- Other businesses: 27

Figure 27: Non-Financial Support Received

- Marketing and branding: 128
- Financial management: 123
- Transitioning to new products or services: 86
- Legal advice: 77
- Business matching or accessing new markets: 76
- Trade and market intelligence: 71
- Adapting the workplace to open safely: 66
- Logistics and distribution: 60

Figure 28: Non Financial Support Needed

- Marketing and branding: 145
- Financial management: 126
- Trade and market intelligence: 111
- Transitioning to new products or services: 109
- Logistics and distribution: 86
- Legal advice: 73
- Adapting the workplace to open safely: 43
- No non-financial support needed: 39
- Other: 7
OUTLOOK AHEAD
Survey respondents are split on the effectiveness of their governments’ COVID-19 recovery strategies for youth-led enterprises.

41 percent believe that the policy response being pursued in their country will be effective in supporting youth-led enterprises to recover. 25 percent are neutral on this question. Meanwhile, 34 percent believe that their government’s strategy will be ineffective in supporting youth-led enterprises to recover.

At the same time, youth entrepreneurs appear relatively confident that the operating environment will become more hospitable. 33 percent believe that the operating environment will be significantly better in one year from the point of the survey, i.e. March 2022. Meanwhile, 59 percent believe that the operating environment will be significantly better in three years from the point of the survey, i.e. March 2024.

Notably, the survey was open from 22nd February to 21st March 2021, therefore it is likely to not capture the full effects of the current waves in COVID-19 cases and resulting socio-economic impacts being experienced in South Asia in particular.

Young entrepreneurs are also very reflective on the characteristics that make them both potentially more vulnerable to the crisis, and more resilient to its impacts.

Asked to what extent they agree with the statement, “Youth-led enterprises are better equipped than adult-led enterprises to recover from COVID-19”, youth entrepreneurs cite both their own strengths, as well as the strengths of adult-led enterprises where they exhibit relative vulnerabilities. See the characteristics they identified in Table 1 (above).

The attributes that youth entrepreneurs identify are very instructive. COVID-19 recovery strategies must prioritise measures to harness these sources of strength and address these sources of vulnerability. This will be critical to ensuring that young entrepreneurs are empowered to lead the way in the journey beyond COVID-19 recovery, towards 2030.
RESEARCH LIMITATIONS
The findings may be restricted on account of the following research limitations:

• **Geographical coverage:** There are limitations in the survey sample size and representativeness in terms of geographical coverage. While the overall regional geographical coverage of the survey is broad, sample sizes vary. For example, the number of responses from the Pacific is quite low compared to the response rate from other sub-regions.

• **Language:** The survey was disseminated in English, Bengali, Korean and Mandarin Chinese. Not being able to respond to the survey in mother tongue will have had effects on the size and representativeness of the sample. Provision of support in translation was provided in other countries, however limitations nonetheless remained.

• **Survey Length:** The survey included 40 questions, and combined with potential language barriers, it may have been relatively time-consuming to complete for some young entrepreneurs. The length of the survey may have affected response and survey completion rates.

• **Leave No One Behind:** The survey requested only limited information on the background of the young entrepreneurs beyond age and gender. Therefore, it is challenging to assess the representativeness of the sample in terms of, e.g., minority status, dis/ability, or other vulnerabilities.

• **Enterprise Profile:** The survey was disseminated primarily through Youth Co:Lab’s communication channels and networks and UNDP Asia-Pacific country offices. These dissemination channels enabled us to reach young social entrepreneurs in particular due to the outreach of the Youth Co:Lab initiative. The findings cannot be fully reflective of the specific needs and vulnerabilities of all types of youth-led enterprises.

• **Digital Format:** Due to the combination of the dissemination strategy based on online channels and the digital format of the online survey form, access to survey was limited to those with access to digital devices and internet connection. This will have limited the representativeness of the sample.
<table>
<thead>
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<th>Question</th>
<th>Options</th>
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| Which age category do you belong to? | 1. 18-20  
2. 21-25  
3. 26-30  
4. 31-35 |
| What is your gender? | 1. Female  
2. Male  
3. Prefer not to say  
4. Other, please specify |
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<thead>
<tr>
<th>What is the primary sector of activity of the enterprise?</th>
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<td>If the enterprise operates in multiple sectors, please select the primary sector of operation.</td>
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<td>[Drop-down list, only one option can be selected]</td>
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<tr>
<td>1. Agriculture, forestry, and fishing</td>
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<td>2. Mining and quarrying</td>
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<td>3. Manufacturing</td>
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<td>7. Wholesale and retail trade</td>
</tr>
<tr>
<td>8. Transportation and storage</td>
</tr>
<tr>
<td>9. Accommodation and food service activities</td>
</tr>
<tr>
<td>10. Information and communication</td>
</tr>
<tr>
<td>11. Financial and insurance activities</td>
</tr>
<tr>
<td>12. Real estate activities</td>
</tr>
<tr>
<td>13. Professional activities</td>
</tr>
<tr>
<td>14. Administrative and support services</td>
</tr>
<tr>
<td>15. Public administration and defence</td>
</tr>
<tr>
<td>16. Education</td>
</tr>
<tr>
<td>17. Health</td>
</tr>
<tr>
<td>18. Arts, entertainment, and recreation</td>
</tr>
<tr>
<td>19. Other service activities</td>
</tr>
<tr>
<td>20. Activities of households as employers</td>
</tr>
<tr>
<td>21. Other. Please specify:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Has your enterprise been partially or fully closed at any time as a result of COVID-19? If yes, please provide the total number of weeks below.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. No</td>
</tr>
<tr>
<td>2. Don’t know</td>
</tr>
<tr>
<td>3. Yes. Please specify: For how many total weeks was your enterprise either partially or fully closed as a result of COVID-19?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comparing your total sales for the last year (Feb 2020 - Jan 2021 inclusive) to total sales in the previous year (Feb 2019 - Jan 2020 inclusive), what was the approximate % change?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Sales increased (please specify approximate % change below)</td>
</tr>
<tr>
<td>2. Sales were approximately the same</td>
</tr>
<tr>
<td>3. Sales decreased (please specify approximate % change below)</td>
</tr>
<tr>
<td>4. Don’t know</td>
</tr>
<tr>
<td>5. The enterprise was not in operation in the previous year, so the comparison is not possible</td>
</tr>
<tr>
<td>6. N/A – the enterprise’s operations are based on grants or other funding and no sales revenue has been generated yet</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>If your sales increased: please specify approximate % change</th>
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<tbody>
<tr>
<td>%</td>
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</table>

<table>
<thead>
<tr>
<th>If your sales decreased: please specify approximate % change</th>
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<tr>
<td>%</td>
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<table>
<thead>
<tr>
<th>What has been the overall impact of COVID-19 on the enterprise’s available cash flow over the past year?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Available cash flow has substantially increased</td>
</tr>
<tr>
<td>2. Available cash flow has slightly increased</td>
</tr>
<tr>
<td>3. Available cash flow has remained approximately the same</td>
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<tr>
<td>4. Available cash flow has slightly decreased</td>
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<tr>
<td>5. Available cash flow has substantially decreased</td>
</tr>
<tr>
<td>6. Don’t know</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Over the past year, has COVID-19 generated any of the following challenges for the enterprise?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please select all that apply</td>
</tr>
<tr>
<td>1. Reduced opportunities to market products / services to customers</td>
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<tr>
<td>2. Reduced customer spending power</td>
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<td>3. Reduced access to outside investment in the business</td>
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<td>4. Reduced access to credit</td>
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<td>5. Customers or clients not paying bills</td>
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<td>6. Disruptions to supply chains or higher costs of inputs and raw materials</td>
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<tr>
<td>7. Disruptions to or higher costs of marketing and distribution</td>
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<td>8. Disruptions to or higher costs of utilities</td>
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<tr>
<td>9. Disruptions to administrative services e.g. securing permits, certifications, licences</td>
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<tr>
<td>10. Reduced access to partners, business networks, or mentors</td>
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<tr>
<td>11. Need to adapt workplace for distancing measures or purchase protective equipment</td>
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<td>12. Stress/worse mental health among management/staff</td>
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<tr>
<td>13. Employee absence due to sickness, care responsibilities or loss of life</td>
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<td>14. None</td>
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<tr>
<td>15. Other. Please specify:</td>
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<td>Appendix</td>
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<tr>
<td><strong>As a result of the impacts of COVID-19, has the enterprise had to implement any of the following actions?</strong> Please select all that apply</td>
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<td><strong>As a result of COVID-19, has the enterprise implemented any of the following mobile or digital solutions?</strong> Please select all that apply</td>
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<td><strong>Compared to before the COVID-19, has the level of digitisation of the enterprise changed?</strong></td>
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<td><strong>Has the enterprise adopted any of the following strategies to manage cash flow since the COVID-19 outbreak?</strong> Please select all that apply</td>
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<td><strong>Since the outbreak of COVID-19, has the enterprise received any of the following forms of financial support in response to the crisis?</strong> Please select all that apply</td>
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<tr>
<td><strong>In your assessment, have available financial support measures been adequate in supporting the enterprise to manage the impacts of COVID-19?</strong></td>
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</tbody>
</table>
Since the outbreak of COVID-19, has the enterprise accessed **non-financial support e.g. advice or capacity development** related to any of the following areas?

Please select all that apply

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Trade and market intelligence</td>
</tr>
<tr>
<td>2.</td>
<td>Technology or digital solutions</td>
</tr>
<tr>
<td>3.</td>
<td>Adapting the workplace to open safely</td>
</tr>
<tr>
<td>4.</td>
<td>Financial planning and management</td>
</tr>
<tr>
<td>5.</td>
<td>Legal advice</td>
</tr>
<tr>
<td>6.</td>
<td>Transitioning to new products or services</td>
</tr>
<tr>
<td>7.</td>
<td>Business matching or accessing new markets</td>
</tr>
<tr>
<td>8.</td>
<td>Marketing and branding</td>
</tr>
<tr>
<td>9.</td>
<td>Logistics and distribution</td>
</tr>
<tr>
<td>10.</td>
<td>No non-financial support received in any areas</td>
</tr>
<tr>
<td>11.</td>
<td>Don’t know</td>
</tr>
<tr>
<td>12.</td>
<td>Other, please specify____________</td>
</tr>
</tbody>
</table>

Which types of organisations have provided the enterprise with the most effective **non-financial support** since the outbreak of COVID-19?

Please select up to top three

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>National government</td>
</tr>
<tr>
<td>2.</td>
<td>Local government</td>
</tr>
<tr>
<td>3.</td>
<td>Non-governmental organisations</td>
</tr>
<tr>
<td>4.</td>
<td>Other businesses</td>
</tr>
<tr>
<td>5.</td>
<td>Business membership or network organisations</td>
</tr>
<tr>
<td>6.</td>
<td>Individual mentors</td>
</tr>
<tr>
<td>7.</td>
<td>International organisations / development partners</td>
</tr>
<tr>
<td>8.</td>
<td>Family / friends</td>
</tr>
<tr>
<td>9.</td>
<td>Academic / educational institutions</td>
</tr>
<tr>
<td>10.</td>
<td>Investors / funders</td>
</tr>
<tr>
<td>11.</td>
<td>None, no non-financial support received</td>
</tr>
<tr>
<td>12.</td>
<td>Don’t know</td>
</tr>
<tr>
<td>13.</td>
<td>Other, please specify____________</td>
</tr>
</tbody>
</table>

In your assessment, how easy has it been to find information on forms of support available to enterprises during COVID-19?

<p>| |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>1. Very easy</td>
</tr>
<tr>
<td>2. Easy</td>
</tr>
<tr>
<td>3. Neither easy nor difficult</td>
</tr>
<tr>
<td>4. Difficult</td>
</tr>
<tr>
<td>5. Very difficult</td>
</tr>
<tr>
<td>6. Don’t know</td>
</tr>
</tbody>
</table>

Going forward, which forms of **financial support** would be most helpful to your enterprise to recover from COVID-19?

Please select up to top three

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Grants / cash transfers</td>
</tr>
<tr>
<td>2.</td>
<td>Deferral of loan payments, suspension of interest payments, or rollover of debt payments</td>
</tr>
<tr>
<td>3.</td>
<td>Access to new credit / concessional loans</td>
</tr>
<tr>
<td>4.</td>
<td>Tax exemptions, tax rate reductions or tax deferrals</td>
</tr>
<tr>
<td>5.</td>
<td>Wage subsidies or social insurance contribution subsidies</td>
</tr>
<tr>
<td>6.</td>
<td>Provision of Personal Protective Equipment or financial support to adapt the workplace</td>
</tr>
<tr>
<td>7.</td>
<td>Utility or rent reductions</td>
</tr>
<tr>
<td>8.</td>
<td>Government procurement schemes</td>
</tr>
<tr>
<td>9.</td>
<td>Provision of in-kind resources e.g. space, equipment, or staff</td>
</tr>
<tr>
<td>10.</td>
<td>No form of financial support is needed</td>
</tr>
<tr>
<td>11.</td>
<td>Don’t know</td>
</tr>
<tr>
<td>12.</td>
<td>Other, please specify____________</td>
</tr>
</tbody>
</table>

Going forward, in which areas would **advice or capacity development** be most helpful to your enterprise to recover from COVID-19?

Please select up to top three

<p>| | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
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</tr>
<tr>
<td>9.</td>
<td>Logistics and distribution</td>
</tr>
<tr>
<td>10.</td>
<td>No non-financial support is needed</td>
</tr>
<tr>
<td>11.</td>
<td>Don’t know</td>
</tr>
<tr>
<td>12.</td>
<td>Other, please specify____________</td>
</tr>
</tbody>
</table>

Has your enterprise developed any solutions to support your community or wider society to mitigate and manage the impacts of COVID-19?

<p>| |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>1. No</td>
</tr>
<tr>
<td>2. Don’t know</td>
</tr>
<tr>
<td>3. Yes. Please provide brief details: ____________</td>
</tr>
<tr>
<td>Question</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Has your enterprise made any of your existing resources* available to support COVID-19 response and recovery efforts?                      | 1. No  
2. Don’t know  
3. Yes. Please provide brief details: ____________                                                                                                                                 |
| *Examples of resources: staff time, assets, equipment, financial resources, tools, networks, platforms, information, business premises, products, or services. |                                                                                                                                                                                                           |
| Overall, has your business strategy changed as a result of COVID-19?                                                                       | 1. Yes, significantly changed  
2. Yes, slightly changed  
3. No, remained the same  
4. N/A, the enterprise was established during COVID-19  
5. Don’t know                                                                                                                                 |
| If you wish, please provide brief details to explain your answer.                                                                           |                                                                                                                                                                                                           |
| If the enterprise was established during COVID-19, please explain if the business opportunity arose as a result of the pandemic and/or how the pandemic shaped business strategy. | [Open text box]                                                                                                                                                                                             |
| As a result of COVID-19, has your enterprise entered into any new partnerships? (Partnerships can involve financial resources or other forms of collaboration). | 1. Yes, with national government.  
2. Yes, with local government.  
3. Yes, with private sector.  
4. Yes, with non-profit organisations.  
5. Yes, with international organisations.  
6. Yes, with community groups.  
7. Yes, with investors / funders.  
8. No  
9. Don’t know                                                                                                                                 |
| If you answered yes, feel free to share brief details                                                                                       | [Open text box]                                                                                                                                                                                             |
| Has COVID-19 catalysed any innovations within your enterprise?                                                                                | 1. Yes, new product(s).  
2. Yes, new service(s).  
3. Yes, business process or technology innovation.  
4. Yes, business model innovation.  
5. Yes, organisational structure innovation.  
6. No  
7. Don’t know                                                                                                                                 |
| If you answered yes, feel free to share brief details                                                                                       | [Open text box]                                                                                                                                                                                             |
| Based on your understanding of the government’s COVID-19 recovery strategies in your country, how effective do you think these strategies will be in supporting youth-led enterprises to recover? | 1. Very ineffective  
2. Ineffective  
3. Neither effective nor ineffective  
4. Effective  
5. Very effective  
6. Don’t know                                                                                                                                 |
| Do you agree or disagree with the following statement? Youth-led enterprises are better equipped than adult-led enterprises to recover from COVID-19. | 1. Strongly disagree  
2. Disagree  
3. Neither agree nor disagree  
4. Agree  
5. Strongly agree  
6. Don’t know                                                                                                                                 |
| If you wish, please briefly explain your answer.                                                                                             | [Open text box]                                                                                                                                                                                             |
| Compared to the current situation, do you expect the operating environment for your enterprise in February 2022 to be:                    | 1. Significantly better  
2. Better  
3. Neither better nor worse  
4. Worse  
5. Significantly worse  
6. Don’t know                                                                                                                                 |
| Compared to the current situation, do you expect the operating environment for your enterprise in February 2024 to be:                    | 1. Significantly better  
2. Better  
3. Neither better nor worse  
4. Worse  
5. Significantly worse  
6. Don’t know                                                                                                                                 |
| If you wish, please add any other comments that you would like to share on any of the topics covered in this survey and anything you would like us to know. | [Open text box]                                                                                                                                                                                             |