

SSMCP LOCAL BUSINESS SURVEY COMPARISON

2015 Business & Community Survey

- Contracted to Elway Research, Inc.
- DATES: 8/31/15 - 9/16/15
- **Cost: \$59,000 but \$9K for business survey**
- Technique: On-line survey
- Delivery: telephone, letters, and email
- **SAMPLE – 146 businesses and business leaders**
- **Locale - 46% Pierce, 54% Thurston**
- 64% independent owned small businesses
- 64% 1-9 employees, 2% >100+ employees
- **82% do not have JBLM contracts, 6% do**
- 63% operating for > 10 years
- Questions - 20
- **Results – focused on effects of downsizing and deployment impacts on businesses**

2020 Local Business Survey

- Collaboration with UW-T graduate school program
- DATES: 12/1/2019 – 1/31/2020
- **Cost: Free, SSMCP donated \$10K to the UW Foundation for JBLM Economic Impact Analysis**
- Technique: On-line survey
- Delivery: Email, website, chamber's listserve, QR code
- **SAMPLE – 560 respondents, 53% business leaders**
- **Locale - 47% Pierce, 53% Thurston**
- 64% independently owned small businesses
- 41% have 1-9 employees, 20% >100+ employees
- **16% do have contracts with JBLM**
- 71% operating for >10 years
- Questions – split among five tailored categories, 7 to 12 questions per category
- **Results – focused on perceptions in preparation for new JBLM economic impact analysis**

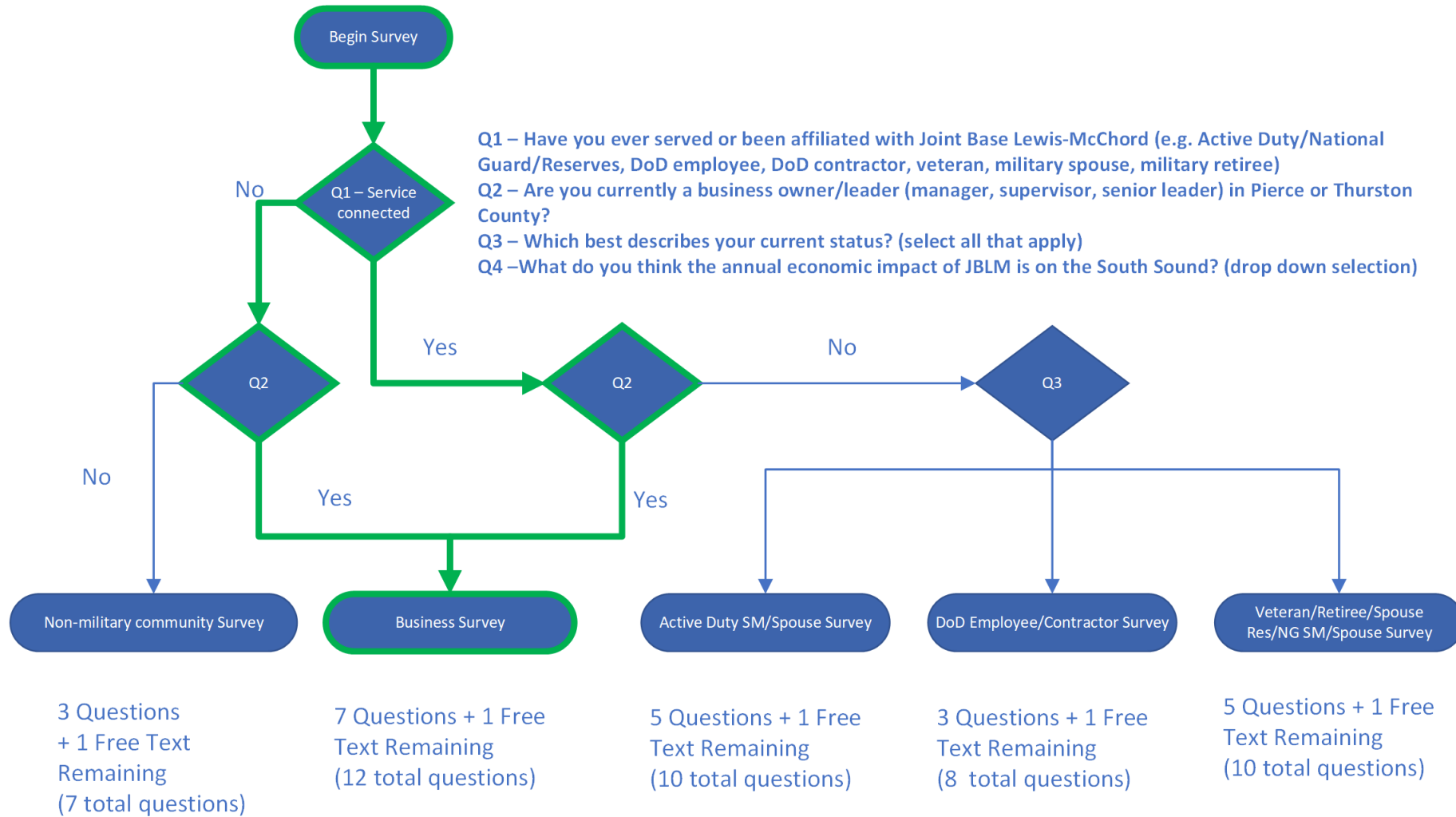
SSMCP Survey Update

25 February 2020



**SOUTH SOUND MILITARY &
COMMUNITIES PARTNERSHIP**

Survey Design

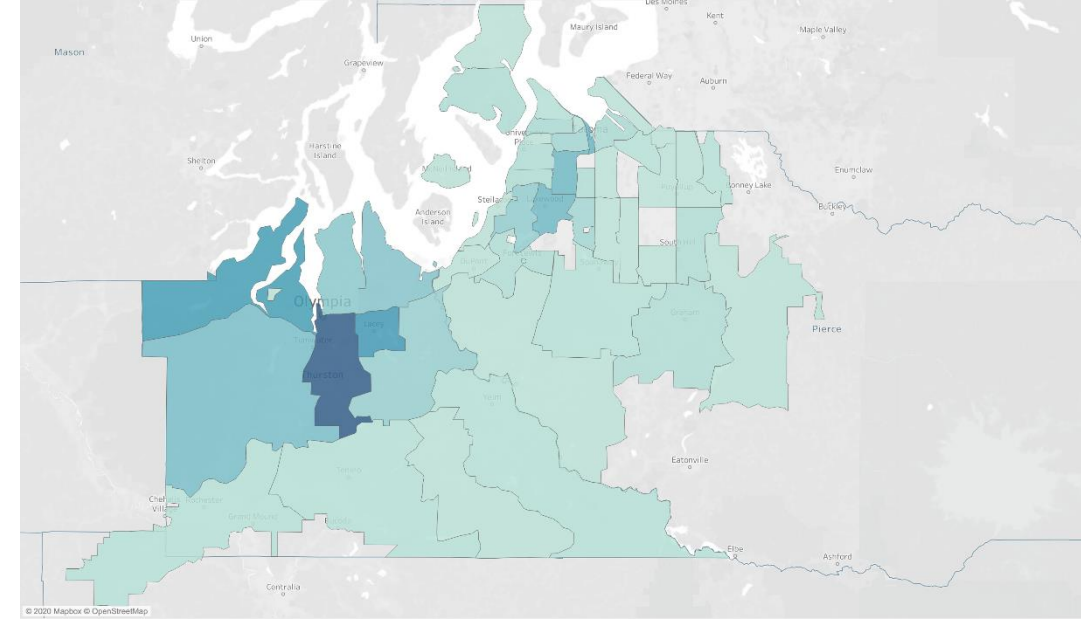


Business Survey Questions

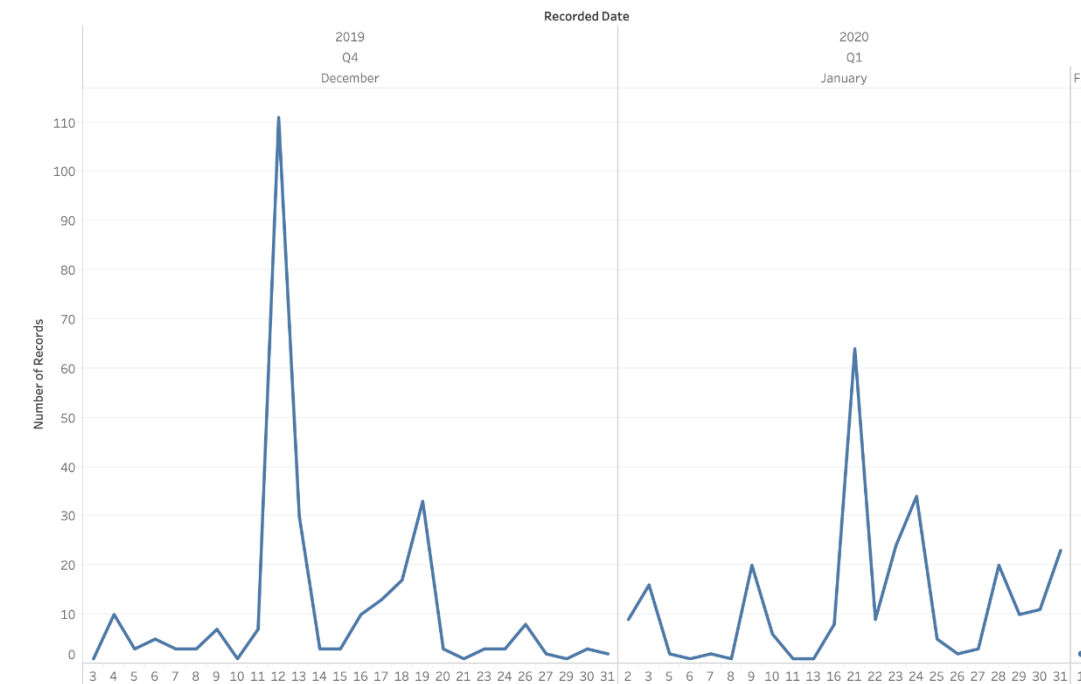
1. Have you ever served at or been affiliated with Joint Base Lewis-McChord (e.g. Active Duty/National Guard/Reserves, DoD employee, DoD contractor, veteran, military spouse, military retiree)?
2. Are you currently a business owner/leader (manager, supervisor, senior leader) in Pierce or Thurston County?
3. This organization/business is
4. What do you think the annual economic impact of JBLM is on the South Sound? (drop down selection)
5. Which of the following industries/sectors best describes this organization/business?
6. How many years has this business operated in Pierce or Thurston County?
7. How many people are employed at this location?
8. What percentage of the employees are veterans of the U.S. armed services?
9. My business currently (select all that apply)
10. Primary Business zipcode
11. What percentage of your business revenue can be attributed to the presence of JBLM?
12. Do you have any additional comments related to JBLM?

Survey Overview

- Survey dates: 12/1/2019– 1/31/2020
- **560** surveys completed
- Reported current/prior affiliation with JBLM/military: **51%**
- Business leader/manager/owner: **56%**
- Business leader & current/prior JBLM affiliation: **34%**
- Business survey respondents by county:
 - Thurston – **53%**
 - Pierce – **47%**



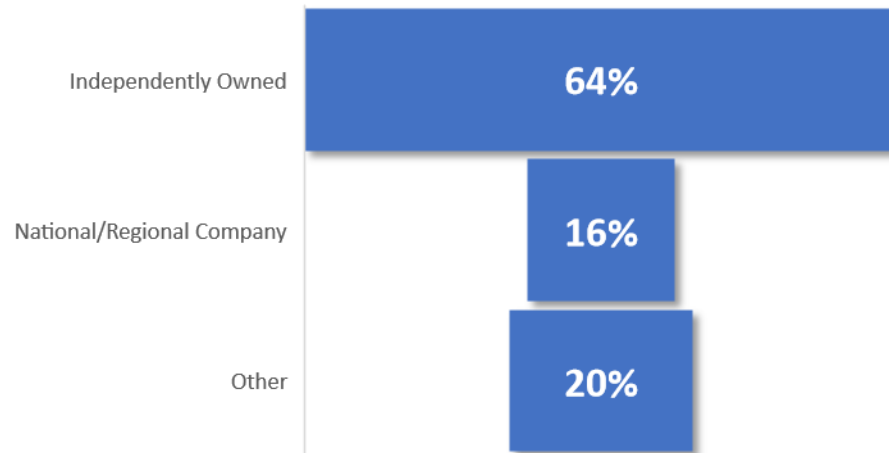
Survey Completion



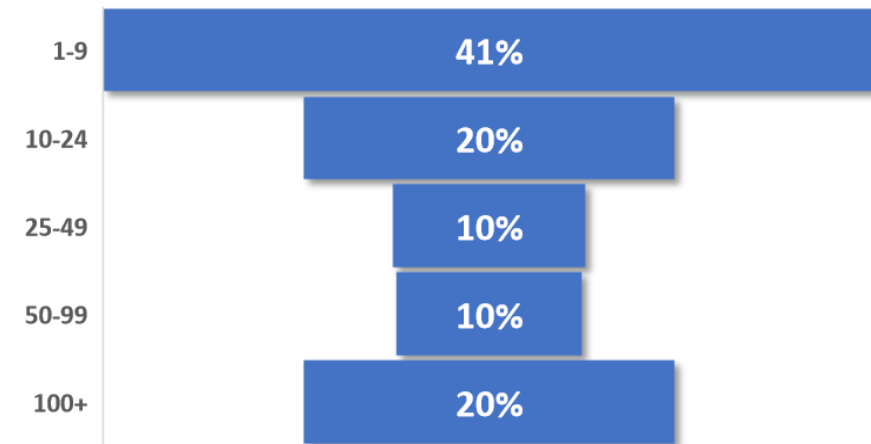
The trend of sum of Number of Records for Recorded Date Day broken down by Recorded Date Year, Recorded Date Quarter and Recorded Date Month.

Business Survey Respondents' Demographics

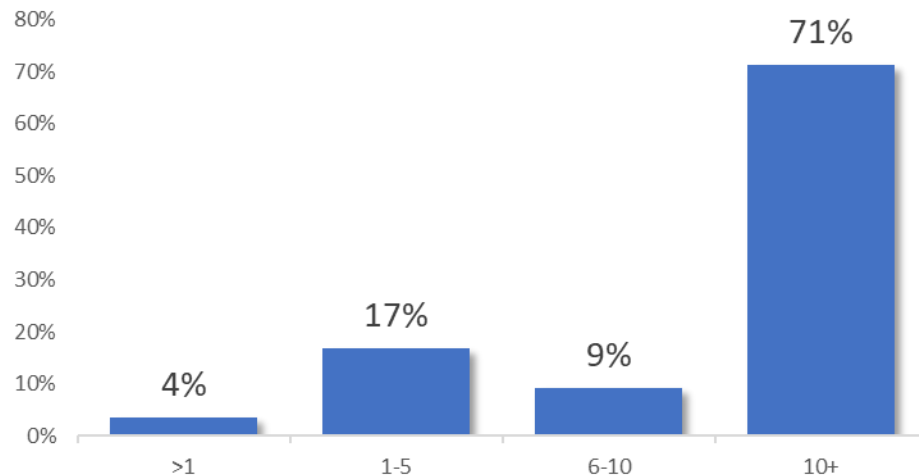
Business Type



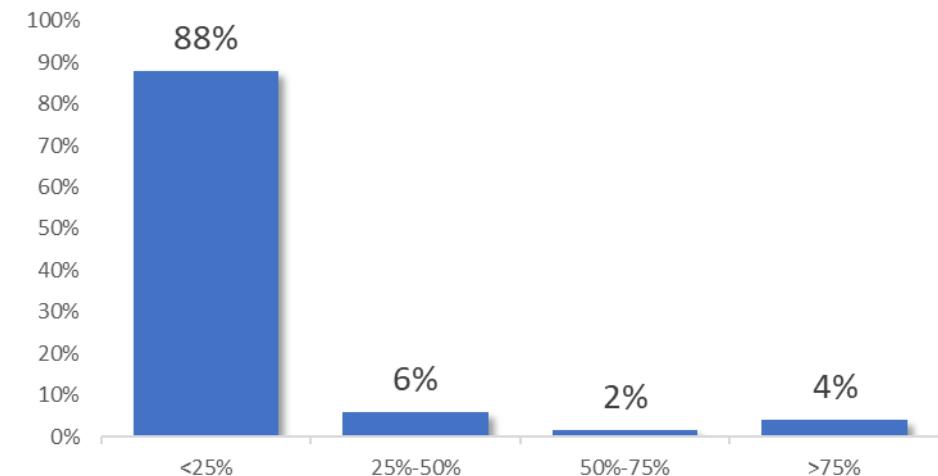
Number of Employees



Years Operating in Pierce/Thurston County

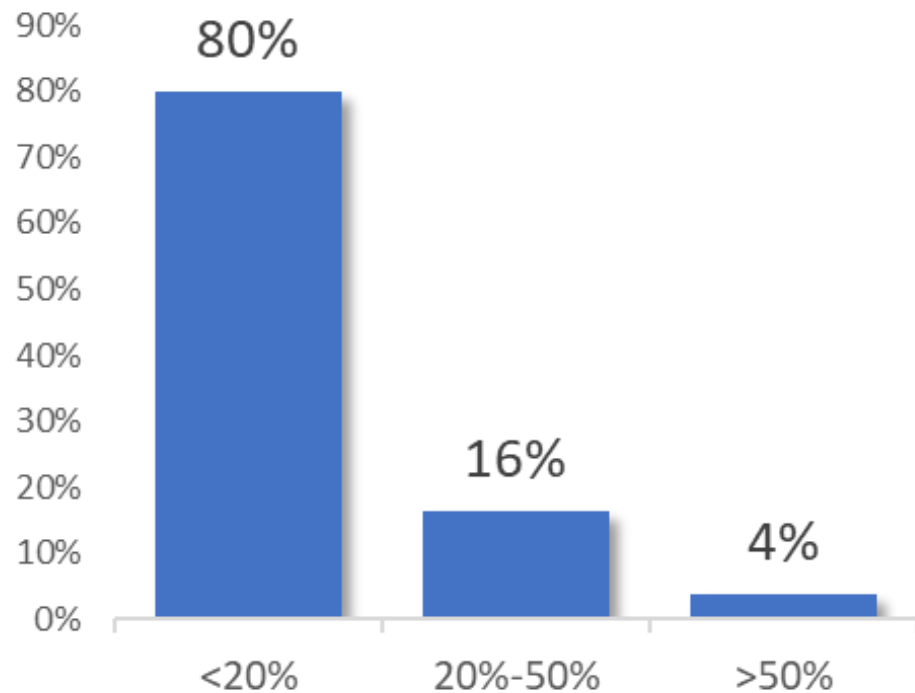


Percentage of Employees Who are Veterans

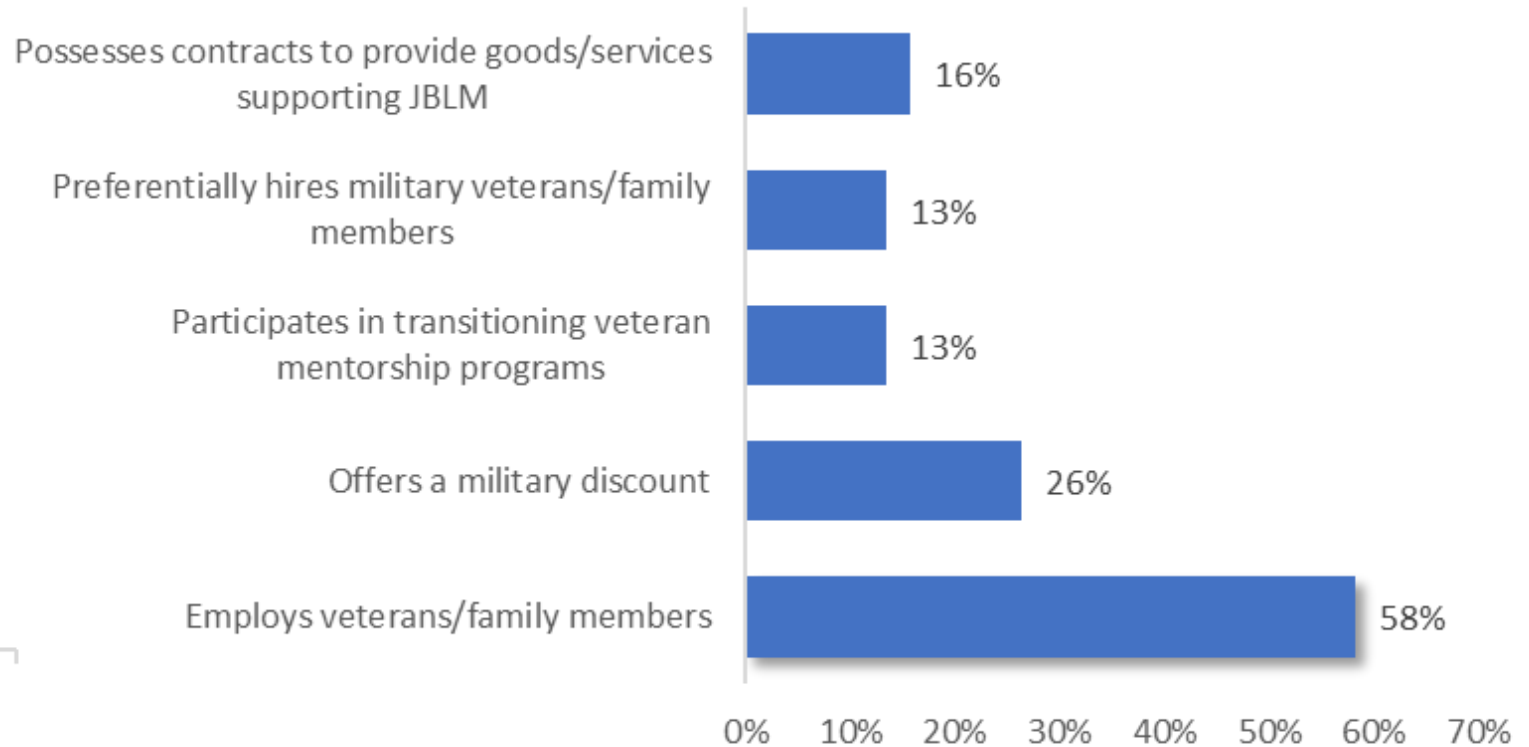


Investment/Engagement with JBLM-affiliated Community Members

Percentage of Business Attributed to the Presence of JBLM

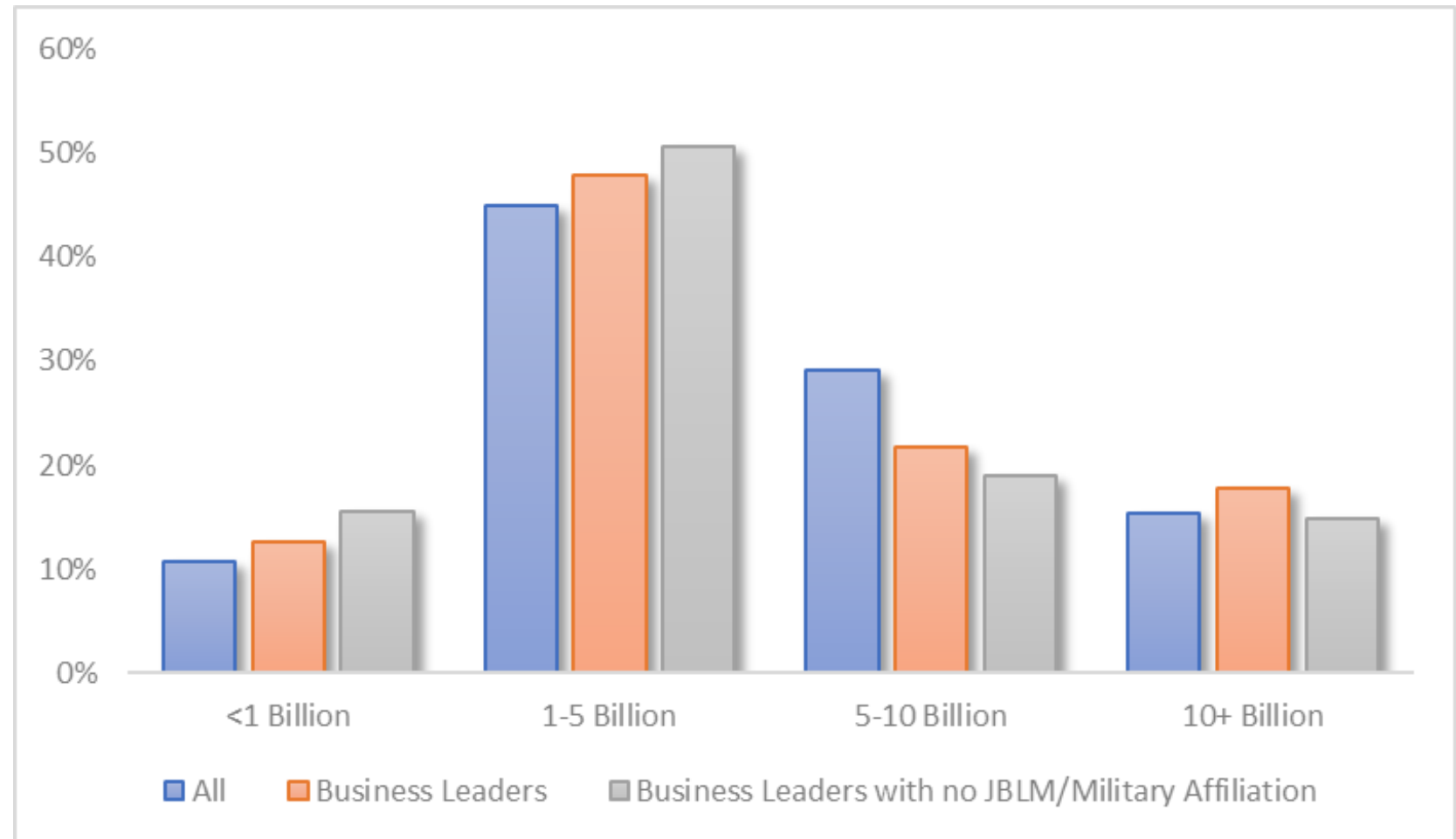


Business Incentives and Activities Offered



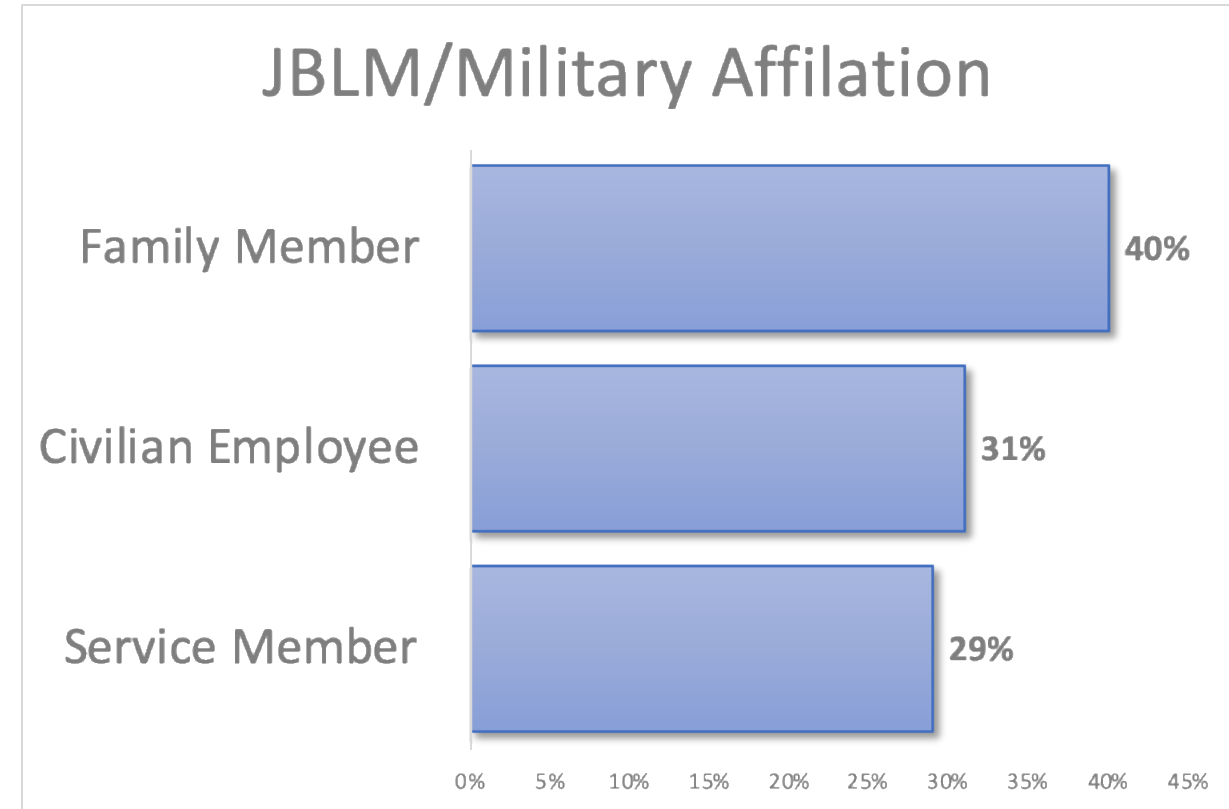
Perceived JBLM Economic Impact

- Business leaders tended to report lower perceived economic impact than non-business leaders
- Business leaders who did not report a current or prior military affiliation reported lower perceived impact than military affiliated business leaders



Findings from JBLM/Military affiliated survey respondents

- JBLM helps attract talent to the region— **75%** of respondents did not live in Pierce/Thurston county prior to their military affiliation
- When they come, they tend to stay – **70%** self-report as homeowners
- Generating local business:
 - Car **66%**
 - House **63%**
 - RV **10%**
 - Boat **5%**
 - Investment property **5%**
 - Other large purchase **6%**





Comments Collected Via the Survey Tool