



# Survey Data Findings

## Small Business Index Q1 2020

### Ipsos Survey on behalf of MetLife – U.S. Chamber of Commerce

Washington, DC, February 7, 2020

These are findings from an Ipsos poll conducted December 19, 2019-January 31, 2020, via telephone in English. For the survey, a sample of 1,000 small business owners and operators was sourced from the continental U.S., Alaska and Hawaii.

Small businesses are defined in this study as companies with fewer than 500 employees that are not sole proprietorships. The sample for this study is a listed business directory of all U.S. businesses obtained through Dun and Bradstreet. Ipsos used fixed sample targets, unique to this study, in drawing sample. This sample calibrates respondent characteristics to be representative of the U.S. small business population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2016 Statistics of U.S. Businesses dataset. The sample drawn for this study reflects fixed sample targets on firmographics. Post-hoc weights were made to the population characteristics on region, industry sector and size of business.

All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. The poll has a margin of error of plus or minus 3.5 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a confidence interval adjusted for design effect of the following: (n=1,000, DEFF=1.5) adjusted Confidence Interval=+/-5 percentage points. Where figures do not sum to 100, this is due to the effects of rounding.

1. First, how would you rate the overall health of your business?

|               | <u>Q1-2018</u> | <u>Q2-2018</u> | <u>Q3-2018</u> | <u>Q4-2018</u> | <u>Q1-2019</u> | <u>Q2-2019</u> | <u>Q3-2019</u> | <u>Q4-2019</u> | <u>Q1-2020</u> |
|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Very good     | 37             | 38             | 38             | 39             | 38             | 39             | 41             | 43             | 35             |
| Somewhat good | 25             | 22             | 26             | 25             | 26             | 26             | 25             | 26             | 30             |
| About average | 27             | 29             | 27             | 26             | 28             | 28             | 25             | 22             | 25             |
| Somewhat poor | 7              | 7              | 5              | 7              | 5              | 5              | 6              | 6              | 7              |
| Very poor     | 3              | 2              | 2              | 2              | 3              | 2              | 3              | 3              | 2              |
| Refused       | 1              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              |
| Don't know    | 0              | 1              | 0              | 0              | 0              | 0              | 0              | 1              | 1              |

2. How would you rate the overall health of the United States economy?

|               | <u>Q1-2018</u> | <u>Q2-2018</u> | <u>Q3-2018</u> | <u>Q4-2018</u> | <u>Q1-2019</u> | <u>Q2-2019</u> | <u>Q3-2019</u> | <u>Q4-2019</u> | <u>Q1-2020</u> |
|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Very good     | 21             | 13             | 21             | 29             | 22             | 25             | 28             | 29             | 29             |
| Somewhat good | 35             | 34             | 33             | 29             | 31             | 34             | 30             | 28             | 30             |
| About average | 26             | 31             | 25             | 27             | 28             | 24             | 25             | 25             | 26             |
| Somewhat poor | 12             | 16             | 13             | 10             | 14             | 13             | 11             | 12             | 9              |
| Very poor     | 4              | 4              | 4              | 4              | 3              | 3              | 4              | 4              | 3              |
| Refused       | 1              | 1              | 1              | 1              | 0              | 1              | --             | 0              | 0              |
| Don't know    | 2              | 1              | 2              | 1              | 2              | 0              | 28             | 2              | 1              |

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## Survey Data Findings – continued –

3. How would you rate the overall health of the economy in your local area?

|               | <u>Q1-2018</u> | <u>Q2-2018</u> | <u>Q3-2018</u> | <u>Q4-2018</u> | <u>Q1-2019</u> | <u>Q2-2019</u> | <u>Q3-2019</u> | <u>Q4-2019</u> | <u>Q1-2020</u> |
|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Very good     | 20             | 20             | 25             | 26             | 23             | 24             | 27             | 29             | 24             |
| Somewhat good | 26             | 29             | 26             | 30             | 29             | 26             | 29             | 30             | 28             |
| About average | 34             | 32             | 31             | 25             | 29             | 31             | 26             | 25             | 31             |
| Somewhat poor | 14             | 16             | 12             | 14             | 14             | 15             | 12             | 11             | 14             |
| Very poor     | 6              | 4              | 6              | 4              | 4              | 4              | 5              | 5              | 3              |
| Refused       | 0              | 0              | 0              | 0              | --             | --             | --             | 0              | 0              |
| Don't know    | 0              | 0              | 0              | 1              | 0              | 0              | 1              | 0              | 0              |

4. Compared to six months ago, does your business see more competition, less competition or about the same level of competition from smaller or local companies?

|                       | <u>Q1-2018</u> | <u>Q2-2018</u> | <u>Q3-2018</u> | <u>Q4-2018</u> | <u>Q1-2019</u> | <u>Q2-2019</u> | <u>Q3-2019</u> | <u>Q4-2019</u> | <u>Q1-2020</u> |
|-----------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| More competition      | 16             | 14             | 18             | 18             | 16             | 18             | 15             | 14             | 14             |
| Less competition      | 4              | 8              | 6              | 6              | 8              | 7              | 8              | 6              | 6              |
| Stayed about the same | 77             | 75             | 74             | 74             | 73             | 72             | 74             | 76             | 76             |
| Refused               | 1              | 2              | 1              | 1              | 1              | 1              | 0              | 1              | 1              |
| Don't know            | 1              | 1              | 2              | 1              | 3              | 2              | 4              | 3              | 3              |

5. How comfortable are you with your company's current cash flow situation?

|                        | <u>Q1-2018</u> | <u>Q2-2018</u> | <u>Q3-2018</u> | <u>Q4-2018</u> | <u>Q1-2019</u> | <u>Q2-2019</u> | <u>Q3-2019</u> | <u>Q4-2019</u> | <u>Q1-2020</u> |
|------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Very comfortable       | 36             | 32             | 34             | 34             | 32             | 35             | 37             | 37             | 28             |
| Somewhat comfortable   | 44             | 47             | 47             | 46             | 50             | 48             | 44             | 46             | 52             |
| Not very comfortable   | 12             | 11             | 11             | 12             | 11             | 10             | 11             | 10             | 11             |
| Not at all comfortable | 7              | 6              | 5              | 5              | 4              | 5              | 6              | 4              | 6              |
| Refused                | 1              | 2              | 1              | 1              | 1              | 1              | 1              | 1              | 1              |
| Don't know             | 1              | 1              | 2              | 2              | 1              | 1              | 2              | 3              | 2              |

6. For the upcoming year, do you plan to...?

|                                                           | <u>Q1-2018</u> | <u>Q2-2018</u> | <u>Q3-2018</u> | <u>Q4-2018</u> | <u>Q1-2019</u> | <u>Q2-2019</u> | <u>Q3-2019</u> | <u>Q4-2019</u> | <u>Q1-2020</u> |
|-----------------------------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Increase investment                                       | 29             | 28             | 25             | 29             | 27             | 27             | 26             | 26             | 29             |
| Invest about as much in the business as you did last year | 54             | 55             | 57             | 53             | 56             | 55             | 55             | 58             | 52             |
| Reduce investment                                         | 13             | 10             | 10             | 12             | 12             | 12             | 12             | 10             | 13             |
| Refused                                                   | 1              | 2              | 1              | 1              | 1              | 1              | 1              | 1              | 1              |
| Don't know                                                | 2              | 5              | 6              | 5              | 4              | 4              | 6              | 5              | 6              |

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## Survey Data Findings – continued –

7. Compared to six months ago, has the time or resources you spend completing licensing, compliance or other government requirements increased, decreased or stayed the same?

|                 | <u>Q1-2018</u> | <u>Q2-2018</u> | <u>Q3-2018</u> | <u>Q4-2018</u> | <u>Q1-2019</u> | <u>Q2-2019</u> | <u>Q3-2019</u> | <u>Q4-2019</u> | <u>Q1-2020</u> |
|-----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Increased       | 18             | 21             | 20             | 23             | 25             | 21             | 22             | 22             | 21             |
| Decreased       | 3              | 2              | 3              | 4              | 4              | 3              | 3              | 3              | 4              |
| Stayed the same | 76             | 74             | 74             | 70             | 69             | 73             | 71             | 74             | 73             |
| Refused         | 1              | 1              | 0              | 1              | 0              | 1              | 0              | 0              | 1              |
| Don't know      | 2              | 2              | 3              | 2              | 2              | 2              | 4              | 2              | 2              |

8. Over the past year, would you say you have...?

|                              | <u>Q1-2018</u> | <u>Q2-2018</u> | <u>Q3-2018</u> | <u>Q4-2018</u> | <u>Q1-2019</u> | <u>Q2-2019</u> | <u>Q3-2019</u> | <u>Q4-2019</u> | <u>Q1-2020</u> |
|------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Increased staff              | 16             | 18             | 19             | 19             | 17             | 18             | 19             | 20             | 17             |
| Retained the same size staff | 68             | 69             | 66             | 64             | 71             | 70             | 68             | 66             | 66             |
| Reduced staff                | 15             | 12             | 13             | 16             | 12             | 11             | 13             | 13             | 16             |
| Refused                      | 0              | 0              | 0              | 0              | --             | 0              | 0              | 0              | 0              |
| Don't know                   | 0              | 0              | 1              | 1              | --             | 1              | 0              | 1              | 0              |

9. In the next year, do you anticipate...?

|                               | <u>Q4-2017</u> | <u>Q1-2018</u> | <u>Q2-2018</u> | <u>Q3-2018</u> | <u>Q1-2019</u> | <u>Q2-2019</u> | <u>Q3-2019</u> | <u>Q4-2019</u> | <u>Q1-2020</u> |
|-------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Increasing staff              | 27             | 32             | 32             | 25             | 29             | 28             | 29             | 28             | 30             |
| Retaining the same size staff | 68             | 62             | 63             | 68             | 65             | 65             | 65             | 65             | 64             |
| Reducing staff                | 3              | 4              | 4              | 5              | 5              | 5              | 6              | 6              | 5              |
| Refused                       | -              | 1              | 0              | 0              | 0              | 0              | 0              | 0              | 0              |
| Don't know                    | 2              | 1              | 1              | 2              | 1              | 1              | 1              | 1              | 2              |

10. Looking forward one year, do you expect next year's revenues to increase, decrease or stay the same?

|               | <u>Q1-2018</u> | <u>Q2-2018</u> | <u>Q3-2018</u> | <u>Q4-2018</u> | <u>Q1-2019</u> | <u>Q2-2019</u> | <u>Q3-2019</u> | <u>Q4-2019</u> | <u>Q1-2020</u> |
|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Increase      | 61             | 62             | 56             | 60             | 56             | 57             | 55             | 58             | 60             |
| Decrease      | 6              | 8              | 8              | 6              | 8              | 7              | 8              | 9              | 7              |
| Stay the same | 30             | 28             | 33             | 32             | 34             | 34             | 35             | 30             | 31             |
| Refused       | 1              | 0              | 1              | 0              | 0              | 1              | 0              | 0              | 0              |
| Don't know    | 2              | 2              | 2              | 1              | 1              | 1              | 1              | 3              | 2              |



## Survey Data Findings – continued –

### Q1 2020 Storyline Questions

11. Do you use or go to the following to find capital or financing to grow your business?

|                                                     | <u>Total</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=333)</u> |
|-----------------------------------------------------|--------------|------------------------------------------------------------------|
| U.S. Small Business Administration                  | 8            | 12                                                               |
| Grants or loans for minority-owned small businesses | 3            | 7                                                                |
| Local banks or credit unions                        | 43           | 38                                                               |
| National banks                                      | 22           | 27                                                               |
| Friends and family                                  | 15           | 19                                                               |
| Personal savings                                    | 43           | 49                                                               |

12. Do any of the following describe the owner(s) of this business?

|                           | <u>Total</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=333)</u> |
|---------------------------|--------------|------------------------------------------------------------------|
| Black or African American | 11           | 31                                                               |
| Hispanic or Latino        | 14           | 40                                                               |
| Asian or Pacific Islander | 6            | 16                                                               |
| Native American           | 5            | 15                                                               |
| Indian                    | 4            | 11                                                               |
| Other racial minority     | 6            | 17                                                               |
| White or Caucasian        | 76           | 47                                                               |
| LBGTQIA                   | 3            | 5                                                                |

13. In the past year, has your business done any of the following?

|                                                                        | <u>Total</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=333)</u> |
|------------------------------------------------------------------------|--------------|------------------------------------------------------------------|
| Intentionally recruited a racially diverse job candidate               | 14           | 17                                                               |
| Promoted a racially diverse employee                                   | 27           | 33                                                               |
| Started or maintained an active racial diversity and inclusion program | 19           | 24                                                               |

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## Survey Data Findings – continued –

14. Do you agree or disagree with the following statements?

- a. Minority-owned small businesses face more challenges than non-minority-owned businesses.

|                       | <u>Total</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=333)</u> |
|-----------------------|--------------|------------------------------------------------------------------|
| Strongly agree        | 25           | 42                                                               |
| Somewhat agree        | 27           | 23                                                               |
| Somewhat disagree     | 21           | 16                                                               |
| Strongly disagree     | 17           | 13                                                               |
| Don't know            | 11           | 6                                                                |
| <i>Agree (Net)</i>    | 52           | 65                                                               |
| <i>Disagree (Net)</i> | 38           | 29                                                               |

- b. There are plenty of business and investment opportunities available for minorities.

|                       | <u>Total</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=333)</u> |
|-----------------------|--------------|------------------------------------------------------------------|
| Strongly agree        | 24           | 20                                                               |
| Somewhat agree        | 39           | 40                                                               |
| Somewhat disagree     | 14           | 15                                                               |
| Strongly disagree     | 10           | 17                                                               |
| Don't know            | 12           | 8                                                                |
| <i>Agree (Net)</i>    | 64           | 60                                                               |
| <i>Disagree (Net)</i> | 24           | 32                                                               |

- c. Hiring racially diverse candidates is beneficial for my business.

|                       | <u>Total</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=333)</u> |
|-----------------------|--------------|------------------------------------------------------------------|
| Strongly agree        | 32           | 44                                                               |
| Somewhat agree        | 33           | 29                                                               |
| Somewhat disagree     | 12           | 9                                                                |
| Strongly disagree     | 8            | 6                                                                |
| Don't know            | 15           | 11                                                               |
| <i>Agree (Net)</i>    | 65           | 74                                                               |
| <i>Disagree (Net)</i> | 20           | 15                                                               |

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## Survey Data Findings – continued –

- d. More businesses should focus on hiring racially diverse employees.

|                       | <u>Total</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=333)</u> |
|-----------------------|--------------|------------------------------------------------------------------|
| Strongly agree        | 29           | 43                                                               |
| Somewhat agree        | 36           | 31                                                               |
| Somewhat disagree     | 15           | 12                                                               |
| Strongly disagree     | 10           | 7                                                                |
| Don't know            | 11           | 8                                                                |
| <hr/>                 |              |                                                                  |
| <i>Agree (Net)</i>    | 64           | 74                                                               |
| <i>Disagree (Net)</i> | 25           | 18                                                               |

- e. There should be more formal workplace trainings or programs to support racially diverse employees.

|                       | <u>Total</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=333)</u> |
|-----------------------|--------------|------------------------------------------------------------------|
| Strongly agree        | 30           | 47                                                               |
| Somewhat agree        | 32           | 28                                                               |
| Somewhat disagree     | 19           | 12                                                               |
| Strongly disagree     | 9            | 5                                                                |
| Don't know            | 11           | 7                                                                |
| <hr/>                 |              |                                                                  |
| <i>Agree (Net)</i>    | 62           | 75                                                               |
| <i>Disagree (Net)</i> | 27           | 17                                                               |

15. **[Asked only if Q12=Any of the options]** Do you agree or disagree with the following statements?

- a. Being a minority has been beneficial for my business.

|                       | <u>Total</u><br><u>(N=232)</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=174)</u> |
|-----------------------|--------------------------------|------------------------------------------------------------------|
| Strongly agree        | 10                             | 13                                                               |
| Somewhat agree        | 16                             | 20                                                               |
| Somewhat disagree     | 25                             | 32                                                               |
| Strongly disagree     | 17                             | 22                                                               |
| Don't know            | 31                             | 13                                                               |
| <hr/>                 |                                |                                                                  |
| <i>Agree (Net)</i>    | 26                             | 33                                                               |
| <i>Disagree (Net)</i> | 43                             | 54                                                               |



## Survey Data Findings – continued –

b. I am aware of what benefits are available for minority-owned business owners.

|                       | <u>Total</u><br><u>(N=232)</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=174)</u> |
|-----------------------|--------------------------------|------------------------------------------------------------------|
| Strongly agree        | 12                             | 16                                                               |
| Somewhat agree        | 26                             | 33                                                               |
| Somewhat disagree     | 16                             | 20                                                               |
| Strongly disagree     | 19                             | 24                                                               |
| Don't know            | 27                             | 7                                                                |
| <i>Agree (Net)</i>    | 38                             | 48                                                               |
| <i>Disagree (Net)</i> | 35                             | 44                                                               |

c. There are adequate minority-specific resources for small business owners.

|                       | <u>Total</u><br><u>(N=232)</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=174)</u> |
|-----------------------|--------------------------------|------------------------------------------------------------------|
| Strongly agree        | 7                              | 9                                                                |
| Somewhat agree        | 28                             | 35                                                               |
| Somewhat disagree     | 21                             | 26                                                               |
| Strongly disagree     | 16                             | 20                                                               |
| Don't know            | 29                             | 10                                                               |
| <i>Agree (Net)</i>    | 35                             | 44                                                               |
| <i>Disagree (Net)</i> | 36                             | 46                                                               |

d. There is easy access to opportunities for obtaining government contracts as a minority-owned business.

|                       | <u>Total</u><br><u>(N=232)</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=174)</u> |
|-----------------------|--------------------------------|------------------------------------------------------------------|
| Strongly agree        | 8                              | 11                                                               |
| Somewhat agree        | 18                             | 22                                                               |
| Somewhat disagree     | 20                             | 25                                                               |
| Strongly disagree     | 22                             | 28                                                               |
| Don't know            | 32                             | 14                                                               |
| <i>Agree (Net)</i>    | 26                             | 33                                                               |
| <i>Disagree (Net)</i> | 42                             | 54                                                               |



## Survey Data Findings – continued –

e. It is difficult to find and build a relationship with a mentor who looks like me.

|                       | <u>Total</u><br><u>(N=232)</u> | <u>Q1-2020</u><br><u>Racial Minority-Owned</u><br><u>(N=174)</u> |
|-----------------------|--------------------------------|------------------------------------------------------------------|
| Strongly agree        | 14                             | 18                                                               |
| Somewhat agree        | 15                             | 19                                                               |
| Somewhat disagree     | 21                             | 26                                                               |
| Strongly disagree     | 26                             | 32                                                               |
| Don't know            | 25                             | 4                                                                |
| <i>Agree (Net)</i>    | 29                             | 37                                                               |
| <i>Disagree (Net)</i> | 46                             | 58                                                               |

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## Survey Data Findings – continued –

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