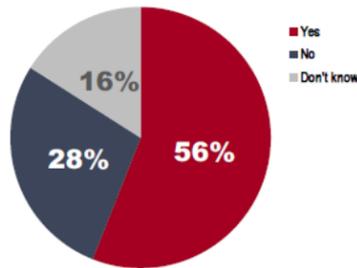


2015 SSMCP Business Survey Results, Continued

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.

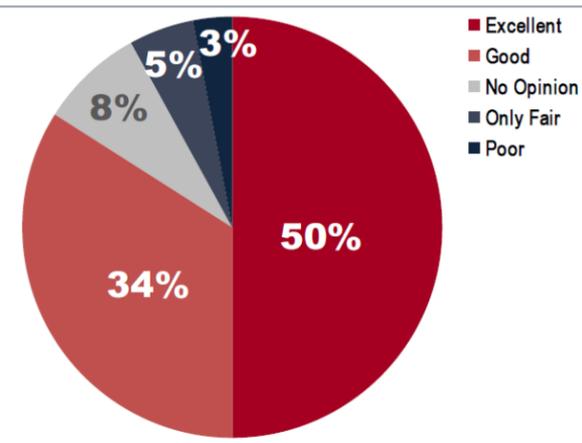
JBLM's economic impact was the most highly regarded, and its potential reduction the most dreaded. Notably, however, JBLM was seen to have a greater positive impact on the community than it had on the respondent's particular enterprise.

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

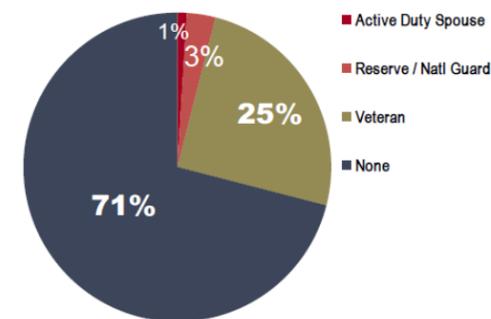
Joint Base Lewis McChord is an over 86,000 acre military installation in the South Puget Sound, nestled among two counties and 17 cities and towns, and bisected by Interstate 5. JBLM is the third largest employer in Washington, and a major economic driver for the state.

South Sound Military & Communities Partnership

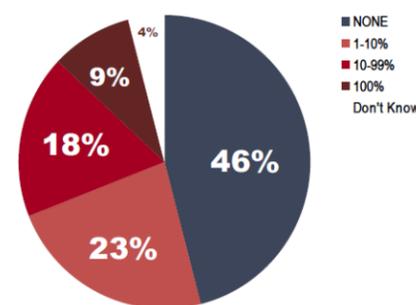
The South Sound Military & Communities Partnership, a regional partnership of governments and organizations in Pierce and Thurston Counties, works to improve outside knowledge of the military's direct and indirect impact on the region and the State, as well as increase coordination between military and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

Key Findings

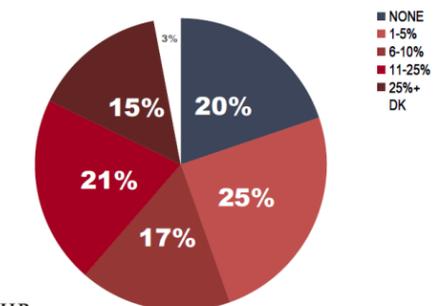
Business Owner Military Demographics



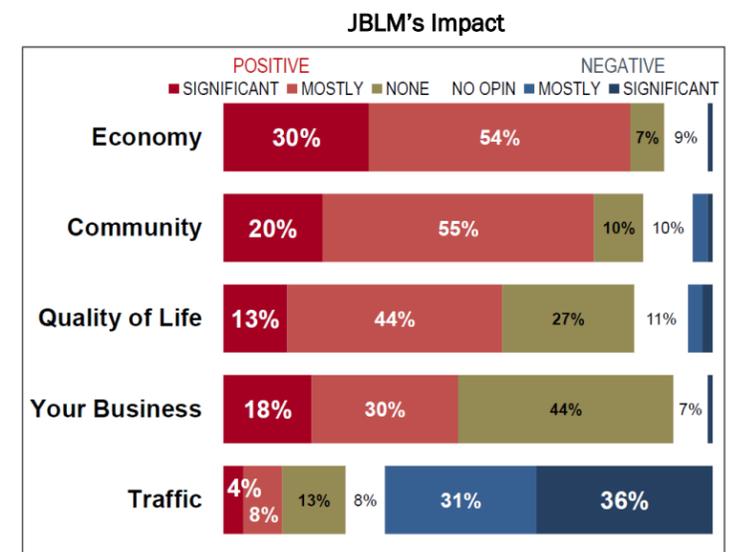
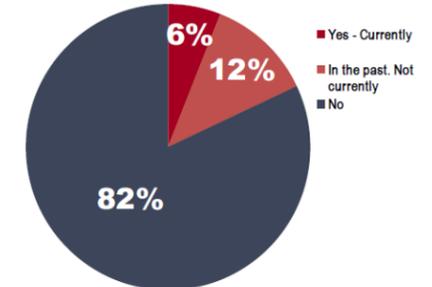
Percentage of Veteran Employees



Percentage of JBLM-related Customers



Percentage with JBLM Contracts



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