Army Marketing Research Group Overview Brief

AAB COIs

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19 APR 18
Dundalk, Maryland

Advancing America’s Army with the World’s Greatest Soldiers!
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 realignments\(^3\).
- 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 knowledgeable\(^4\).

As a result, nearly half of the adult population (48%) report that the entertainment industry has a significant impact on the way they perceive veterans\(^5\). This leads to misperceptions about the Army.

Sources:
2. DoD Youth Attitude Tracking Study and JAMRS’ DoD Youth Poll
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.

17- to 24-Year-Old Population: 31,795,000
Eligible: 9,100,000
High Academic Quality Eligible: 4,410,000
High Quality Range: 465,000

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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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.
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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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

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


PEW RESEARCH CENTER

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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: 40%
In 2014 (Fall): 16%

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)

48%: Not at all knowledgeable
38%: 1 to 3
14%: 4 to 7
0%: 8 to 10

“[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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General Adult Population

Percent with a “Great Deal” or “Quite a Lot” of Confidence

Military: 72%
Small Business: 70%
Police: 57%
Church or Organized Religion: 41%
U.S. Supreme Court: 40%
Medical System: 37%
Public Schools: 36%
Presidency: 32%
Banks: 32%
Organized Labor: 28%
Criminal Justice System: 27%
Newspapers: 27%
Television News: 24%
Big Business: 21%
News on the Internet: 16%
Congress: 12%

“"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)

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

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Source: June 2017 Gallup survey
# Marketplace Environment

**Perceptions of the Military**

## General Adult Population

<table>
<thead>
<tr>
<th>Post 9-11 Veterans.....</th>
<th>True, Certain</th>
<th>True, Best Guess</th>
<th>False, Best Guess</th>
<th>False, Certain</th>
<th>True-False</th>
<th>Reality</th>
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<tbody>
<tr>
<td>...than average civilians of a similar age</td>
<td>23</td>
<td>59</td>
<td>15</td>
<td>2</td>
<td>83-17</td>
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<tr>
<td>...are more likely to suffer from mental health issues</td>
<td>20</td>
<td>55</td>
<td>22</td>
<td>3</td>
<td>75-25</td>
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<td>...commit suicide at higher rates</td>
<td>11</td>
<td>50</td>
<td>35</td>
<td>4</td>
<td>61-39</td>
<td>FALSE</td>
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<tr>
<td>...have higher rates of substance abuse</td>
<td>12</td>
<td>48</td>
<td>37</td>
<td>3</td>
<td>60-40</td>
<td>FALSE</td>
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<td>...are more likely to be unemployed</td>
<td>5</td>
<td>21</td>
<td>62</td>
<td>12</td>
<td>26-74</td>
<td>TRUE</td>
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<tr>
<td>...make more money</td>
<td>6</td>
<td>27</td>
<td>61</td>
<td>6</td>
<td>33-67</td>
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<tr>
<td>...are more likely to have a stable family life</td>
<td>8</td>
<td>29</td>
<td>54</td>
<td>8</td>
<td>38-62</td>
<td>TRUE</td>
</tr>
<tr>
<td>...are less likely to be homeless</td>
<td>9</td>
<td>42</td>
<td>46</td>
<td>3</td>
<td>51-49</td>
<td>TRUE</td>
</tr>
<tr>
<td>...stay at their jobs longer</td>
<td>10</td>
<td>43</td>
<td>51</td>
<td>8</td>
<td>62-57</td>
<td>TRUE</td>
</tr>
</tbody>
</table>

Marketplace Environment
Target Audience

The Youth Market is shifting and so must the Army

**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

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## Successful brands have made a shift from Product to Purpose

<table>
<thead>
<tr>
<th>From:</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product</strong></td>
<td><strong>Purpose</strong></td>
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<tr>
<td><strong>Functional benefits</strong></td>
<td><strong>Values</strong></td>
</tr>
<tr>
<td><strong>Reason’s To Believe</strong></td>
<td><strong>Actions</strong></td>
</tr>
<tr>
<td><strong>Expressive advertising</strong></td>
<td><strong>Substance</strong></td>
</tr>
<tr>
<td><strong>Broadcasting to the masses</strong></td>
<td><strong>Nurturing communities</strong></td>
</tr>
<tr>
<td><strong>Connections</strong></td>
<td><strong>Genuine relationships</strong></td>
</tr>
</tbody>
</table>

*Advancing America’s Army with the World’s Greatest Soldiers!*
Enterprise Army Brand

The Army’s Brand Identity Crisis
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.
Enterprise Army Brand Strategy

Significant change in Army’s approach to Marketing

Individual Benefits and Personal Transformation to

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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Advancing America’s Army with the World’s Greatest Soldiers!
Questions?