

Army Marketing Research Group Overview Brief

AAB COIs



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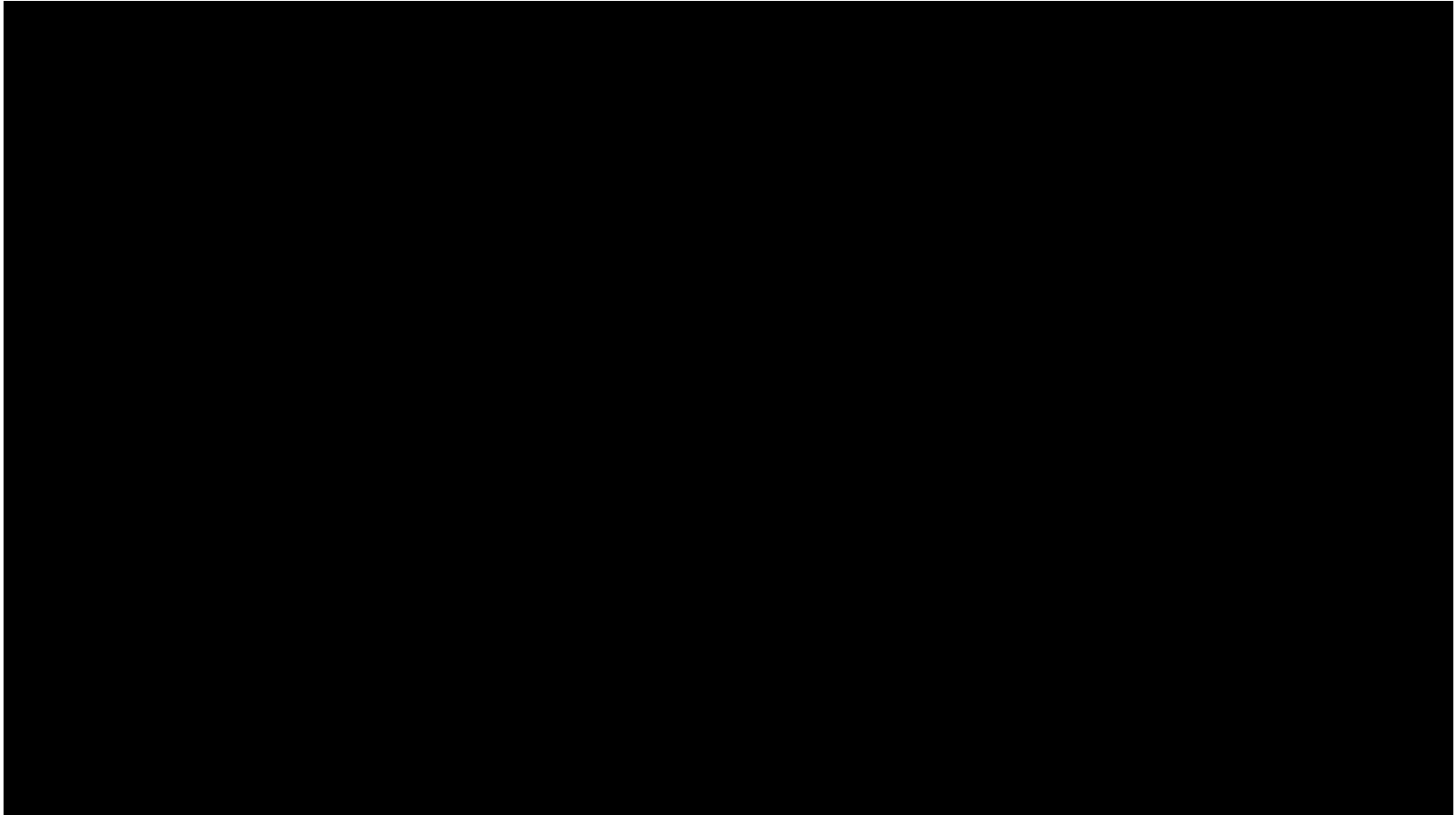
Dundalk, Maryland

Advancing America's Army with the World's Greatest Soldiers!

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AMRG- Who and Why



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Marketplace Environment

Public Perceptions



The American Public is Disconnected.

The American population is not well informed regarding it's Military or it's Army.

Americans' exposure to the military continues to decline:

- The military veteran population continues to shrink (-35% from 2013-2043)¹.
- In 1995, 40% of youth ages 16-24 had a parent who served in the military; in 2014, the proportion was 16%².
- The 2005 Base Realignment and Closure (BRAC) consolidated the Army through 12 major base closures and 6 major base realignments³.
- Half of young adults ages 17-35 say they have little or no knowledge about Active Duty military service; only 12% say they are highly knowledgeable⁴.

As a result, nearly half of the adult population (48%) report that the entertainment industry has a significant impact on the way they perceive veterans⁵. This leads to misperceptions about the Army.

Sources:

1. Office of the Actuary, Veteran Population Projections Model (VetPop2014)
2. DoD Youth Attitude Tracking Study and JAMRS' DoD Youth Poll
3. Retrieved from <http://www.brac.gov/docs/final/Volume1BRACReport.pdf>
4. DoD Advertising Tracking Study Jul-Sep 2014
5. Greenbert Quinlan Rosner Research for "Got Your Six", Apr-May 2014

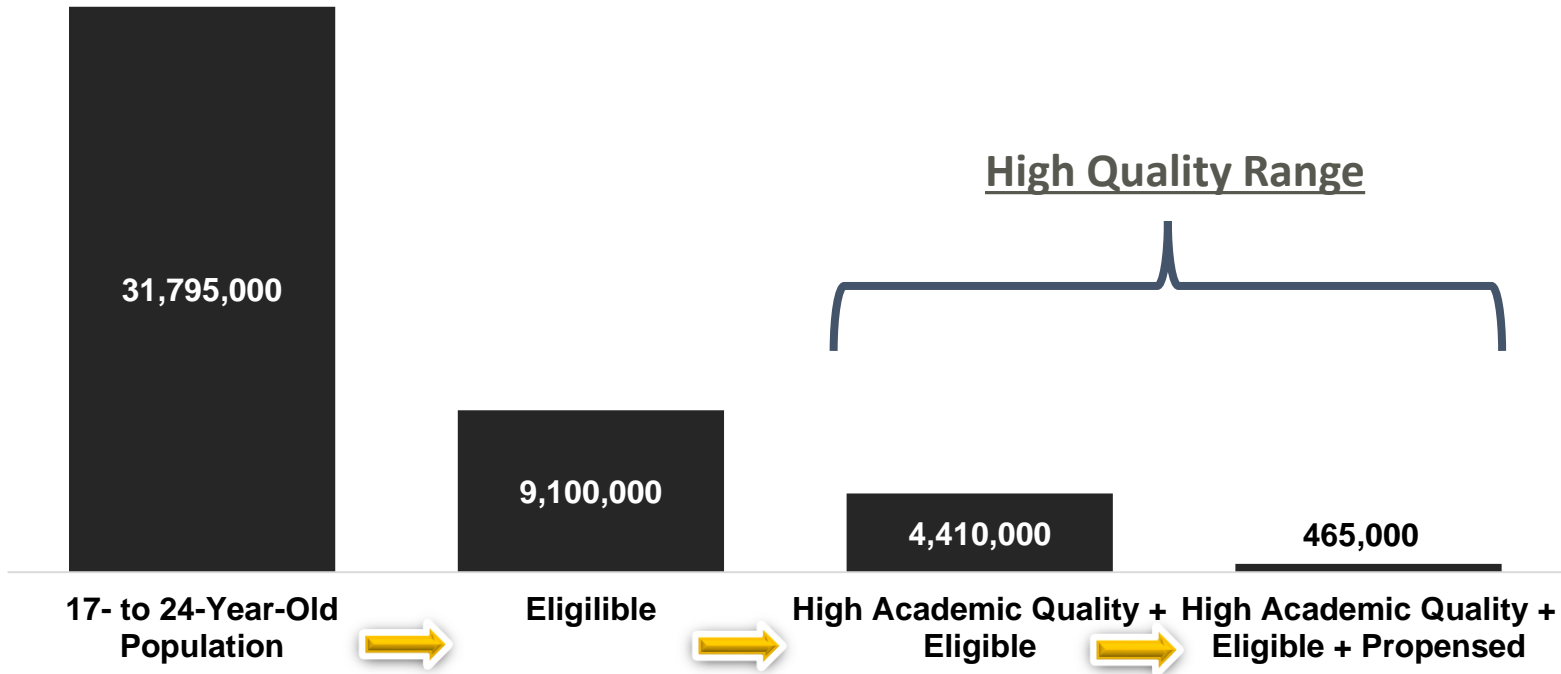
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Estimating the Size of the 2018 Youth Market OF ALL THE MILITARY SERVICES



**The Army cannot rely solely on propensed youth for recruitment.
The Army must reach a larger pool of youth prospects.**



Sources: Woods and Poole Population Estimates, from the Data Warehouse and Office of the Secretary of Defense Accession Policy, JAMRS & Lewin Group QMA Study, 2013; JAMRS DoD Youth Poll
High Academic Quality = Youth who report getting mostly "As" and "Bs" in High School; this has been found to be correlated with scoring 50 or above on the AFQT (Armed Forces Qualification Test)

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Army Civilian Acquired Skills Program (ACASP)



- Chapter 7 Regular Army and Reserve Components Civilian Acquired Skills Program
- Section I Introduction
- 7–1. General This chapter provides policy and guidance for implementing the ACASP. ACASP attracts and uses persons with civilian-acquired skills required by the Army. Persons qualified for ACASP may be given an advance in grade upon enlistment.
- 7–2. Objectives- Objectives of ACASP are as follows:
 - ❖ a. Enlistment of qualified personnel with civilian-acquired skills needed by the Army.
 - ❖ b. Increased job satisfaction.
 - ❖ c. Improved personnel classification and use while MOS performance standards are maintained.
 - ❖ d. Reduced training loads and costs.
 - ❖ e. Added means for rapid mobilization.

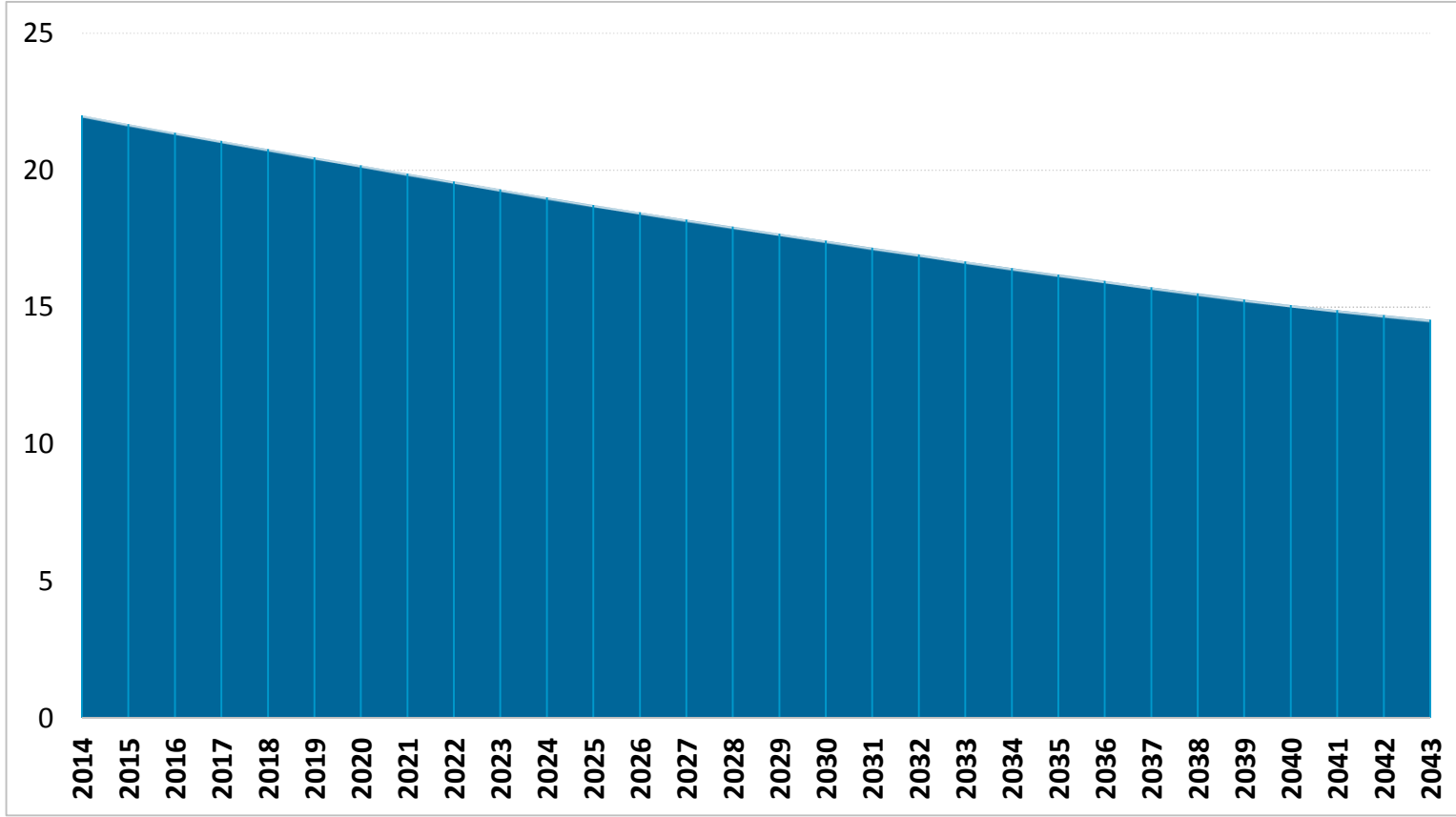
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Military Veteran Population



Military veterans are very supportive of young people serving in the Military, but their number will be cut by 35% over the next 30 years.



Source: Office of the Actuary, Veteran Population Projections Model (VetPop2014)

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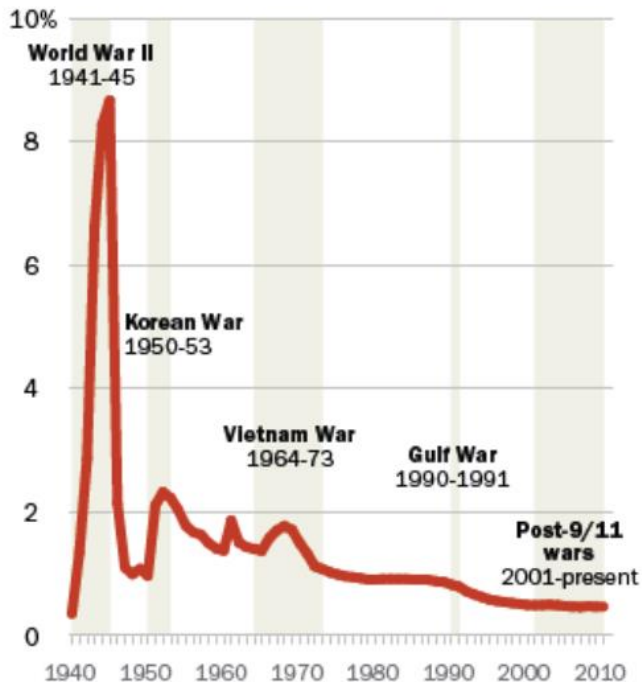


Military Participation



Military participation

Percent of total U.S. population in the armed forces, 1940-2010



Source: Molly Clever and David R. Segal. "After Conscription: The United States and the All-Volunteer Force." Security and Peace (Sicherheit und Frieden), 2012.

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In 1995, 40% of youth ages 16-24 had a parent who served in the military; in 2014, the proportion was 16%.

DoD Youth Attitude Tracking Study and JAMRS' DoD Youth Poll

Veterans as share of population



Source: Census Bureau

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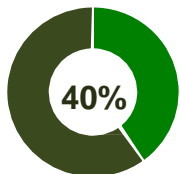
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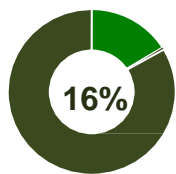
Understanding the Market

Youth Market: Awareness and Knowledge

Proportion of Youth with a Parent Who Served (Youth Ages 16–21)



In 1995



In 2014
(Fall)

Awareness

(Young Adults Ages 17–35; Apr–Jun 2015)

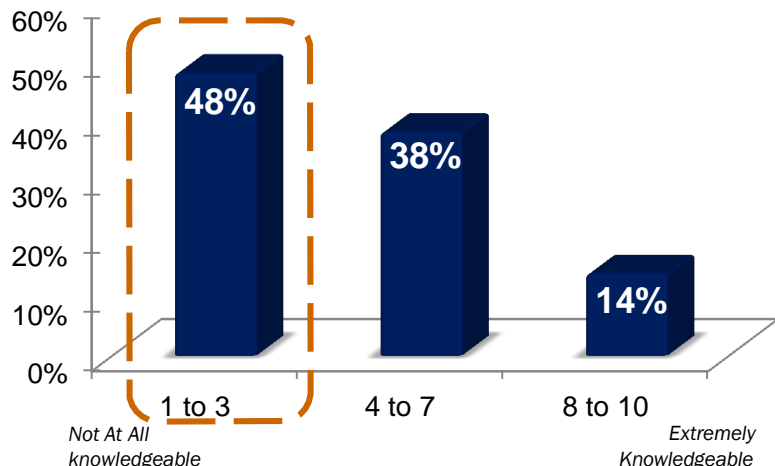


...can name **all four DoD Active Duty Services**.



...do not know there is a difference between an Officer and an enlisted person.

Self-Reported Knowledge of Active Duty Service (Young Adults Ages 17–35; Apr–Jun 2015)



"[Service members] don't get to plan out anything because their whole plan could change right away."

"Pets aren't allowed on base...right? Are you allowed to have a dog in the Military?"

"Is there a penalty for getting pregnant (in the Military)?"

"There's also people that come out and they don't know what to do in the real world anymore."

Many young adults lack basic knowledge about the Military.

Source: JAMRS' DoD Youth Poll; Military Ad Tracking Reserve Study; JAMRS DoD Focus Groups

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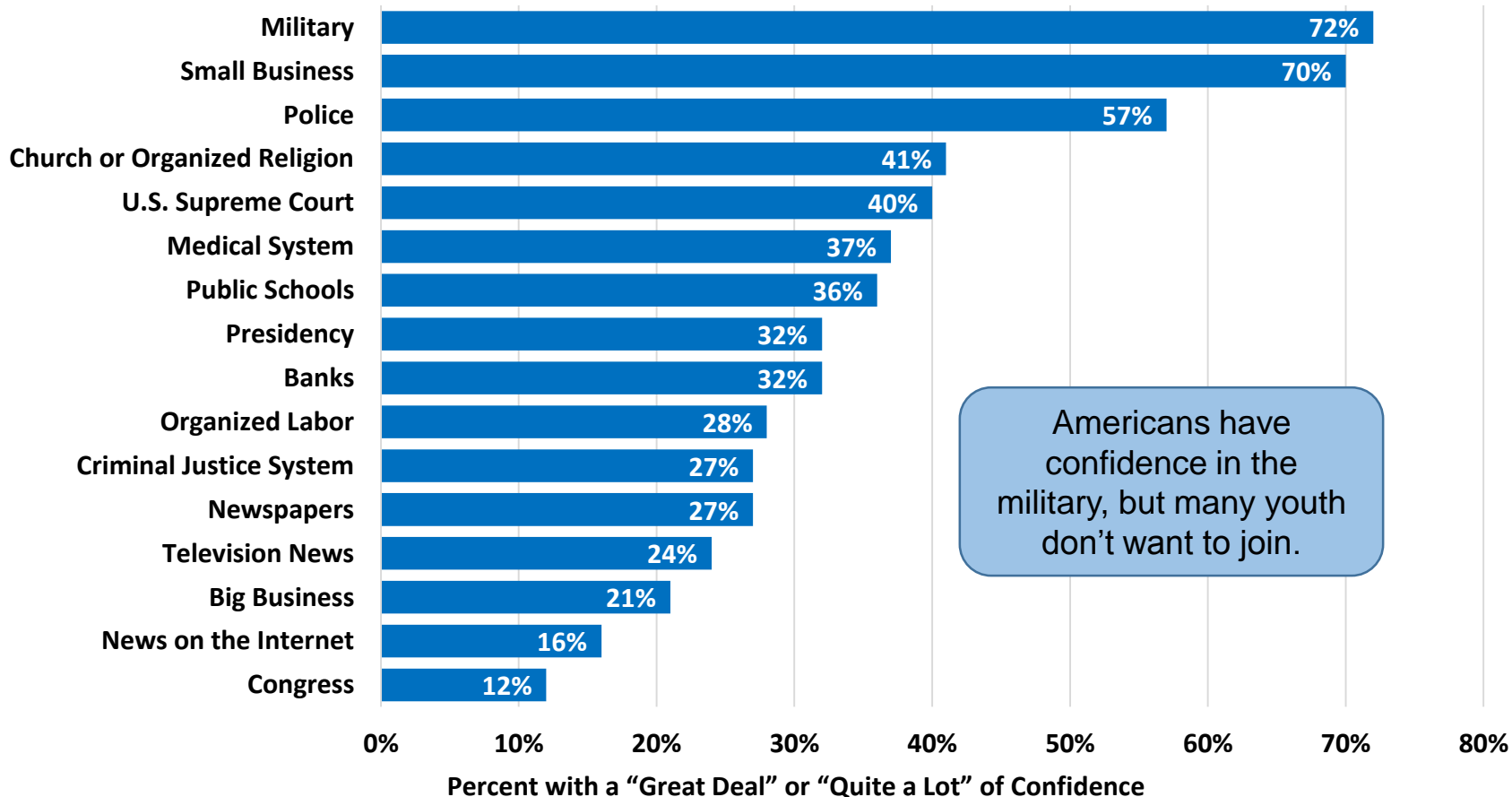


Marketplace Environment

Confidence in American Institutions



General Adult Population



Americans have confidence in the military, but many youth don't want to join.

"I am going to read you a list of institutions in American society. Please tell me how much confidence you, yourself, have in each one – a great deal, quite a lot, some or very little?" (Gallup June 7-11, 2017)

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Marketplace Environment

Perceptions of the Military



General Adult Population

| Post 9-11 Veterans.... ...than average civilians of a similar age | True, Certain | True, Best Guess | False, Best Guess | False, Certai n | True- False | Reality |
|---|------------------|------------------------|-------------------------|-----------------------|----------------|---------|
| ...are more likely to suffer from mental health issues | 23 | 59 | 15 | 2 | 83-17 | FALSE |
| ... commit suicide at higher rates | 20 | 55 | 22 | 3 | 75-25 | FALSE |
| ...have higher rates of substance abuse | 11 | 50 | 35 | 4 | 61-39 | FALSE |
| ...are more likely to be unemployed | 12 | 48 | 37 | 3 | 60-40 | FALSE |
| ...make more money | 5 | 21 | 62 | 12 | 26-74 | TRUE |
| ...are more likely to have a stable family life | 6 | 27 | 61 | 6 | 33-67 | TRUE |
| ...are less likely to be homeless | 8 | 29 | 54 | 8 | 38-62 | TRUE |
| ...stay at their jobs longer | 9 | 42 | 46 | 3 | 51-49 | TRUE |

Source: 'Got Your Six', Greenberg Quinlan Rosner Research, Strengthening Perceptions of America's Post-9/11 Veterans, Survey Analysis Report, June 2014

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Marketplace Environment *Target Audience*



The Youth Market is shifting and so must the Army

0-19 Years

GENERATION Z



Realists

Resourceful

The We Generation

Feel Innate Responsibility

Are Future Focused

Look Up To Everyday People Who
Make A Positive Difference To
Society

Feel They Have The Power To
Change The World

Connect With Brands With
Purpose

MILLENNIALS

Idealists

Entitled

The Me Generation

Defer Responsibility

Are Present Oriented

Look Up To Entitled Characters Who
Live Cushy Lives

Don't Want To Think About World
Issues

Connect To Brands Based On
Image

20-36 Years



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Marketplace Environment

Target Audience



Successful brands have made a shift from Product to Purpose

From:

To:

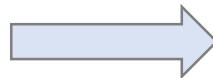
Product



Purpose



Functional benefits



Values



Reason's To Believe



Actions



Expressive advertising



Substance



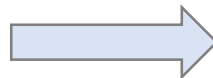
Broadcasting to the masses



Nurturing communities



Connections



Genuine relationships



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Enterprise Army Brand

The Army's Brand Identity Crisis



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Enterprise Army Brand Strategy

Army Enterprise Positioning Statement



The U.S. Army is the Nation's most versatile force meeting the ever-changing challenges of today. It has the scale and scope to adapt to challenges that arise both at home and abroad.

The Army is constantly evolving its competencies and capabilities to prevail in complex environments to protect and preserve our Nation.

A **positioning statement** (*marketing term*) is an expression of how a given product, service or brand fills a particular consumer need in a way that its competitors don't. **Positioning** is the process of identifying an appropriate market niche for a product (or service or brand) and getting it established in that area.

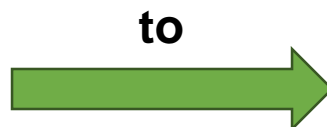
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Enterprise Army Brand Strategy

Significant change in Army's approach to Marketing

Individual Benefits
and Personal
Transformation



Puts "The Army" as
an Institution, at the
Forefront of all
Communication

"The Army" is marketed as a vital American institution and team, that prospects should want to be a part of; their parents should support them joining; and which the American people will advocate for, because they will **have a better understanding of, and value for, Army Service.**

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Enterprise Army Brand Commercials

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CYBER WARRIOR - FACELESS

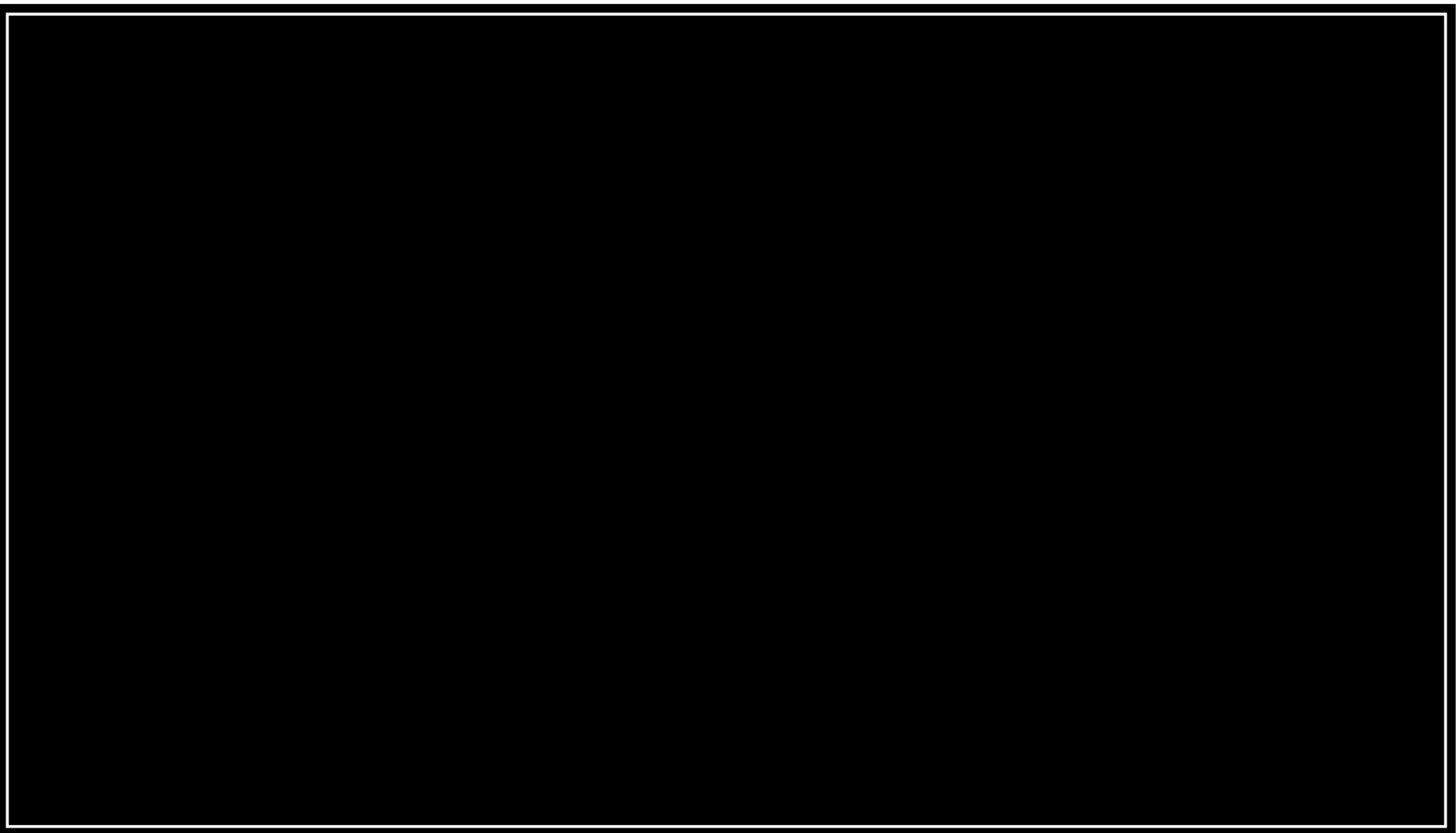


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CYBER WARRIOR FACELESS – BROKEN DOWN



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TUNNEL – AMPHIBIOUS ASSAULT



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Questions?

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