



UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION



ASSESSMENT OF THE IMPACT OF THE COVID-19 OUTBREAK ON WOMEN AND YOUTH ENTREPRENEURS IN THE MANUFACTURING SECTOR AND MANUFACTURING-RELATED SERVICES

Overview of the survey results

JUNE 2020

CONTEXT

Better understand the impact of the COVID-19 crisis on women and youth-led businesses

The onset of the COVID-19 pandemic has had far-reaching political, social and economic consequences at national and global levels. In particular, the COVID-19 outbreak has caused major disruptions in supply chains and has resulted in drastic shifts in consumption patterns, all putting the resilience of businesses to the test.

To better understand the impact of the COVID-19 crisis on women- and youth-led businesses and, based on that, adapt its response, the Division of Rural Entrepreneurship, Job Creation and Human Security of the United Nations Industrial Development Organization (UNIDO) Department of Agribusiness, has conducted a global online survey from 21 April 2020 to 21 May 2020.



SURVEY QUESTIONNAIRE

The questionnaire consisted of thirteen questions covering sociodemographic data and business characteristics and most importantly, a self-assessment of the COVID-19 outbreak on businesses and of the support needed to help businesses overcome the crisis.

The questionnaire was hosted on the Survey Monkey platform and made available in French and English.



TARGET AUDIENCE

The primary target group was women and youth entrepreneurs whose businesses operate in the manufacturing sector defined as per ISIC classification chapter C and manufacturing-related services defined as business services that are predominantly purchased by other manufacturing businesses rather than final consumers.

Entrepreneurs (both male and female) up to 35 are defined as youth.



ADMINISTRATION METHOD

The invitation to participate in the survey was widely disseminated among women and youth entrepreneurs, women and youth associations, professional associations and chambers of commerce, UN and other international organizations as well as national institutions, through emails and social medias. In some countries, a telephone survey (e.g. Lebanon, Morocco, Ghana) was also implemented.

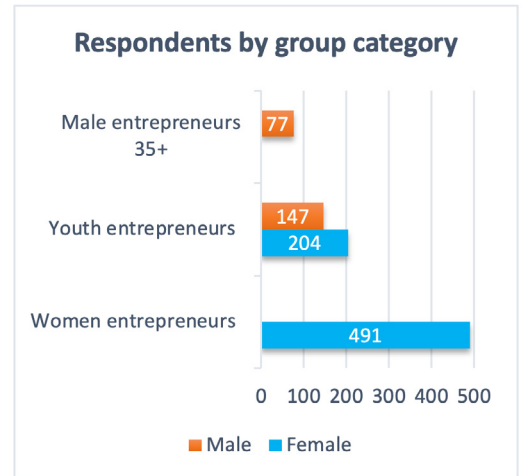
SAMPLE DEMOGRAPHICS AND BUSINESS CHARACTERISTICS

- The survey received 1119 responses of whom 759 were female and 347 were male. Eleven respondents preferred not to specify their gender.

Following a data cleaning process that was conducted to eliminate non-exploitable surveys and duplicates, as well as non-eligible respondents with reference to their businesses' sector of operation, 717 fully filled and exploitable surveys were submitted for analysis.

Within this dataset, three subgroups were identified:

- The women entrepreneurs' group comprised 491 respondents.
- The youth entrepreneurs' group comprised 352 respondents of whom 204 were young female entrepreneurs.
- The "Male entrepreneurs above 35" group was kept as a control group to assess the reality of a differentiated impact against the two other groups and comprised 77 respondents.



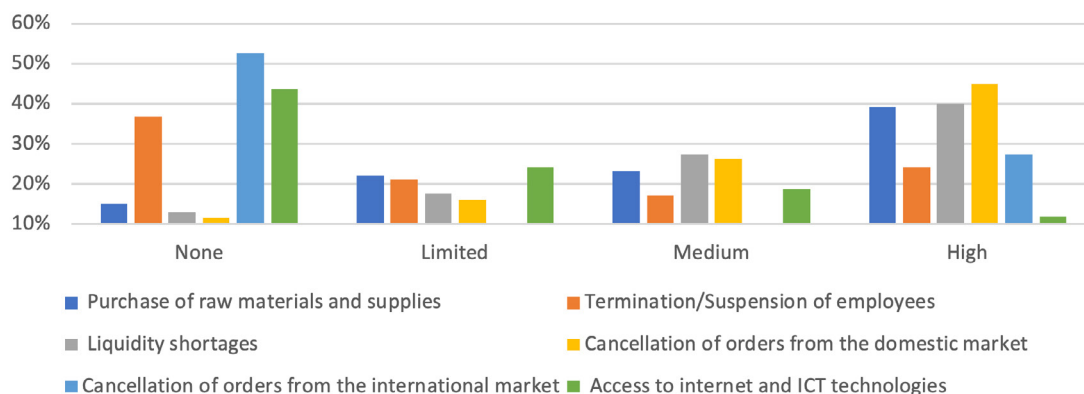
Source: UNIDO survey (2020)

- Looking at gender, women entrepreneurs provided 68% of valid surveys.
- In terms of age category, the largest group is 25-35 (43%) immediately followed by 36-49 (40%). No respondents are aged under 19.
- Respondents originate from 34 countries mostly in Africa and the Middle East. 89% of them are in Ghana (133), Morocco (123), Lebanon (106), Algeria (99), Kenya (53), Jordan (43), Iran (41) and Myanmar (39).
- The main sectors that respondents operate in are agribusiness with 45% of surveyed businesses in "Food and Beverage" (25%) and "Textile, wearing apparel, leather and leather-related products" (20%), followed by "Manufacturing-related services" (15%), "Chemicals incl. cosmetics and other body care products" (9%) and "Other industries" (8%), mostly creative industries (Arts, Media, Creative Services) and recycling/green economy activities. Capital-intensive industries such as pharmaceuticals, transport equipment, machinery and electrical equipment are far less represented (9%).
- The sample structure by gender reveals an overrepresentation of female entrepreneurs in "Textile, Wearing Apparel, leather and leather-related products", "Chemicals (incl. cosmetics and other body care products)", "Accessories (non-leather bags, jewelry etc.)" and to a lesser extent in the "Food and Beverage" sectors. Male entrepreneurs on the other side are overrepresented in "Computers, electronics and optical products", "Machinery and equipment, incl. electrical equipment" and "Rubber and plastic products" sectors. Looking at the youth sub-group, the distribution by sector of operation does not significantly differ from that of female entrepreneurs, except for "Other industries" where, in proportion, youth entrepreneurs are more represented in the survey sample.
- A large majority of surveyed businesses declare less than 10 permanent and/or temporary employees, qualifying hence as micro to small enterprises.
- In terms of years of business operation, the sample structure is fairly balanced with a slight over-representation of new businesses (up to 3 years of operation) that represent 32% of the sample against 24% for businesses operating for more than 10 years, 23% for businesses operating for 3 to 5 years and 21% for businesses operating for 5 to 10 years.
- 70% of all surveyed businesses have no exposure to the international market and 20% have export sales amounting less than 30% of turnover.

IMPACT OF COVID-19 ON BUSINESSES

- The COVID-19 outbreak is having a severe impact on business activity with 46% of surveyed businesses reporting a temporary suspension of activity against 2% reporting permanent closure. 49% of surveyed women entrepreneurs reported temporary suspension of business activities due to COVID-19 against 51% of youth entrepreneurs and 35% of male entrepreneurs over 35. 3% of surveyed women entrepreneurs reported permanent suspension of business activities due to COVID-19 against 2% of youth entrepreneurs and none for male entrepreneurs over 35.
- As a result, 52% of surveyed entrepreneurs reported having to terminate employees. Among those, 3 in every 4 companies terminated 1 to 5 employees.
- Overall, market losses, liquidity shortages and supply difficulties appear to be the major COVID-19 related challenges faced by surveyed businesses.
- When asked to assess the impact of the COVID-19 outbreak on their business, “Cancellation of orders from the domestic market” is associated with a high degree of difficulty by 45% of respondents, followed by “Liquidity shortages” and “Purchase of raw materials and supplies” for about 40% of them.
- On the other hand, “Access to internet and ICT technologies” and “Cancellation of orders from the international market” are assessed with the lowest degree of difficulty, with respectively 45% and 57% of respondents reporting no difficulty at all. In the latter case, the result is to be carefully weighed against the 30 % proportion of businesses reporting export sales.

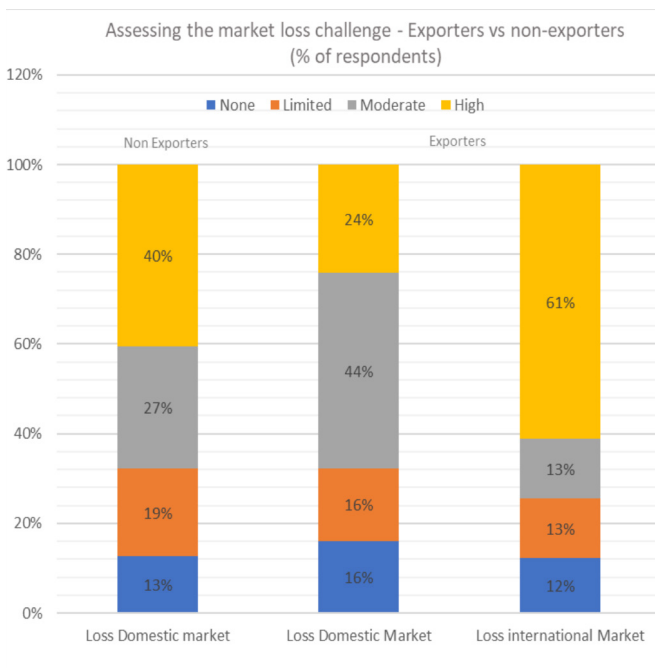
Assessing COVID-19 related challenges by degree of difficulty - All businesses (% of respondents)



Source: UNIDO survey (2020)

- In general, women and youth entrepreneurs are in proportion fewer than their “male over 35” counterparts to report none to limited impact of COVID-19 indicating that, while nature of the challenges is similar across businesses, women and youth-led businesses seem less resilient against the crisis. Gaps are particularly significant for “Purchase of raw material and supplies”, associated with a low level of difficulty by 50% of male entrepreneurs above 35 against 35% of women and youth entrepreneurs.

- When looking in detail at market loss, it is associated with a limited to high degree of difficulty by 92% of women entrepreneurs and 90% of youth entrepreneurs, implying that they largely experienced cancellation of orders from the domestic and/or the international market because of the COVID-19 pandemic.
- Cancellation of orders from the international market is perceived as a higher threat to businesses than cancellation of orders from the domestic market. 61% of export-oriented businesses associate “Cancellation of orders from the international market” with a high degree of difficulty against 40% of non-exporters who associate “Cancellation of orders from the domestic market” with the same degree of difficulty.



Source : UNIDO survey 2020

- By sub-group, this is particularly true for women entrepreneurs selling abroad, of whom 65% report losses on the international market to be a significant difficulty against 48% for non-exporters on the domestic market. A smaller share of youth and male entrepreneurs over 35, and selling abroad, also associate losses on the international market with a high degree of difficulty (respectively 48% and 56%).
- As for supply difficulties, the analysis by subgroup reveals that 40% of women entrepreneurs, 37% of youth entrepreneurs and 28 % of surveyed male entrepreneurs over 35 associate purchase of raw material and supplies with a high degree of difficulty.
- The pattern is quite similar for liquidity shortages which a degree of difficulty assessed as high by 41% of women entrepreneurs, 36% of youth entrepreneurs and 32% of male entrepreneurs over 35.

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