

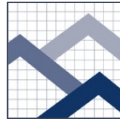
**SOUTH SOUND MILITARY & COMMUNITIES PARTNERSHIP**

# **JBLM Impact on Local Business: Survey of Area Executives**

September 2015



***ELWAY RESEARCH, INC.***



## **SOUTH SOUND MILITARY & COMMUNITIES PARTNERSHIP**

# **Impact of JBLM on Local Business: Survey of Area Executives**

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## **SOUTH SOUND MILITARY & COMMUNITIES PARTNERSHIP**

# **Impact of JBLM on Local Business: Survey of Area Executives**

September 2015

### **INTRODUCTION**

This report summarizes the results of a survey of businesses and community organizations in Pierce and Thurston Counties on behalf of the South Sound Military and Communities Partnership. The survey was conducted to assess the relationship between local businesses and JBLM from the point of view of business operators in the surrounding communities.

More than 2800 businesses and community organizations were invited to take the online survey: 2000 businesses were selected at random from ZIP Codes surrounding JBLM. In addition, organizations associated with the SSMCP sent email invitations to people on their mailing lists. These invitations included both businesses and non-profit organizations. The exact count is unknown, but totaled at least 850.

A total of 146 executives responded to the invitation and completed the survey.

The survey was designed to assess:

- Business practices with regard to service members and veterans (hiring preferences, veteran recruitment, etc.);
- Impact of JBLM on the specific business (direct contracts, proportion of customers; percentage of income, etc.);
- Assessment of JBLM overall impact on the community (local economy, quality of life, traffic, etc.);
- Anticipated impacts of potential troop drawdowns and JBLM (local economy, quality of life, traffic, etc.);

A profile of the respondents was collected so as to compare and contrast answers by different sizes and types of responding organizations.

The survey was designed and administered by Elway Research, Inc. The questionnaire was designed in collaboration with SSMCP staff.

The report includes Key Findings, followed by annotated graphs summarizing the results to each question. The full questionnaire and a complete set of cross-tabulation tables is presented in the appendix.



## METHODS

<b>SAMPLE:</b>	146 Business and non-profit executives in Pierce and Thurston Counties.
<b>TECHNIQUE:</b>	Online survey.
<b>FIELD DATES:</b>	August 17 thru September 16, 2015.
<b>DATA COLLECTION:</b>	<p>2000 randomly-selected businesses were mailed an invitation to take the survey online. The invitation letter was on SSMCP letterhead and signed by Tiffany Speir on behalf of the SSMCP Steering Committee.</p> <p>An additional 850 (approx.) were invited via email from organizations they belong to or are associated with.</p>

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.



## RESPONDENT PROFILE

In interpreting these findings, it is important to keep in mind the characteristics of the people actually interviewed. This table presents a profile of the respondents in the survey.

NOTE: Here and throughout this report, percentages may not add to 100%, due to rounding.

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



# SUMMARY

## ◆ 3 in 10 respondents had a direct connection to the military.

- 25% were veterans.
- 4% were from active duty or reserve households.

## ◆ Half of the organizations employ veterans.

- Of those employing veterans, 56% have a veteran hiring preference.
- 1 in 6 businesses participate in a veteran recruitment program.

## ◆ 1 in 5 respondents have had contracts with JBLM.

- 6% have a current contract to provide goods or services.

## ◆ 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.

- Most respondents (53%) said there would be little or no impact on their particular enterprise.



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# FINDINGS

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- This section presents the survey findings in the form of annotated graphs.
- Bullet points indicate significant or noteworthy differences among population subgroups.

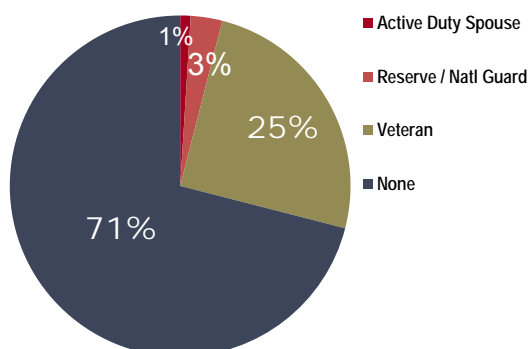


## Relationship to Military

### 3 in 10 Respondents had Direct Connection to the Military

- 25% were veterans;
- 4% were in active duty (1%) or reserve (3%) households.
- 66% of veteran-owners were previously stationed in Washington; 50% at Fort Lewis.

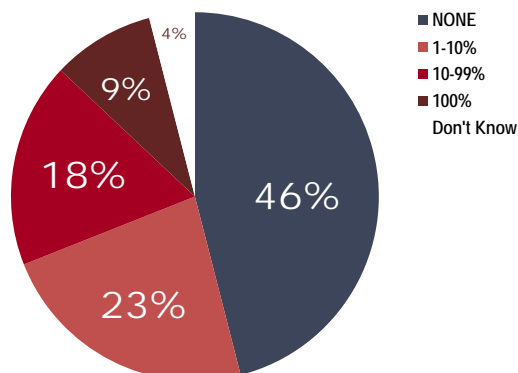
Q12. Is the business or franchise owner:



### Half of Enterprises Employ Veterans

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

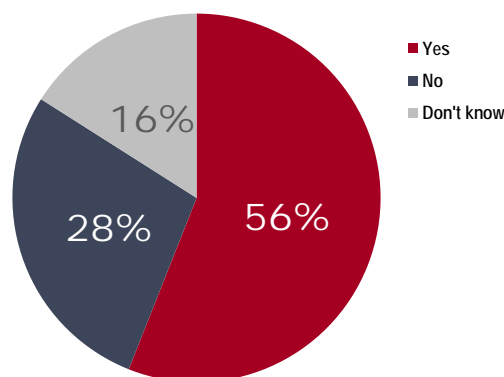
Q9. What percentage of your employees are veterans of the armed services?



### More Than Half of Enterprises Employing Veterans Report Having a Veteran Hiring Preference

- 45% of those with fewer than 10% veteran employees, and
- 66% of those with more than 10%.

Q10. Do you have a preference for hiring veterans?





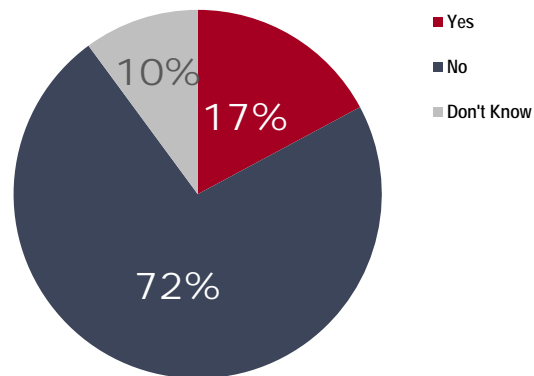


## Relationship to Military

### 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.

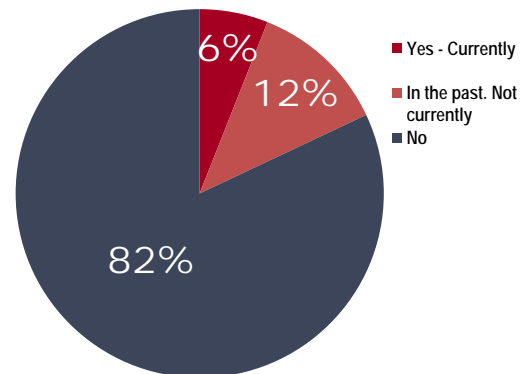
Q11. Does this business participate in any veteran recruitment programs?



### 1 in 5 Responding Businesses have had JBLM Contracts (18%).

- 6% have current contracts;
- 12% have had contracts in the past.

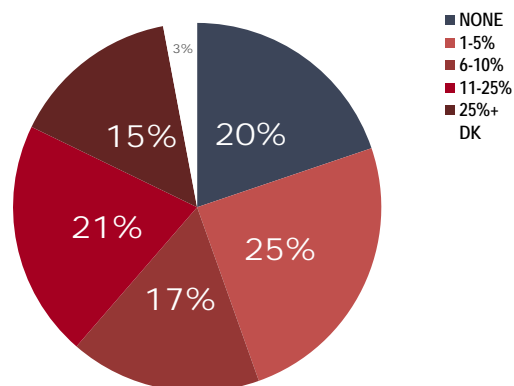
Q13. Do you have contracts with to provide goods or services to Joint Base Lewis McChord?



### 8 in 10 have JBLM-related customers or clients

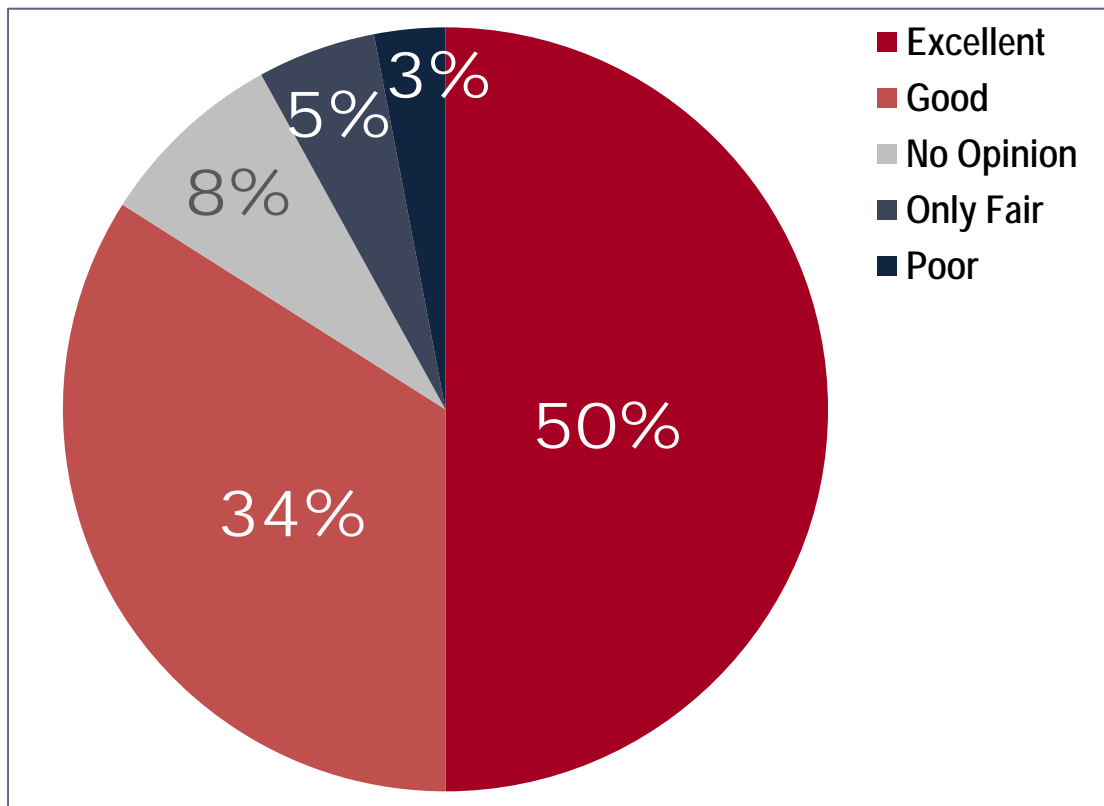
- 36% said more than 10% of their customers are JBLM connected.

Q14 What percentage of your customers or clients would you estimate are directly connected to JBLM





## JBLM Impact

**JBLM Rated as an Excellent to Good Neighbor**

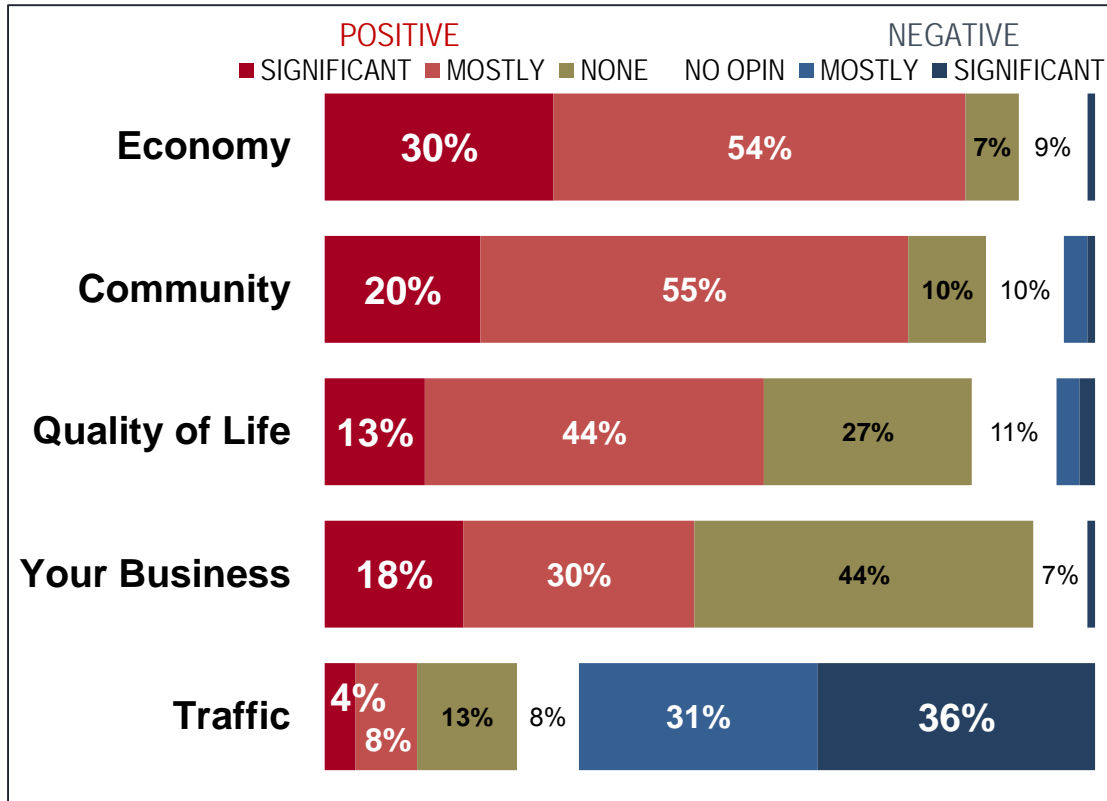
Q15 Overall, how would you rate JBLM as a neighbor in this community?

- **Half of the business operators responding rated JBLM as an "excellent" neighbor.**
  - Another 34% said "good."
- **JBLM got its highest ratings from**
  - Newer businesses (68% of those in business less than 5 years v. 46% of those in business 5+ years);
  - Thurston County (55% excellent, v. 46% in Pierce);
  - Owners (55%) v. 38% among Executive or Managers.
- **Rating of JBLM as a neighbor went up with the proportion of JBLM customers:**
  - 31% of those with no JBLM customers said JBLM was an "excellent" neighbor; compared to
  - 68% of those with 25% or more of their customers coming from JBLM.



## JBLM Impact

## JBLM Growth Seen as Having a "Mostly Positive" Impact on Local Economy and Quality of Life



Q16 Between 2003 and 2010, JBLM grew from 35,331 active duty and civilian employees to 50,587. What has been the impact of that growth on the following: \*The local economy; \*the overall community; \*the quality of life in this areas; \*your business; \* traffic.

- **Large majorities of respondents said the impact of JBLM growth since 2003 has been mostly positive for:**
  - The local economy (84% positive, including 30% significant(ly) positive, and 54% "mostly positive") ;
  - The "overall community" (75% positive, including 20% significant(ly) positive, and 55% "mostly positive");
  - The quality of life in the area (57% positive, including 13% significant(ly) positive, and 44% "mostly positive") .
- **Nearly half of these executives (48%) said the impact on their own enterprise has been positive, while almost as many (44%) said there had been little or no impact.**
- **Traffic was rated as a negative impact by 67% including**
  - 36% who said it has had a "significant negative" impact ; and
  - 31% who said "mostly negative."



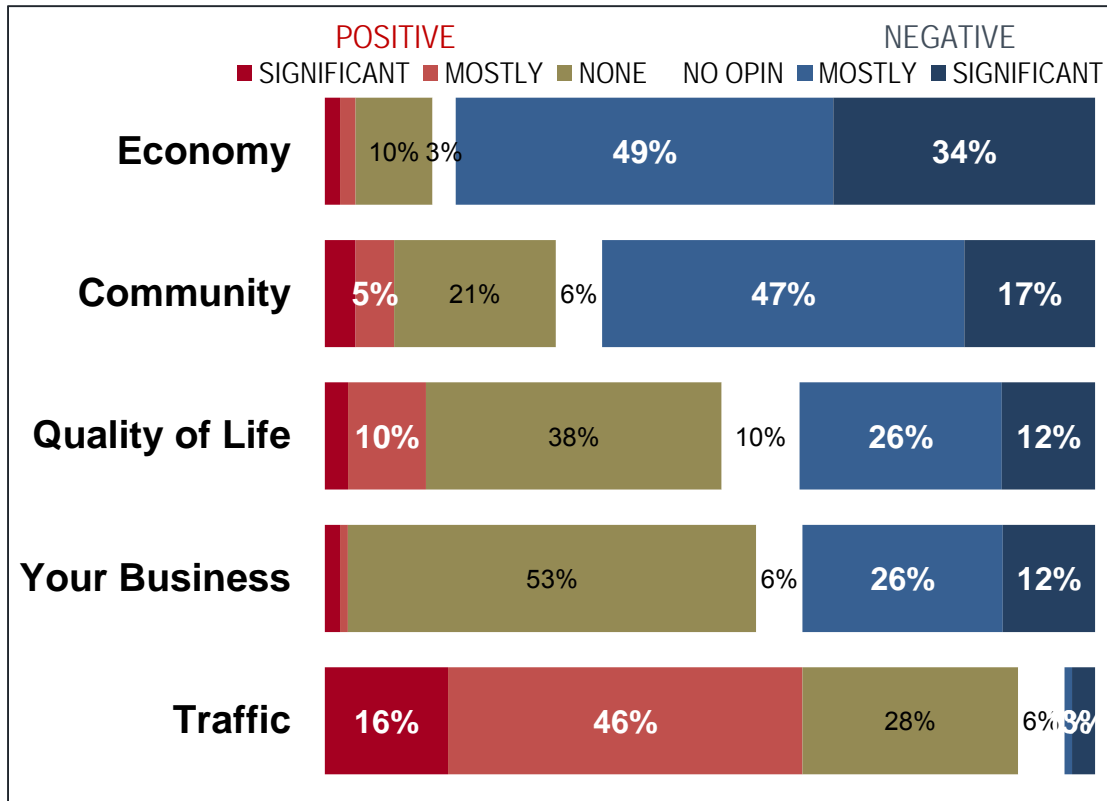
CONTINUED ►

- **For each item, a majority in every category said the impact on each of these community attributes has been positive – except traffic. There were some slight differences in the propensity to say there has been a "significant positive" impact.**
  - 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.
  - The propensity to say there has been a positive impact went up with the proportion of JBLM customers for each of the attributes.
- **The small sample sizes mean that these differences are not statistically significant, but the consistent patterns are notable.**



## Drawdown Impact

## Drawdowns Seen as Having Negative Impact on Local Economy & Community; Positive Impact on Traffic



Q17. In the current era of the Budget Control Act spending caps, the Army intends to reduce its total strength by 70,000 active duty soldiers by 2019. If JBLM were to continue to lose employees, what would be the effect on the following: \*The local economy; \*the overall community; \*the quality of life in this areas; \*your business; \* traffic.

- **By far the most significant impact anticipated if JBLM continues to contract is the negative impact on the local economy.**
  - 83% said that impact would be "mostly" (49%) or "significantly" (34%) negative.
- **Most (53%) said there would be little or no impact on their particular enterprise, but**
  - 38% anticipated "mostly" (26%) or "significant" (12%) negative consequences.
- **A 64% majority also said the impact on the overall community would be "mostly" (47%) or "significantly" (17%) negative.**
- **Traffic was the only thing anticipated to improve:**
  - 62% said the impact on traffic would be "mostly" (46%) or "significantly" (16%) positive.



## Additional Comments

### Last Words

At the end of the questionnaire, respondents were asked if they had "any additional comments related to JBLM." A transcription of all the comments is presented in the appendix. Below are representative highlights.

#### Regional Economic Impact

*JBLM is a huge driver of business in Pierce Co. and I don't believe many businesses and residents realize that.*

*Most civilian commercial appraisers and feasibility studies do not adequately or accurately estimate the effect which military dollars have on the local economy.*

#### Business / Personal Impact

*We do not wanna lose our Army/Air Force customers, they are largest customers.*

*We don't employ a vet, but we do employ a military spouse.*

*We are a local nonprofit organization. Every year we have 50 or so JBLM personnel volunteer for us. They do a great job, and we really appreciate it.*

#### Community Connection / Impacts

*Lacey has worked very hard to be welcoming to the military. They are an important part of our community and identity. It would be a hardship on our economy and our lifestyle if there were steep reductions. We want to keep them!*

*JBLM is a very important part of the community and I would hate to see it have very many cuts in personnel.*

*The schools will take a big hit and so will businesses.*

*JBLM is a proud and patriotic symbol of the south sound. ...most of the business around Lakewood, Tacoma, DuPont and Lacey would not be here today had it not been for JBLM.*

#### Affinity For Military

*Being a veteran myself I very much appreciate the service our men and women do. I never will I stop supporting them with anything they need.*

*We love the military in the area!*

#### Critical Comments

*I gave the impact to the community a mostly negative rating because, whereas the presence of the military is a significantly positive for the local businesses, the residential areas suffer because we have a large number of transient residents who don't care about their neighborhoods or the city in general as much as a permanent resident would.*

*The traffic problems that JBLM has caused significant damage to the Olympia/Tacoma area. I would personally vote to close the base completely just to eliminate the traffic problems it causes.*



# DISCUSSION

The business operators and organization executives responding to this survey clearly perceive a positive effect from Joint Base Lewis McChord on the economy and the communities in Pierce and Thurston Counties. Large majorities said the impact of the base was positive on the local economy, the overall community, and the quality of life in the area.

For many it was up close and personal: one-quarter of these respondents were veterans themselves and half employed veterans. One in 5 have current contracts to supply goods or services to JBLM and 8 in 10 have JBLM customers. Ratings generally went up with the proportion of JBLM customers – the higher the proportion of customers from JBLM, the more positive the ratings for JBLM's impact on the community.

The ratings were not universal and were not entirely positive, however. For each attribute tested in this survey, more respondents said JBLM's impact has been "mostly positive" than said "significantly positive," suggesting room for improvement. Traffic impacts, particularly, dampened the overall ratings of the base, with 2 in 3 saying that the base has had a negative impact on area traffic.

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 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." But only 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 simply based on economic self-interest, but on a perceived broader contribution to the region.



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# APPENDIX

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**SSMCP Steering  
Committee:**

City of DuPont

City of Lacey

City of Lakewood

Town of Steilacoom

City of Tacoma

City of Olympia

City of University Place

City of Yelm

Pierce County

Thurston County

Thurston Regional  
Planning Council

Nisqually Tribe

Joint Base Lewis-  
McChord

Tacoma-Pierce County  
Health Department

Tacoma-Pierce County  
Chamber of Commerce

United Way-Pierce  
County

Washington State  
Department of  
Transportation

Washington State  
Military Department

September 21, 2015

Dear Business Operator,

The South Sound Region is conducting a survey to gather business perspectives on military-community ties in the region of Joint Base Lewis-McChord and Camp Murray. Your business was selected to participate in the survey. For this study to be representative of the South Sound business community, it is vital that we hear from you.

The survey is available online. To take the survey, please type this address into your internet browser:

<http://sgiz.mobi/s3/elway815>

The owner or manager of this business should complete the survey. Your answers are anonymous and confidential, and no one in any government will see your individual responses. It will take less than 10 minutes to complete.

The survey is being conducted by Elway Research, Inc., a highly respected independent research firm. Elway will collect and tally the results and publish a summary analysis. Results will be published by October of 2015.

We hope you will let us know what you think. Your input will be valuable as we look to better understand how the military affects the economy in Pierce and Thurston Counties, as well as work to improve community and business relationships.

We know you are very busy, so we appreciate you taking the time to help shape efforts in the region. If you have any questions, please contact our Program Coordinator, Sierra McWilliams, at 253-983-7774 or [smcwilliams@cityoflakewood.us](mailto:smcwilliams@cityoflakewood.us).

Sincerely,



Tiffany Speir, Program Manager, on behalf SSMCP Steering Committee

## REMINDER CARD

Dear Business Operator:



SOUTH SOUND MILITARY &  
COMMUNITIES PARTNERSHIP

Last week we sent you an invitation to take part in a survey about the relationship between JBLM and local businesses.

You were specifically selected to make this survey representative of businesses in Pierce and Thurston Counties.

If you have already taken the survey, *Thank You!*

**If you have not already done so, please log on to the website below and take the survey today.** It will take 5-10 minutes. Your responses will be anonymous and confidential.

Thank you for your cooperation in this important research.

Elway Research, Inc.

TAKE THE SURVEY ON LINE

Log on at: <http://sgiz.mobi/s3/elway815>

Questions: Sierra McWilliams: City of Lakewood 253-983-7774; [smcwilliams@cityoflakewood.us](mailto:smcwilliams@cityoflakewood.us).

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# **QUESTIONNAIRE**

**with Data**

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SAMPLE: 146 Business Operators in Pierce and Thurston Counties

SAMPLE FRAME: Commercial list of businesses in the two counties;  
Organizations associated with SSMCP

DATA COLLECTION: Online Survey.  
Invitations were mailed or emailed to businesses, inviting the owner/manager to log on the survey website and complete the questionnaire

FIELD DATES: August 17 – September 16, 2015

COUNTY: Pierce **54%** Thurston **46%**

- The questions are presented here as they were asked in the interview
- The figures in **bold type** are percentages of respondents who gave each answer.
- Percentages may not add to 100% due to rounding.

## YOUR BUSINESS

### 1. What is your position with this business?

56% Owner  
34% Executive/Manager  
10% Other> \_\_\_\_\_

### 2. In what city is this business located? [PICK LIST]

54% PIERCE	46% THURSTON
8% DuPont	19% Lacey
8% Lakewood	25% Olympia
10% Puyallup	1% Tumwater
20% Tacoma	2% Other Thurston County
1% University Place	
7% Other Pierce County	

### 3. What is the business ZIP code?

### 4. Is this business

64% Independently owned  
6% Part of a chain (2 or more locations)  
6% A franchise  
25% Other

#### 4.1. IF 2 OR 3: In how many locations does this business operate in Pierce and Thurston Counties? [n=16 businesses]

33%..one 53%..2 to 9 13%..10 or more

### 5. Is this a woman-owned or minority-owned business?

69% No  
19% Woman-owned  
5% Minority-owned  
7% Both (WMBE)

**6. Which of these best describes this business:**

- 3% Automotive
- 14% Business/Professional Services
- 6% Construction\*
- 2% Distribution/ Transportation / Warehousing
- 8% Financial / Insurance
- 1% Grocery or Spirits
- 5% Health
- 1% Housing/Real Estate\*
- 6% Manufacturing
- 8% Personal Services
- 7% Recreation/ Hospitality
- 1% Restaurant / Food Service
- 8% Retail
- 7% Non-profit\*
- 25% Other

NOTE: Categories marked with [\*] were recorded as "other" in a number of cases. They are therefore slightly under-reported in these data.

**7. How long has this business operated in Pierce or Thurston County?**

- 1% Less than 1 year
- 16% 1-5 years
- 20% 6-10 years
- 63% More than 10 years

**8. How many people are employed at this location?**

- 64% [1-9]
- 16% [10-24]
- 10% [25-49]
- 8% [50-99]
- 2% [100+]

**9. What percentage of the employees are veterans of the armed services?**

- 46% None
- 23% [1-10%]
- 18% [10%+]
- 9% [100%]
- 4% Don't Know

**10. Do you have a preference for hiring veterans?**

- 25% Yes

**11. Does this business participate in any veteran recruitment programs? (e.g., military-specific apprenticeships, military hiring fairs, partnerships with nonprofits or government agencies dedicated to placing veterans in employment, such as: Camo2Commerce, Hero2Hired, Boots2Business, etc.)**

- 17% Yes
- 72% No
- 11% Don't Know

**12. Is the business or franchise owner:**

- 0 Active duty service member
- 1% Reserve or National Guard
- 0 Department of Defense Civilian workforce
- 3% Spouse/Partner of a service member
- 25% Veteran

**12.1. IF BUSINESS OWNER IS A CURRENT OR FORMER SERVICE MEMBER [n=42]:**

Was the service member previously stationed at a Washington State military base?

- 66% Yes (former service members)
- 19% of total sample

**12.2. IF YES: Where was s/he stationed? [n=28 former service members stationed in WA]**

- 75% Fort Lewis
- 7% McChord Air Force Base
- 7% Naval Base Kitsap
- 10% Camp Murray

## INTERACTION WITH JBLM

**13. Do you have contracts with to provide goods or services to Joint Base Lewis McChord?**

- 6% YES, CURRENTLY
- 12% YES, IN THE PAST
- 82% NO

**13.1. IF CURRENT: What is the approximate annual dollar amount of your current contracts?**

[ of 9 with current contracts, 4 answered: \$3M, 1M, \$80K, \$30K ]

**14. What percentage of your customers or clients would you estimate are directly connected to JBLM (Active Duty or civilian employees and family members?)**

- 20% [Zero]
- 25% [1-5% of customers]
- 17% [6-10% of customers]
- 21% [11-25% of customers]
- 15% [ 25% of customers]

## JBLM IMPACT

**15. Overall, how would you rate JBLM as a neighbor in this community?**

- 50% Excellent
- 34% Good
- 5% Only Fair
- 3% Poor
- 8% No Opinion

**16.** Between 2003 and 2010, JBLM grew from 35,331 active duty and civilian employees to 50,587. What has been the impact of that [growth/change] on the following:

ROTATE	SIGNIF POS	MOSTLY POS	LITTLE NONE	MOSTLY NEG	SIGNIF NEG	NO OPIN
A. The overall community .....	20%	55%	10%	3%	1%	10%
B. The local economy .....	30%	54%	7%	0	1%	9%
C. Your business.....	18%	30%	44%	0	1%	7%
D. Traffic .....	4%	8%	13%	31%	36%	8%
E. The quality of life in this area .....	13%	44%	27%	3%	2%	11%

**17.** In the current era of the Budget Control Act spending caps, the Army intends to reduce its total strength by 70,000 active duty soldiers by 2019. If JBLM were to continue to lose employees, what would be the effect on the following:

ROTATE	SIGNIF POS	MOSTLY POS	LITTLE NONE	MOSTLY NEG	SIGNIF NEG	NO OPIN
A. The overall community .....	4%	5%	21%	47%	17%	6%
B. The local economy .....	2%	2%	10%	49%	34%	3%
C. Your business.....	2%	1%	53%	26%	12%	6%
D. Traffic .....	16%	46%	28%	1%	3%	6%
E. The quality of life in the area .....	3%	10%	38%	26%	12%	10%

**18.** Do you have any additional comments Related to JBLM [OPEN]

*Thank you for your time and opinions.*

## Do you have any additional comments related to JBLM?

### Verbatim Comments

<b>REGIONAL ECONOMIC IMPACT</b>
JBLM is a huge driver of business in Pierce Co. and I don't believe many businesses and residents realize that.
Most civilian commercial appraisers and feasibility studies do not adequately or accurately estimate the effect which military dollars have on the local economy. They also underestimate the amount of "leakage" of sales to the AAFES Exchange and Commissary.
I am working on getting a government contract in this area so any reduction in employees with JBLM will no doubt affect whether I get a contract or not. I also have several family members who are retired from the military - male and female. In the near future they may become my partners.
Reduction in Personnel effect would be felt. Loss of Working Spouse would effect a lot of business. Loss of military spending income would effect all nearby counties.
Although we're not in the retail business, nor a direct vendor to JBLM - there will be significant impact to us when local businesses lose income due to the dramatic reduction in forces currently being proposed at JBLM. As a locally owned business since the 1930's we've weathered many downturns with the last decade being the worst. Although we've turned the corner - a cutback like this for us and many local business owners has the potential to be devastating.
Without JBLM, almost all businesses in the area would suffer significant economic impacts.
<b>BUSINESS / PERSONAL IMPACT</b>
It was a pleasure to build homes for the men and woman of the armed forces
We at Pacific Harbors Council, BSA have a great working relationship with JBLM. We have units on post, we utilize their grounds for events. In the long term, the military gets back young men worthy to be of service to our country.
We are a local nonprofit organization. Every year we have 50 or so JBLM personnel volunteer for us. They do a great job, and we really appreciate it.
Both of the Owners sons are in the Military.
We don't employ a vet, but we do employ a military spouse.
Would love more information on how we can better connect with opportunities to partner with JBLM
Our business needs to cater to those military families, especially those families with only one parent or limited funds. Our business is located downtown, i don't think that many of the military come shopping here - maybe visit the bars and restaurants, but i think many shop in places that are more economical like Walmart and Shopko - but for a movie and concert theater, you can't beat our prices and free movies for kids, we're considering offering military pricing because we are noticing the increase in military in our community. We have great volunteer opportunities too for those who are looking to get back into the community!
We would love to be more available to the officers and enlisted personnel. Dancing is such a booster of moral and it will also help them prepare for military balls, wedding first dances, etc. Dancing is a great stress reliever
Would love to recruit on base, but your mickey mouse rules won't allow us to participate.
We do not wanna lose our Army/Air Force customers, they are largest customers. Their wives are Korean. They always encourage their husbands to get accupuncture.



### COMMUNITY CONNECTION / IMPACTS

Even though we do not provide a lot to the active employees we do pave and fix the homes that they are buying. I feel much safer with them around and would not want to trade less traffic to have them leave. I think it would cause a great impact on Thurston co. to have them leave.

JBLM has been an asset to the community.

JBLM is a very important part of the community and I would hate to see it have very many cuts in personnel. We have enough issues with large companies leaving the area as it is.

JBLM is good for this region and should not downsize the personnel on base

Lacey has worked very hard to be welcoming to the military. They are an important part of our community and identity. It would be a hardship on our economy and our lifestyle if there were steep reductions. We want to keep them!

JBLM is a proud and patriotic symbol of the south sound. The land was dedicated to the US Military 100 years ago, most of the business around Lakewood, Tacoma, Dupont and Lacey would not be here today had it not been for JBLM. We should try and attract more not cut back on the activities of the base. FIX THE ROADS AROUND THE BASE! DO IT NOW!

It will be sad to see the reduction. The schools will take a big hit and so will businesses.

### NEGATIVE IMPACTS OF JBLM

I gave the impact to the community a mostly negative rating because, whereas the presence of the military is a significantly positive for the local businesses, the residential areas suffer because we have a large number of transient residents who don't care about their neighborhoods or the city in general as much as a permanent resident would. A recent survey indicated that 40% of the homes in DuPont are military occupied. Only about 1/4 of the residents of DuPont are registered voters. It's hard to get tax measures passed, even ones that would benefit the military while they are here, when 3/4 of the population don't care what happens here because they will be gone in 4 years. We are lucky in that we do have a number of military who choose to retire here and are thus a little more vested but the majority are not and it shows in the appearance of some of the neighborhoods.

Please create a gate to divert traffic from away from Interstate 5/SR 512. A diversion to Parkland and a diversion to Mounts Road would do wonders for Interstate 5.

If you don't fix the traffic problem you will have more and more people who will start to dislike JBLM

Traffic problems are due to State politicians not addressing the issue not JBLM.

We have an iris garden/farm in the Nisqually Valley. Because of the traffic congestion, many people find it difficult to make the drive to our place. Could you not open more gates to lessen the congestion?

1 - I am not sure the traffic is directly related to JBLM as much as poor WADOT mgmt. 2 - I feel reducing anything with the troops is a bad choice, I personally feel congress and the senate should restructure and monetary downsize would have more effect over all. JBLM and ALL OF THE TROOPS are important to this community.

Deal with your traffic issues and quit dumping the problems on surrounding communities. I don't need your business that much.

I am a mid-level manager in local government. Stop the low level fly overs!

Yes: I think all of the military bases in Washington are "social programs" which are job creation and revenue sharing "programs" mandated by congress and linked to "pork" spending. It is tough for an area to lose JBLM, see a reduction in workforce / members, etc. However, it's an opportunity to re-develop the land, to re-energize industry (manufacturing, tech, etc.) and put people to work on other than State or Federal Payrolls. For one, I am not upset in the reduction of

the work force. For those who say the national debt is too big - this is one step. Ceasing farm subsidies, eliminating tax loopholes, etc., are all "other" requirements that need to be done. Our military is bloated - we don't need 1/2 of the bases we have on either coast (East or West), they should be consolidated into 1 or two on each coast but who wants that!?! It's all about jobs. Period.

The traffic problems that JBLM has caused significant damage to the Olympia/Tacoma area. I would personally vote to close the base completely just to eliminate the traffic problems it causes.

The sooner it shuts down the better. No reason for the big guns shaking the area. Move to a less developed area. Military personnel are mostly rude and cocky.

Please use Yakima firing range for large gun testing, that is why it is there.

### **AFFINITY FOR MILITARY**

Being British, I enjoy meeting and chatting with the military. Very friendly neighbours.

Being a veteran myself I very much appreciate the service our men and women do. I never will I stop supporting them with anything they need. If the numbers of military personnel is reduced it not be a good thing for Lacey or our country.

We love the military in the area!

We've enjoyed the work we've done for JBLM employees.

### **COMMENTS ON THE MILITARY DOWNSIZING**

Don't like hearing that severe cuts are on the horizon, but it emphasizes a fact: Elections DO have consequences!

JBLM is an integral, vital element of national defense. As defense needs change nationally, the effects of JBLM will also change. We must learn to live with the changes and recognize that national requirements over which the local area has not much control must dictate what happens at JBLM.

The consolidation of Lewis and McChord was enough. Troop strength and readiness must increase; not decrease. JBLM is a strategic installation and has a strategic location. Above all other military installations, it should not be diminished in any facet: troop strength, readiness, mission or function!

I am a Pierce County resident, but my business is located in Federal Way. I have worked in social and mental health services, mostly in Pierce County, since 1997. In this experience, I have observed that service members, their partners, and their children have more difficulty accessing needed social and mental health services than the general population, both on and off base. This negatively affects the quality of life in the community in multiple ways. My business is a private practice mental health counseling group, contracted with Tricare. I personally know veterans whose military health coverage does not allow them to receive treatment for their mental health needs, including acute PTSD, from our highly qualified providers, even when what is available to them on base does not meet their needs. When we do work with military clients, Tricare pays so little, and requires so many administrative hours to ensure that claims are paid correctly, that it often costs our business money to provide services to these clients. I would like to see much more generous and user-friendly social and mental health care options provided by the military to its members and veterans. This would benefit military personnel/veterans, businesses, and the general community around the base, which, by the way, impacts South King County as well as Pierce and Thurston Counties.

**NOT FOR PROFITS**

As a non-profit trade association JBLM doesn't impact our business but a decrease in active duty does impact our local economy.

We are the Buffalo Soldiers Museum. We are member of the Pierce County Arts and Culture Coalition. Arts and Culture is a great part of quality of life in a community. This area should be added to your survey. People need an outlet to reduce stress.

This survey was slanted towards for-profit and you totally negated and ignored the impact of the nonprofit businesses by the questions in your survey. That was appalling to completely ignore this vital part of our economic engine. It spoke volumes about the knowledge and the results of this survey are completely skewed and won't be an accurate representation. May I suggest hiring a survey source who knows Pierce & Thurston County and the surrounding area that serves, is impacted and supports our military, active and retired and THEIR FAMILIES!!!!

We are a non-profit cultural attraction. Some of these questions really do not pertain to us. We don't ask visitors if they come from JBLM, so my answer to that question is really just a guess.

**MISC**

I have "Praise"; for the work being done at Madigan, and your other medical facilities serving returning veterans / all veterans. I'm hoping none of your care givers will get transferred, or laid off.

Great commissary at both Ft Lewis and McChord.

There needs to be initiatives for improving family life and focus on the health of families, which are the core of building healthy communities.

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# DATA TABLES

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## READING THE CROSSTABULATION TABLES

The crosstabulations found in this report are presented in a "banner table" format. Categories of respondents (e.g. "35-54 years old," or "Female") are listed across the top of each page (the "banner"). The questions asked in the survey are listed down the left margin. The figures in the cells are percentages based on the number of respondents in the category at the head of each



## SSMCP BUSINESS SURVEY

1 of 6

JBLM GROWTH IMPACT	TOTAL		COUNTY		RESPONDENT POSITION			BUSINESS STRUCTURE		
	(N=)	Pierce	Thurs	Owner	Exec/ Mgr	Other	Indepen dent	Chai n/ Franch	Other	
TOTAL (N=)	146	79	67	82	50	14	94	16	36	100
RATE JBLM AS NEIGHBOR										
Poor	4	1	3	3	0	1	2	0	2	6
Fair	7	4	3	3	4	0	3	2	13	6
Good	50	30	20	25	30	3	33	6	38	31
Exlnt	73	36	37	45	55	9	49	7	44	47
No Opin	12	8	4	6	7	1	7	1	6	11
ECONOMY										
Signi f Pos	43	21	22	27	33	3	28	4	25	31
Most Pos	79	42	37	42	51	10	49	9	56	58
Little/None	10	5	5	5	6	0	7	0	0	8
Signi f Neg	1	0	1	1	1	0	1	0	0	0
No Opin'	13	11	2	7	9	1	9	3	19	3
COMMUNI TY										
Signi f Pos	29	13	16	23	28	2	20	2	13	19
Most Pos	80	41	39	36	44	9	46	10	63	67
Little/None	15	10	5	9	11	1	13	1	6	3
Most Neg	5	2	3	4	5	1	3	0	0	6
Signi f Neg	2	1	1	2	2	0	2	0	0	0
No Opin'	15	12	3	8	10	1	10	3	19	6
QUALITY OF LIFE										
Signi f Pos	19	6	13	14	17	3	12	1	6	17
Most Pos	64	34	30	34	41	6	41	7	44	44
Little/None	39	23	16	19	23	4	27	3	19	25
Most Neg	5	2	3	4	5	0	3	1	6	3
Signi f Neg	3	1	2	3	4	0	3	0	0	0
No Opin'	16	13	3	8	10	2	8	4	25	11
YOUR BUSINESS										
Signi f Pos	26	8	18	13	16	4	13	3	19	28
Most Pos	44	23	21	23	28	4	27	6	38	31
Little/None	64	38	26	40	49	4	46	5	31	36
Signi f Neg	2	1	1	2	2	0	2	0	0	0
No Opin'	10	9	1	4	5	2	6	2	13	6
TRAFFIC										
Signi f Pos	6	3	3	5	6	0	5	0	0	3
Most Pos	12	8	4	7	9	1	8	1	6	8
Little/None	19	12	7	11	13	3	12	0	0	7
Most Neg	45	19	26	25	30	7	28	6	38	31
Signi f Neg	53	28	25	29	35	2	36	6	38	31
No Opin'	11	9	2	5	6	1	5	3	19	8

ELWAY RESEARCH, INC.

## SSMCP BUSINESS SURVEY

JBLM GROWTH IMPACT	TOTAL (N=)	YEARS IN BUSINESS				NUMBER OF EMPLOYEES		
		1-5 yrs	6-10 yrs	10+ yrs		1-9	10-24	25+
TOTAL (N=)	146	100	29	100	92	100	23	100
RATE JBLM AS NEIGHBOR								
Poor	4	3%	1	4%	0	0%	0	0%
Fair	7	5%	1	4%	3	3%	3	13%
Good	50	34%	3	12%	34	37%	7	30%
Exlnt	73	50%	17	68%	43	47%	11	48%
No Opin	12	8%	3	12%	7	8%	2	9%
ECONOMY								
Signi f Pos	43	29%	9	36%	25	27%	32	34%
Most Pos	79	54%	13	52%	50	54%	48	52%
Li ttle/None	10	7%	2	8%	7	8%	6	6%
Signi f Neg	1	1%	0	0%	1	1%	1	1%
No Opin'	13	9%	1	4%	9	10%	6	6%
COMMUNI TY								
Signi f Pos	29	20%	8	32%	16	17%	22	24%
Most Pos	80	55%	11	44%	52	57%	52	56%
Li ttle/None	15	10%	3	12%	11	12%	6	6%
Most Neg	5	3%	1	4%	3	3%	3	3%
Signi f Neg	2	1%	1	4%	1	1%	2	2%
No Opin'	15	10%	1	4%	9	10%	8	9%
QUALI TY OF LI FE								
Signi f Pos	19	13%	5	20%	10	11%	16	17%
Most Pos	64	44%	11	44%	39	42%	39	42%
Li ttle/None	39	27%	5	20%	27	29%	21	23%
Most Neg	5	3%	1	4%	3	3%	4	4%
Signi f Neg	3	2%	1	4%	2	2%	3	3%
No Opin'	16	11%	2	8%	11	12%	10	11%
YOUR BUSINESS								
Signi f Pos	26	18%	6	24%	16	17%	14	15%
Most Pos	44	30%	7	28%	28	30%	29	31%
Li ttle/None	64	44%	11	44%	40	43%	45	48%
Signi f Neg	2	1%	0	0%	1	1%	2	2%
No Opin'	10	7%	1	4%	7	8%	3	3%
TRAFFIC								
Signi f Pos	6	4%	2	8%	1	1%	5	5%
Most Pos	12	8%	2	8%	7	8%	8	9%
Li ttle/None	19	13%	4	16%	12	13%	16	17%
Most Neg	45	31%	8	32%	29	32%	24	26%
Signi f Neg	53	36%	7	28%	37	40%	34	37%
No Opin'	11	8%	2	8%	6	7%	6	6%

JBLM GROWTH I MPACT	TOTAL (N=)	% OF VETS EMPLOYED				OWNER CONNECTED TO MILITARY			% OF JBLM CUSTOMERS				
		None	1-10%	10%+	100%	Yes	Veteran	None	None	1-5%	6-10%	11-25%	25%+
TOTAL (N=)	146	100	34	26	13	6	36	104	29	36	25	30	22
	4	3%	0	0	0	0	0	4	1	3%	1	0	0
	7	5%	0	4	0	0	0	5	0	8%	2	1	5%
	50	34%	12	13	2	33%	11	37	15	33%	5	10	6
	73	50%	18	6	10	67%	20	49	9	44%	14	18	15
RATE JBLM AS NEIGHBOR	12	8%	4	3	1	0	3	9	4	11%	3	1	0
	43	29%	8	4	9	0	14	29	8	17%	7	11	10
	79	54%	22	19	3	100	19	54	16	61%	13	15	11
	10	7%	1	1	0	0	1	9	2	8%	2	2	1
	1	1%	0	0	0	0	0	1	0	3%	0	0	0
ECONOMY	13	9%	3	2	1	0	2	11	3	11%	3	2	0
	43	29%	8	4	9	0	14	29	8	17%	7	11	10
	79	54%	22	19	3	100	19	54	16	61%	13	15	11
	10	7%	1	1	0	0	1	9	2	8%	2	2	1
	1	1%	0	0	0	0	0	1	0	3%	0	0	0
COMMUNI TY	29	20%	6	5	5	1	12	16	3	10%	7	8	8
	80	55%	19	14	7	83%	17	58	16	58%	12	18	12
	15	10%	5	3	0	0	2	13	5	17%	1	1	2
	5	3%	0	1	0	0	1	4	2	7%	1	0	0
	2	1%	0	0	0	0	0	2	0	3%	1	0	0
QUALITY OF LIFE	15	10%	4	3	1	0	4	11	3	14%	3	3	0
	29	20%	6	5	5	1	12	16	3	10%	7	8	8
	80	55%	19	14	7	83%	17	58	16	58%	12	18	12
	15	10%	5	3	0	0	2	13	5	17%	1	1	2
	5	3%	0	1	0	0	1	4	2	7%	1	0	0
YOUR BUSINESS	3	2%	0	1	0	0	1	3	1	3%	1	0	0
	16	11%	4	2	2	0	4	12	2	17%	3	4	0
	19	13%	3	2	5	0	9	10	4	8%	4	13	4
	64	44%	17	11	6	67%	18	42	10	33%	9	17	14
	39	27%	9	10	0	33%	3	34	11	36%	7	4	3
TRAFFIC	5	3%	1	0	0	0	1	4	1	3%	1	1	1
	3	2%	0	1	0	0	1	3	1	3%	1	0	0
	16	11%	4	2	2	0	4	12	2	17%	3	4	0
	26	18%	8	3	4	0	8	17	1	3%	4	7	10
	44	30%	9	9	3	67%	10	29	5	22%	6	15	9
TOTAL (N=)	64	44%	13	11	5	33%	15	47	19	66%	12	6	3
	2	1%	0	1	0	0	1	1	1	3%	0	0	0
	10	7%	4	2	1	0	2	8	3	3%	3	2	0
	26	18%	8	3	4	0	8	17	1	3%	4	7	10
	44	30%	9	9	3	67%	10	29	5	22%	6	15	9
RATE JBLM AS NEIGHBOR	64	44%	13	11	5	33%	15	47	19	66%	12	6	3
	2	1%	0	1	0	0	1	1	1	3%	0	0	0
	10	7%	4	2	1	0	2	8	3	3%	3	2	0
	26	18%	8	3	4	0	8	17	1	3%	4	7	10
	44	30%	9	9	3	67%	10	29	5	22%	6	15	9
YOUR BUSINESS	6	4%	2	0	0	0	1	5	2	7%	1	0	2
	12	8%	2	1	0	33%	1	9	1	8%	2	2	2
	19	13%	12	4	1	17%	5	13	4	14%	3	9	9
	45	31%	15	7	8	0	16	29	10	31%	6	9	6
	53	36%	14	11	3	33%	10	41	11	28%	9	12	10
TRAFFIC	11	8%	2	3	1	17%	3	7	1	6%	4	4	0
	26	18%	8	3	4	0	8	17	1	3%	4	7	10
	44	30%	9	9	3	67%	10	29	5	22%	6	15	9
	64	44%	13	11	5	33%	15	47	19	66%	12	6	3
	2	1%	0	1	0	0	1	1	1	3%	0	0	0
TOTAL (N=)	10	7%	4	2	1	0	2	8	3	3%	3	2	0
	26	18%	8	3	4	0	8	17	1	3%	4	7	10
	44	30%	9	9	3	67%	10	29	5	22%	6	15	9
	64	44%	13	11	5	33%	15	47	19	66%	12	6	3
	2	1%	0	1	0	0	1	1	1	3%	0	0	0
RATE JBLM AS NEIGHBOR	10	7%	4	2	1	0	2	8	3	3%	3	2	0
	26	18%	8	3	4	0	8	17	1	3%	4	7	10
	44	30%	9	9	3	67%	10	29	5	22%	6	15	9
	64	44%	13	11	5	33%	15	47	19	66%	12	6	3
	2	1%	0	1	0	0	1	1	1	3%	0	0	0
YOUR BUSINESS	6	4%	2	0	0	0	1	5	2	7%	1	0	2
	12	8%	2	1	0	33%	1	9	1	8%	2	2	2
	19	13%	12	4	1	17%	5	13	4	14%	3	9	9
	45	31%	15	7	8	0	16	29	10	31%	6	9	6
	53	36%	14	11	3	33%	10	41	11	28%	9	12	10
TRAFFIC	11	8%	2	3	1	17%	3	7	1	6%	4	4	0
	26	18%	8	3	4	0	8	17	1	3%	4	7	10
	44	30%	9	9	3	67%	10	29	5	22%	6	15	9
	64	44%	13	11	5	33%	15	47	19	66%	12	6	3
	2	1%	0	1	0	0	1	1	1	3%	0	0	0

## SSMCP BUSINESS SURVEY

DRAWDOWN IMPACT	TOTAL (N=)	COUNTY		RESPONDENT POSITION			BUSINESS STRUCTURE		
		Pi erce	Thurs	Owner	Exec/ Mgr	Other	Indepen dent	Chai n/ Franch	Other
TOTAL (N=)	146	79	67	100	82	100	94	100	36
COMMUNI TY									
Signi f Pos	6	4%	4	6%	4	5%	3	3%	3
Most Pos	7	5%	2	3%	6	7%	6	6%	1
Little/None	31	21%	13	16%	18	22%	23	24%	5
Most Neg	68	47%	40	51%	35	43%	38	40%	21
Signi f Neg	25	17%	11	14%	17	21%	18	19%	5
No Opin'	9	6%	8	10%	2	2%	6	6%	1
ECONOMY									
Signi f Pos	3	2%	2	3%	2	2%	2	2%	1
Most Pos	3	2%	1	1%	2	2%	2	2%	1
Little/None	15	10%	7	10%	10	12%	10	11%	5
Most Neg	71	49%	32	48%	34	41%	45	48%	17
Signi f Neg	49	34%	25	37%	33	40%	32	34%	11
No Opin'	5	3%	0	0%	1	1%	3	3%	1
YOUR BUSINESS									
Signi f Pos	3	2%	2	3%	2	2%	2	2%	1
Most Pos	1	1%	0	0%	0	0%	0	0%	1
Little/None	78	53%	35	52%	47	57%	51	54%	23
Most Neg	38	26%	19	24%	17	21%	23	24%	7
Signi f Neg	17	12%	7	9%	12	15%	12	13%	3
No Opin'	9	6%	1	1%	4	5%	6	6%	1
TRAFFIC									
Signi f Pos	23	16%	15	22%	12	15%	15	16%	7
Most Pos	67	46%	31	46%	38	46%	47	50%	12
Little/None	41	28%	18	27%	22	27%	25	27%	12
Most Neg	1	1%	0	0%	1	1%	1	1%	0
Signi f Neg	5	3%	2	3%	4	5%	3	3%	2
No Opin'	9	6%	1	1%	5	6%	3	3%	3
QUALITY OF LIFE									
Signi f Pos	5	3%	3	4%	3	4%	3	3%	2
Most Pos	15	10%	7	10%	11	13%	11	12%	2
Little/None	55	38%	29	43%	21	42%	35	37%	14
Most Neg	38	26%	16	24%	19	23%	24	26%	10
Signi f Neg	18	12%	10	15%	14	17%	13	14%	4
No Opin'	15	10%	2	3%	6	7%	8	9%	4

ELWAY RESEARCH, INC.



SSMCP BUSINESS SURVEY

DRAWDOWN IMPACT	TOTAL (N=)	YEARS IN BUSINESS			NUMBER OF EMPLOYEES		
		1-5 yrs	6-10 yrs	10+ yrs	1-9	10-24	25+
TOTAL (N=)	146	100	29	92	93	23	29
COMMUNI TY							
Signi f Pos	6	4%	0	4	4	1	1
Most Pos	7	5%	3	2	5	2	0
Li ttle/None	31	21%	7	21	18	4	9
Most Neg	68	47%	12	42	45	9	14
Signi f Neg	25	17%	6	17	16	4	4
No Opin'	9	6%	1	6	5	3	1
ECONOMY							
Signi f Pos	3	2%	0	1	3	0	0
Most Pos	3	2%	2	0	3	0	0
Li ttle/None	15	10%	4	10	9	3	3
Most Neg	71	49%	10	46	43	10	18
Signi f Neg	49	34%	13	31	33	7	8
No Opin'	5	3%	0	4	2	3	0
YOUR BUSINESS							
Signi f Pos	3	2%	0	1	3	0	0
Most Pos	1	1%	1	0	1	0	0
Li ttle/None	78	53%	17	53	56	9	13
Most Neg	38	26%	5	23	18	8	12
Signi f Neg	17	12%	5	9	11	2	3
No Opin'	9	6%	1	6	4	4	1
TRAFFIC							
Signi f Pos	23	16%	6	14	15	3	5
Most Pos	67	46%	14	41	42	12	13
Li ttle/None	41	28%	6	28	27	5	9
Most Neg	1	1%	0	1	1	0	0
Signi f Neg	5	3%	2	2	3	1	0
No Opin'	9	6%	1	6	5	2	2
QUALI TY OF LI FE							
Signi f Pos	5	3%	0	3	3	1	1
Most Pos	15	10%	5	5	13	2	0
Li ttle/None	55	38%	10	38	32	8	15
Most Neg	38	26%	6	25	23	6	9
Signi f Neg	18	12%	5	11	13	2	2
No Opin'	15	10%	3	10	9	4	2

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DRAWDOWN IMPACT	TOTAL (N=)	% OF VETS EMPLOYED				OWNER CONNECTED TO MILITARY			% OF JBLM CUSTOMERS				
		None	1-10%	10%+	100%	Yes	Veteran	None	None	1-5%	6-10%	11-25%	25%+
TOTAL (N=)	146 100	67 100	34 100	26 100	13 100	6 100	36 100	104 100	29 100	36 100	25 100	30 100	22 100
COMMUNITY													
Signif Pos	6 4%	4 6%	1 3%	0 0%	0 0%	0 0%	0 0%	6 6%	3 10%	1 3%	1 4%	0 0%	0 0%
Most Pos	7 5%	3 4%	1 3%	2 8%	1 8%	0 0%	3 8%	4 4%	2 7%	3 8%	2 8%	0 0%	0 0%
Little/None	31 21%	12 18%	7 21%	9 35%	1 8%	2 33%	5 14%	24 23%	8 28%	9 25%	6 24%	4 13%	3 14%
Most Neg	68 47%	30 45%	17 50%	11 42%	9 69%	3 50%	20 56%	45 43%	14 48%	14 39%	12 48%	16 53%	11 50%
Signif Neg	25 17%	13 19%	7 21%	3 12%	1 8%	1 17%	7 19%	17 16%	1 3%	5 14%	3 12%	9 30%	7 32%
No Op'n'	9 6%	5 7%	1 3%	1 4%	1 8%	0 0%	1 3%	8 8%	1 3%	4 11%	1 4%	1 3%	1 5%
ECONOMY													
Signif Pos	3 2%	3 4%	0 0%	0 0%	0 0%	0 0%	0 0%	3 3%	1 3%	1 3%	1 4%	0 0%	0 0%
Most Pos	3 2%	1 1%	1 3%	0 0%	1 8%	0 0%	1 3%	2 2%	0 0%	2 6%	1 4%	0 0%	0 0%
Little/None	15 10%	5 7%	4 12%	4 15%	1 8%	2 33%	4 11%	9 9%	5 17%	4 11%	3 12%	1 3%	1 5%
Most Neg	71 49%	28 42%	16 47%	16 62%	8 62%	2 33%	19 53%	50 48%	20 69%	17 47%	11 44%	11 37%	10 45%
Signif Neg	49 34%	27 40%	13 38%	6 23%	2 15%	2 33%	11 31%	36 35%	3 10%	10 28%	7 28%	18 60%	11 50%
No Op'n'	5 3%	3 4%	0 0%	0 0%	1 8%	0 0%	1 3%	4 4%	0 0%	2 6%	2 8%	0 0%	0 0%
YOUR BUSINESS													
Signif Pos	3 2%	3 4%	0 0%	0 0%	0 0%	0 0%	0 0%	3 3%	1 3%	1 3%	1 4%	0 0%	0 0%
Most Pos	1 1%	0 0%	1 3%	0 0%	0 0%	0 0%	0 0%	1 1%	0 0%	1 3%	0 0%	0 0%	0 0%
Little/None	78 53%	40 60%	13 38%	18 69%	5 38%	3 50%	19 53%	56 54%	18 62%	28 78%	13 52%	10 33%	7 32%
Most Neg	38 26%	12 18%	14 41%	4 15%	6 46%	1 17%	12 33%	25 24%	5 17%	2 6%	5 20%	15 50%	10 45%
Signif Neg	17 12%	10 15%	3 9%	3 12%	0 0%	2 33%	3 8%	12 12%	1 3%	3 8%	4 16%	4 13%	5 23%
No Op'n'	9 6%	2 3%	3 9%	1 4%	2 15%	0 0%	2 6%	7 7%	4 14%	1 3%	2 8%	1 3%	0 0%
TRAFFIC													
Signif Pos	23 16%	13 19%	4 12%	4 15%	1 8%	0 0%	3 8%	20 19%	7 24%	7 19%	2 8%	4 13%	2 9%
Most Pos	67 46%	31 46%	18 53%	12 46%	4 31%	2 33%	15 42%	50 48%	15 52%	13 36%	12 48%	14 47%	11 50%
Little/None	41 28%	17 25%	7 21%	10 38%	6 46%	2 33%	15 42%	24 23%	5 17%	11 31%	8 32%	8 27%	8 36%
Most Neg	1 1%	1 1%	0 0%	0 0%	0 0%	1 17%	0 0%	0 0%	0 0%	1 3%	0 0%	0 0%	0 0%
Signif Neg	5 3%	2 3%	2 6%	0 0%	0 0%	1 17%	1 3%	3 3%	0 0%	2 6%	1 4%	1 3%	1 5%
No Op'n'	9 6%	3 4%	3 9%	0 0%	2 15%	0 0%	2 6%	7 7%	2 7%	2 6%	2 8%	3 10%	0 0%
QUALITY OF LIFE													
Signif Pos	5 3%	3 4%	1 3%	0 0%	0 0%	0 0%	0 0%	5 5%	2 7%	1 3%	1 4%	0 0%	0 0%
Most Pos	15 10%	6 9%	2 6%	4 15%	1 8%	0 0%	5 14%	10 10%	5 17%	3 8%	4 16%	1 3%	1 5%
Little/None	55 38%	23 34%	14 41%	14 54%	4 31%	3 50%	12 33%	40 38%	13 45%	15 42%	10 40%	9 30%	7 32%
Most Neg	38 26%	17 25%	11 32%	4 15%	5 38%	2 33%	11 31%	25 24%	7 24%	8 22%	4 16%	9 30%	10 45%
Signif Neg	18 12%	11 16%	4 12%	1 4%	1 8%	1 17%	4 11%	13 13%	1 3%	4 11%	4 16%	6 20%	3 14%
No Op'n'	15 10%	7 10%	2 6%	3 12%	2 15%	0 0%	4 11%	11 11%	1 3%	5 14%	2 8%	5 17%	1 5%

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