



## National Survey of SMB Voters June 29–July 8, 2022

(N = 1,000 - Margin of Error = +/- 3.1%)

### Topline Survey Data

#### Intro Screeners

**/\* DISPLAY \*/** We are going to start by asking you a few questions to see if you qualify for this study.

1. How many employees does your company have in total? **OE RECORD EXACT NUMBER**

0 to 9	60%
10 to 49	17%
50 or more	23%

2. In what state is your company headquartered? If there isn't an official headquarters location, where is the main office, or what state has the most employees? **/\* DROP \*/ /\* STATE \*/**

Northeast	19%
Midwest	20%
South	38%
West	23%

3. In what zip code is your primary business located?

4. Which of the following best describes your current employment status? Please select one.

Employed full-time (30+ hours per week)	31%
Self-employed	69%

5. How would you describe your role when it comes to making decisions that affect your business? [Single select]

I am the sole/primary decision maker	86%
I share decision making with my partner/co-owner/executive team	14%



6. In what industry is your business or company?

Professional Services	18%
Construction	13%
Retail	13%
Real Estate/Leasing	7%
IT	6%
Consulting	5%
Food/Beverages	4%
Manufacturing	4%
Hospitality/Travel	3%
Financial Services	2%
Apparel and Accessories	2%
Transportation/Warehouse/Logistics	2%
Automotive	1%
Non-Profit/Association	1%
Media	1%
Insurance	1%
Wholesale	1%
Advertising	1%
Computer and Electronics	1%
Finance	1%
Industrial Supplies/Equipment	1%
Marketing	1%
Telecommunications	1%
Other (Specify)	10%

7. Does your company sell physical goods of any kind, size, or price, either wholesale or retail, to customers or companies? (it doesn't matter if services such as installation or consulting are sometimes included)

*For example, if you sell a variety of rugs and carpeting and sometimes a customer will also purchase installation services, you would answer "yes".*

Yes products only	22%
Yes products and services	42%
No just services	36%

8. Would you say the area your business is based is...?

Suburban	49%
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Rural	17%
Urban	34%

9. How likely would you say you are to vote in the November 2022 election for Congress?

Extremely likely	73%
Very likely	20%
Somewhat likely	8%

### Changing the subject...

10. Compared to a year ago, would you say your business is doing....

Much better than a year ago	23%
Somewhat better	36%
About the same	23%
Somewhat worse	11%
Much worse than a year ago	6%
<b>NET BETTER</b>	<b>59%</b>
<b>NET WORSE</b>	<b>17%</b>

11. And looking ahead one year from now, do you think your business will be doing....

Much better than today	31%
Somewhat better	36%
About the same	21%
Somewhat worse	6%
Much worse than today	6%
<b>NET BETTER</b>	<b>67%</b>
<b>NET WORSE</b>	<b>12%</b>

12. Given everything you know about your business, your industry, and the economy (e.g., inflation, access to capital, people's savings, consumer confidence, etc.), how do you currently feel about the "future of the consumer"?

Very confident	23%
Confident	31%
Neutral	19%
Not confident	20%
Very not confident	7%
<b>NET CONFIDENT</b>	<b>54%</b>
<b>NET NOT CONFIDENT</b>	<b>27%</b>



For each of the following list of issues that may affect your business, please rate each on how concerned you are about it negatively affecting your business, with a 1 being absolutely not concerned at all, and a 10 being extremely concerned. If it doesn't have anything to do with your business, please select "doesn't apply."

**(RANDOMIZE)**

	<b>MEAN</b>
13. Inflation	<b>7.7</b>
14. High gas or other energy prices	<b>7.5</b>
15. Supply chain disruptions	<b>6.7</b>
16. Regulatory burden on small businesses	<b>6.7</b>
17. Health/COVID	<b>6.1</b>
18. The business practices of large tech companies like Amazon, Apple, and Google	<b>6</b>
19. Lack of consumer data security and privacy	<b>5.9</b>
20. Access to skilled employees for open roles	<b>5.8</b>

21. Does your business use any digital tools or marketplaces from any of the following companies? **(RANDOMIZE) SELECT ALL THAT APPLY**

Amazon (e.g. Amazon.com marketplace, AWS cloud, FBA)	47%
Apple (e.g. Apple Ads, Apple iOS store, Apple Business Essentials)	23%
Google (e.g. Gmail, Google Workspace/G Suite, Google Ads, Google Cloud)	83%

**DISPLAY: Some members of Congress are pursuing an aggressive regulatory agenda that would force tech companies above a certain size to eliminate popular, integrated features and services such as Amazon Prime, Apple payments, and Google maps, and that enable millions of small businesses to scale, grow and succeed.**

22. Knowing this, would you support such a policy?

Yes	28%
No	48%
I don't know	25%

23. And knowing this, would this make you...

Much more likely to vote in November	48%
Somewhat more likely to vote in November	20%
Would have no real impact	30%
Somewhat less likely to vote in November	2%



Much less likely to vote in November	0%
<b>MORE LIKELY</b>	<b>68%</b>
<b>LESS LIKELY</b>	<b>2%</b>

24. In general, do you support or oppose more tech regulation by the government which could limit the availability or effectiveness of digital services used by small businesses?

Strongly support	14%
Somewhat support	18%
Neither support nor oppose	22%
Somewhat oppose	21%
Strongly oppose	26%
<b>NET SUPPORT</b>	<b>32%</b>
<b>NET OPPOSE</b>	<b>47%</b>

**DISPLAY: Independent economists have estimated that more tech regulations like the ones currently being considered by Congress could result in reduced U.S. small business sales of more than \$500 billion.**

25. Knowing this, would you say you support or oppose more tech regulation by the government which could limit the availability or effectiveness of digital services used by small businesses?

Strongly support	11%
Somewhat support	13%
Neither support nor oppose	21%
Somewhat oppose	20%
Strongly oppose	34%
<b>NET SUPPORT</b>	<b>24%</b>
<b>NET OPPOSE</b>	<b>54%</b>

26. And if you were to learn that a candidate running for Congress supported these new tech regulations, would that make you...

Much more likely to vote for that candidate	14%
Somewhat more likely to vote for that candidate	17%
Would have no real impact	23%
Somewhat less likely to vote for that candidate	19%
Much less likely to vote for that candidate	27%



<b>MORE LIKELY</b>	<b>31%</b>
<b>LESS LIKELY</b>	<b>46%</b>

**Changing topics....**

27. How would you describe the role of digital technology and tools in running your business right now? [single select]

Very important	55%
Somewhat important	34%
Not very important	10%
Not important at all	1%

28. Would you say your business' product or services sales are made:

Completely or almost completely online	19%
Mostly online, but some meaningful offline	16%
An even mix of online and offline	35%
Mostly offline, but some meaningful online	19%
Completely or almost completely offline	11%

29. Does your business... **SELECT ALL THAT APPLY**

Sell products using a third-party online marketplace (e.g., Amazon.com, eBay, Etsy)	37%
Sell products on its own web store (e.g., run on Shopify, Squarespace, Wix, etc.)	51%
Use mobile payment systems (e.g., PayPal, Apple Pay)	80%
Use pay later apps (e.g. Affirm, Sezzle, AfterPay)	17%

30. How important is access to an online marketplace to the success of your small business?

Very important	47%
Somewhat important	31%
Not very important	14%
Not important at all	9%

31. Some online marketplaces offer additional services besides selling/transactions that are seamlessly “integrated” within the platform. Do you use any of the following integrated services with your Online Marketplace? **SELECT ALL THAT APPLY:**



Fulfillment by Amazon (FBA)	31%
Walmart Fulfillment Services	23%
Etsy Payments	16%
eBay Labels	21%
Other (Specify)	2%
None	49%

32. How important are such “integrated services” within online marketplaces to your business (sales, revenue, customer engagement, customer acquisition, etc.)?

Very important	37%
Somewhat important	36%
Not very important	17%
Not important at all	10%

33. Using your best guess, what percentage of your customer payments come via cash, credit card, and mobile payments?

CASH	30.3%
CREDIT CARD	35.2%
MOBILE PAYMENT APPS	24.2%
Some other way	10.3%

## DEMOGRAPHICS

34. What is your age? <OE Numeric> [Range: 0-99]

18-34	31%
35-54	41%
55+	28%

35. What is your gender? [Single select]

Male	53%
Female	47%

36. Generally, which party's candidates or policies do you tend to align with the most? *I\**  
**RANDOM ROTATE CHOICES \*/**



Democratic	39%
Republican	28%
Independent	28%
I don't align with any party	5%
Other (Specify)	0%

37. Which of the following best describes you? Select all that apply.

**[Multiselect]**

White	75%
Hispanic or Latino	11%
Black/African American	15%
Asian	3%
American Indian or Alaskan Native	3%
Other	2%
Prefer not to say	0%

38. As far as you know, is your company a veteran-owned business, at least in part?

Yes	17%
No	82%
Not sure	2%

39. As far as you know, is your company a woman-owned business, at least in part?

Yes	53%
No	46%
Not sure	1%

40. As far as you know, is your company a minority/underrepresented community-owned business, at least in part?

Yes	33%
No	62%
Not sure	6%