The Fort Drum Consumer Market

Executive Summary

This report describes the results of primary and secondary research into Fort Drum consumers, as well as the typical demographic profile of an Army household or service member. It offers suggestions for regional businesses interested in reaching the lucrative Fort Drum market. It also provides some guidance to economic developers interested in attracting new retail business to the region. The research was conducted by the Center for Community Studies at Jefferson Community College in the spring and early summer of 2007.

The Fort Drum Consumer market consists of roughly 17,000 households with a total population of 34,000 people and a combined pre-tax income of approximately $600 million. They have distinct spending habits and desires and their consumer characteristics differ from that of the typical civilian household in Jefferson County.

The typical Fort Drum household is more likely to be ethnically diverse and have an interest in ethnic foods and other products. They are typically very aware of national brands and retail chains and have limited awareness of local non-chain stores. The Fort Drum market has distinct segments based around income/age/rank but some general trends permeate the entire market. These include an interest in family activities, an appreciation of national chains/brands, and the tendency to make price-sensitive purchasing decisions.

The typical member of a Fort Drum household is younger and better educated than their civilian counterparts, and more likely to be in a household with young children. Most Fort Drum soldiers are married, although frequent deployments cause the remaining spouse to assume roles similar to that of a single parent.

Fort Drum members sometimes report feeling isolated from the local civilian community and do not see Northern New York as “their” community. Typically, they see this as one of a number of places they have been/will be and have limited interest in deeply exploring the area. They pay limited attention to most local advertising and gain market knowledge through word of mouth between other soldiers/families. They are frequent on-line shoppers and use the Internet extensively to gather information.

This report was prepared using secondary market data on the US Army in general and Fort Drum specifically. It is supplemented by the results of two focus groups of Fort Drum spouses. The groups were segmented by average household income with one group drawn from junior enlisted spouses (lower incomes) and the other from officers and senior enlisted spouses (higher income.)

Secondary Research: The Fort Drum Consumer Market

The Fort Drum consumer market includes approximately 34,000 people in 7300 families, with a combined pre-tax income in 2005 of $ 591,864,406. They tend to be young, well-educated, ethnically diverse, and will spend freely on things they like.

They typically enjoy outdoor recreation, family activities, and travel. They are avid on-line shoppers and investors and have above-average spending propensities for children's toys and clothes, electronic items, video games and music, and fashionable clothing and jewelry. They are frequent pet owners – usually dogs.

They are familiar with national brands and chain stores and tend to shop at these locations versus local/non-brand locations. They vary significantly among themselves in disposable income and many with larger families tend to be strong value shoppers. Those with smaller families/no families enjoy more disposable income and are an excellent market for aspirational items such as high-end cars, clothes, and electronic equipment.

They are ethnically diverse, well-traveled nationally and internationally, and have family ties and history in many areas across the US. This makes them regular travelers, as well as an active market for ethnic foods and experiences, and urban products/brands.

The Fort Drum market can be grouped into four general target categories, based on socio-economics and age demographics. These categories can be used to help define niche markets more precisely.

<u>Junior Enlisted Soldiers</u>
This is the second-largest largest category by numbers with roughly 11,790 soldiers. It includes soldiers in grades E1 – E5. These soldiers are very young – almost all under 25, and tend to have a high school education but little college and very few degrees. They have pre-tax incomes between $25,488 and $38,520 - the lowest of any category. They are seldom married and have very few dependents. They are a strong market for used cars, electronics equipment, and clothing in youthful fashions. They spend freely on entertainment and may be a good market for credit/loan services.

<u>Senior Enlisted Soldiers</u>
This category includes roughly 3100 soldiers in grades E6 to E9. They have pre-tax incomes between $34,308 and $96,408. They are older than their junior enlisted subordinates but still tend to be under 50 years old, even at the highest grades. They have education levels better than the average for Jefferson County but much lower than the officer categories. They are typically married and have an average of 2 children. Their children are usually young and their spouses are of a similar age and socio-economic level. They are good markets for houses, new automobiles/trucks, children's items, and outdoor and family recreation equipment, including boats and RVs.

Junior Officers

This category includes roughly 1275 officers in grades O1 – O3. They have an average age of less than 30 and are somewhat more likely than junior enlisted soldiers to be married. Virtually all officers have at least a bachelor's degree and many have advanced degrees as well. They enjoy pre-tax incomes between $41,148 and $87,000, making them some of the best-paid young professionals in the NNY region. They are excellent markets for new cars and electronic equipment as well as entertainment, travel, and computer equipment. If they have families, they tend to be very young.

Senior Officers

These are the small group of senior leaders who direct operations at Fort Drum. They are by far the smallest group, with roughly 420 members in grades O4 to O8. They are almost always married and have children across a broad age group. They typically have a bachelor's degree and usually advanced degrees as well. They enjoy pre-tax incomes between $62,160 and $131,232, making them some of the best-compensated senior professionals in Jefferson County. They are strong markets for houses, automobiles, and home furnishings, as well as travel and entertainment.

NOTE: These categories do not specifically address warrant officers (grades W1-W5). The number of soldiers in these grades is relatively small and would not represent a reasonable consumer market segment for Fort Drum alone. For market planning and segmentation purposes, warrant officers should be included in campaigns aimed at senior non-commissioned officers (NCOs).

The spouses of soldiers in each category tend to mirror the Army member in age and education levels.

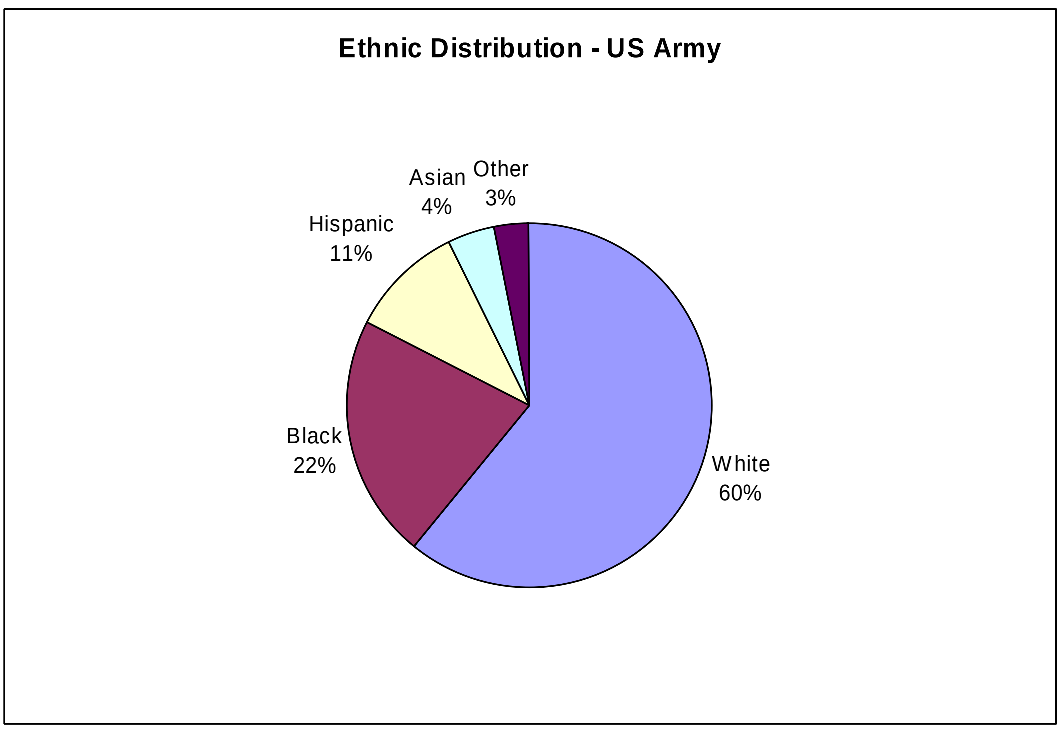
Army Demographics

Relatively few specific demographics are available for the Fort Drum community but the US Army as a whole has been well-studied. The population at Fort Drum can be reasonably assumed to resemble that of the Amy as whole, with certain general exceptions. As the home of a light infantry unit, the military population of Fort Drum is somewhat more likely to be male, younger, and have a slightly higher proportion of enlisted personnel to officers.

Enlisted personnel make up 83% of the Army population, while commissioned officers and warrant officers make up only 14% and 3% respectively. The male to female ratio for enlisted soldiers is 86% to 14%, while the ratio for officers is 83% male to 17% female. Female soldiers are less likely to be married than are male soldiers but are more likely to be married to another soldier.

Figure 1 shows the distribution by ethnic group. Over the past ten years, enlistments of Black soldiers have been decreasing while the enlistment rate for Hispanics has almost doubled.

Figure 1



Source: Army Profile 2005

The majority of all soldiers are married (54%). Officers are most likely to be married at 68% for commissioned officers and 82% for warrant officers. Enlisted soldiers are almost evenly split, with just over 50% married. These trends have been moving slightly downward for all ranks since 1995.

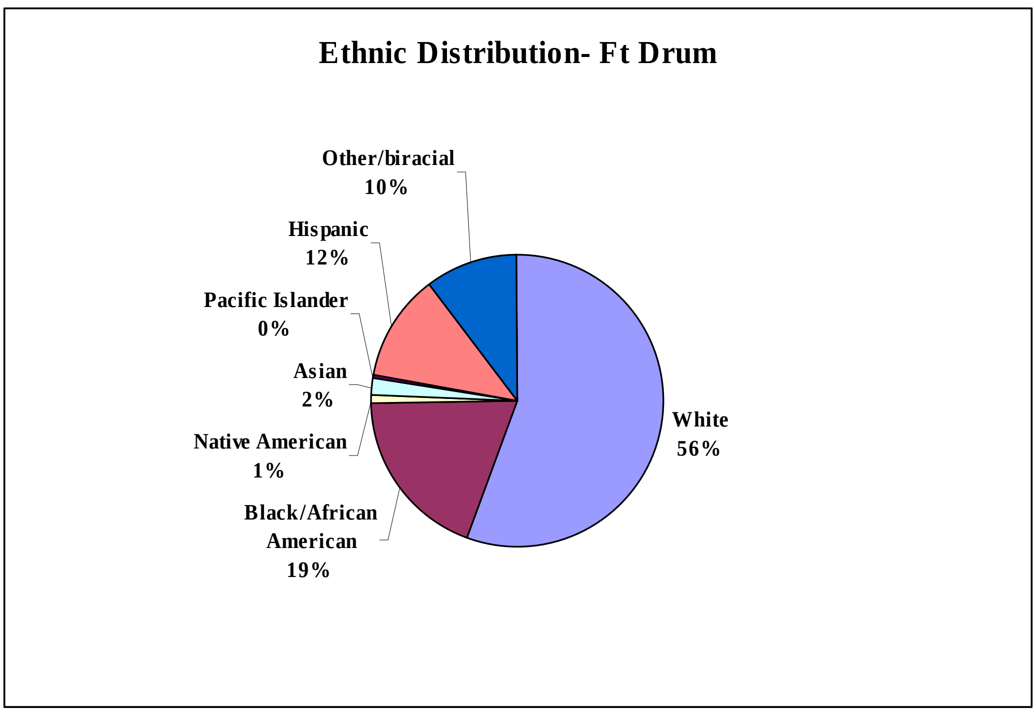
Forty-six percent of all soldiers have children – 53% of all commissioned officers, 75% of all warrant officers, and 44% of all enlisted soldiers. The average number of children in an army family with children is two. Single parenthood is relatively rare in the Army, with only 7% of all soldiers acting as single parents. The average soldier is 24.6 years of age at the birth of his/her first child. Over half of all Army children are under 7 years of age.

The Young/Single Soldier at Fort Drum

In most cases, it is difficult to pick soldiers out from the surrounding population for study. The 13602 zip code, however, is limited to Fort Drum and includes almost entirely single soldiers living on post. Census Bureau data from the 2000 census is available to give a picture of this group of young men and women.

The group has a median age of 22.3 years, with 73% under 25 and almost everyone between 18 and 35. They are 90% male (the effect of an infantry unit), and ethnically diverse. Figure 2 shows this diversity.

Figure 2



Source: US Census Bureau, 2000 census
Note: Numbers exceed 100% as Hispanic may include other categories as well.

This group has higher rates of high school and some college/associates degree completion than their youthful counterparts in the rest of the county, but are less likely to have a bachelor's degree or higher. Table 1 shows the comparison between Fort Drum and Jefferson County populations under 25.

Table 1 - Education Comparison Ft Drum to Jefferson County Population Under 25 Years Old

	Ft Drum/13602	Jefferson County
HS Grad (incld equivalency)	60.5%	43.5%
Some college/Associates Degree	36.6%	34.0%
Bachelors Degree or Higher	1.1%	5.0%

Source: US Census Bureau, 2000 Census

This group had a per-capita income of $16,774 in 2000. Because they are concentrated in the lowest ranks of the Army, they have lower incomes than the Fort Drum population as a whole or the Jefferson County population. This low income causes them to be less likely to spend in most categories than the overall population. Within their spending capacity, however, they are more likely to spend money on used cars, electronics equipment, pet ownership, and education. They are less likely to spend on financial/investment products. Roughly 1 in 10 of these soldiers is expected to retire from an Army career. The average term of service is likely to be 10 years or less.

Military Families at Fort Drum

The 13603 zip code is limited largely to Fort Drum families living on or near the post, giving a general demographic glimpse of this group.

> *NOTE: The 13603 zip code does include a number of non-military civilians who may or may not be directly associated with Fort Drum. Demographic evidence suggests this group is relatively small and unlikely to significantly affect average results for the zip code, but some care must be taken in using these demographics as the basis for a very focused marketing effort.*

According to 2000 Census Bureau data, this group of 7498 residents includes 1998 (43%) members of the armed forces. 2488 residents are veterans, including 546 who are now civilian. Only 8 people were reported as being 65 years old or older. This suggests a military family population but does not absolutely define it.

The group has a median age of 22 years, with 57% under 25. They are evenly divided between male and female and somewhat less ethnically diverse than other general Army populations. The group is overwhelmingly likely to be married (90.3%), with an average family size of 3.3 persons. 1402 people (18.7%) are under 5 years of age and 10.7% are enrolled in primary or secondary schools. Another 7.6% are enrolled in higher education. Almost all (98.3%) live in rented houses.

Direct comparisons of education levels with either the 13602 zip code or Jefferson County as whole are problematic given the large school-age population. The residents of the 13603 zip code are far more likely than their single army or local civilian counterparts to have earned a bachelor's degree or higher. Twenty-four percent of the 13603 residents under 25 hold a bachelor's degree or higher, versus only 1.1% for 13602 and 5% for Jefferson County as a whole.

The group enjoys a median household income of $31,528 (in 2000 dollars), with 88% of all households between $15,000 and $75,000 in income. The ESRI zip code demographic survey characterizes 13603 as a Military Proximity community. These residents are described as being active in outdoor sports and family recreation, likely to own a pet (usually a dog), and attend theme parks. Their most recent significant purchases are likely to include consumer electronics, video games, apparel, and jewelry. They are likely to be active users of the Internet for shopping and investing.

Army Incomes and Spending

The Fort Drum Economic Impact report for 2005 shows a total payroll of $591,864,406 on the post. This number has increased since that time, with the continuing arrival of new troops. This represents the total potential purchasing power of the Fort Drum population, less taxes. Table 2 shows the estimated general spending by consumer categories for the Fort Drum population at full strength. Clearly, the consumer market is huge.

Table 2

Estimated Fort Drum Spending

	Total
Food at Home	$44,482,652
Food Away from Home	$39,774,766
Housing	$162,758,352
Home Furnishings	$21,851,362
Clothing/Apparel	$29,961,062
Transportation	$117,538,969
Health Care	$17,994,408
Entertainment	$29,799,564
Personal Care	$7,482,641
Education	$23,210,558
Gifts	$10,513,798
Total	$624,115,837

Sources: U.S. Bureau of Labor Statistics Consumer Expenditure Surveys
U.S. Census Bureau Population Demographics, 2000 Census

Note: Because spending estimates were prepared using different data than the actual payroll numbers provided by Fort Drum, the two numbers cannot be directly compared.

Table 3 shows the base pay and allowances for each Army rank (Housing allowance is specific to Fort Drum). Individual soldiers may receive other allowances as well, based on specific circumstances. It should be noted that, while base pay is subject to income taxation by both the federal government and the soldier's home state, housing and food allowances are not. This acts to raise the effective disposable income for all soldiers.

Table 3
Military Base Pay and Standard Allowances
Effective 1 April 2007

Grade	Base Pay (Monthly)	Housing Allowance w/dependents	Housing Allowance w/out dependents	Food Allowance	Total Range (Monthly)
E1	1204 - 1301	867	640	280	2124 – 2448
E2	1459	867	640	280	2379 - 2606
E3	1534 - 1729	867	640	280	2454 - 2876
E4	1700 - 2063	867	640	280	2620 - 3210
E5	1854 - 2630	966	725	280	2859 - 3876
E6	2023 - 3134	1174	781	280	3084 - 4588
E7	2339 - 4204	1235	873	280	3492 - 5719
E8	3365 - 4799	1303	1007	280	4652 - 6382
E9	4111 - 6382	1372	1072	280	5463 - 8034
W1	2413 - 4170	1175	829	193	3435 - 5538
W2	2749 - 4589	1263	1006	193	3948 - 6045
W3	3107 - 5450	1345	1078	193	4378 - 6988
W4	3402 - 6338	1383	1189	193	4784 – 7914
W5	6050 - 7916	1426	1250	193	7493 - 9535
O1	2469 - 3875	990	767	193	3429 - 5058
O2	2844 - 4559	1189	932	193	3969 – 5941
O3	3292 - 5715	1342	1099	193	4584 - 7250
O4	3745 - 6252	1444	1242	193	5180 – 7889
O5	4340 - 7373	1515	1283	193	5816 – 9081
O6	5206 - 9216	1527	1345	193	6744 - 10936

Source: DOD Pay and Allowances

These compensation levels put many soldiers comfortably into a middle or upper-middle class income bracket. In addition, because the Army offers generous health care and retirement benefits, career soldiers do not need to devote as much of their income to savings as would a comparable civilian household. This allows even more discretionary spending by these soldiers.

Soldiers who are deployed to a combat zone receive additional allowances, as well as complete tax exemption. This tends to create pent-up demand for goods and services and allows considerable additional spending when the soldier returns to Fort Drum.

Conversely, the rigors of Army family life demand additional spending on areas such as travel, telephone services, and frequent relocations. Army families have significant disposable income but some constraints to spending not found in typical civilian life.

Community Survey Results

The 8th Annual Survey of the Community, conducted in April 2007 by the Center for Community Studies at Jefferson Community College, surveyed a sample of the population of Jefferson County regarding a variety of issues, including their opinions on shopping in the community. This report allowed the response of civilians to be compared with those households reporting at least one active duty military member.

Eighty percent of military households reported believing that shopping opportunities in Jefferson County were getting better versus 88% of civilian households. Overall, military households were slightly less positive about improvements in local shopping than their civilian counterparts but all responses were generally positive.

There were some reported differences between military and non-military households in response to the question "What is most important to you in a shopping/dining experience?" Table 4 shows the comparison.

Table 4
Most Important to You in a Shopping/Dining Experience?

	Shopping		**Dining**	
	Military	**Civilian**	**Military**	**Civilian**
Price	34%	34.3%	8.2%	12.6%
Convenience	9.2%	13.2%	5.9%	6.8%
Selection	7.2%	14%	14.8%	12.3%
Atmosphere	14.2%	4.3%	24.7%	14%
Location	16.8%	5.8%	7.4%	5.3%
Quality	18.7%	23.9%	34.2%	41.9%

Military consumers are significantly more concerned with issues of atmosphere and location in a shopping experience than are civilian residents. They are likewise significantly more likely to be concerned with atmosphere in a dining experience. Quality is the most important factor in a dining experience to the majority of both military and civilian residents; however military residents are slightly less likely to name it as their top priority than civilian residents.

Primary Research: Focus Groups

The secondary market research for this study is supplemented by the results of two focus groups of Fort Drum spouses. The groups were segmented by average household income with one group drawn from junior enlisted spouses (lower incomes) and the other from officers and senior enlisted spouses (higher income.)

Junior Enlisted Focus Group Results

A focus group of spouses/dependents of junior and mid-grade enlisted soldiers was held at Jefferson Community College. This section documents the results of that focus group.

Each participant was asked to complete the questionnaire included in Appendix I, and was then led by a moderator through a general discussion of the questions included in Appendix II. The privacy statement included in Appendix III was administered to all participants.

The participants ranged in age from 19 to 41, and were of diverse ethnic background. They came from a variety of different states in the U.S. All were high school graduates while two reported having master's degrees. Military sponsors ranged in grade from junior to mid-grade enlisted and warrant officers. All participants were female.

Summary of Results

The strongest themes to emerge from the group were frustration at the lack of diversity in the Watertown retail mix. Of particular concern was the lack of ethnic restaurants and sources of urban/ethnic clothing. Considerable concern was also raised regarding the lack of family activities, including entertainment and dining venues. Comments included:

"I wish we had a REAL Mexican restaurant"

"All they have here is Italian diners. It's not even real Italian food sometimes."

"I wish you had something like a Chuckee Cheese. My kids want to go someplace where they can have fun."

"I cannot even find a beauty parlor that understands how to treat hair for women of color."

"There is nothing to do here at night for young people. No good clubs or anything."

Participants typically compared/contrasted the Watertown experience with their experiences at other Army posts. They displayed strong awareness of national brands in stores and products and could name large numbers of national retailers operating in the Watertown area.

Conversely, they had little awareness of locally-owned businesses and did not consider them when thinking about favorite stores. Several expressed vague uneasiness regarding shopping in local stores away from the Mall complex. In particular, Public Square was perceived by several to be dirty, difficult to navigate, and of questionable retail interest.

While most participants reported reading the Watertown Daily Times and listening to a variety of TV and radio stations/programs, none reported using local media as a primary source of information about local events and shopping. They reported little interest in tracking local news issues and depended on flyers in their mailboxes and word of mouth from other military people for information on shopping/entertainment opportunities. Throughout the discussion, participants frequently informed one another of retail opportunities in the area, as well as in Syracuse and on-line.

Deployments had a significant impact on shopping and general life activities. Several reported a pattern of “cocooning” where they were less likely to leave the post or even their house while the military spouse was deployed. They were more likely to schedule trips home to visit family and friends during deployments, and faced logistic challenges with childcare while remaining at Fort Drum.

Detailed Results

The detailed results of the written focus group questionnaire are included as Appendix IV.

Officer/Senior NCO Focus Group Results

A focus group of spouses/dependents of commissioned officers, warrant officers, and senior non-commissioned officers was held at the Army Community Center at Fort Drum. This section documents the results of that focus group.

Each participant was asked to complete the questionnaire included in Appendix I, and was then led by a moderator through a general discussion of the questions included in Appendix II. The privacy statement included in Appendix III was administered to all participants.

The participants ranged in age from 28 to 51, and were of diverse ethnic background. They came from a variety of different states in the U.S. All were high school graduates, while all but two reported having a college degree. Four reported having master's degrees. Military sponsors ranged in grade from junior officer to very senior enlisted and warrant officers and senior officers. All participants were female.

Summary of Results

The strongest themes to emerge from the group were frustration at the crowding of local restaurants/stores and the poor road conditions and lack of parking. Some concern was also raised regarding the lack of family activities, including entertainment and dining venues. Comments included:

"We need more indoor waiting areas. We have more winter here than summer."

"Downtown is unique and has character. I don't want to see it filled with the same chain stores you see everywhere else. But the parking and traffic are horrendous."

"Decent small local shops are hard to find."

"Sackets (Harbor) rocks."

"There are no indoor play areas for kids. We need one at the mall."

"We need more children's shops."

"We need more things for teenagers. If you don't keep them busy, they get in trouble."

Participants had a strong awareness of national brands and were very conscious of socio-economic differences between retail stores. While they reported doing much of their shopping at mid-scale department stores and discount stores, they reported missing some upscale stores and felt that many stores/offerings in the area were dowdy or unfashionable. They were sensitive to the overall shopping or dining experience and were quick to complain about overcrowding, noisy environments, or poor service.

They were sympathetic to local non-chain retailers but did not name any specifically during the focus group meeting.

There was some concern that area merchants did not understand the needs of military families and were inclined to try to charge them more for some goods/services. Local small businesses, however, were recognized as being more likely to offer military discounts and be military-friendly. "Our salaries are available on the web so everyone thinks we have more money to spend. They don't understand what our lives are like."

Several participants expressed concerns that limited competition in the local market led to high prices/price gouging. Having only one movie theater was given as an example, along with some children's play venues. Although this group enjoys relatively high incomes, they remain price conscious and sensitive to value propositions.

While several participants reported reading the Watertown Daily Times and listening to a variety of TV and radio stations/programs, few reported using local media as a source of information about local events and shopping. Newzjunky.com was the most common single source of shopping information, but word of mouth was also used widely. The entire group reported regular trips to Syracuse to shop, as well as heavy use of the Internet. They were more concerned with restaurant issues than with other retail choices.

Unlike the junior enlisted group, this group did not report using flyers and direct mail. They were more likely to read the Blizzard (on-base paper) and could remember several advertisers in the Blizzard.

Deployments had a significant impact on shopping and general life activities. In particular, the burden of childcare causes shifts in shopping patterns. "We become single parents when our soldiers deploy. We have to schedule everything around our kids." Several expressed a desire for services to amuse children while the parents shopped.

There was a strong recognition that the retail environment was getting better, with the arrival of a number of national chain stores/restaurants. This group, like their junior counterparts, compared local shopping to that at other bases and saw a strong base of accessible national chains as a good retail environment. Concerns were expressed that the concentration of new stores/restaurants in the mall area was too dense and that the road infrastructure could not handle the need.

The Arsenal Street strip and mall complex were not considered convenient or accessible and many participants asked for growth nearer Fort Drum or in the Carthage area. Several lived in or near Carthage and complained that the town had no hotel and none of the services they wanted. It was inconvenient to travel to Watertown for family dining or shopping.

Detailed Results

The detailed results of the written focus group questionnaire are included as Appendix V.

Marketing Recommendations

Fort Drum consumers appear to be a lucrative market for NNY businesses but they present special marketing challenges. They are isolated from the general community in many cases and traditional local media channels are not likely to be as effective in reaching them as with the civilian population. They demand variety in retail shopping and dining experiences and seek more youth and family-oriented retail opportunities than the typical Jefferson County civilian consumer.

They arrive at Fort Drum from outside the area knowing they will probably be here only a few years. They have strong awareness of national chain stores and brands and typically prefer these choices over unfamiliar local stores. They have limited interest in the events and issues of the local area and do not typically appear to perceive the NNY region as "their community". They are often unfamiliar with local roads and traffic patterns and are extremely impatient with poor traffic or inadequate roads and signage.

Their lives are further disrupted by frequent deployments and the general rigor of military life. This seems to further discourage significant interaction with the local community.

Reaching the Fort Drum Market

1. Increase the use of direct mail and mailbox flyers to expand awareness of local products. All advertisements should include directions to the store or event and mention any national product brands that may be involved, as well as a website. Do not depend on traditional local media channels alone to attract the attention of Fort Drum customers, even when they are effective for local civilians. NOTE: No one contacted for this research was able to identify a specific company currently engaged in mailing to Fort Drum families or providing flyers to that community.

2. Offer military customers referral rewards and other loyalty benefits to encourage them to share their experiences with other military families. The Fort Drum community is insular and places significant value on word of mouth promotions. Reward military customers who help spread the word about your product or service on the post.

3. Create a newcomer package/welcome wagon service to provide coupons, maps, and other services to new arrivals at Fort Drum. The Greater Watertown North Country Chamber of Commerce has a relocation package program and members can include marketing materials in this channel. A more robust and general-purpose program should be launched as well. Shopping patterns tend to form early with new arrivals in any community and getting your name in front of incoming Fort Drum families could encourage them to become loyal customers for the duration of their time on post.

4. Develop entertainment experiences that supplement the retail experience. These could include things like children's events (clowns, magicians, etc), or adult experiences such as makeovers, home repair seminars, etc. The idea is to turn your

venue into an entertainment opportunity, as well as, a shopping opportunity. The entertainment could be what lures bored/housebound families off post. Once they know where your store is and what it sells, they are more likely to return. If names are captured at the event, you also gain a mailing list to promote future offerings.

5. Promote popular product brands you carry, as well as, your store name/location. While Fort Drum customers may not be familiar with your store, they are certainly familiar with national product brands. The reassurance of national product brands will help overcome resistance to visiting an unfamiliar store.

6. When developing a product offering or promotional program aimed at the Fort Drum market, focus the effort on one or more of the group categories identified in this report, or concentrate on another niche grouping, such as those with young families or single soldiers. The Fort Drum market is not homogenous and has significant differences by age, gender, income, and family status.

7. Develop a user-friendly website with detailed current information about sales, events, and directions to the store. The Fort Drum consumers tend to be frequent on-line shoppers and use the Internet to gain information about a variety of aspects. Include the website URL on all advertisements and signage.

New Market/Economic Development Opportunities

The expanding Fort Drum population represents new market/economic development opportunities for the region. There are military consumer needs that are not being fully met.

1. Entertainment. Theaters, clubs, themed restaurants, and recreational venues are in strong demand by the Fort Drum community. In particular, opportunities for family-oriented fun, as well as, young adult social opportunities. The Fort Drum market is accustomed to a broader selection of entertainment than is currently available and are likely to be sophisticated consumers in this category.

2. Ethnic restaurants and retail outlets. The Fort Drum market is ethnically diverse and even those without strong ethnic orientation have been exposed to a variety of cultures and backgrounds during their Army service. They tend to recognize authenticity and to have well-defined tastes in this area. In many cases, retiring/separating soldiers from Fort Drum might be an excellent source of entrepreneurs to expand regional ethnic offerings.

3. Visual/traffic enhancement. The Fort Drum community arrives with little or no familiarity with the geography and traffic patterns of Jefferson County. They quickly reach lasting judgments regarding the desirability of stores in the area based on the experience of finding and visiting them for the first time. Fort Drum traffic could be directed to areas targeted for economic development by an increased effort to provide smoother traffic flows, improved signage, and enhanced streetscape appearance.

Secondary Data Sources

1. Army Profile FY05 – HQ Department of the Army
www.armyg1.army.mil/demographics

2. "America's Military Population", *Population Bulletin*, December 2004, Vol 59/Issue 4
D. R. Segal and M. W. Segal

3. DOD Demographics Report 2005, Office of the Deputy Under Secretary of Defense (Military Community and Family Policy)

4. Fort Drum FY 05 Economic Impact Statement

5. ESRI Zipcode Demographics Profiles

6. PRIZM Neighborhood Demographics

7. US Census Bureau

8. 8th Annual Survey of the Community, Center for Community Studies at Jefferson Community College.

9. Defense Finance and Accounting Service, Office of the Military Representative to Fort Drum Mountain Community Homes (Data provided to this report by the Ft Drum Regional Liaison Organization.)

10. US Bureau of Labor Statistics/consumer expenditures

Appendix I

Ft Drum Focus Group
Shopping Questionnaire

Please list your three favorite stores anywhere.

Please list your three favorite stores in the Watertown/Jefferson County area.

Please list your least favorite stores in the Watertown/Jefferson County area.

What is most important to you in a shopping experience?

When do you prefer to shop?

Where did you buy your Christmas/holiday gifts this year? (Local stores, online, etc)

What stores do you wish we had in the Watertown/Jefferson County area?

What is your favorite radio station?

What is your favorite TV station?

What magazines or newspapers do you read regularly?

How do you stay informed about local sales and retail offers?

How many times per year do you travel outside the Watertown/Jefferson County area to shop?

Summarize the good and the bad of shopping in the Watertown/Jefferson County area.

How old are you? _______________ M/F? ___________

What is the highest level of education you have completed? ______________________________

How long have you been at Fort Drum? _________________________________

Are you a:

__ Army Member?

__ Army spouse?

__ Army family dependent child?

What rank is/are the military member(s) in your family? ______________________________

Please describe your family – number/ages/gender of children. Any parents/grandparents living in your home?

Where are you originally from?

Do you consider yourself to be a member of any specific ethnic or racial group?

Appendix II

Ft Drum Focus Group
Study Questionnaire

Capture basic demographics – age, education level, family size/ages, military rank, ethnic background, region of origin, time at Ft Drum.

Please list your three favorite stores anywhere.

Please list your favorite stores in the Watertown/Jefferson County area.

Please list your least favorite stores in the Watertown/Jefferson County area

What is most important to you in a shopping experience?

When do you prefer to shop?

Where did you buy your Christmas/holiday gifts this year? (Local stores, online, etc)

What stores do you wish we had in the Watertown/Jefferson County area?

What is your favorite radio station?

What is your favorite TV station?

What magazines or newspapers do you read regularly?

How do you stay informed about local sales and retail offers?

How many times per year do you travel outside the Watertown/Jefferson County area to shop?

Summarize the good and the bad of shopping in the Watertown/Jefferson County area.

Elicitation Topics:
Affects of deployments on shopping/spending patterns

Perceptions of local independents vs chains

Perceptions of local advertising effectiveness

Appendix III

Privacy Disclosure

Thank you for agreeing to participate in today's focus group. We think the results of this research will help improve the shopping and business environment for the entire community, including Fort Drum members.

The Center for Community Studies at Jefferson Community College is committed to protecting the privacy of everyone engaged in this research. As such, we make the following commitment to all participants:

All information and opinions which you share today will be kept in strict confidence. Nothing will be released or published in any way that would allow a non-participant to identify you as a participant or to attribute a comment or opinion to any specific participant.

We cannot, however, prevent another participant in today's event from sharing information inappropriately outside this forum. Please bear this limitation in mind during your participation in today's focus group.

Appendix IV
Junior Enlisted Focus Group Results

The Shopping Experience

Important to me in a Shopping Experience	Important to me in a Dining Experience	I Prefer to Shop…
Accessibility	Affordable (3)	After work (2)
Affordable (4)	Atmosphere	Afternoons (2)
Atmosphere	Cleanliness	All the Time
Availability of Merchandise	Fast Service	Daytime Weekends
Cleanliness (3)	Friendly Service (3)	During the Holidays
Customer Service	Good Quality	Early Morning
Friendly Service (2)	Good Service (3)	Evening (2)
Good Service (2)	Quality of Food	Late Night Weekends
Hours of Operation	Short Wait Time	Mid Afternoon
Merchandise Location	Sit Down Restaurants	Online
Not Busy (2)	Variety	Special Occasion
Quality Merchandise (2)		Weekends (3)
Sales		When mom takes me
Service (2)		When Need Something
Unique Items		When the Stores are Not Busy (2)
Upscale Dinning		Without Kids
Variety (7)		

Keeping Informed

Favorite Radio Stations/Programs	Favorite TV Stations/Programs	Magazines or Newspapers Read	How Do I Stay Informed About Local Sales and Shopping Events?
100.7 FM	ABC	Carthage Rep.	Catalogs
105.7 FM	Ch 10--News 10 (2)	Cosmopolitan (2)	Coupons
90 FM	Ch 2--Fox	Country Weekly	Don't (3)
97.5 FM	Ch 4--CBS (2)	Discover	Flyers (6)
Froggy 97 (2)	CNN	Don't (4)	Mailings (4)
Hot 97--NYC (2)	Court TV	Elle	Newspaper
Joe 96.3	CW (3)	Glamour	Word of Mouth (5)
NPR	Disney Ch	Military Report	Work
The Border 106.7 (4)	FX	New York Times	
	MTV	News Online	
	N/A	People Magazine (2)	
	Nickelodeon	Teen Magazine	
	None	Teen Vogue	
	PBS	Time Magazine(3)	
	Spike	US News & World Report	
	TLC	Vogue	
	TNT	W	
		Washington Post Weekly	
		Watertown Daily Times (5)	

Store Preferences

My Favorite Stores Anywhere	My Favorite Stores in Jeff County	My Least Favorite Stores in Jeff County	Stores I wish We had Here	Where I Shopped Last Holiday Season
Ann Taylor Loft	Aeropostale	Big Lots	Abercrombie and Fitch	Aeropostale
Babies R Us	American Eagle	CJ Banks(2)	Babies R Us	American Eagle
Bally's	Bed, Bath & Beyond (2)	Food Pantry	Barnes and Noble	Bath and Body Works
Barnes and Noble	Best Buy	JC Penny	Build a Bear Workshop	Bed, Bath & Beyond
Bed, Bath & Beyond	Borders	K-Mart	Charlotte Russe	Casual Corner
Best Buy	Claire's	N/A (3)	Chuckie Cheese	Charlotte Russe
Burlington Coat Factory	Deb	Stores in the Square	Dillards	Commissary
Casual Corner	Dick's	Walmart	Ethic Food Restaurants	Finish Line
Charlotte Russe	Family Dollar	Walmart--Watertown	Forever 21	Forever 21
Dollar General	Friendly Service		Full Service Gas Station	Hollister
Family Dollar	Gander Mountain		H & M	JoAnn Fabric
Finish Line	Herb Phillipson's		Journey's	Local Stores (5)
Forever 21	Home Depot		Kitchen Store	Macy's
Gold's Gym	Kohl's (4)		Libby Lu	Mall
H & M (2)	Maurice's (2)		Macy's (2)	On Post
Hollister	Merchandise Location		N/A	Online (5)
Home Depot	Michael's		Torrid	Ross's
JoAnn Fabric	None		Toys R Us	Syracuse (3)
Kirkland's	Old Navy		Wet Seal	Walmart (4)
Krogers	P & C			
Macy's (2)	Pier One (2)			
Michael's	Price Chopper			
Old Navy	Sam's Club			
P & C (2)	Sears			
Ross	Steve N Barry's			
Roux 21	Super Walmart (2)			
Sears	T.J. Maxx (2)			
Super Walmart	Target (3)			
T. J. Maxx	Target (3)			
Target (6)	Victoria Secret			
The Mall	Walmart (5)			
Toys R Us	Zumies			
Victoria Secret				
Walmart (4)				
Wegman's				
Zumiez				

The Good and Bad About Shopping in Watertown/Jefferson County

Good About Shopping Here?	Bad About Shopping Here?	How many Times per Year Do You Travel outside the Area to Shop?
Downtown has Historic Value	Arsenal St traffic	10 to 15 (2)
Find Clothing Staples in Stores	Can find every thing looking for	2 to 5
Mall has a nice selection of stores	Lack of Culture	3 or More
More Stores are Coming Into the Area (2)	Lack of Parental Supervision	5 to 10
Variety of Stores/Services	Lack of Parking	50 or More
N/A (4)	Lack of Variety (4)	6 or More
Reasonable Prices	Merchandise Does Not Appeal to all Cultures	8 to 10
	N/A (2)	Every Weekend
	New Businesses are not including Entertainment	Multiple Times
	Not Enough Parking	N/A (2)
	Road Condition	Twice a Month
	Stores are Far Away	
	Stores Close to Early	
	There are no Outlet Stores	

Appendix V
Officer/Senior NCO Focus Group Results

The Shopping Experience

Important to me in a Shopping Experience	Important to me in a Dining Experience	I Prefer to Shop…
Price and selection (2)	Quality	Evenings or weekends
Price (4)	Service (4)	During school hours
Organization/cleanliness	Price	Daytime
Availability of Merchandise	Cleanliness (3)	Weekday mornings (school)
Cleanliness (3)	Taste	Mornings – fewer people
Good value	Good Value	At night
Service	Variety	Weekend afternoons
Accessibility w/children in tow	Good waiting area	Weekday afternoons
Courteous staff	Good kids menu	When crowds are small
Clear pricing	Enough seating	Early mornings
Decent selection	Indoor waiting area	Late nights
Have a great shopping experience	Have everything that's on the menu	Weekends – not around holidays
Neat stores	Courteous staff	
New styles	Meet and greet	
Accessibility and security	Consistently good food	
No clutter/noise	Customer sizing	
Not too brightly lit	Not too noisy/chaotic	

Keeping Informed

Favorite Radio Stations/Programs	Favorite TV Stations/Programs	Magazines or Newspapers Read	How Do I Stay Informed About Local Sales and Shopping Events?
K-Love	CBS (2)	Family Fun	When I receive the ads
Froggy 97 (3)	ESPN	Weight Watchers	Word of Mouth (2)
Magic 103.1 (3)	Channel 10	NASCAR News	Sunday circular
The Border (2	Channel 7	Sports Illustrated	Flyers
90.1 KCOV (2)	The Sopranos	Watertown Daily Times (3)	Newspaper and TV
	History Channel	NY Times	Don't know
	Fox	Cosmopolitan	Sunday paper
		First	Newsjunky
		USA Today	On-line (3)
		Army Times (2)	Mail
		Knit 1	
		Crochet Today	
		Lucky	
		Domino	
		Star	
		Blizzard	
		Newsjunky.com (2)	
		Bon Appetit	
		Cooking Light	
		Runners World	

		Soap Opera Digest	
		People	

Store Preferences

My Favorite Stores Anywhere	My Favorite Stores in Jeff County	My Least Favorite Stores in Jeff County	Stores I wish We had Here	Where I Shopped Last Holiday Season
Gymboree	Gap Kids	Kmart (3)	Olive Garden (3)	Target
Dillards (2)	Kohls (2)	BonTon (3)	Sonic 43)	Gap Kids
Kohls (2)	Target (4)	Korenna	Ikea (4)	Best Buy
Olive Garden (4)	Walmart (4)	Hacketts (2)	Barnes and Noble (2)	On-line (4)
Target (2)	Texas Roadhouse (2)	Jrecks	Chick-Fil-A (2)	PX
Home Depot	Dunkin Donuts	Kohls	Dillards (2)	Gap
Mellow mushroom	Farmer’s Market	Sears (2)	Lane Bryant	Walmart (2)
Old Navy (2)	Old Navy	JC Penny	Toy R Us (4)	JC penny
Ikea	Gap	Walmart (2)	Cibilis	Sears
Chick Fil A	Michaels	Fashion Bug	Chuck e Cheese (2)	Kmart
Papa Johns	BonTon	Gander Mountain	Indoor play areas	Local and Syracuse stores (2)
Gap	JC Penny (2)	Zumies	Build a Bear	Home Depot
Michaels	Borders	Time Warner cable	Abercrombie & Fitch	TJ Maxx
Walmart (3)	Sams Club	Verizon	Mall near Ft Drum	Dicks
Barnes and Noble	Tin Pan galley	Dunkin Donuts	Upscale clothing	BonTon
Kmart	T.J. Maxx	Target	Catherines	Syracuse mall
Texas Roadhouse	Home Depot		Day Spa	
Chilis			Roller skating rink	
Tony Romas			Furniture stores	
T.J. Maxx (2)			Eddie Bauer	
Belk & Kohls			Maceys	
Any outlet store				
Saks				
Jordans				
Border				
Anne Taylor				
Marshalls				
Ross				
Eddie Bauer				

The Good and Bad about Shopping in Watertown/Jefferson County

Good About Shopping Here?	Bad About Shopping Here?	How many Times per Year Do You Travel outside the Area to Shop?
Convenient	Horrible parking lots	10
Always good	Not enough variety	5
Getting better. Looking forward to Hollister and Charlotte Russe	Street construction deters traveling downtown	Lots
More things going in north of Watertown.	Poor selection, stores, and service	6 - 8
Slowly getting better	Poor selection	Too much
Everything is centralized.	TGI Friday's is awful. They're rude and always mess up our orders.	12 - 15
	Local gov't gets in the way and slows down progress. Doesn't maintain infrastructure – parking.	2 - 3
	Traffic makes it hard. It would be nice to put new stores and restaurants in less developed areas – convenient to Ft Drum and Watertown	4 -6. More if I couldn't shop on-line.
	Travel/road conditions horrendous. Too much traffic w/no room on main road	Over 30
	Not enough for the people we have here, in both stores and restaurants	5 -6 . Usually go on-line if the store isn't here.