Small Businesses & the Pandemic:

A survey of consumers in the US, UK, France and Germany

Sendinblue & CITE Research

June 2021

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Background & Methodology

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Objectives

- The pandemic has greatly changed consumer behaviors, needs, and purchasing decisions forcing small businesses to adapt in order to survive. The survey addressed the shifting expectations consumers have from small businesses, how this affects communications and data privacy expectations and will provide insight that businesses can use to succeed in a post-pandemic marketplace.

Methodology

- CITE Research (www.citeresearch.com), on behalf of Sendinblue, conducted an online survey among 4,199 consumers, with approximately 1,000 each in the US, France, UK and Germany in June 2021.
- Black arrows throughout the report indicate a statistically significant difference between at least 2 countries at the 95% confidence level.

Screening Criteria

- Respondents were screened to:
  - Over 18
  - Made a purchase online in the past 12 months

Executive Summary

The pandemic has led to consumers to shop small businesses more, which they plan to continue into the future.

The pandemic drove consumers to small businesses.

- More than four-in-ten (44%) consumers globally are **purchasing more from small businesses** than they did pre-pandemic.
- **Younger generations are leading the shift** – 46% of Gen Z and 51% of Millennials have increased their purchases at small businesses.

Consumers feel more connected to small businesses – and want to help their local economy.

- The **top drivers** of increasing small business purchases are wanting to **contribute to the local economy** (57%) and feeling a **greater bond with small businesses** (52%).

The increase in small business shopping is likely to continue post-pandemic.

- **Only 8% of consumers** globally plan to **decrease small business purchases** in-person in the future, with the majority keeping purchase level the same or increasing.

Consumers far prefer email communication from small businesses, while Instagram may only reach the young.

Email is the consumer favorite.

- **Email** is the method **consumers prefer** when it comes to small business communications – 30% rank this as their top method.
- In comparison, Facebook is a distant second at 13% #1 ranking.
- 62% of consumers rank it as a top three method.

Only the very young prefer Instagram.

- **All demographics prefer email** over other forms of communications, **except for Gen Z**.
- Gen Z consumers prefer Instagram with 23% of these consumers ranking it #1 and 59% ranking it as a top 3 method.

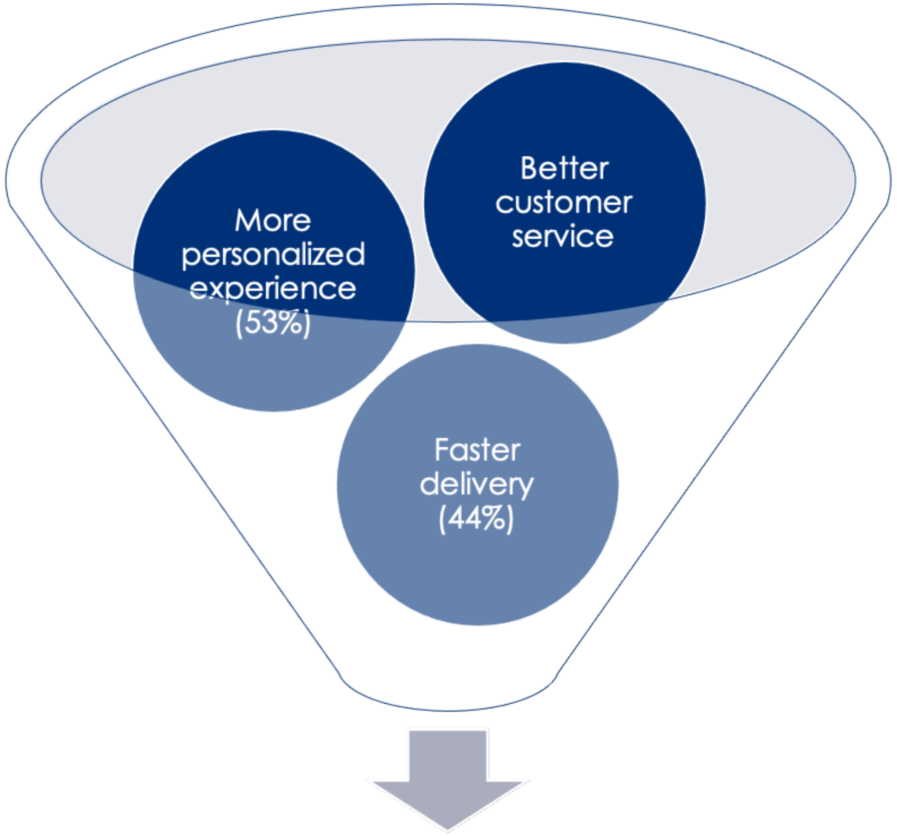
Consumers love the convenience of email.

- Consumers are **driven to prefer email** because it is **convenient** and **easy to use.**

The pandemic led to even more email usage.

- **Opening email updates** saw the **biggest increase** in usage during the pandemic of all digital tools tested - **27%** reported using it **more frequently**.

Small businesses edge out larger businesses in the online shopping experience.



46% prefer the online shopping experience of small businesses

Small businesses can **utilize these features** – according to consumers – to **make the online experience** even **better**:

✓ Free shipping
✓ Wider selection
✓ Easy-to-use checkout

Data privacy concerns on the rise, but clarity on data usage and discounts/ promotions can go a long way.

Data privacy concerns rose during the pandemic.

68% of consumers are **more concerned with online privacy** now than pre-pandemic and **65% trust third-party applications less** now than they did one year ago.

But data transparency can help assuage concerns.

78% of consumers are **willing to share data** with small businesses that guarantee they would **not sell their information** to other companies.

75% of consumers are **willing to share data** with small businesses that made it **clear how their data is being used**.

And discounts / promotions motivate consumers to share anyways.

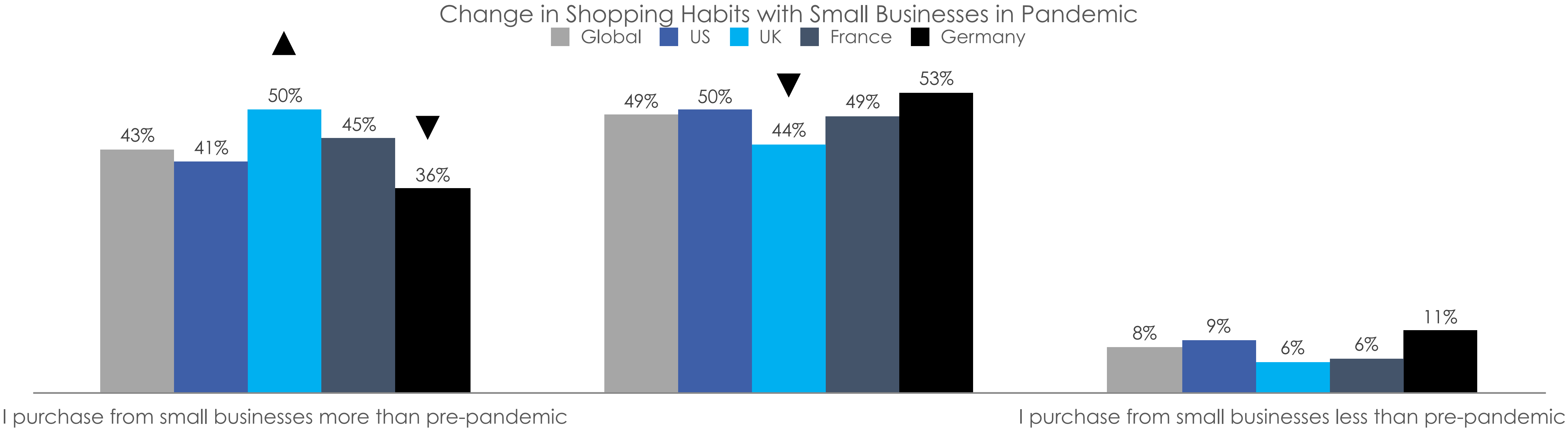
82% would share some personal data with small businesses **for discounts / promotions.**

Detailed Findings

The Pandemic Impact on Shopping Habits

Almost half of consumers are shopping small businesses more, with younger generations leading the way...

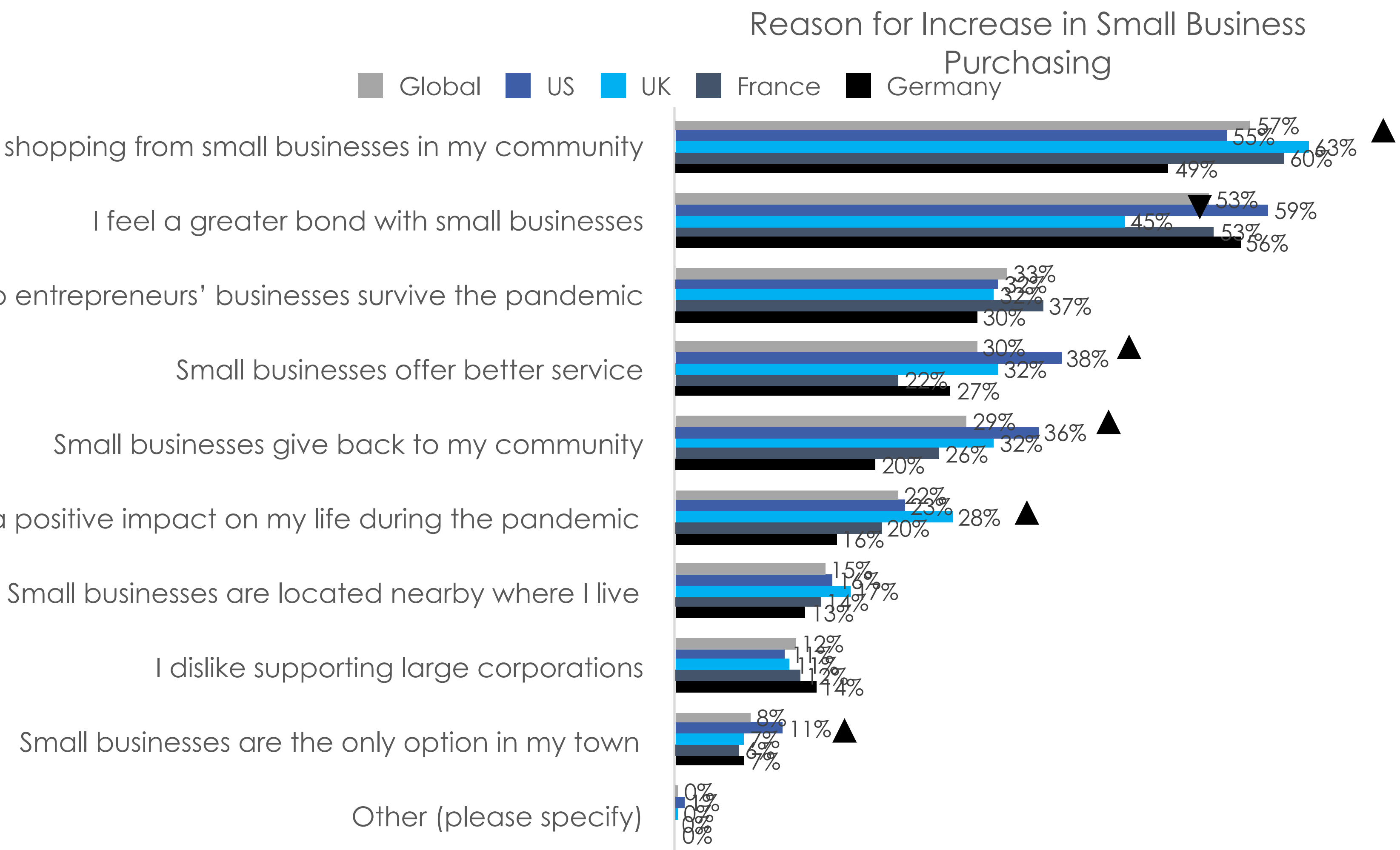
- More than four-in-ten consumers globally say they purchase from small businesses more than pre-pandemic, with UK shoppers being significantly more likely to have done so.
- Younger consumers are most likely to have made the shift to more purchases – with 46% of Gen Z and 51% of Millennials having increased their purchases.
- Higher income consumers are also more likely to be shopping small business more often (49%).



Q1: Since the COVID-19 pandemic began, how have your shopping habits with small businesses changed (if at all)? Small businesses are privately owned corporations, partnerships, or sole proprietorships which have less than 500 employees and/or less annual revenue than a regular-sized business or corporation.

…Being driven by wanting to contribute to the local economy and feeling bonded to those businesses.

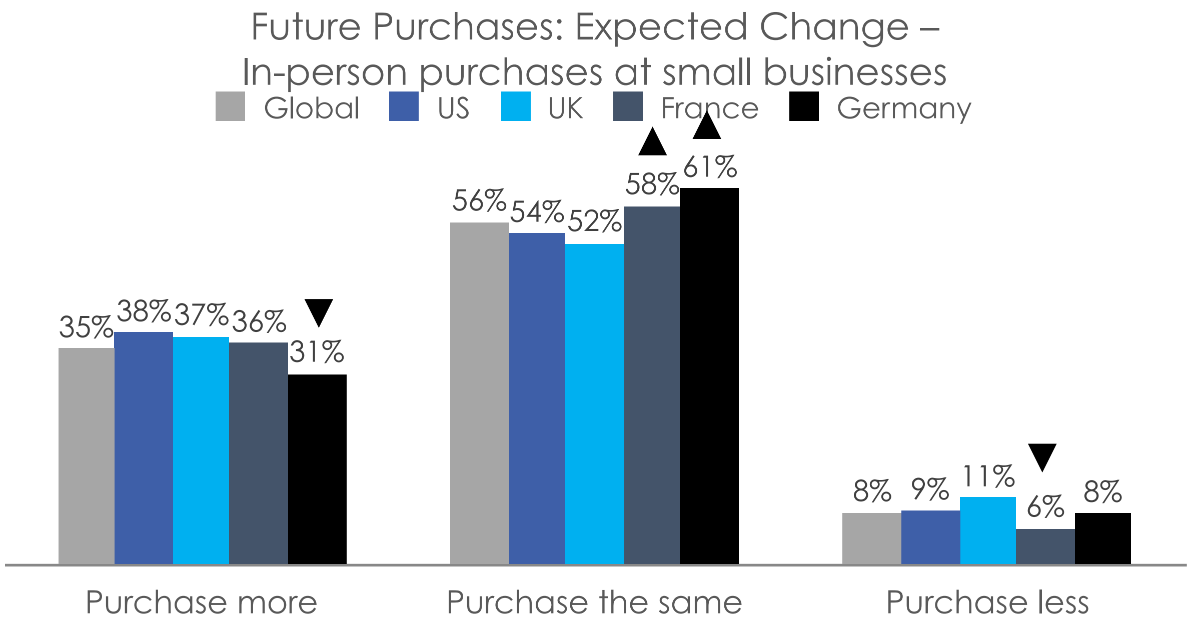
- Consumers who have purchased from small businesses more since the beginning of the pandemic are most often driven by:
  - Wanting to contribute to the local economy (those in the UK being especially likely to say this).
  - They feel a greater bond with small businesses (those in the UK being less likely than other regions to say this).
- Baby Boomers are also highly motivated by contributing to the local economy (78%). Moreover, they are more likely to say they wanted to help businesses survive (46%).
- Females are more likely to want to contribute to the local economy (60%), while Males are more likely to feel the greater bond to small businesses (55%).

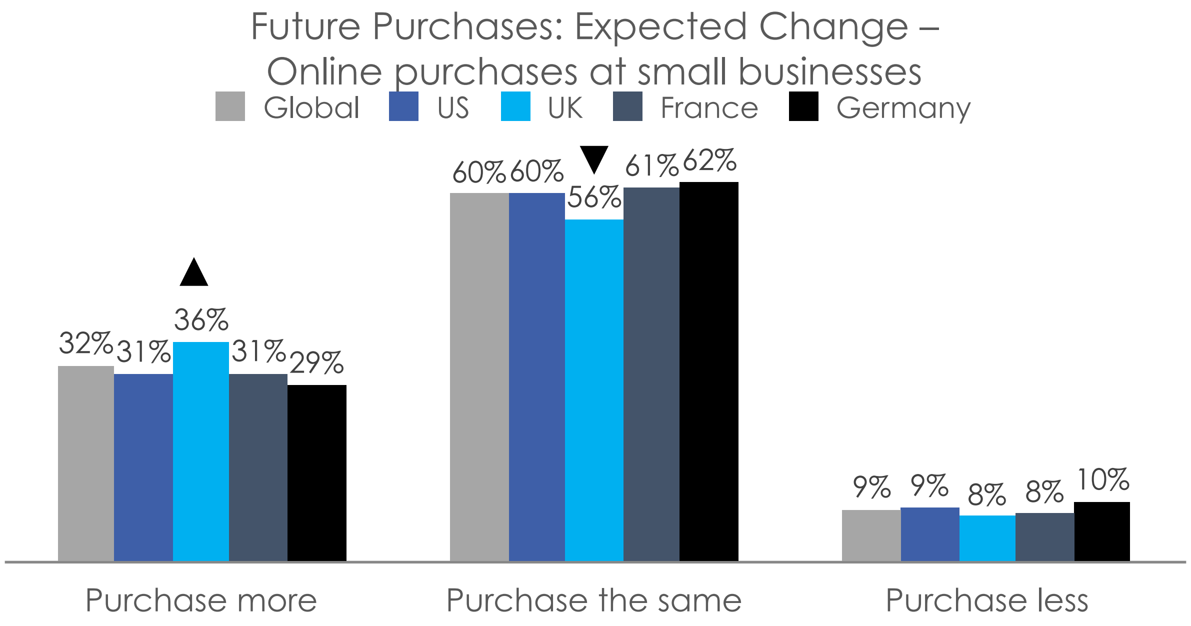


Q2: Why are you purchasing from small businesses more? Please select all that apply. [N=1799]

Increases in small business purchases will hold steady or rise in the future.

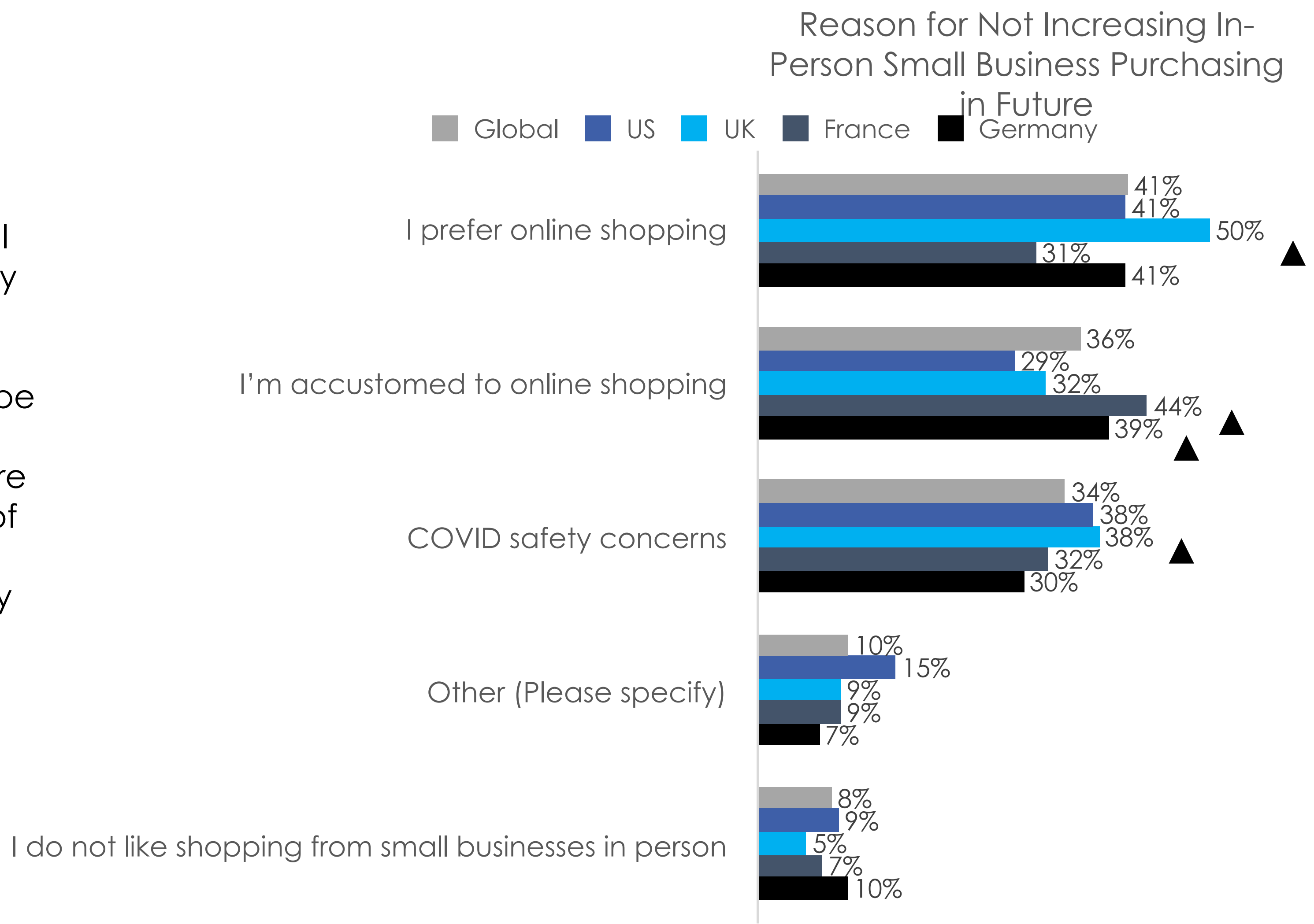
- More than half of consumers globally expect to make in-person purchases at small businesses (56%) and online purchases at small businesses (59%) at the same rate in the future as they did last year.
- Notably, consumers who increased small business shopping as a result of the pandemic are more likely to say they will purchase more in-person purchases at small businesses in the future (57%).
- Gen Z and Millennials continue to be more likely than older generations to say they will purchase more both in-person and online – however, the majority of each age group falls into the "purchase the same" category.





Q5: Looking to the future, how do you expect your purchases in the following categories to change compared to the last year?

For some, online shopping has become preferable to and more comfortable than going in-person to small businesses.

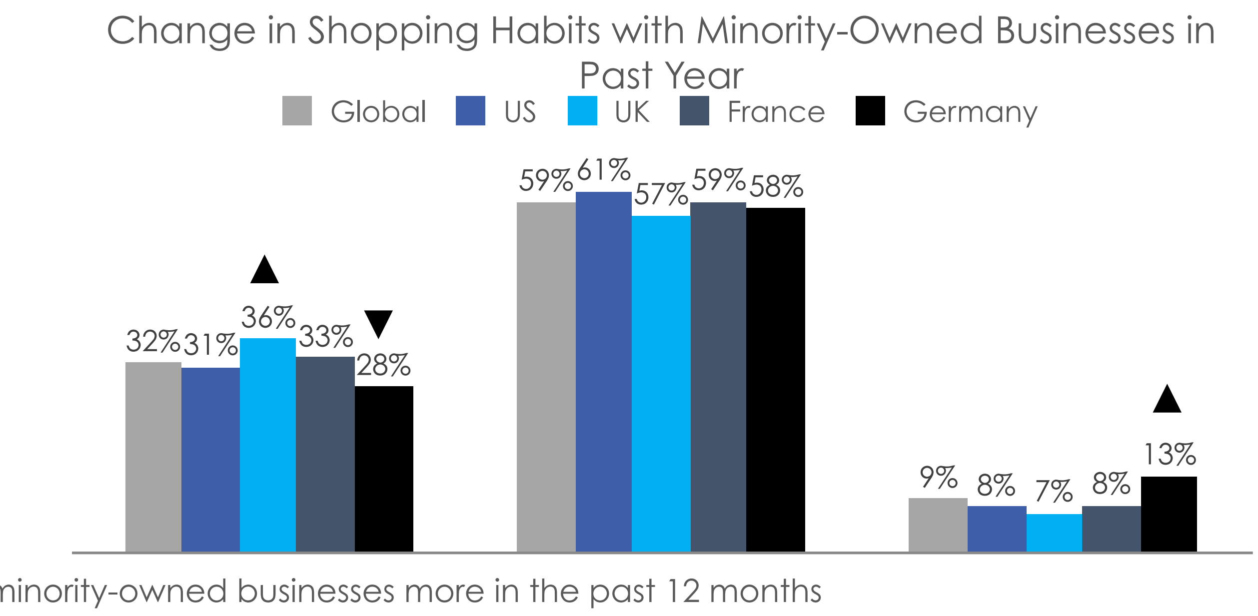


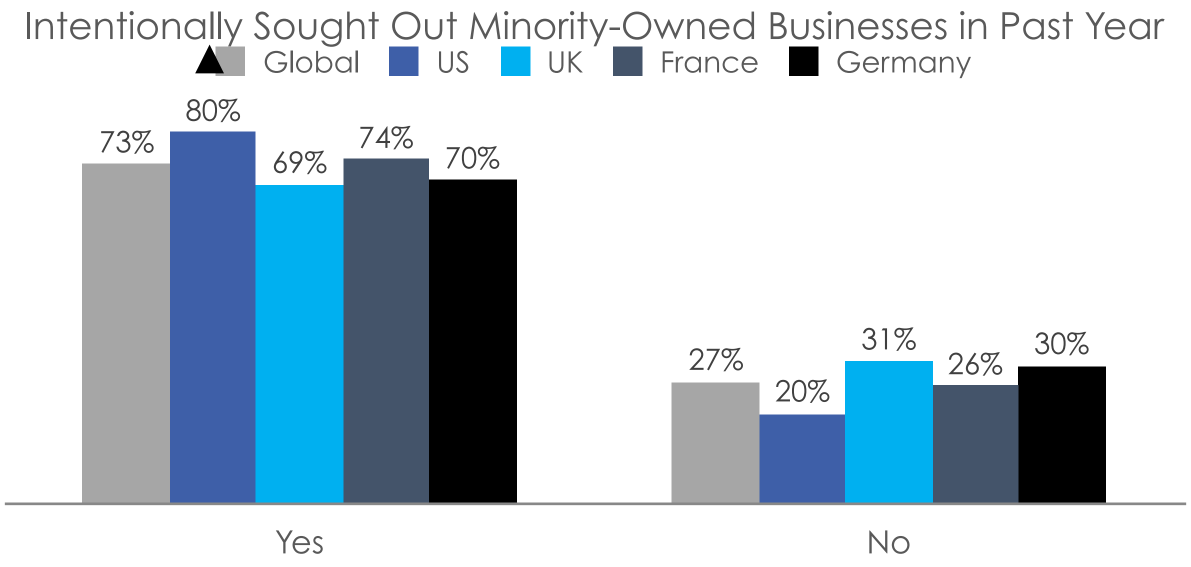
- Among those who will not increase in-person small business shopping in the future, four-in-ten say they prefer online shopping.
  - This is especially true among UK consumers (50%). UK consumers are also more likely to be deterred by COVID safety concerns (38%).
  - The tech savvy younger generations are more likely to prefer online shopping as well (51% of Gen Z, 44% of Millennials).
- In France and Germany, consumers are especially likely to say they are accustomed to online shopping.

Q6: Why are you not planning on making more in-person purchases at small businesses in the future? [N=2723]

One-third of consumers purchased more from minority-owned businesses over the last year, with most those consumers intentionally doing so.

- While more than half of consumers say they did not make changes in shopping habits regarding minority-owned businesses, one-third increased their purchases. UK consumers are especially likely to say they purchased more.
- Those who increased their purchases of small businesses (60%) and African-American / Black consumers (51%) are the groups that are more likely to have increased their minority-owned business purchases.
- Most of those who increased their purchases did so purposefully, with African-American/Black consumers (83%), US consumers (80%), high income consumers (80%), higher educated consumers, those who increased small business purchases (78%), and Millennials (76%) being the most likely groups to have done so intentionally.

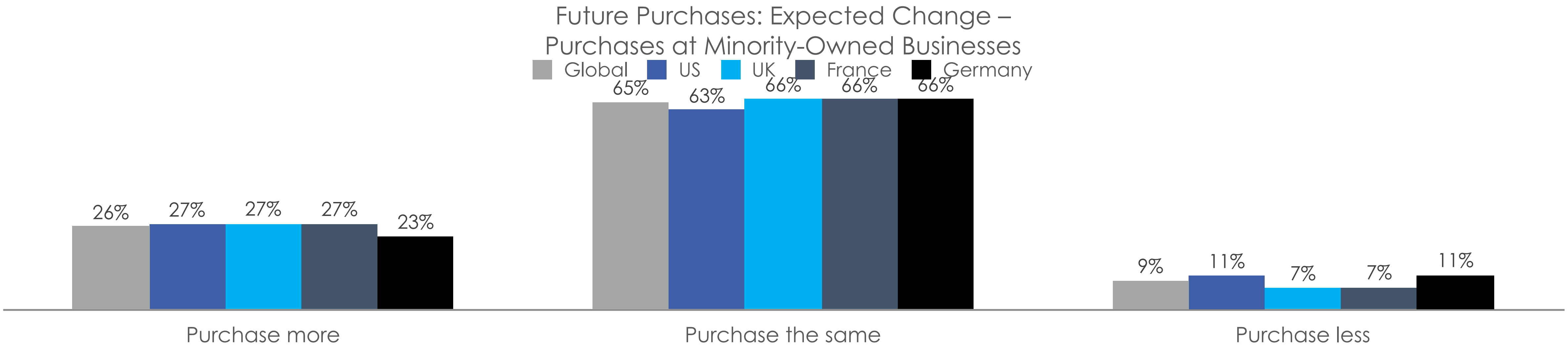




Q3: In the past 12 months, how have your shopping habits surrounding minority-owned businesses changed, if at all?
Q4: Do you intentionally seek out minority-owned businesses compared to pre-pandemic? [N=1347]

A quarter of consumers expect to purchase more from minority-owned businesses in the future.

- About two-thirds of consumers plan to purchase the same amounts from minority-owned businesses in the future, while one-in-four will purchase more.
- Those who purchased more from minority-owned businesses over the past year are most likely to say they will purchase more in the future (51%).
- While certain sub-groups are more likely than their counterparts to say they will purchase more, the majority of each of these sub-groups falls into the "purchase the same" category. These groups more likely to increase purchases in the future include:
  - Those who increased small business purchases during the pandemic (43%), African-American / Black consumers (38%), Asian-American / Asian consumers (38%), Gen Z (32%) and Millennials (31%).



Q5: Looking to the future, how do you expect your purchases in the following categories to change compared to the last year?

Consumers most often report increased online shopping for clothing / apparel…

- While consumers generally report making online purchases in the same frequency across categories more so than increasing / decreasing, four-in-ten consumers report an increase in online shopping for apparel / clothing.
- Those in the US, those in the UK, Gen Z and Millennials are more likely to report an increase in online shopping across categories.*

Pandemic Impact on Online Purchases by Category	I purchase online more frequently	I purchase online in the same frequency	I purchase online less frequently	I do not make purchases in this category
Apparel / Clothing	39%	41%	13%	7%
Entertainment	26%	38%	15%	22%
Cosmetics / Personal care	25%	39%	17%	18%
Restaurants	22%	29%	19%	29%
Health & Wellness	21%	40%	16%	23%
Education / education tools	16%	27%	14%	43%
Cultural events	13%	27%	18%	42%
Real estate browsing / visits	13%	23%	12%	52%
Life coaching	11%	19%	11%	59%

Q11. How has the pandemic impacted your shopping in each of the following categories online compared to pre-pandemic?
*Country-level breakdown found in the appendix.

…And are opening update emails from small businesses more than pre-pandemic.

- Consumers most often use digital tools in the same frequency as pre-pandemic. Opening update emails, QR code scan, and SMS notifications have seen the largest increases in reported usage.
- Those in the US, those in the UK, Gen Z and Millennials are more likely to report an increase in nearly all digital tools.*

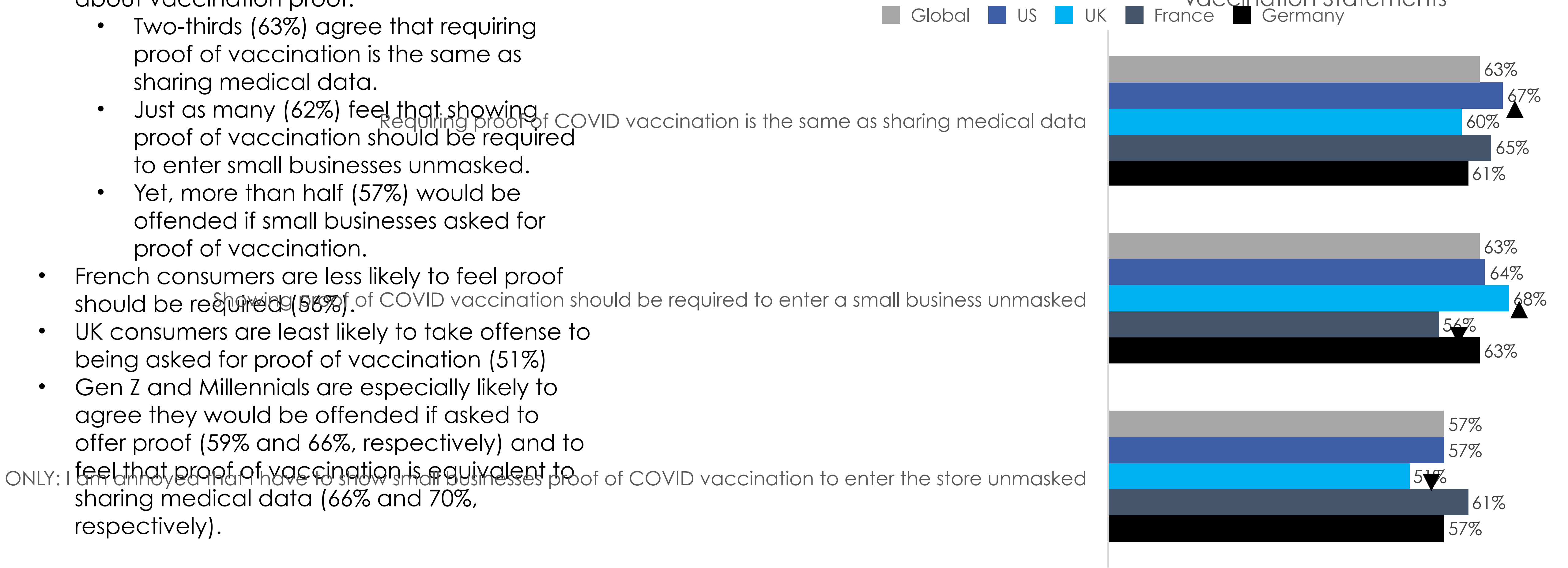
Pandemic Impact on Digital Tool Usage	**I use this more frequently**	**I use this in the same frequency**	**I use this less frequently**	**I have never used this**
Opening update emails	27%	45%	11%	17%
QR code scan	26%	32%	13%	30%
SMS notifications	24%	42%	13%	21%
App push notifications	20%	38%	13%	29%
Website push notifications	17%	37%	14%	32%
Live chat on small business websites	17%	32%	13%	38%

Q12: How has the pandemic impacted your use of the following digital tools with small businesses?
*Country-level breakdown found in the appendix.

Consumers have mixed feelings on COVID vaccination proof and small businesses.

- Consumers are clearly mixed on how they feel about vaccination proof:
  - Two-thirds (63%) agree that requiring proof of vaccination is the same as sharing medical data.
  - Just as many (62%) feel that showing proof of vaccination should be required to enter small businesses unmasked.
  - Yet, more than half (57%) would be offended if small businesses asked for proof of vaccination.
- French consumers are less likely to feel proof should be required (56%).
- UK consumers are least likely to take offense to being asked for proof of vaccination (51%)
- Gen Z and Millennials are especially likely to agree they would be offended if asked to offer proof (59% and 66%, respectively) and to feel that proof of vaccination is equivalent to sharing medical data (66% and 70%, respectively).

Agreement (Completely + Somewhat) with Statements about Vaccination Statements

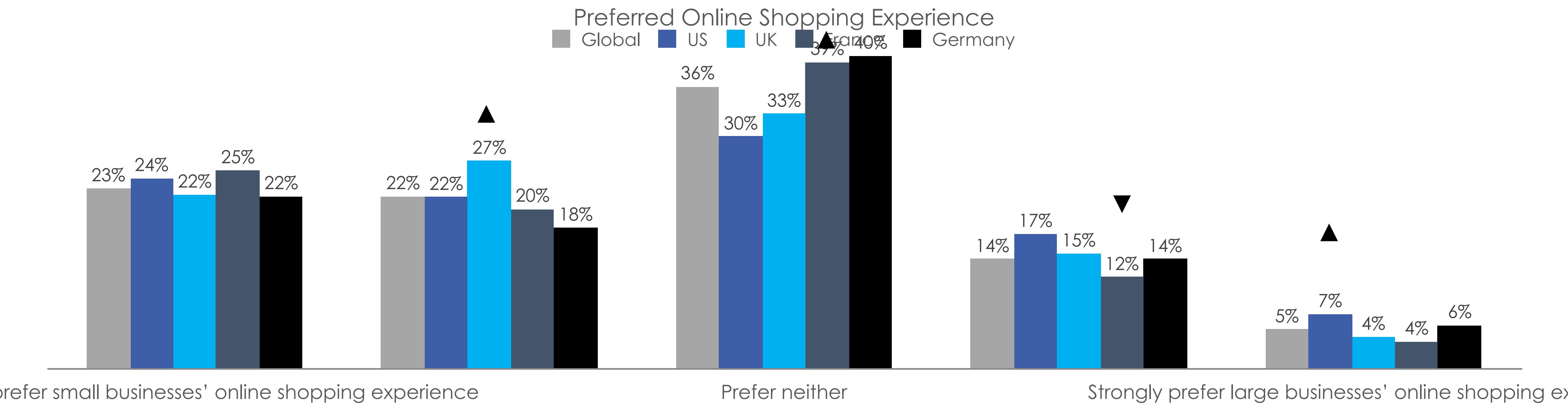


Q26: How much do you agree or disagree with each of the following statements?

Preferred Shopping Experiences

Consumers prefer the small business online shopping experience over large…

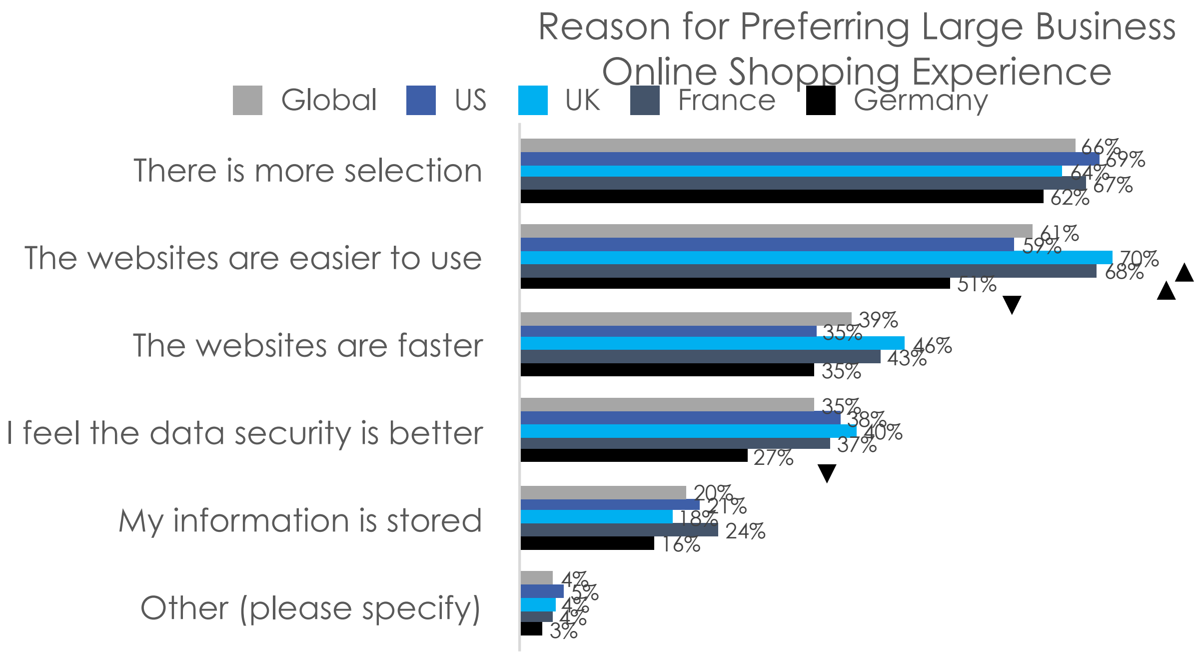
- Overall, consumers lean towards preferring the small business online shopping experience (46% strongly/somewhat) over large business (20% very/somewhat).
  - Those who purchased more from small businesses since pre-pandemic, Females (63%), Gen Z (54%), Millennials (54%), and those in the UK (49%) are most likely to prefer the small businesses online shopping experience.

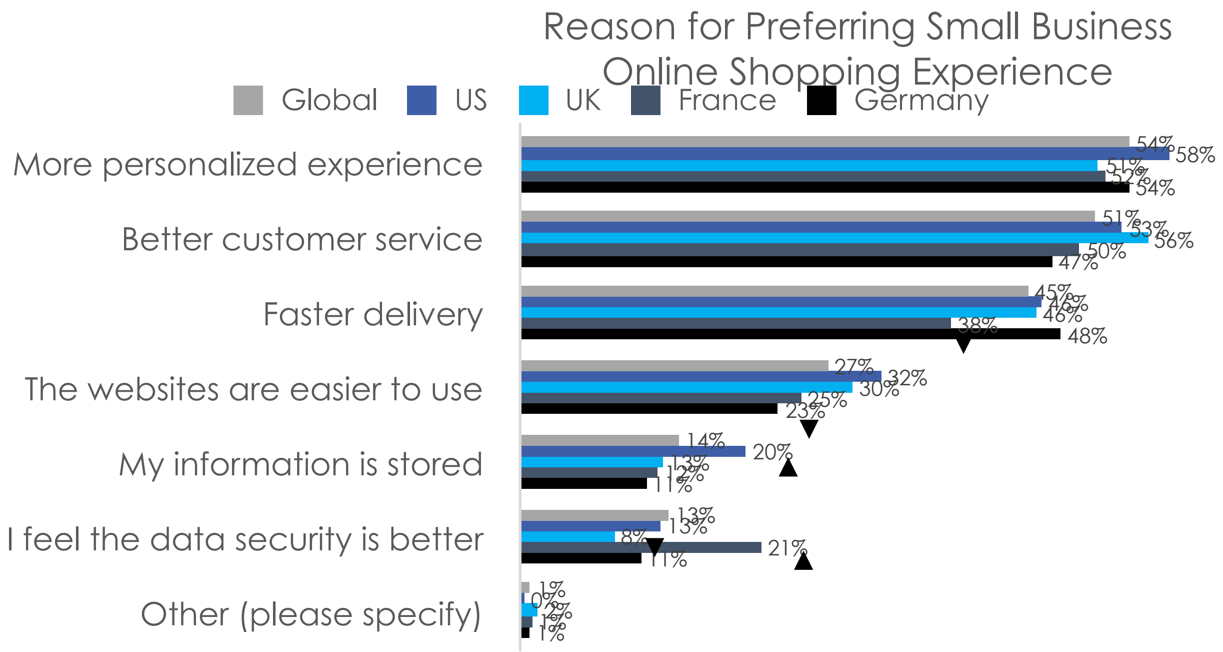


Q7: Do you prefer the online shopping experience more through small businesses or large businesses:

…Driven by the more personalized experience and better customer service.

- Among those who prefer the large business online shopping experience, selection and ease of use on the website are the top drivers for that preference. Gen Z and Millennials are more likely than other age groups to say they prefer large because the websites are faster (43%, 47% respectively), indicating a key area of website UX design for small businesses to focus on in the future.
- On the other hand, preference for the small business online experience is driven by personalized service, better customer service, and faster delivery.
  - Baby Boomers are especially swayed by better customer service (65%). Females are more likely to be driven by personalization (56%).





Q8: For which of the following reasons do you prefer large businesses' online shopping experience? Please select all that apply. [N=816]
Q10: For which of the following reasons do you prefer small businesses' online shopping experience? Please select all that apply. [N=1888]

Free shipping, wider selection and easy checkout could make the small business shopping experience even better.

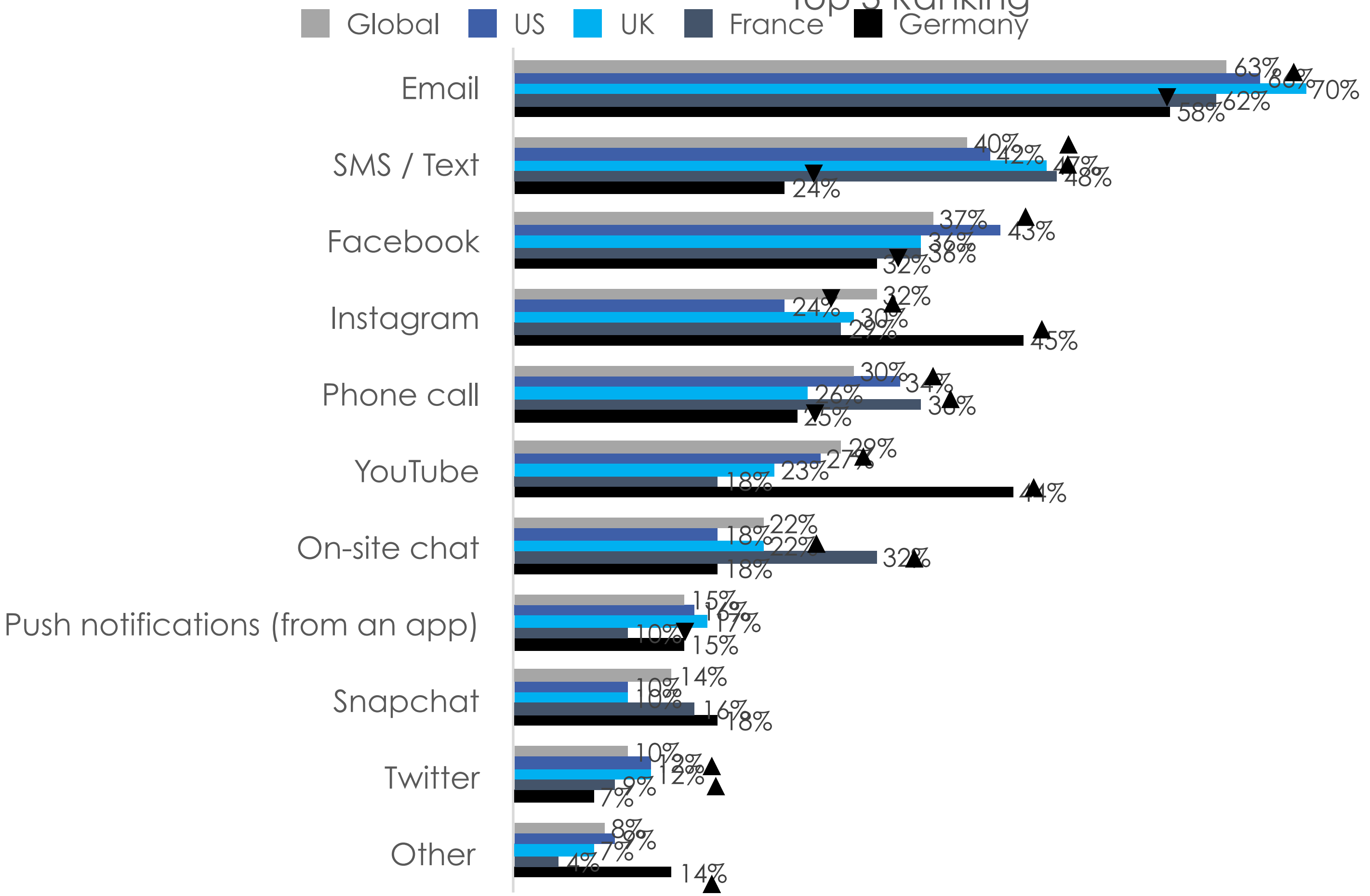
- Free shipping is the top feature consumers say would help improve the small business online shopping experience, followed by wider selection and easy-to-use checkout.
- More payment options (37%) and customer support chat feature (33%) are significantly more important to Gen Z consumers compared to older consumers.

Q9: What features would help improve the online shopping experience on small business websites? Please select all that apply. [N=816]

Email is the way consumers want to hear from small businesses...

- Email is the method consumers prefer when it comes to small business communications – with 30% ranking it at their top method, higher than every other method tested (Facebook comes in a distant second at 13% for #1 rankings). Two-thirds of consumers put it as one of their top 3 methods (62%).
  - Older consumers (Gen X and older) heavily favor email at levels statistically significantly higher than younger consumers.
  - Only for Gen Z does the overall preference shift – with Instagram(23% #1 rank, 59% top 3 rank) beating out email (16% #1 rank, 42% top 3 rank).
  - In Germany, preference for Instagram is significantly higher than other countries and email is significantly lower, putting them Instagram in a close second. YouTube is also significantly more preferred in Germany, making it a top tier method there.

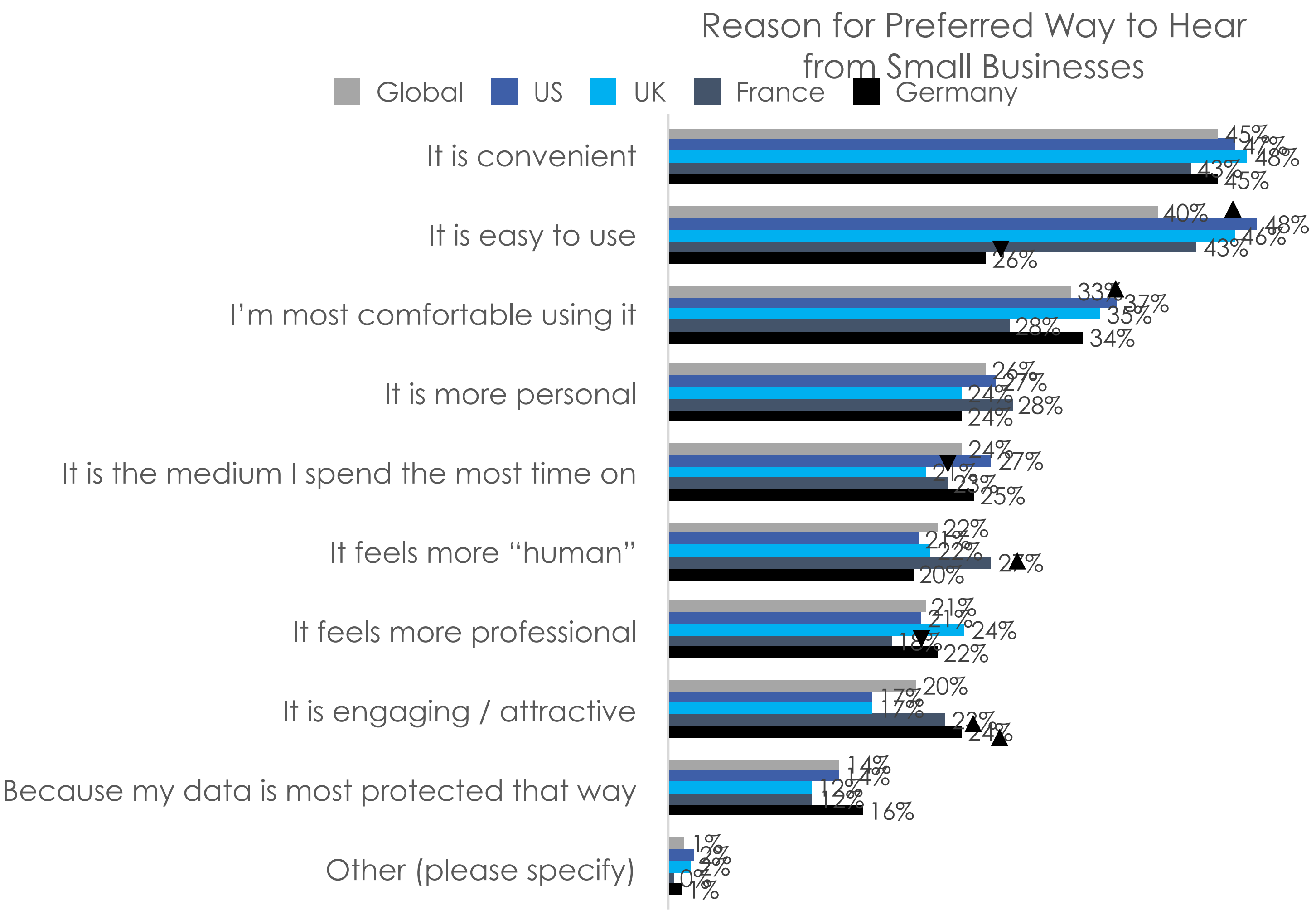
Preferred Way to Hear from Small Businesses – Top 3 Ranking



Q13: What are your preferred ways to hear from small businesses? Please select the top 3, with 1 being the most preferred way to connect with businesses.

…With preferred method being driven by convenience and ease of use.

- Consumers choose their preferred method because of convenience and ease of use. One-in-three also select a method because they are most comfortable with it.
- Ease of use is especially important in the US and less important in Germany.
- Gen Z consumers place relatively more weight on being engaging / attractive (28%) and feeling professional (25%) – although convenience remains their top driver (40%).



Q14: Why is [INSERT #1 FROM Q12] your preferred way to hear from small businesses? Please select all that apply.

Gen Z and Millennials want to receive content once a week or more.

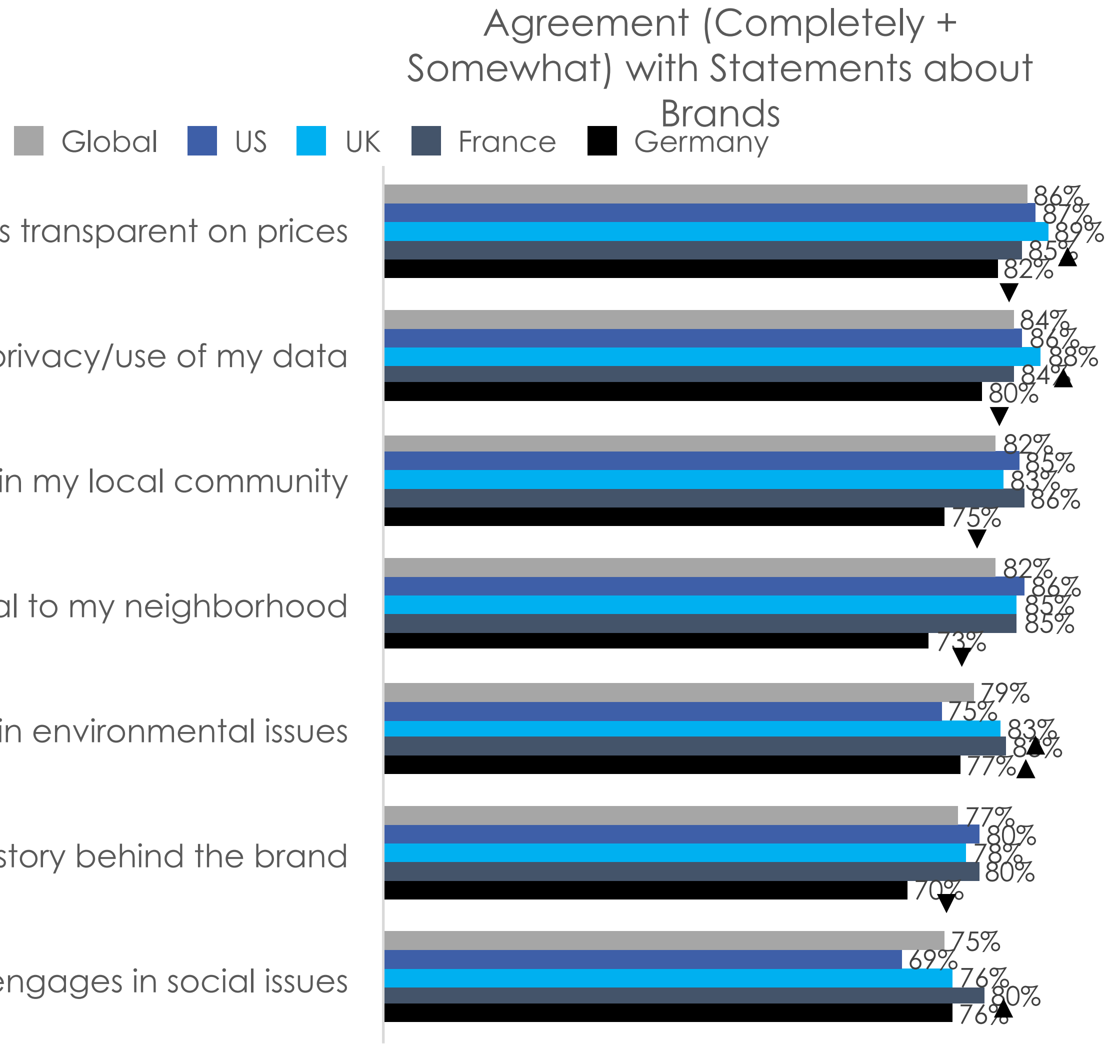
- Approximately a quarter of consumers would like to receive humorous and/or entertainment content daily. However, a deal or promotion may be the most appealing, with 50% wanting to receive this content once a week or more.
- Gen Z and Millennials are significantly more likely to want to receive every type of content frequently (once a week or more) than their older counterparts. Gen Z especially wants entertaining (57% once a week or more) and humorous (56%) content, while Millennials prefer to get deals (55%), personalized content (51%), and entertaining content (51%).
- Those in the US and Germany are significantly more likely to want daily communication on various types of content.*

Preferred Frequency of Receiving Information Type	Daily	Once a week	A few times a month	Once a month	A few times a year	Never
Humorous content	22%	21%	19%	11%	9%	19%
Entertaining content	22%	22%	20%	13%	9%	15%
Deal or promotion	20%	30%	23%	13%	7%	7%
Personalized content	20%	26%	22%	14%	8%	11%
Informational/advice	17%	25%	22%	15%	10%	11%
Values-based content	15%	24%	22%	14%	9%	15%

Q15: Thinking of your preferred way to hear from small businesses, [INSERT #1 FROM Q12], how often do you want to receive the following types of information?
*Country-level breakdown found in the appendix.

Transparency from businesses on prices and data privacy is vital…

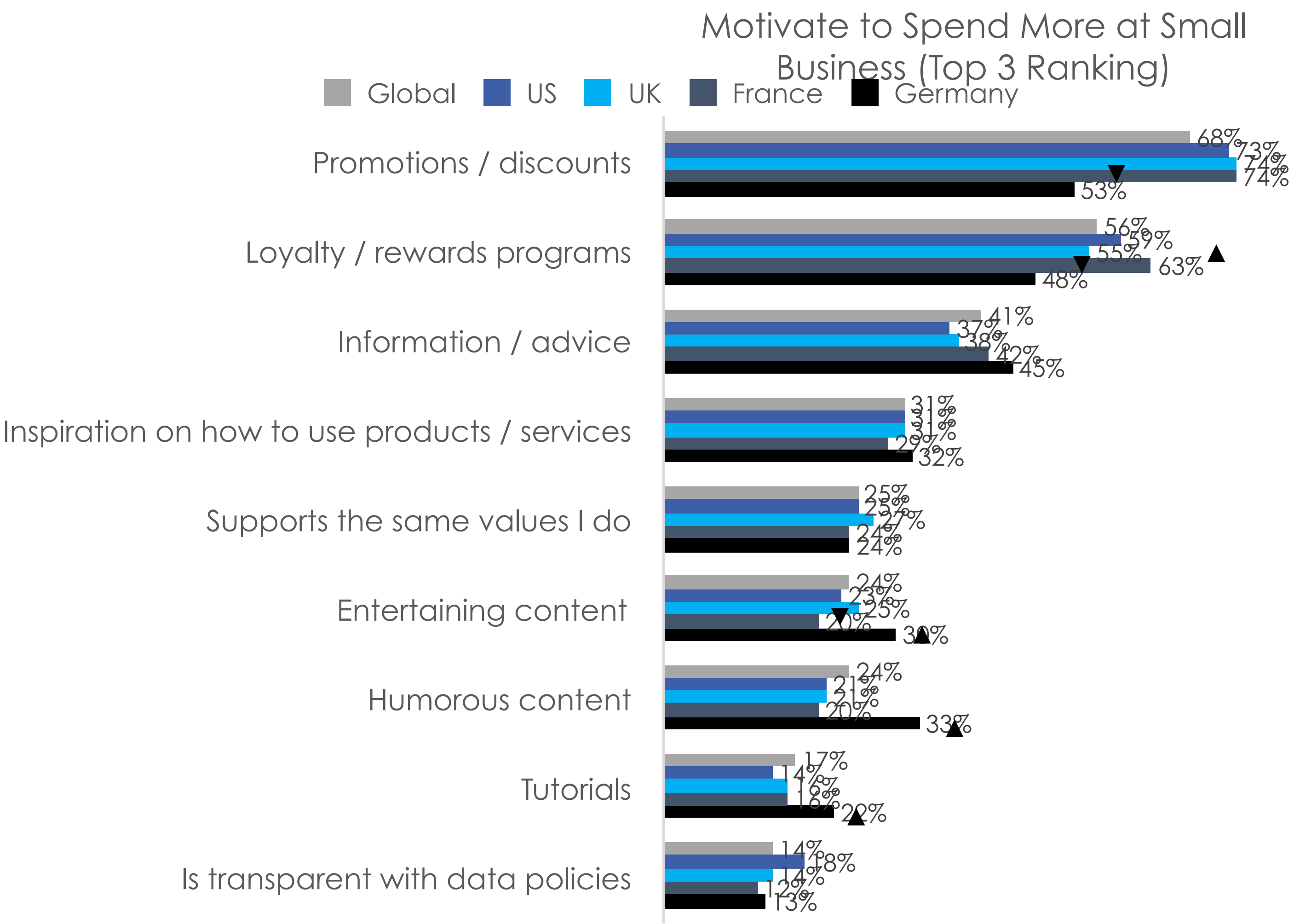
- The majority of consumers agree with all statements tested, with highest level of agreement being a preference in connecting with small businesses that are transparent on prices.
- Overall, these preferences around brands are significantly less important among German consumers.
- Several areas (price transparency, data privacy, environmental issues, and social issues) are more important among UK consumers.
- Interestingly, Gen Z consumers are less likely to agree with nearly all statements than their older counterparts – the exception being that they are equally likely to agree they prefer to connect with a small business that engages in social issues.



Q16: How much do you agree or disagree with the following statements about brands?

…But promotions and rewards motivate consumers to spend.

- By far, promotions / discounts and loyalty / rewards programs are the most motivating for consumers to spend money at small businesses.
  - Baby Boomers are especially motivating by promotions / discounts (80% select this as a top 3 ranking).
  - Females are relatively more motivated by promotions / discounts (70% select this as a top 3 ranking) and loyalty rewards (59%) compared to Males.
- These are relatively less motivational for German consumers. While discounts and rewards are still the top motivators among the German consumers, entertaining content, humorous content and tutorials are significantly more motivating to the German consumer compared to other countries.
- Gen Z and Millennial consumers are significantly more likely than older consumers to say entertaining content, humorous content and tutorials are motivating as well.

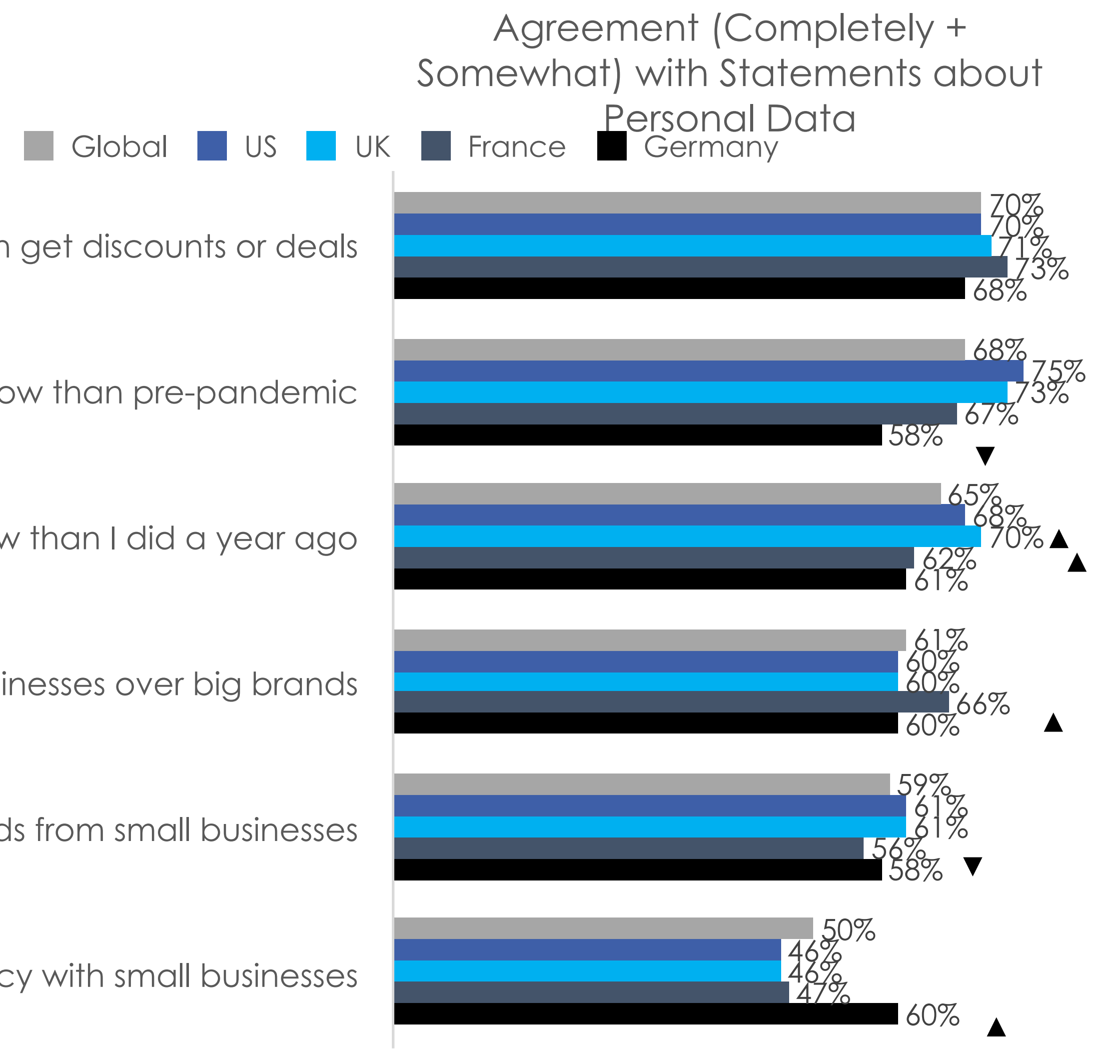


Q17: Which of the following would motivate you the most to spend more money at a small business? Please select the top 3 ways from below a small business could motivate you to purchase, with 1 being the most motivating.

Data Privacy Perceptions

Most consumers will exchange data for discounts…

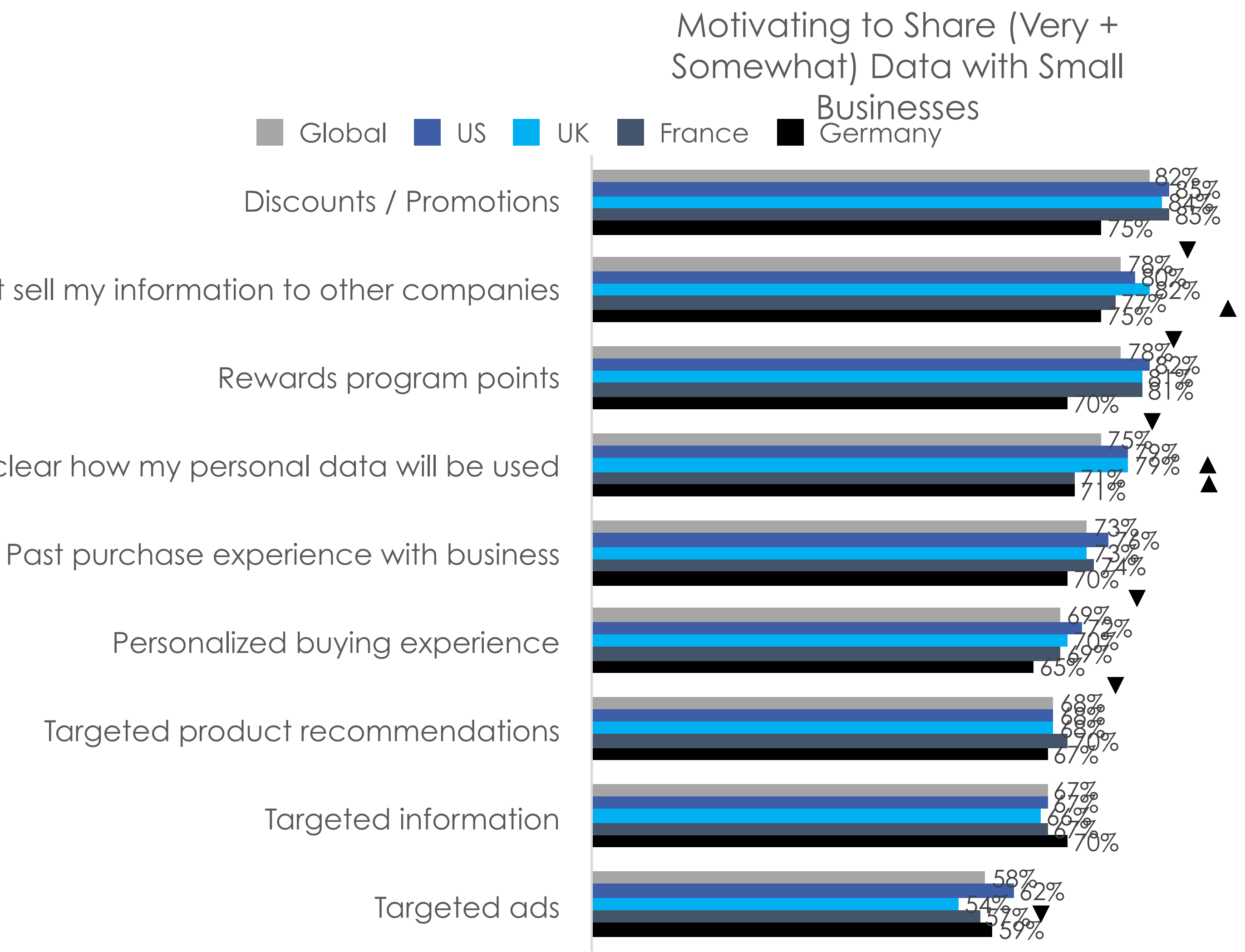
- Seven-in-ten consumers agree that they are willing to share data with small businesses in exchange for discounts.
- However, online privacy concerns are on the rise – 68% of consumers are more concerned with online privacy now than pre-pandemic and 65% trust third-party applications less now than they did a year ago.
  - Those in the UK and US are more likely to say they are more concerned / trust less.
- German consumers significantly less concerned, with 60% agreeing they are not at all concerned with online privacy with small businesses.
  - Younger consumers are also less concerned, with 60% of Gen Z and 56% of Millennials agreeing they are not at all concerned.
- French consumers are especially likely to prefer to share personal data with small business over large.
- Gen Z and Millennials are more likely to agree with they are willing to exchange data for personalized ads (62%, 64% agree, respectively).



Q18: How much do you agree or disagree with each of the following statements?

…And are also motivated by clarity on how that information will or will not be used.

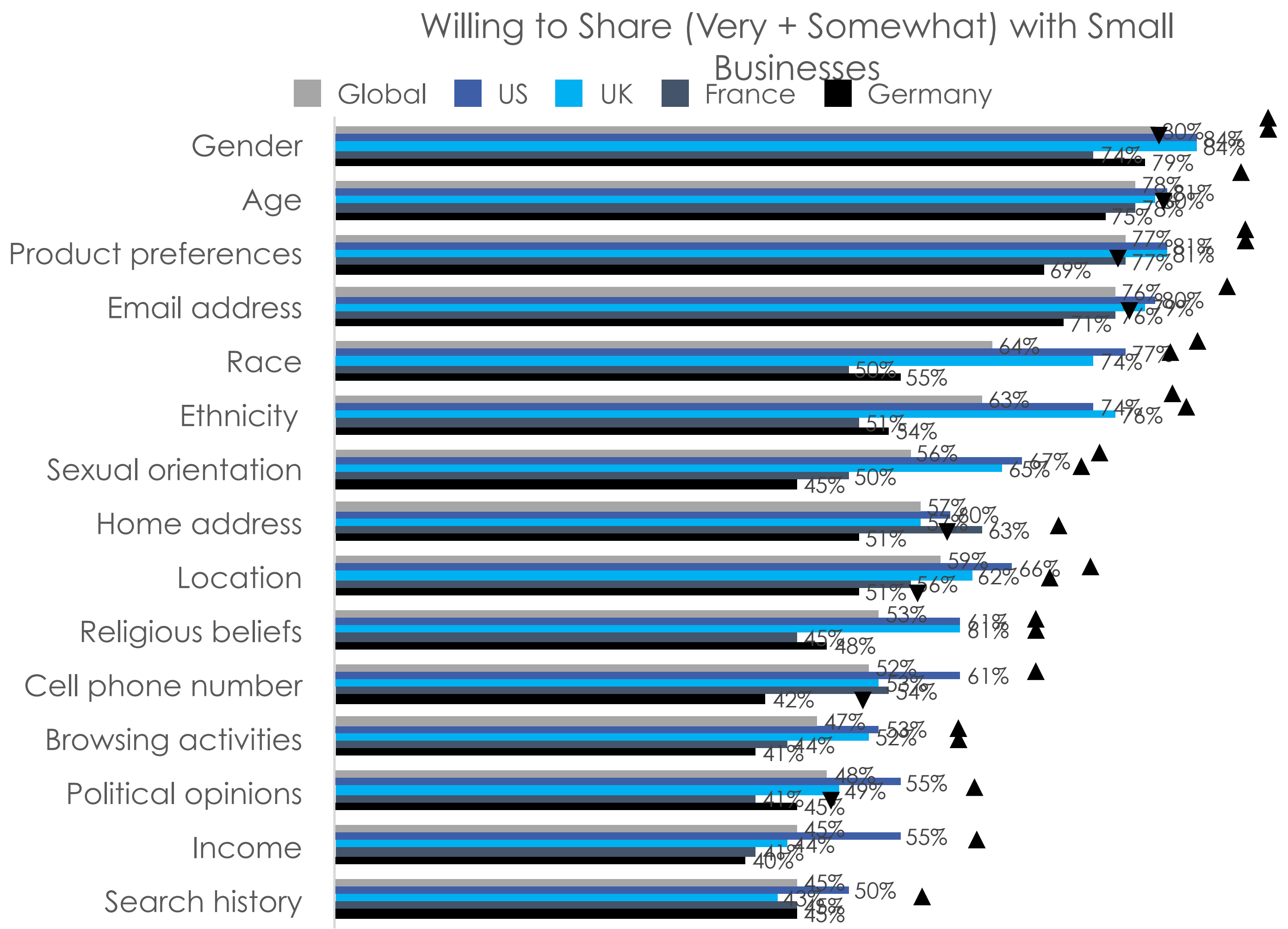
- Discounts / promotions and rewards programs points continue to be motivating to consumers in sharing personal data (82% and 78% of consumers find these motivating).
- However, how that information is being used is motivational. 78% find a guarantee their information will not be sold to other companies to be motivating to share data. Moreover, 75% say if it is made clear how their data will be used, they will be motivated to share data.
  - How data will be used is particularly important in the US and UK, as expected given their heightened concerns with with online data privacy since the pandemic began.
- Millennials appear to be highly motivated with these trade-offs – they are significantly more likely to find each to be motivating compared to other age groups.



Q20: Which of the following would motivate you to share some personal data with small business owners? Please select how motivating each of the following would be for you.

Most are willing to share gender, age, product preferences and email address.

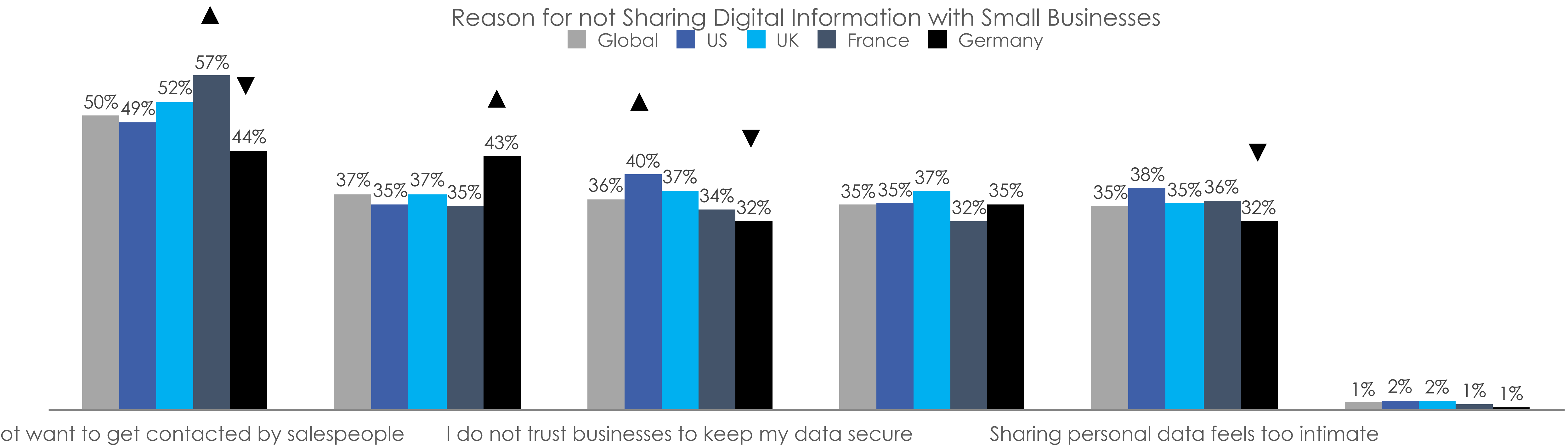
- Interestingly, although the US and UK have heightened data privacy concerns, they are more willing to share nearly every piece of information compared to consumers in France and the UK.
- Gen Z and Millennial consumers are also more willing to share, including sexual orientation (60%, 61%, willing respectively, cell phone number (58%, 57%, respectively), political opinions (51%, 54%, respectively), and income (50% willing for both age groups).
- Males are more willing to share more pieces of information as well.
- Those who prefer the small business online shopping experience are more willing to share most pieces of information as well, indicating that small businesses may have more success getting consumer data.



Q19: How willing or unwilling are you to share the following information with small businesses?

Consumers do not want to be contacted by salespeople upon sharing digital information…

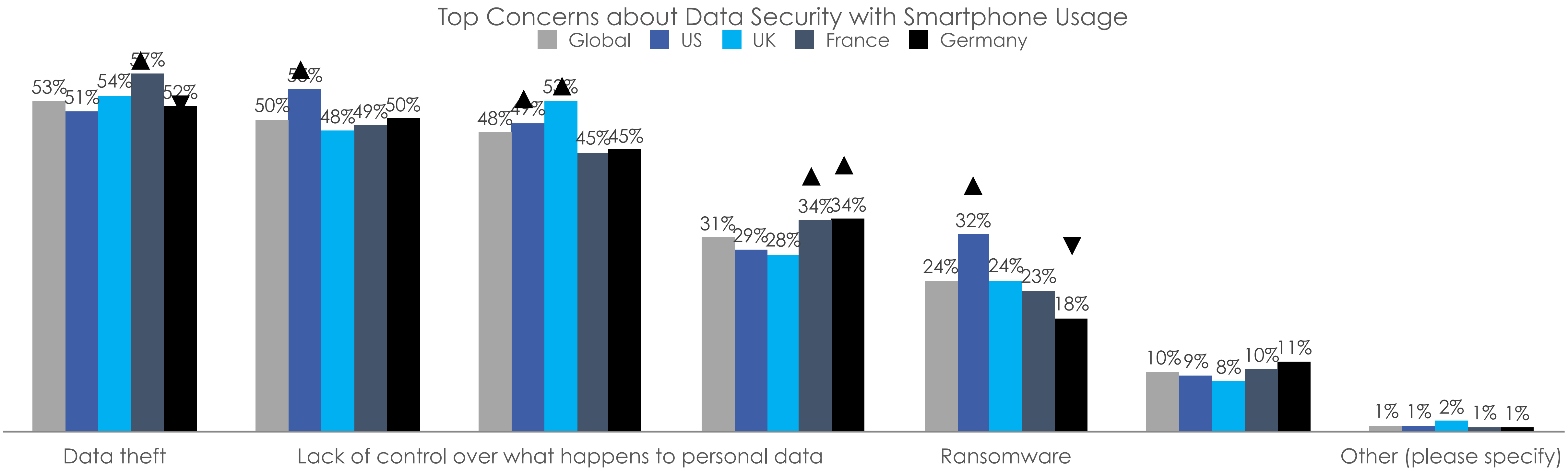
- The top reason for not sharing information with small businesses is not wanting to be contacted by salespeople. In France, they are particularly likely to be deterred.
- In Germany, consumers are more likely to say they do not understand how their data is being used.
- Females are more likely to say sharing personal data feels too intimate – this is the top reason females give for not sharing (52%).



Q21: If you don't share digital information with small businesses, what prevents you from doing so? Please select all that apply.

…And fear data theft and unauthorized access to personal data.

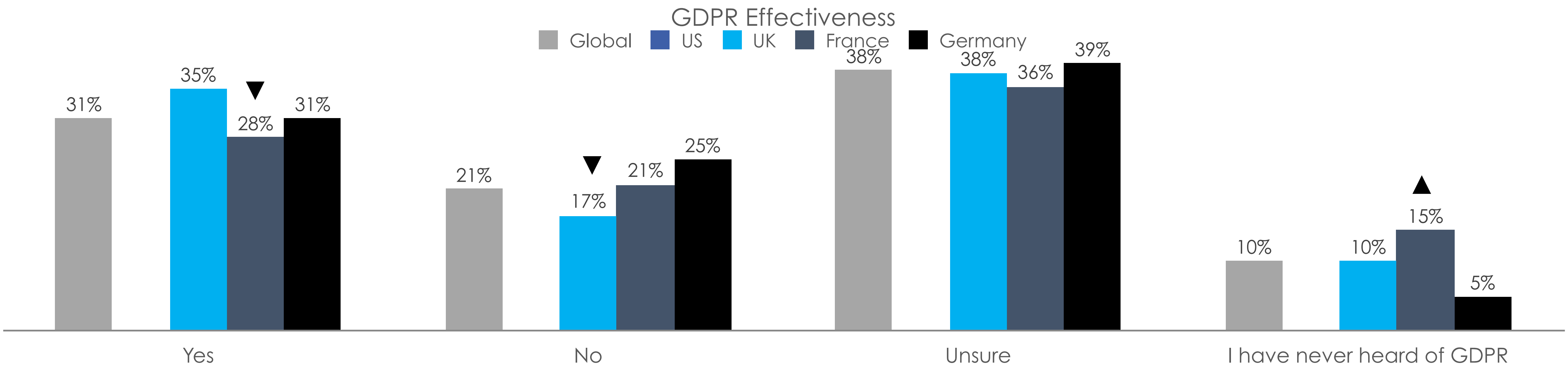
- The top concerns with smartphone usage are data theft and unauthorized access to personal data. French consumers are particularly concerned about the former, while US consumers are particularly concerned with the latter. UK consumers are especially concerned about lack of control over what happens with their data.
- Older consumers are more concerned, with Baby Boomers being significantly more likely to worry about all areas except eaves dropping.



Q22: What are your biggest concerns about data security when you use your smartphone? Please select all that apply.

European consumers have mixed feelings about GDPR effectiveness.

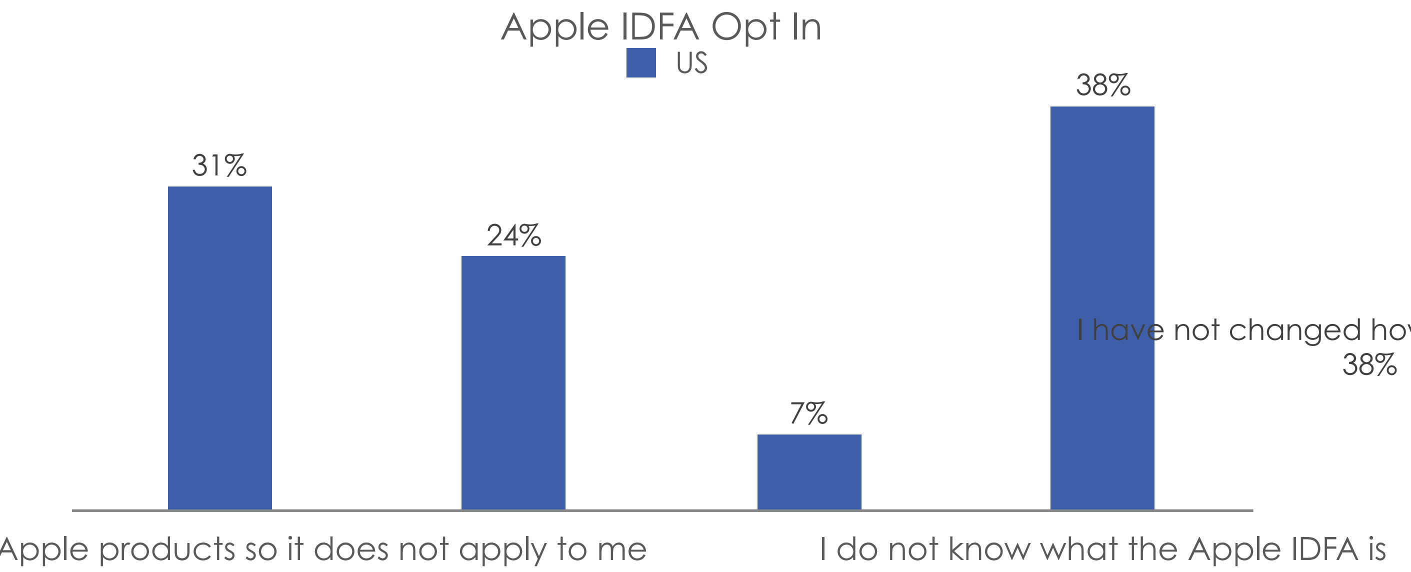
- Consumer perceptions of GDPR vary widely with no clear majority: 32% say it is effective, 21% say it is ineffective, 37% are unsure and 10% have never heard of it.
- Higher income consumers (40%), Gen Z (39%), Millennials (38%), and Males (35%) and are most likely to find it effective.
- French consumers are most likely to say they have never heard of the GDPR.

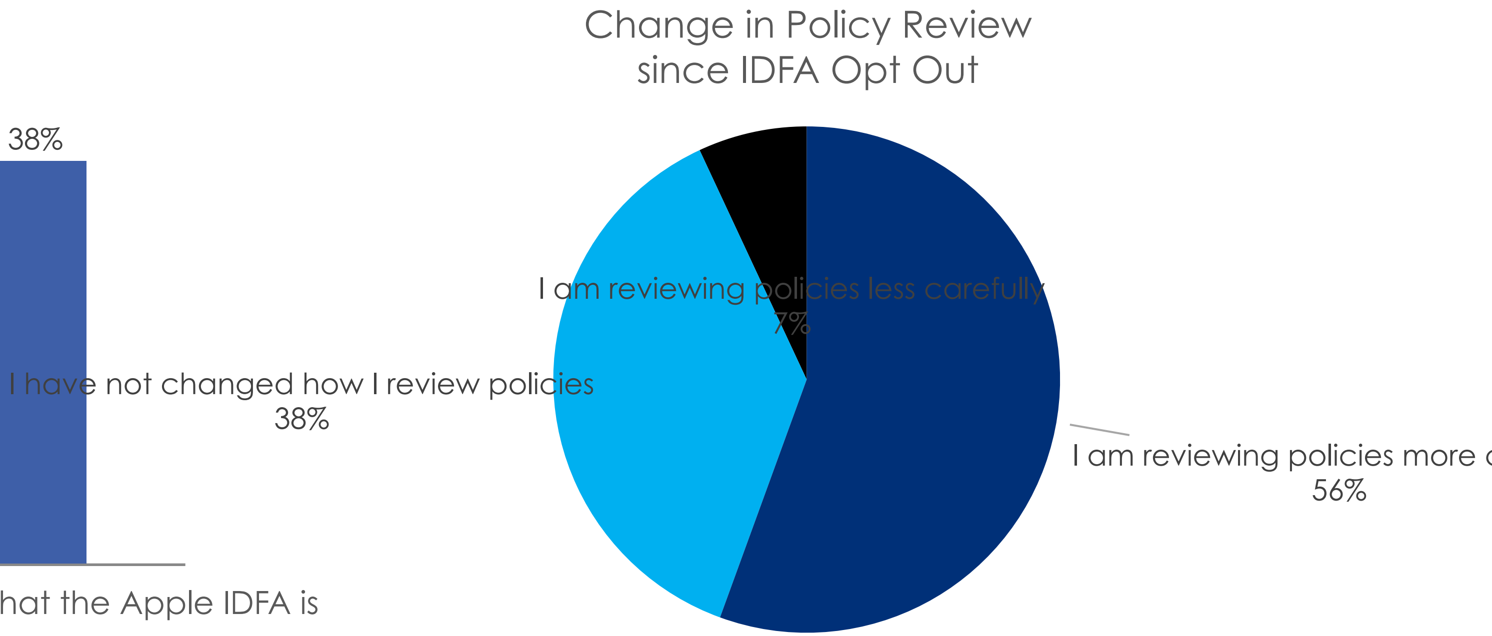


Q23: This year marks the third anniversary of the EU's General Data Protection Regulation (GDPR). Do you think the GDPR is effective in protecting data? [N=3000]

One-third of US consumers are unaware of the Apple IDFA.

- US consumers are mixed about the Apple IDFA, with the largest proportion (38%) not knowing what it is.
  - Baby Boomers and the Silent Generation have significantly lower awareness (63%, 79%, respectively).
- Of the minority who opted out, about half are reviewing policies more carefully.





Q24: Have you opted into the Apple IDFA (Identifier for Advertisers)?
Q25: Since opting out of the Apple IDFA, have you changed how carefully you are reviewing data privacy policies when you shop online? Please select which statement best applies. [N=72]

Appendix

Demographics / Screeners

Gender					
	Global	**US**	**UK**	**FR**	**DE**
Male	48%	47%	49%	48%	50%
Female	51%	52%	51%	51%	49%
Non-binary / Prefer not to answer	1%	1%	1%	0%	1%

Gender					
	Global	**US**	**UK**	**FR**	**DE**
18-24 (Gen Z)	23%	13%	22%	20%	34%
25-40 (Millennials)	35%	37%	37%	36%	29%
41-56 (Gen X)	24%	21%	26%	30%	20%
57 – 75 (Baby Boomers)	17%	26%	13%	13%	17%
76+ (Silent Generation)	1%	3%	1%	0%	1%

Demographics / Screeners

Categories Purchased Online					
	Global	**US**	**UK**	**FR**	**DE**
Automotive	13%	18%	13%	13%	10%
Electronics	43%	37%	45%	36%	53%
Baby products	15%	17%	18%	9%	16%
Books	38%	32%	41%	40%	38%
Cosmetics & Personal care	39%	38%	44%	39%	35%
Health & Wellness	30%	32%	28%	33%	28%
Entertainment	27%	24%	35%	30%	21%
Apparel / Clothing	71%	69%	74%	65%	75%
Grocery / Food	46%	51%	61%	35%	37%
Pet Supplies	29%	32%	33%	34%	21%
Sports & Outdoors	19%	15%	21%	15%	25%
Athletic / Sports Coaching	15%	23%	24%	8%	5%
Tools & Home Improvement	21%	21%	24%	24%	16%
Toys & Games	32%	25%	32%	41%	29%
Finance	12%	12%	15%	11%	11%
Travel	18%	16%	20%	20%	18%
Education	11%	12%	15%	8%	10%

US and UK consumers report the most increases in online purchases.

- US and UK consumers are significantly more likely to say they increased online purchases across various categories.
- German consumers are more likely to report a decrease in online purchases for almost every category.

Pandemic Impact on Online Purchases by Category	I purchase online more frequently				I purchase online in the same frequency				I purchase online less frequently				I do not make purchases in this category			
	US	UK	FR	DE	US	UK	FR	DE	US	UK	FR	DE	US	UK	FR	DE
Apparel / Clothing	37%	41%	34%	44%	43%	42%	43%	36%	12%	11%	15%	15%	8%	6%	8%	6%
Cosmetics / Personal care	29%	31%	20%	22%	40%	41%	41%	36%	12%	13%	19%	23%	20%	14%	20%	19%
Entertainment	26%	30%	22%	26%	38%	39%	37%	37%	13%	13%	14%	18%	23%	18%	27%	20%
Restaurants	30%	23%	17%	18%	35%	30%	27%	26%	16%	17%	18%	25%	20%	29%	38%	31%
Health & Wellness	26%	24%	19%	18%	42%	41%	43%	35%	12%	10%	15%	24%	20%	25%	24%	23%
Education / education tools	18%	17%	13%	15%	26%	30%	25%	28%	13%	13%	11%	19%	43%	40%	51%	39%
Cultural events	17%	11%	15%	12%	25%	27%	31%	24%	14%	17%	17%	24%	44%	46%	37%	40%
Real estate browsing / visits	17%	11%	13%	12%	24%	24%	23%	22%	11%	12%	14%	16%	49%	54%	54%	52%
Life coaching	15%	9%	10%	10%	21%	19%	18%	18%	10%	10%	9%	15%	54%	63%	64%	57%

Q11: How has the pandemic impacted your shopping in each of the following categories online compared to pre-pandemic?
Black boxes indicate statistically significant difference between country and at least two other countries.

US consumers increased digital tool usage in the pandemic.

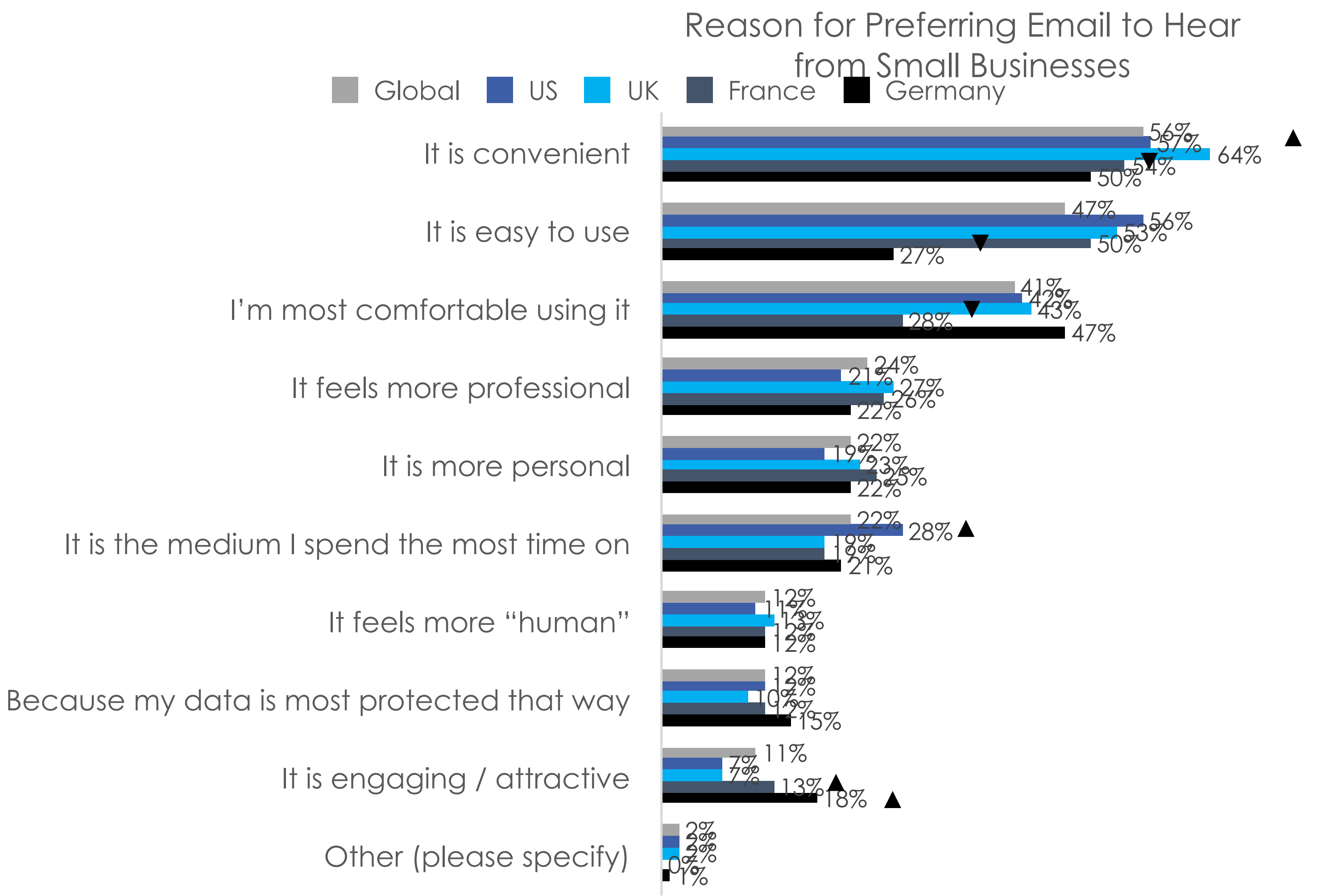
- US consumers are significantly more likely to report an increase in usage for most digital tools tested.
- French consumers are most likely to have never used most digital tools tested, with usage of live chat on small business websites especially low.

Pandemic Impact on Digital Tool Usage	I use this more frequently				I use this in the same frequency				I use this less frequently				I have never used this			
	US	UK	FR	DE	US	UK	FR	DE	US	UK	FR	DE	US	UK	FR	DE
Opening update emails	32%	29%	23%	25%	41%	48%	43%	46%	10%	9%	10%	14%	17%	13%	24%	15%
QR code scan	23%	28%	25%	27%	30%	32%	33%	33%	11%	11%	11%	18%	36%	30%	32%	23%
SMS notifications	25%	26%	25%	21%	39%	44%	47%	37%	10%	11%	10%	21%	26%	19%	18%	21%
App push notifications	24%	22%	14%	21%	35%	41%	38%	38%	12%	12%	12%	17%	29%	26%	37%	24%
Website push notifications	22%	17%	14%	16%	36%	42%	36%	36%	11%	12%	12%	19%	31%	30%	38%	29%
Live chat on small business websites	20%	19%	15%	15%	30%	37%	33%	28%	11%	11%	11%	17%	39%	34%	42%	40%

Q12: How has the pandemic impacted your use of the following digital tools with small businesses?
Black boxes indicate statistically significant difference between country and at least two other countries.

Convenience drives preference for email communications.

- More than half of consumers who prefer email choose this method because it is convenient. Many also feel it is easy to use.
- Among Germany consumers, being comfortable using it is a top driver.
- Of those Gen Z and Millennial consumers who prefer email, they are more likely than older consumers to feel it is more professional (42%, 28%, respectively).



Q14: Why is [INSERT #1 FROM Q12] your preferred way to hear from small businesses? Please select all that apply. [N=1300]

US and German consumers are most open to daily communications.

- Across content types, US and German consumers are more likely to say they would want to receive that information daily from small businesses.
- The sweet spot for UK consumers appears to be a few times a month.
- French consumers are most likely to say they never want to receive most types of communication.

	Daily				Once a week				A few times a month				Once a month				A few times a year				Never			
	US	UK	FR	DE	US	UK	FR	DE	US	UK	FR	DE	US	UK	FR	DE	US	UK	FR	DE	US	UK	FR	DE
Humorous content	24%	17%	18%	27%	19%	23%	19%	21%	19%	22%	17%	18%	10%	12%	12%	11%	9%	8%	9%	9%	18%	19%	26%	15%
Entertaining content	23%	17%	18%	27%	21%	23%	21%	23%	18%	24%	18%	18%	12%	13%	14%	12%	10%	8%	10%	8%	15%	15%	19%	12%
Deal or promotion	23%	19%	17%	19%	31%	30%	28%	30%	22%	26%	22%	21%	12%	13%	13%	14%	6%	8%	9%	7%	7%	4%	10%	8%
Informational/advice	24%	15%	17%	19%	24%	27%	25%	25%	21%	25%	20%	21%	16%	15%	16%	15%	8%	11%	12%	9%	11%	7%	13%	11%
Values-based content	20%	13%	13%	16%	25%	25%	21%	25%	21%	26%	19%	21%	13%	15%	16%	13%	8%	9%	11%	9%	12%	12%	20%	16%
Personalized content	24%	15%	17%	22%	24%	27%	25%	26%	20%	26%	20%	21%	13%	14%	16%	13%	8%	8%	10%	7%	11%	10%	14%	11%

Q15: Thinking of your preferred way to hear from small businesses, [INSERT #1 FROM Q12], how often do you want to receive the following types of information?
Black boxes indicate statistically significant difference between country and at least two other countries.