

A Multinational Comparison of Post-Pandemic Business Recovery and Supportive Policies

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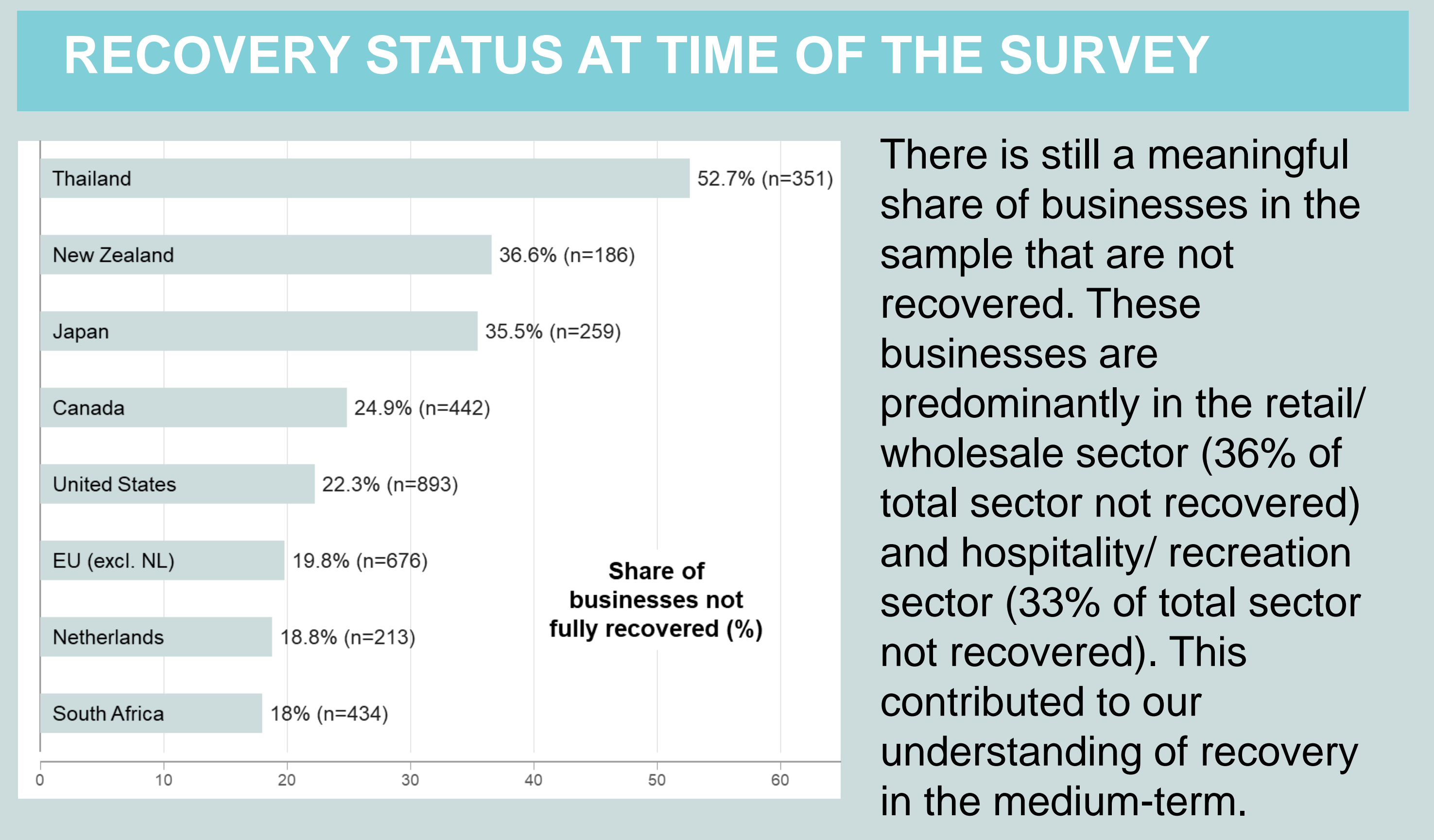
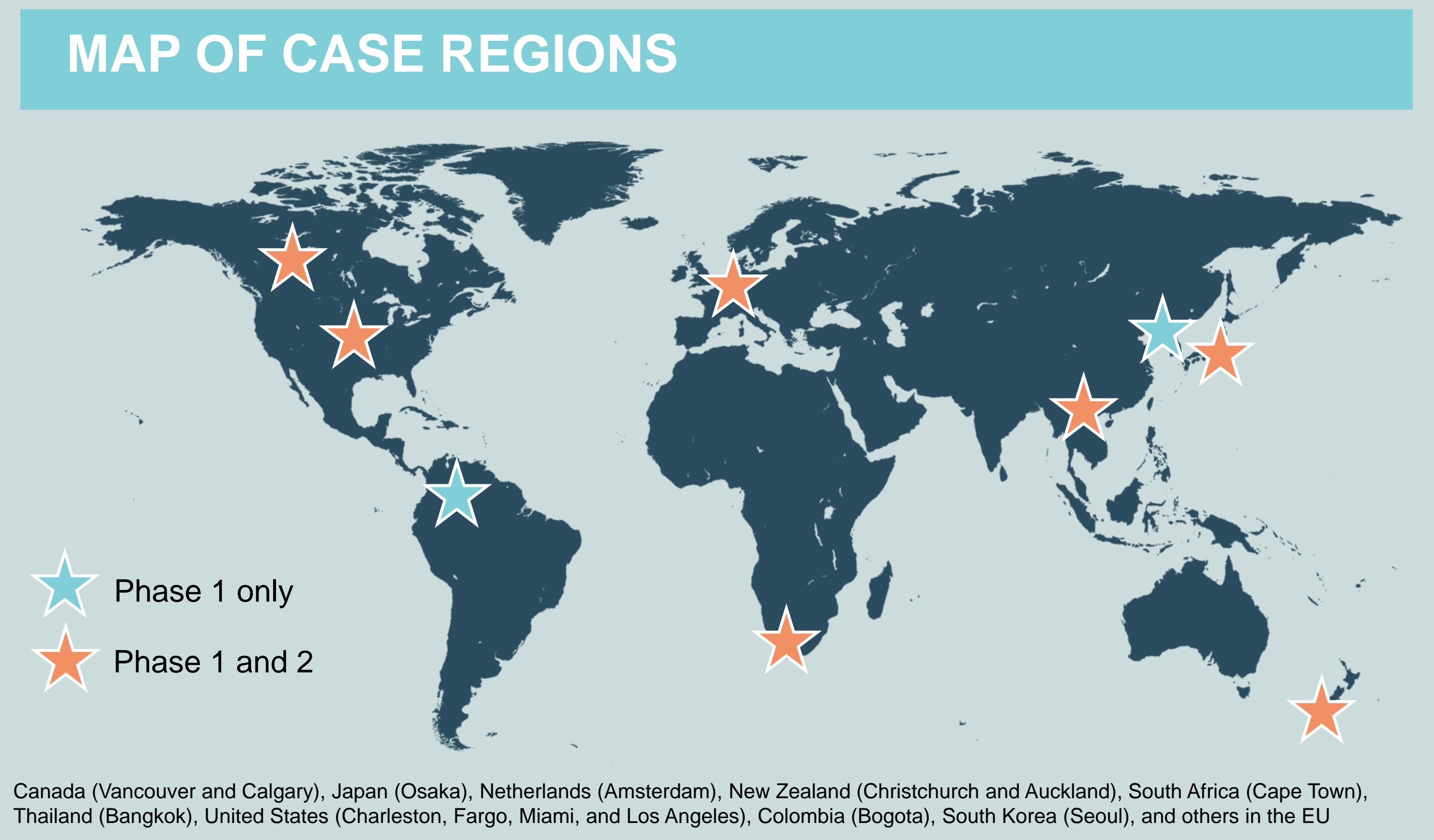
ABSTRACT: The COVID-19 pandemic caused significant shocks to businesses and economies around the world. However, the breadth and diversity of policy responses present an opportunity to better understand the role of financial and non-financial assistance on business outcomes. This poster presents the findings of an international, collaborative effort to understand business recovery and the role of these supportive policies after the COVID-19 pandemic and related lockdown measures. **We present the findings of a survey of businesses that took place between July 2024 and May 2025 across 10 cities and seven countries**, including Vancouver, Calgary, Miami, Los Angeles, Amsterdam, Auckland, Christchurch, Cape Town, Bangkok, and Osaka. Using 3,435 individual responses, we explore business impact and recovery, business adaptations, access to financial and non-financial assistance, supporting program characteristics, the extent of short- and long-term business adaptation, and the role the pandemic played in changing business readiness for future disruption.

RESEARCH DESIGN

Research Questions:

- RQ1. How did businesses' capacity to withstand shocks change in the pandemic?
- RQ2. What kinds of policies helped or hindered businesses to strengthen their adaptive capacity?
- RQ3. Which findings are robust across diverse local contexts?

Phase 1: Informant interviews and creation of an international database of policies used to support businesses (n=374 policies).
Phase 2: Online survey of individual businesses (n=3,435 total responses).
Database of policies and research materials to be available on DesignSafe



DATABASE CURATION AND POLICY ANALYSIS

Share of policies targeting business sectors and sizes

	No. of policies	Business sectors targeted		Business sizes targeted	
		Specific	None	Specific	None
All policies	374	37%	63%	48%	52%
Major policies	49	14%	86%	51%	49%
Level of government					
National	244	34%	66%	51%	49%
State/provincial ¹	65	35%	65%	38%	62%
Local ²	65	49%	51%	46%	54%

¹ Includes prefectural governments ² Includes regional, county, and municipal governments.

Policies encouraging adaptation and innovation

	No. of policies	Adaptation ¹ (%)	Green ² (%)	E-commerce ³ (%)
All policies	374	7%	4%	5%
Major policies	49	4%	4%	2%
Level of government				
National	244	7%	4%	5%
State/provincial	65	5%	0%	5%
Local	65	11%	6%	5%

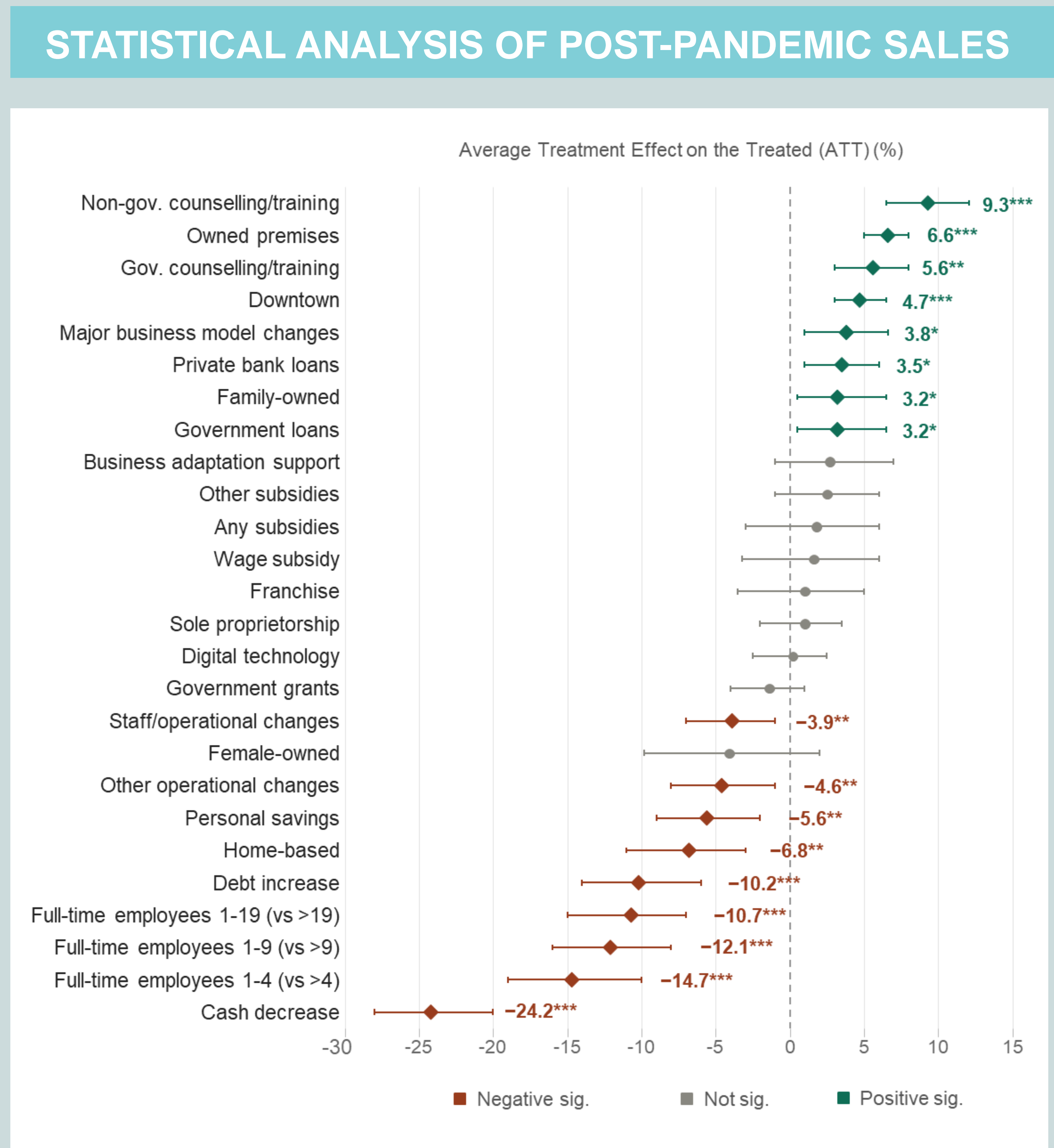
¹Policies encouraging changes in business practices. Includes 'green' and 'e-commerce' policies. ²Policies mentioning sustainability, climate change mitigation or adaptation, renewable energy, etc. ³Policies mentioning digitalization, increasing online commerce, etc.

New policies in the COVID-19 pandemic, by country

Country	National policies		Subnational policies	
	Total number	% new ¹	Total number ²	% new ¹
Canada	51	88%	36	92%
Colombia	5	100%	1	100%
Japan	32	41%	24	67%
Netherlands	27	89%	12	92%
New Zealand	24	75%	0	-
South Africa	29	100%	1	100%
South Korea	36	72%	11	91%
Thailand	24	88%	0	-
USA	16	75%	45	89%
Total	244	79%	130	86%

¹Policies created for the COVID-19 pandemic. Excludes policies adopted or modified from ones used in disaster recovery before COVID. ²Canada: Calgary, Vancouver; Colombia: Bogotá; Japan: Okayama, Osaka; Netherlands: Amsterdam; New Zealand: Christchurch; South Africa: Cape Town; South Korea: Seoul; Thailand: Bangkok; USA: Charleston, Fargo, Los Angeles, Miami.

*Paper led by Stephanie Chang under review



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The pooled analysis (left) uses a quasi-experimental approach based on propensity score and conduct the analysis separately for each factor of interest. This approach constructs two statistically comparable groups and estimates the average effect of the presence of a given factor on post-pandemic business sales (controlling for other covariates), mimicking a randomized controlled trial.

SUMMARY AND TAKEAWAYS

- The pandemic spurred a remarkable degree of policy innovation: some 79% of national policies and 86% of subnational ones were newly developed.
- The policy mix varied substantially between countries and between cities within the same country. Some 37% of policies were targeted to specific sectors and 48% to specific business sizes, nearly all to smaller businesses.
- Non-governmental mentoring and training generate stronger recovery effects compared to financial support measures such as loans and subsidies.
- Small businesses with 1–19 employees remain persistently vulnerable, have lower access to support programs, and depend more heavily on personal financing.
- Policy effectiveness varies substantially across regions and sectors, underscoring the need for region-specific support mechanisms for strengthening business resilience.