

2015 SSMCP Community Survey Summary

For residents of the South Puget Sound, Joint Base Lewis McChord is as much a part of the region as the Sound and Mount Rainier. Most locals would have a hard time imagining the region without it. Nor would they want to.

Overall, **7 in 10** rated having JBLM nearby as positive. JBLM's relationship with its neighbors, while generally positive, is complex: **3 out those 7** said "mostly positive" instead of "very positive." And **more than 7 in 10** respondents could think of both advantages and disadvantages to living near the base.

Half of these respondents have some direct relationship with JBLM or the military due to someone in their household who is currently in the military, works at JBLM or is a veteran. **Half** of the non-military respondents live in neighborhoods with active duty service members.

Not surprisingly, the prospect of a shrinking military presence in the region was greeted negatively. Nearly **7 in 10** respondents said that larger troop reductions at JBLM would have a negative impact – mostly economic – on the area. For **4 of those 7**, the impact would be "mostly negative" instead of "very negative." However, the feeling was not universal: 1 in 5 said either that the impact would be positive, or they could not think of a significant impact.

Most did not think JBLM needs to be doing more to minimize its impact on the surrounding communities or that surrounding communities needed to be doing more to improve their relations with JBLM.

View full survey results at ssmcp.org

2015 SSMCP Members

- City of Lakewood
- City of Lacey
- City of DuPont
- Town of Steilacoom
- City of Tacoma
- City of Tumwater
- City of University Place
- City of Yelm
- City of Puyallup
- Pierce County
- Thurston County
- Nisqually Indian Tribe
- Thurston Regional Planning Council
- Joint Base Lewis-McChord
- WA Military Department
- WA Department of Transportation
- WA Department of Veterans Affairs
- Tacoma-Pierce County Chamber of Commerce
- Tacoma-Pierce County Health Dept
- United Way of Pierce County
- Clover Park School District
- Franklin Pierce School District
- Tacoma Pierce County Assn of Realtors
- WorkForce Central
- Give an Hour

SSMCP
Core Objectives

Formalize New Methods of
Regional Collaboration

Improve Regional Mobility

Improve Access to
Information

Promote JBLM as a Center
of Regional Economic
Significance

Improve Access to Existing
Services for Active Duty
Service -Members and
Veterans

Improve Support for
Military Families



MISSION

To foster effective communication, understanding, and mutual benefit by serving as the most effective point of coordination for resolution of those issues which transcend the specific interests of the military and civilian communities of the South Sound region.

SSMCP is open to any group, agency, or organization interested in community / military issues in the Pierce and Thurston Counties region. To join, go to ssmcp.org

SSMCP

6000 Main St. SW
Lakewood, WA 98499
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2015 SSMCP Community Survey Results

About the Survey

- Purpose:** To capture community perceptions, knowledge, and interactions with Joint Base Lewis-McChord.
- Sample:** 1524 adult residents of Pierce and Thurston Counties selected at random from households in 39 ZIP Codes near JBLM. The sample was proportional to the number of households in each ZIP Code.
- Technique:** 1024 interviews were conducted by telephone by live interviewers, including 23% on cell phones. 500 residents completed the same questionnaire online.
- Margin of Error:** ±2.5% at the 95% confidence interval.

Survey Conducted by Elway Research, Inc.



Joint Base Lewis McChord & the South Sound

Joint Base Lewis McChord is an over 86,000 acre military installation in the South Puget Sound, nestled among two counties and 17 cities and towns, and bisected by Interstate 5. JBLM is the third largest employer in Washington, and an economic driver for the state.

South Sound Military & Communities Partnership

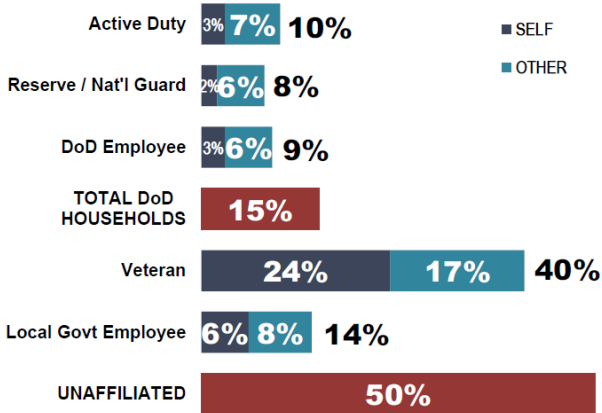
The South Sound Military & Communities Partnership, a regional partnership of governments and organizations in Pierce and Thurston Counties, works to improve outside knowledge of the military's direct and indirect impact on the region and the State, as well as increase coordination between military and civilian counterparts.

Key Findings

South Sound Connections to the Military

1 in 7 respondents had a current connection to the military

- 10%** lived in a household where at least one person was on active duty
- 40%** lived in households with at least one veteran



Rating JBLM as a Neighbor

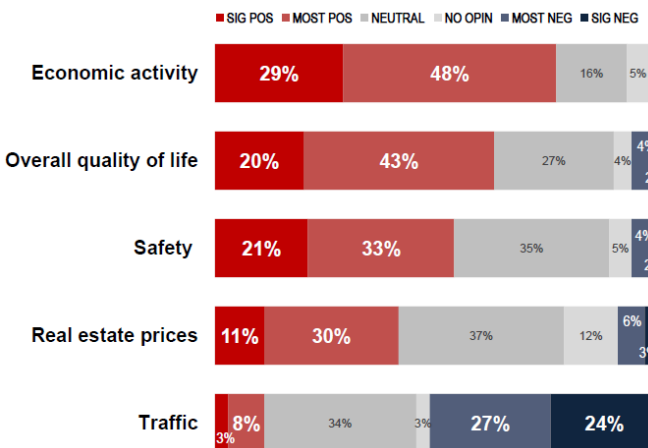
8 in 10 volunteered at least one advantage of having JBLM nearby:

- Half (**48%**) of the advantages named were economic;
- 19%** cited increased security.

7 in 10 volunteered at least one disadvantage:

- Half (**46%**) cited traffic congestion;
- Nearly 1 in 4 (**23%**) cited noise from aircraft or the firing range

"Please rate JBLM's effect on the following aspects of your community..."

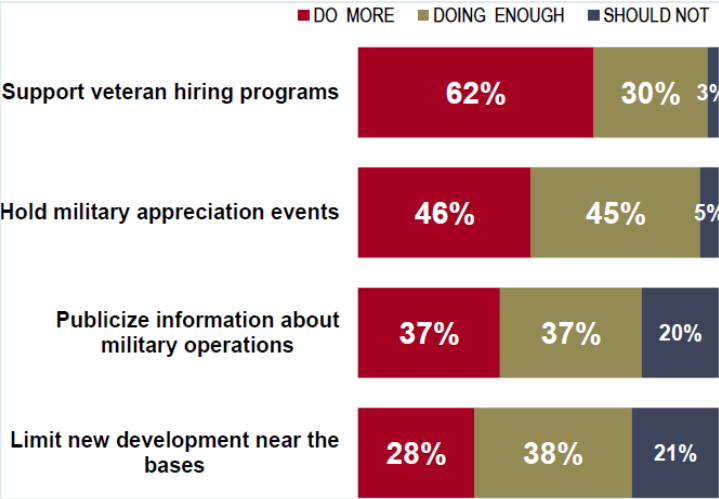


SSMCP 2015 Community Survey Results

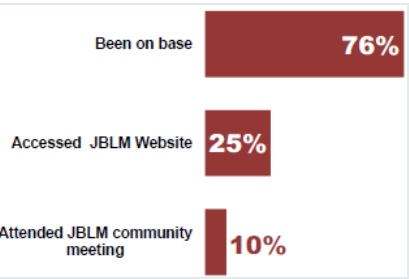
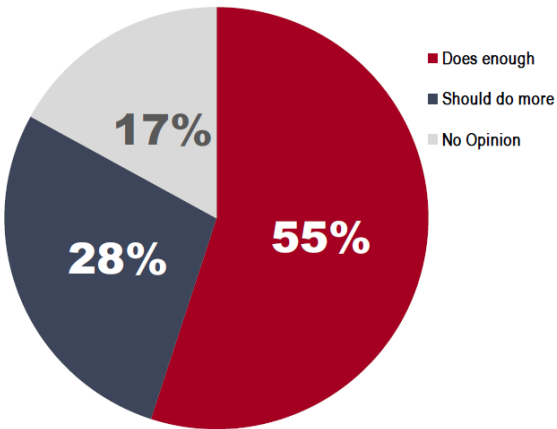
Military/Community Relations

Most do not think JBLM needs to be doing more to minimize its impact on the surrounding communities—or that those surrounding communities needed to be doing more to improve their relations with JBLM—beyond hiring more veterans. Any differences were mostly a matter of degree, rather than disagreements.

Should the Community do more to support the base?



Does JBLM do enough to minimize any negative impact on the surrounding communities?

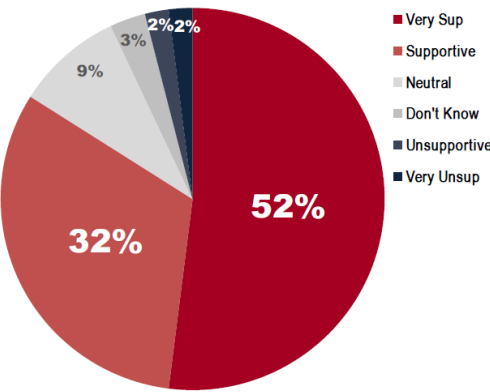


Community Interactions With JBLM A large proportion of respondents had interacted in some way with the base, including those in non-DoD connected households.

Support for Service Members in Community

More than **8 in 10** rated the attitude in their neighborhood as supportive toward service members

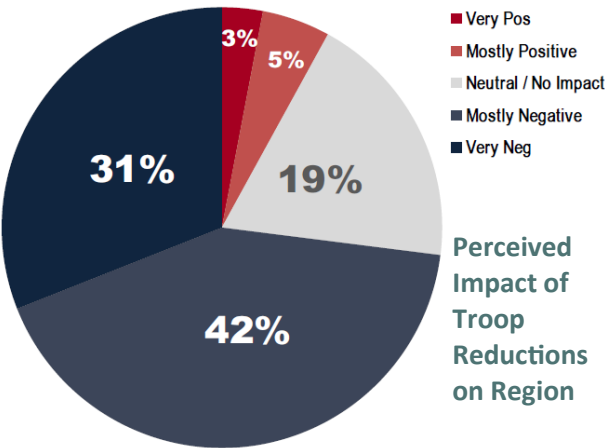
Supportiveness of Community



Economic Impacts

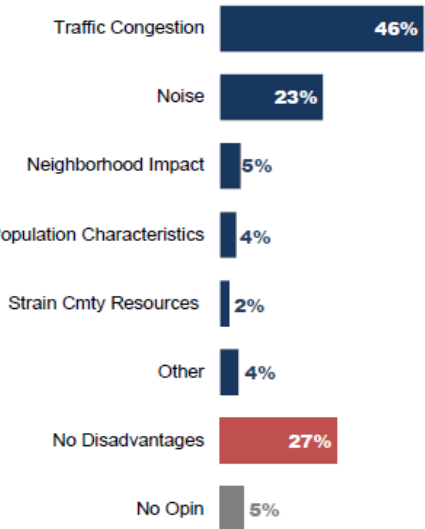
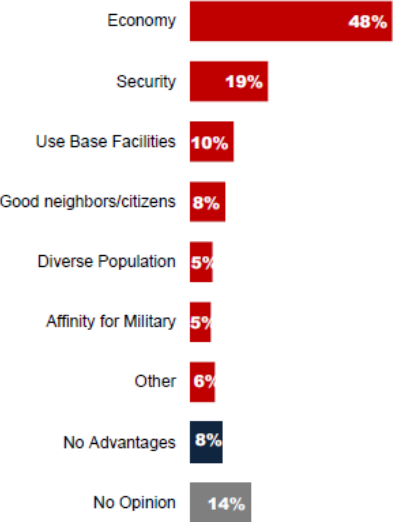
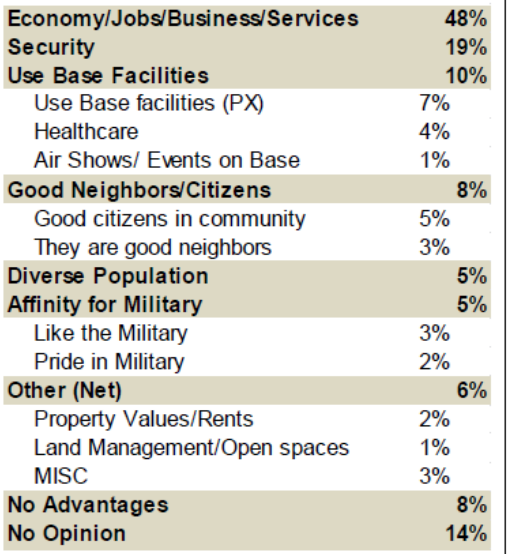
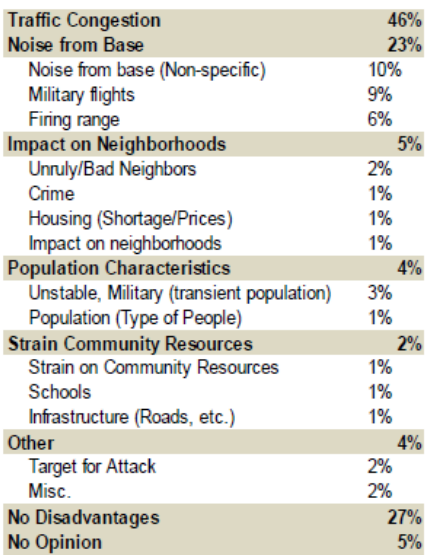
Nearly **3 in 4** survey respondents said troop reductions would have a negative impact on the South Sound area.

- **4 in 10** estimated that more than 25% of their community’s economy depends on JBLM
- **67%** were aware JBLM is the **3rd Largest Employer** in the State



Perceived Impact of Troop Reductions on Region

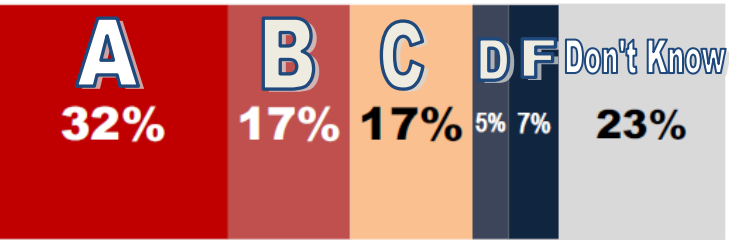
When asked an open-ended question about the **BENEFITS** of living near Joint Base Lewis McChord, most noted its effect on the **ECONOMY**



When asked an open-ended question about the **NEGATIVES** of living near Joint Base Lewis McChord, most noted **TRAFFIC CONGESTION**

Rating the Schools

Active-Duty Households with Children were asked to give their school system a letter grade for how they integrate and support military children—**2 in 3** rated the schools “Satisfactory” or above.



Active Duty Parents

The “JBLM Traffic” Myth

This survey highlighted an ongoing citizen belief that JBLM is the primary cause of the traffic congestion on I-5.

THE FACTS: I-5 has not been widened through JBLM since 1975, and is inadequate to meet today’s demand. Between 1970 and 2010, the population of Washington State grew by 97 percent, Pierce County grew by 95 percent, and Thurston County grew by 228 percent.

Population Growth 2000-2010:

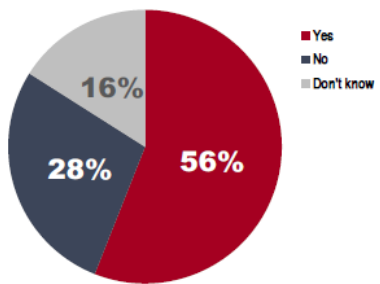
- Military on-base population increase: **4,611**
- Military off-base population increase estimate: **10,759**
- Civilian Pierce and Thurston population increase: **128,577**

Population growth in Pierce and Thurston counties is projected to continue at a similar pace through 2040. SSMCP, with regional partners, is working to improve transportation in the region.

Over \$500 million in I-5 improvements are currently underway

2015 SSMCP Business Survey Results, Continued

Veteran Hiring Preference?



1 in 6 Businesses (17%) Participate in a Veteran Recruitment Program

- Of those who participate in a recruitment program: 78% employ veterans, including 48% whose workforce is more than 10% veterans.
- Of those who do not participate: 46% employ veterans, including 25% whose workforce is more than 10% veterans.

Half of Enterprises Employ Veterans

- For nearly 1 in 3 (27%), more than 10% of their employees were veterans.

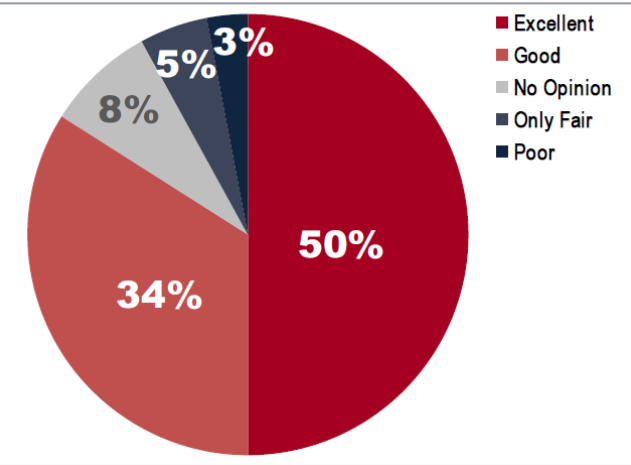
JBLM's economic impact was the most highly regarded, and its potential reduction the most dreaded. Notably, however, JBLM was seen to have a greater positive impact on the community than it had on the respondent's particular enterprise.

Some 83% rated JBLM's impact on the regional economy as positive and 75% said the same of its impact on the "overall community." 48% said there had been a positive impact on their particular enterprise. Similarly, only 37% said that drawdowns would have a negative impact on their enterprise, but 83% said the impact would be negative for the region's economy and 64% said it would be negative for the "overall community."

These findings indicate that JBLM's perceived benefits are not a simply based on economic self-interest, but on a perceived broader contribution to the region.

- Thurston County respondents were somewhat more likely than Pierce County respondents to say there were "significant positive" impacts;
- Newer organizations (in operation less than 5 years) were more likely than older ones (10+ years old) to say there were "significant positive" impacts;
- Smaller organizations (fewer than 10 employees) were more likely than larger ones (10+ employees) to say there were "significant positive" impacts on the local economy, the community and the quality of life, but
- Larger organizations were more likely than smaller ones to say there has been a "significant positive" impact on their particular enterprise.

JBLM Rated as an Excellent to Good Neighbor



Respondent Demographics

COUNTY	54%	Pierce
	46%	Thurston
RESPONDENT	56%	Owner
	34%	Exec/Manager
	10%	Other
STRUCTURE	64%	Independent
	6%	Chain
	6%	Franchise
	25%	Other
OWNERSHIP	26%	Woman-owned
	12%	Minority-owned
	25%	Veteran-owned
	3%	Active Duty Spouse
	1%	Reserve or Natl Guard
SIZE:	64%	1-9 Employees
	16%	10-24
	10%	25-49
	8%	50-99
	2%	100+ Employees
YRS IN BUSINESS	17%	0-5 years
	20%	6-10
	63%	10+ Years

SUMMARY

- 3 in 10 respondents had a direct connection to the military.
- Half of the organizations employ veterans.
- 1 in 5 respondents have had contracts with JBLM.
- JBLM was rated as an "excellent" (50%) to "good" (34%) neighbor in the community.
- JBLM's recent growth was seen as having a "mostly positive" impact on:
 - The local economy (84%);
 - The "overall community" (75%);
 - The quality of life in the area (57%).
- Half of these executives (48%) said the impact on their own enterprise has been positive, while nearly half (44%) said there had been little or no impact.
- Traffic was rated as a negative impact by 67%.
- Potential drawdowns at JBLM were seen as having a negative impact on the local economy and community, but a positive impact on traffic.

Thank you to our partners who assisted in circulating the 2015 SSMCP Business Survey:



6000 Main St SW, Lakewood, WA 98499 | ssmcp.org

2015 SSMCP Business Survey Results

Purpose

The 2015 SSMCP Business Survey was designed to assess:

- Business practices with regards to service members and veterans near Joint Base Lewis-McChord
- Impact of JBLM on the specific business
- JBLM's overall impact on the community
- Anticipated impacts of potential troop drawdowns



Sample: 2000 were randomly selected businesses within the geographic area of Joint Base Lewis-McChord were invited to participate. The sample frame for this survey was a blend of a systematic sample of businesses obtained from a commercial list vendor and a convenience sample of organizations associated with SSMCP partners. The latter lists included businesses, non-profit organizations and governmental organizations. Because of the size and nature of the sample, these results should be interpreted only as representing the answers given by these respondents to these questions at the time they completed the questionnaire. The survey was designed and administered by Elway Research, Inc.

Joint Base Lewis McChord & the South Sound

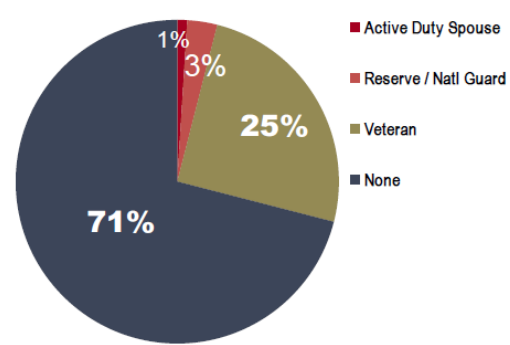
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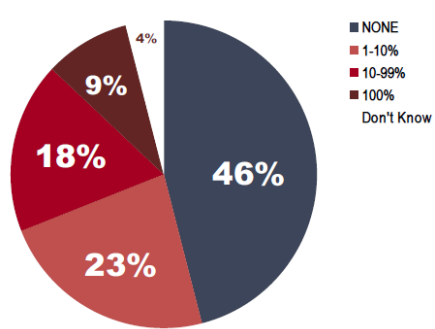
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Key Findings

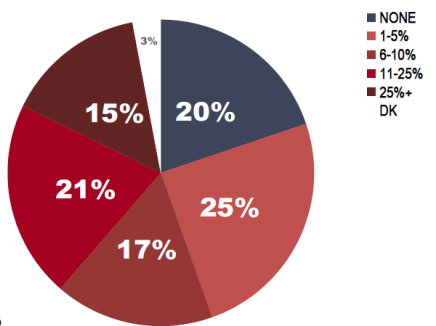
Business Owner Military Demographics



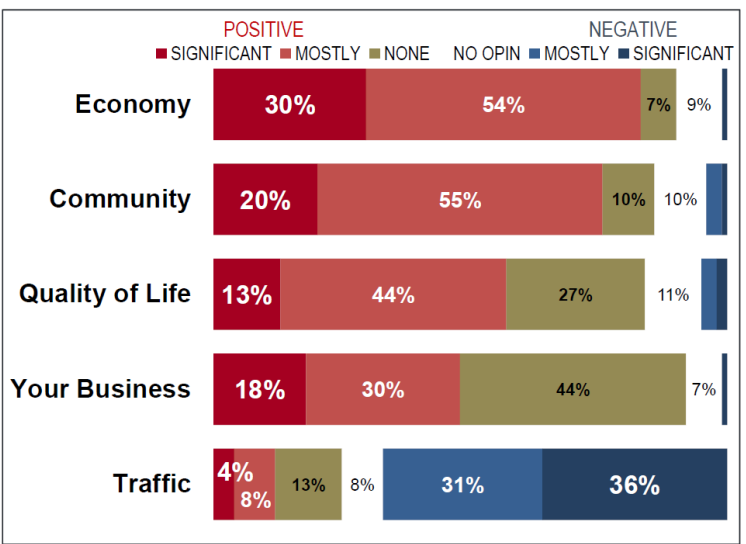
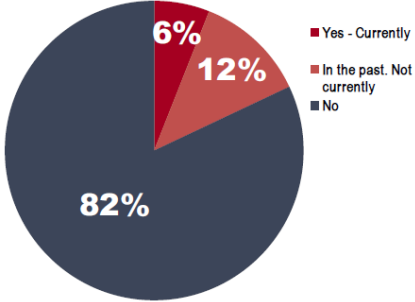
Percentage of Veteran Employees



Percentage of JBLM-related Customers



Percentage with JBLM Contracts



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