



U.S. Military Image Study

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A report for:

GfK Custom Research Inc.
8401 Golden Valley Road
P.O. Box 27900
Minneapolis, Minnesota 55427
Tel: 763-542-0800



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Background

The U.S. Army faces a constant challenge of recruiting sufficient numbers of volunteers.

- Recruiting an all-volunteer Army in times of war is increasingly difficult.
 - As such, it is important to understand potential recruits as well as possible to provide messaging that is meaningful, relevant, and compelling.

A major research study was completed late in 2000, prior to the launch of "An Army of One" advertising campaign in January, 2001.

- That research was designed to learn more about:
 - Plans and aspirations of young adults,
 - Attitudes toward military service and relative position of branches, and
 - Attitudes towards Army enlistment.

It is time to update the learning from that study.

Background, continued

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Homeland Security

- September 11 attacks
- U.S realization—we are not immune
- Increased security/military presence at airports, elsewhere
- Heightened awareness across U.S.

Global and Military Conflicts

- War in Afghanistan
- Invasion of Iraq
- End of major conflict in Iraq
- Continued presence in Iraq
- GWOT

The world has changed in the past 5 years!

Economic Changes

- Economic conditions worsen
- Stock market decline 3/01
- Mild recession begins
- Unemployment improves
- College costs skyrocket
- Economy improves, recently

Other Newsworthy Events

- New, Republican president elected
- Capture of Saddam Hussein
- News: Daily casualties reported
- Pat Tillman killed
- Iraqi prisoner scandal
- New Army direction: Future Force/
Warrior Ethos

Objectives

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Hypothesis: These changes and increased possibility of combat are impacting the consideration set for potential Armed Forces recruits and making Army recruiting efforts even more difficult.

The Goal: Update the Army's understanding of how potential recruits view military service and the Army, so that effective marketing efforts and advertising messages contribute to meeting the Army's recruiting mission.

Information Objectives

Imagery

1. What is the current image of the Army, overall and in comparison to other branches?
2. Has this image changed, and if so how, since 2000?
3. What is "An Army of One" communicating to young people?

Decision Making

1. Do potential prospects have more choices, post high school, than in the past?
2. What are their mind sets, thoughts, aspirations and how have they changed from 2000?
3. How/what do they think about joining the military (e.g., motivators, barriers) and how has their thinking changed?

Ethnic Groups

1. How do African Americans and Hispanics, two groups of special interest, view the military?
2. How are these groups different than others on propensity, motivators, barriers, etc.?

Questionnaire

7

Questionnaire covered many areas:

- 45 minute interview
- Explore differences between the general population, African Americans, and Hispanics
- Analyze reactions to the Soldier's Creed and Warrior's Ethos

Behaviors	Attitudes	Demos/Descriptors
Military propensity <ul style="list-style-type: none">- Overall- By service type- By service branch	Attitudes about future Motivators to military service Barriers to military service and ROTC, Reserve Preference for 4 services Perceptions of 4 services Reactions to "An Army of One"	Standard demos Educational goals College affordability Family history in military

Methodology

Interviews were conducted online.

- Greenfield Online (GOL) and Survey Sampling panels used.
 - A random sample from 450,000+ 16 and 24 year olds in GOL Internet panel.
 - Additional interviews (20%) using Survey Sampling panel—to fill specific age and ethnicity quotas.

Qualifications

- Males and females ages 16-24 (50% 16-18, 30% 19-21, 20% 22-24)
- Not currently serving, and have not previously served, or a high school drop out
- Not “dead beat” (future plans not work or go to school and to live with parents as long as possible)
- English speaking

Data Collection April 16 through May 19, 2004

Sample Size

- Total Contacts/Representative Sample of 3,236 youth age 16-24
- Sample of interest of 1,828
- Additional interviews to yield a total of:
 - 341 African Americans
 - 342 Hispanics

Comparison of 2000 and 2004 Research

2000

- **Web TV panel used (U.S. representative, not Internet-based)**
 - TV with web access placed in home, in exchange for doing surveys
 - Data collected on TV using keypad
- **Age 15-24**
- **Included females, reported males only**
- **Personnel at supplier who completed the 2000 study no longer available.**

2004

- **Online interviewing, two online panels (Internet penetration higher)**
 - E-mail invitation, sending panelists to survey link for qualification and participation
 - Data collected on computer
- **Age 16-24**
- **Reported males and females in the sample of interest in both years**
- **Retabulated 2000 data to be consistent with 2004 data, for direct comparisons**
- **Questionnaire very similar to 2000, but updated;**
 - 75%-80% the same
 - Some attributes/motivators/barriers added, modified or deleted to reflect new reality

2000 to 2004 Direct Comparisons

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To facilitate comparisons across years, a directly comparable sample of interest was created.

- Weighted samples for both years were created to be able to provide exact comparison of 2000 and 2004 data.
- The following variables were controlled—so they are not factors in any difference between studies.
 - **Age:**
 - 50% under age 18*
 - 30% age 19-21
 - 20% age 22-24
 - **Gender**
 - 70% male
 - 30% female
 - **Propensity**
 - Propensity recalculated so bottom box propensity (Definitely will not serve) is capped at 30%
 - Other propensity points controlled to be *identical* between two studies

See Technical Appendix for more information on sample construction and weighting

*2000 study included 15 year olds, 2004 did not. For comparison purposes the percent of respondents aged 18 and under was controlled to be identical between studies.

Reader's Notes

Subgroup Definitions

- Sample of Interest—the relevant universe for the Army, defined as:
 - 70% male; 30% female
 - 50% age 18 and under; 30% age 19-21; 20% age 22-24
 - No more than 30% who say they definitely will not serve in the military
- SALs (Scholars, Athletes, Leaders) are defined according to standard Army definitions (see Appendix).

Percentages Not Totaling 100%

- For tabulation purposes, percentages are rounded to the nearest whole number. As a result, totals in a given table column may be slightly higher or lower than 100%.

Significance Testing

- Significance testing was performed at the 95% confidence level; statistically significant differences are shown in tables or charts by column letters.
 - Where significant differences occur, the letter that corresponds to the column of the smaller number is placed next to the larger of the two numbers.

In Percent	Total (A)	Males (B)	Females (C)
Attribute 1	42	39	52 B

Compared to Males (column B), Females rate Attribute 1 higher (at the 95% Confidence Level)

Bottom Line Up-Front

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- 1. The Army's recruiting mission in a post 9/11 world is an extremely difficult one. There is a lot of work to be done and it will take a lot of time to make major changes in the Army experience and the Army's image.**
- 2. The option of military service causes inner conflict in today's youth.**
- 3. The competitive set of career choices for today's youth has broadened.**
- 4. College still "wins" as the preferential choice for most young adults.**

Bottom Line Up-Front, continued

13

5. **Money for college remains a major motivator to joining the military, across all propensities.**
6. **Fear of death or injury is the major barrier to joining the military today.**
7. **The traditional expectation of Reserve service (sign up, but never go) is no longer a safe bet.**
8. **The Army's image as a career choice has not changed dramatically over the past four years—although some improvements are seen in several core military dimensions.**

Bottom Line Up-Front, continued

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9. **The Army does not own perceptions associated with Warrior Ethos or reflecting the Soldier's Creed.**
10. **"An Army of One" slogan is widely recognized, but it is communicating either group effort *or* individuality—but not both of these messages, as was intended.**
11. **More African Americans identify having to fight for a cause they don't support as a barrier to military service.**
12. **Generally, Hispanics are interested in tangible benefits for joining—as well as experiential ones.**

General Military Appeal

Historical Propensity Tracking

16

Propensity, as measured in the 2004 representative sample is consistent with the Army's ongoing tracking propensity measures (Millward Brown and the recent DoD Youth Poll).

In Percent	Total Contacts 2004 Image Study	Millward Brown Tracking Work*				DoD Youth Poll* May 2004
		Q2-2001	Q2-2002	Q2-2003	Q2-2004	
Definitely will join	5	2	2	3	3	3
Probably will join	10	9	10	10	8	13
Probably will not join	30	36	33	34	34	31
Definitely will not join	55	52	54	52	54	53

Q 9.0 Now I'd like to ask you how likely it is that you will serve in the military in the next few years?

* Source Millward Brown Potential Recruits Tracking Study and DoD Youth Poll

Base = Total potential recruits contacted (3836 for Image Study and approximately 1500 for tracking work)

Propensity To Serve In Military—2004 Rep Sample

Total 2004 Representative Sample (Total Contacts)

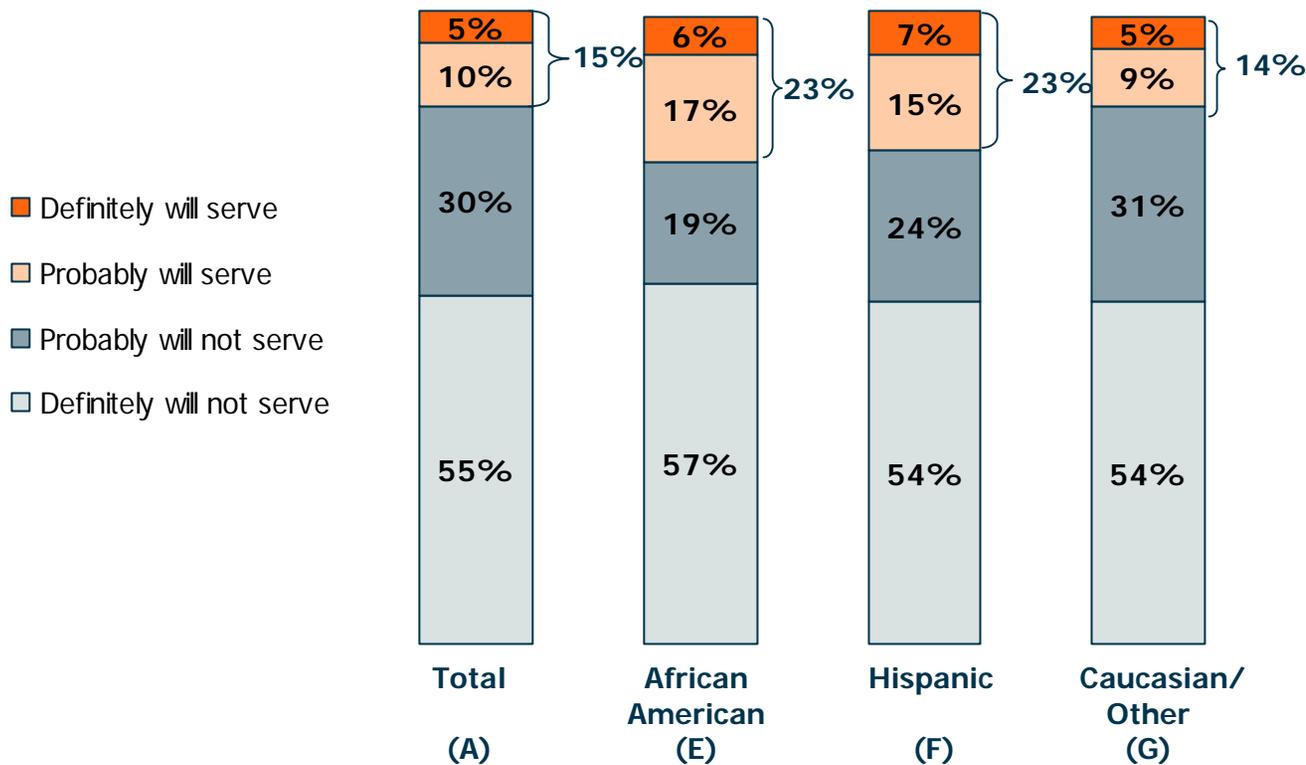


Table 214; Q9.0 How likely is it that you will serve in the military in the next few years? Balanced to census. Base = Total Sample of Interest, African Americans, Hispanic, Caucasian/Other (3236, 776, 761, 2442)

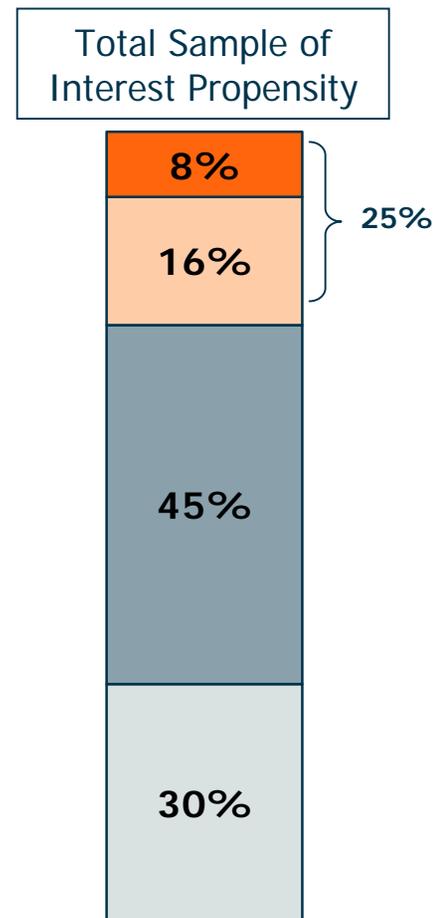
2004 Sample Of Interest and Propensity To Serve

18

The rest of the findings are based on the Army's sample of interest.

- **Definitely will not serve is capped at 30% for total and within each ethnic subgroup.**
- **Propensity, age, gender *identical 2000-2004.***

- Definitely will serve
- Probably will serve
- Probably will not serve
- Definitely will not serve



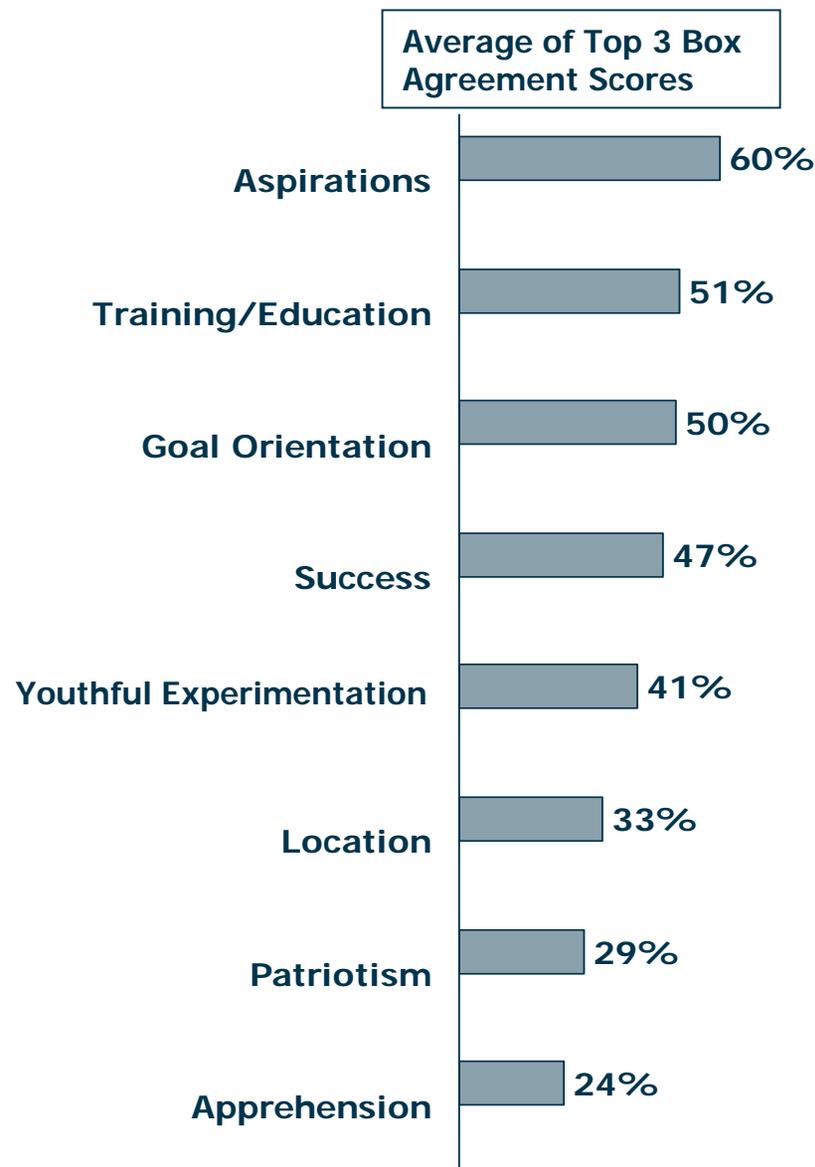
Mind Set Of Young People

Personal Goals—Factor Averages 2004

20

A series of 42 school, career and life goal statements were used to help better understand the mind set and values of young men and women.

- Factor analysis was completed to organize the 42 agree/disagree statements into similar groups.
- Eight factors were identified.



Source: Table 003b; Q18.0 Here are some statements about school, careers, and life goals. For each one, please indicate how strongly you agree or disagree using the scale below. Average rating of top three box scores of all statements in factor (on an 11 point scale, where 10 = "Strongly agree" and 0 = "Strongly disagree")
Base = Total Sample of Interest 2004 (1828)

Personal Goals—*Aspirations Factor*

21

Most youth still believe in the work ethic and value doing something with their lives.

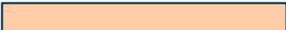
- This includes the desire to be somebody, to be proud of what they do, to do something they believe in, and to do something exciting.

Top 3 Box Agreement Scores

Factor Average  **60%**

If I work hard enough, I can accomplish just about anything**  **76%**

Maintaining my self respect is important to me**  **76%**

I want to be somebody**  **72%**

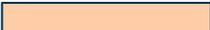
What matters most in the next few years is doing something I can be really proud of  **70%**

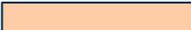
What matters most in the next few years is finding something to do that I really believe in  **68%**

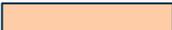
I'd like to do something really exciting with my life  **68%**

What matters most in the next few years is developing a good plan for my life  **65%**

It's important to me that I make a difference in whatever I do**  **64%**

What matters most in the next few years is doing something my family will be proud of  **53%**

What matters most in the next few years is doing something others will respect  **49%**

What matters most in the next few years is finding a job that's mentally challenging  **43%**

It's important to me to help in my community**  **43%**

What matters most in the next few years is being with people like me*  **38%**

Table 003b; Q18.0 Here are some statements about school, careers, and life goals. For each one, please indicate how strongly you agree or disagree using the scale below.

Top three box ratings on an 11 point scale, where 10 = "Strongly agree" and 0 = "Strongly disagree"

Base = Total Sample of Interest 2004 (1828) *Slight wording change in 2004; **Statement not asked in 2000;

Personal Goals—*Training/Education Factor*

22

Today's youth also recognize the importance of computer skills and their role in success.

- College is also considered essential to success, but less so than computer skills!
- About one half of youth highly value training in job skills or leadership.



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Top three box ratings on an 11 point scale, where 10 = "Strongly agree" and 0 = "Strongly disagree"

Base = Total Sample of Interest 2004 (1828)

*Slight wording change in 2004; **Statement not asked in 2000

↔ = Draws attention, but does not indicate significant differences

Personal Goals—*Goal Orientation Factor*

23

Young people are optimistic about the future.

- Nearly two thirds agree they are optimistic.
- About one half have an idea of what they want to be in life, and/or how to achieve their goals.

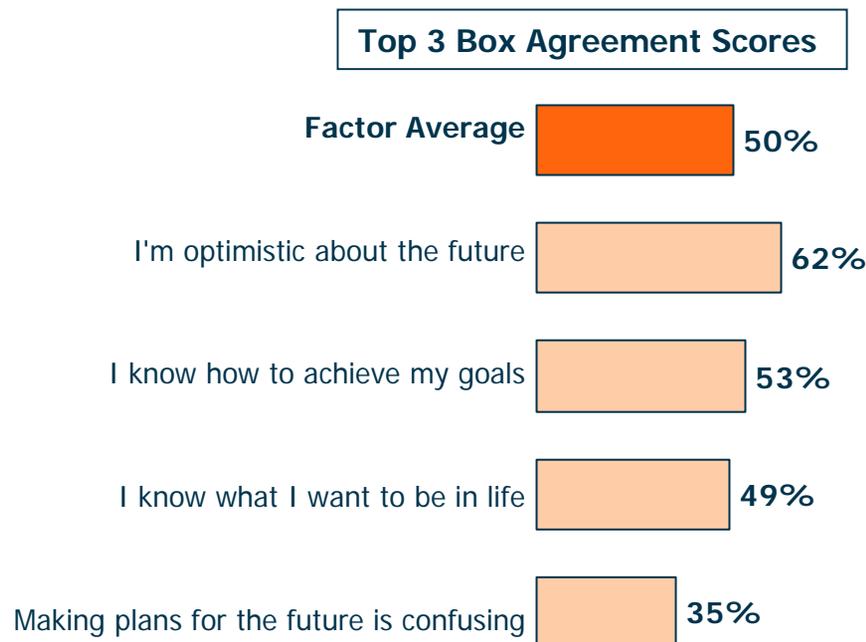


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Base = Total Sample of Interest 2004 (1828) *Slight wording change in 2004; **Statement not asked in 2000

Personal Goals—*Success Factor*

24

For many, long-term financial success is their highest priority.

- Today's youth also seek independence and job security.
- Quite a few youth (4 of 10) admit they want it all (house, car, money) *now*.

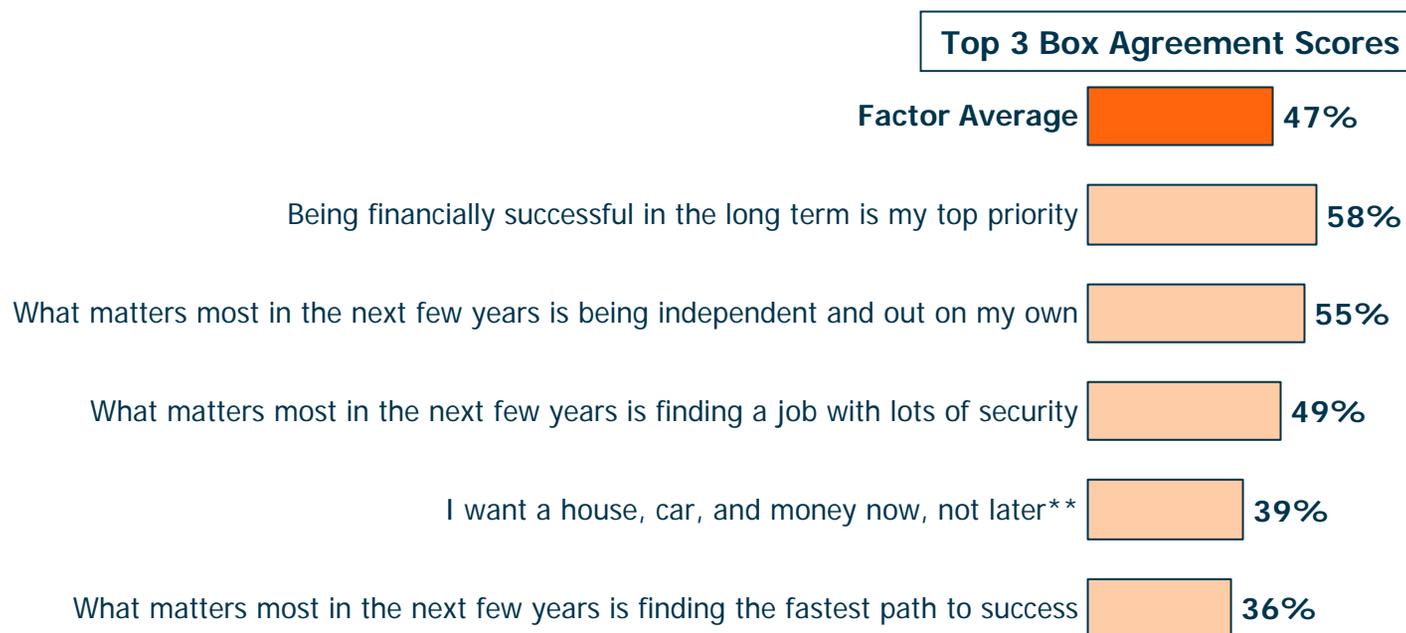


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 Base = Total Sample of Interest 2004 (1828) *Slight wording change in 2004; **Statement not asked in 2000

Personal Goals—*Youthful Experimentation Factor*

25

Youth is also about keeping options open and experimenting.

- One half of young men and women want to keep their options open and try lots of different things.
- Slightly fewer have a desire to see the world before settling down.
- Relatively few want to settle down and start a family fairly soon.

Top 3 Box Agreement Scores

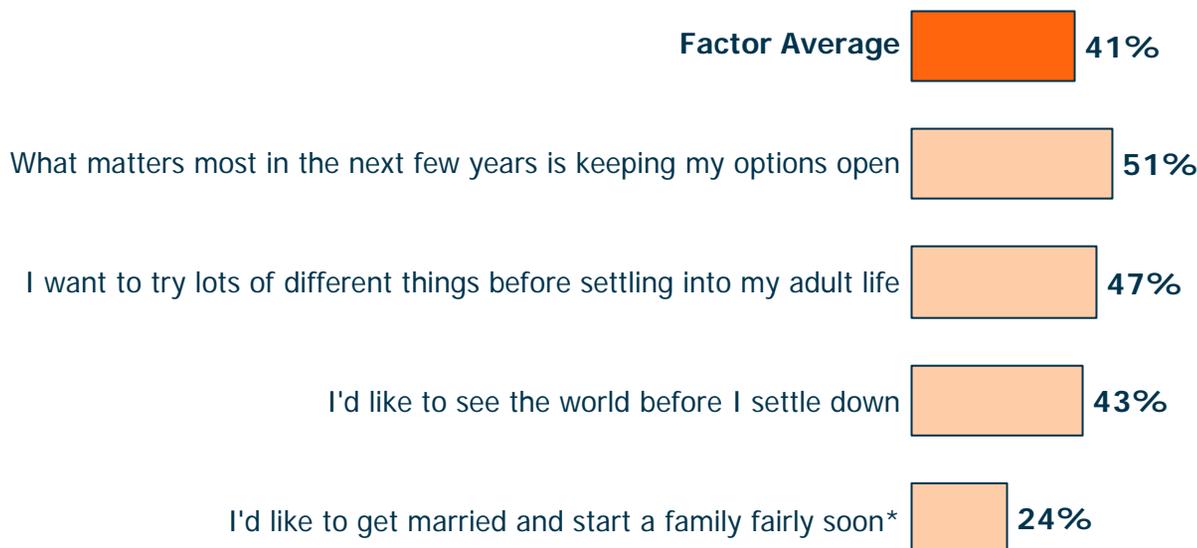


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Base = Total Sample of Interest 2004 (1828)

*Slight wording change in 2004; **Statement not asked in 2000

Personal Goals—*Location Factor*

26

Not all youth want to stay close to home when they are independent.

- About one third of youth want to do so, another one third want to get away from where they grew up.

Top 3 Box Agreement Scores

Factor Average



33%

When I'm out on my own, living near my parents and siblings is very important to me



33%

I'd like to get away from the area where I grew up



32%

Personal Goals—*Patriotism Factor*

27

Willingness to fight for one's country is low and depends on the cause.

- Four in 10 will do so *depending* on the cause, and only half as many say they will do so for *any* cause.
- Patriotism is not a universally held belief—only 4 in 10 say they are very patriotic.

Top 3 Box Agreement Scores

Factor Average 29%

I'm a very patriotic person 43%

Depending on the cause, I am willing to fight for my country** 41%

I am willing to fight for my country for any cause** 22%

Everyone should serve in the military* 10%

Personal Goals—*Apprehension Factor*

28

At 16-24, young people are not overly concerned with safety or avoiding risks.

- Only slightly more than one third agree they want to lead a safe life, avoiding risks when they can.
- A few are concerned about getting off on the wrong track, not being treated fairly in the work place, or not being able to get a well paying job with their education.

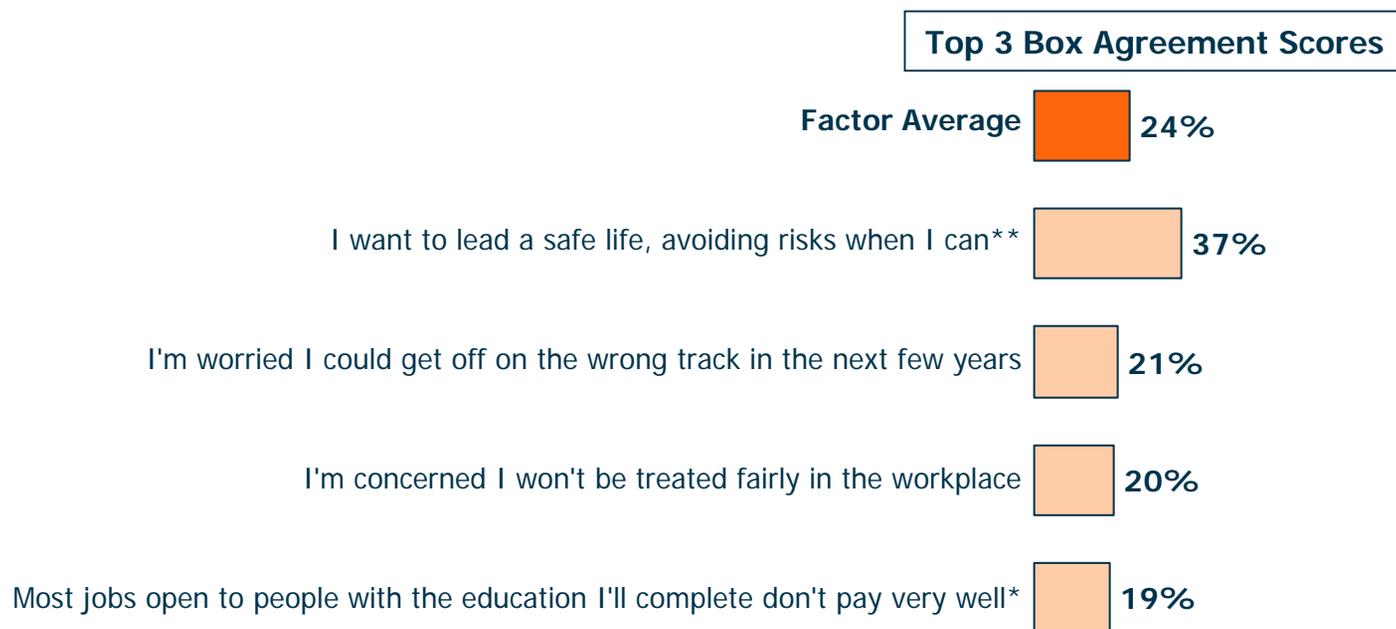


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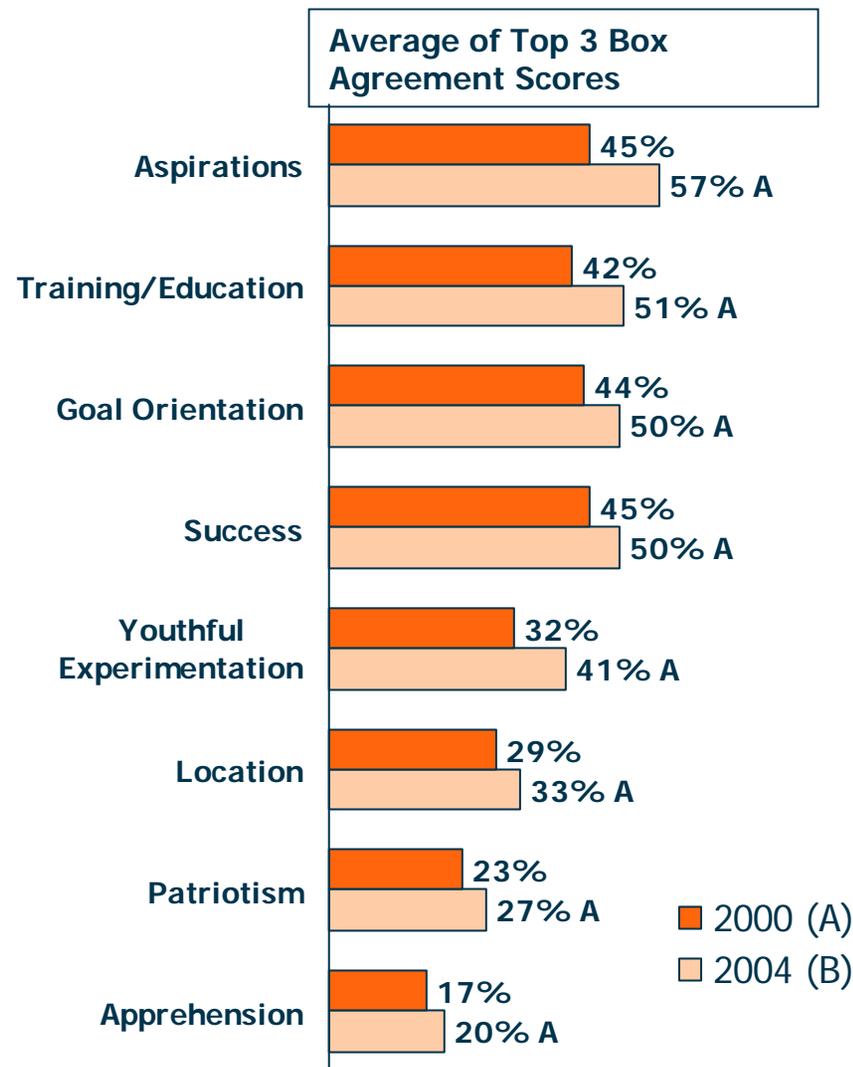
*Base = Total Sample of Interest 2004 (1828) Slight wording change in 2004; **Statement not asked in 2000

Personal Goals—Factor Averages Among Common Statements: 2000 vs. 2004

29

Although the *intensity* of feelings has increased, the *relative* position of personal goals and life attitudes is consistent over time.

- Aspirations, training and education desires, goal or plan orientation, and desire for success are the predominant themes.
- Aspirations (to be someone, to do something important) have jumped dramatically in the past four years, now describing nearly 3 of 5 young people.
- Location, patriotism, and apprehension themes are more narrowly held.
- On an absolute basis agreement levels are higher in 2004.



Source: Table 003b; Q18.0 Here are some statements about school, careers, and life goals. For each one, please indicate how strongly you agree or disagree using the scale below.

Base = Total Sample Of Interest (1410, 1828)

Letters indicate significance at 95% Confidence Level; rows tested AB

Average of top three box scores of all statements in factor (on an 11 point scale, where 10 = "Strongly agree" and 0 = "Strongly disagree")

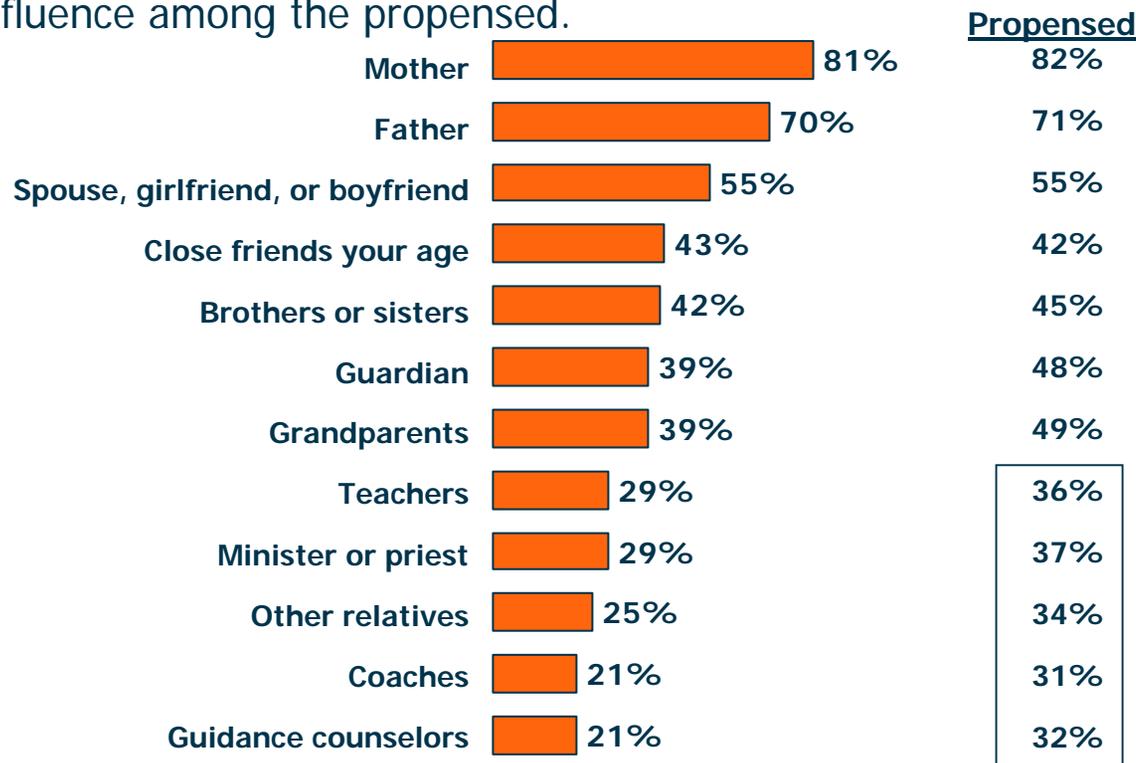
Note: only statements asked in both years are included in the factor averages

Influencers, Plans And Considerations

Importance Of Influencers On Life Decisions

From the youths' perspective, parents—especially moms—are most influential when it comes to making major life decisions.

- “Significant others” such as a spouse, girlfriend, or boyfriend, have the next most influence in young people’s lives.
- School personnel (teachers, coaches, guidance counselors) and ministers/priests have more influence among the propensed.



Future Plans For Next Few Years—2000 vs. 2004

Choice of military service is flat over time, but some youth today are more likely to choose non-traditional alternatives.

- In addition to the traditional school/work/military choices, many youth are volunteering, traveling, or staying home preparing for work or school. These seem more accepted today.
- Starting their own business is also an option many intend to pursue.

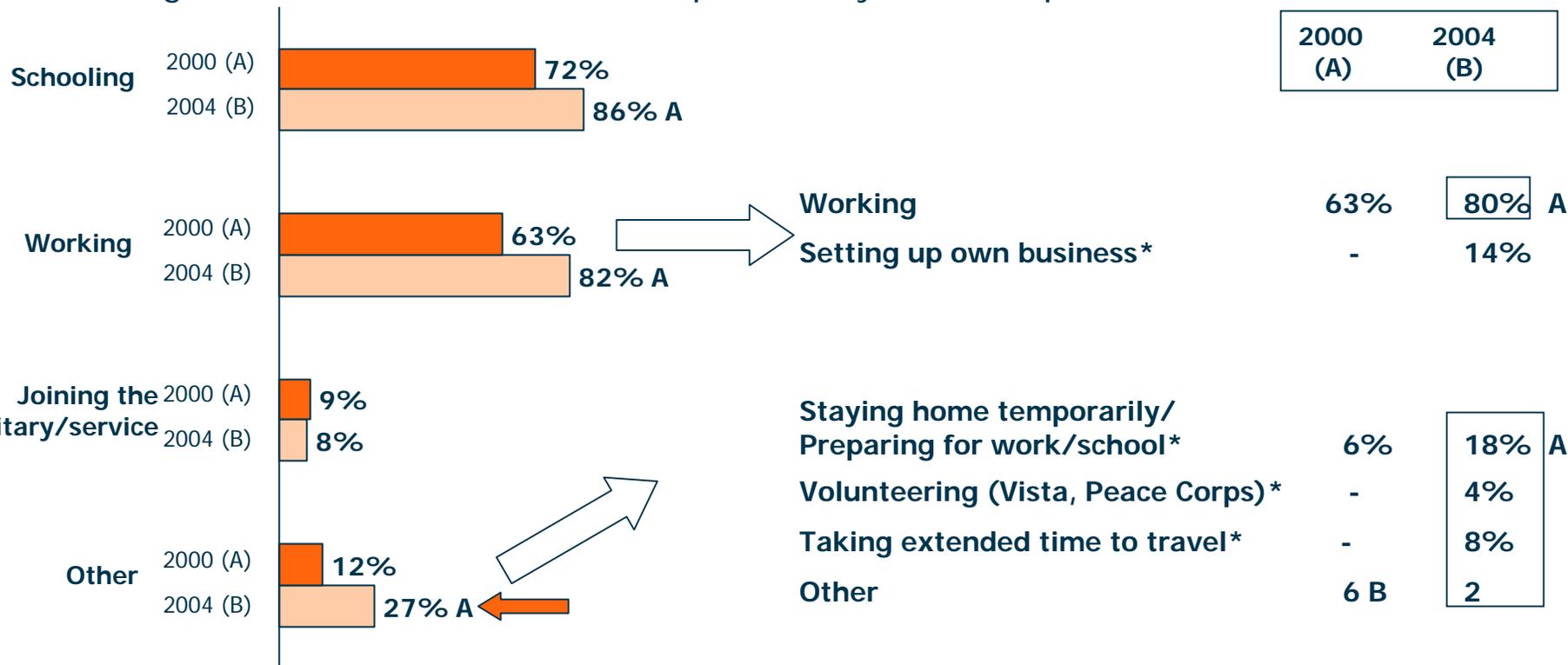


Table 208; Q7.5 Please select anything below that you think you might be doing in the next few years?

Base = Total Sample of Interest (1401, 1828)

Letters indicate significance at 95% Confidence Level; columns tested AB

□ = Draws attention, but does not indicate significant differences

*Statement not asked in 2000 and results are probably inflated somewhat

Highest Level In School Eventually Like To Complete

33

As in 2000, the vast majority of the sample of interest expect to go to college or vocational/technical school.

- One third have aspirations of eventually completing a Bachelor's degree.

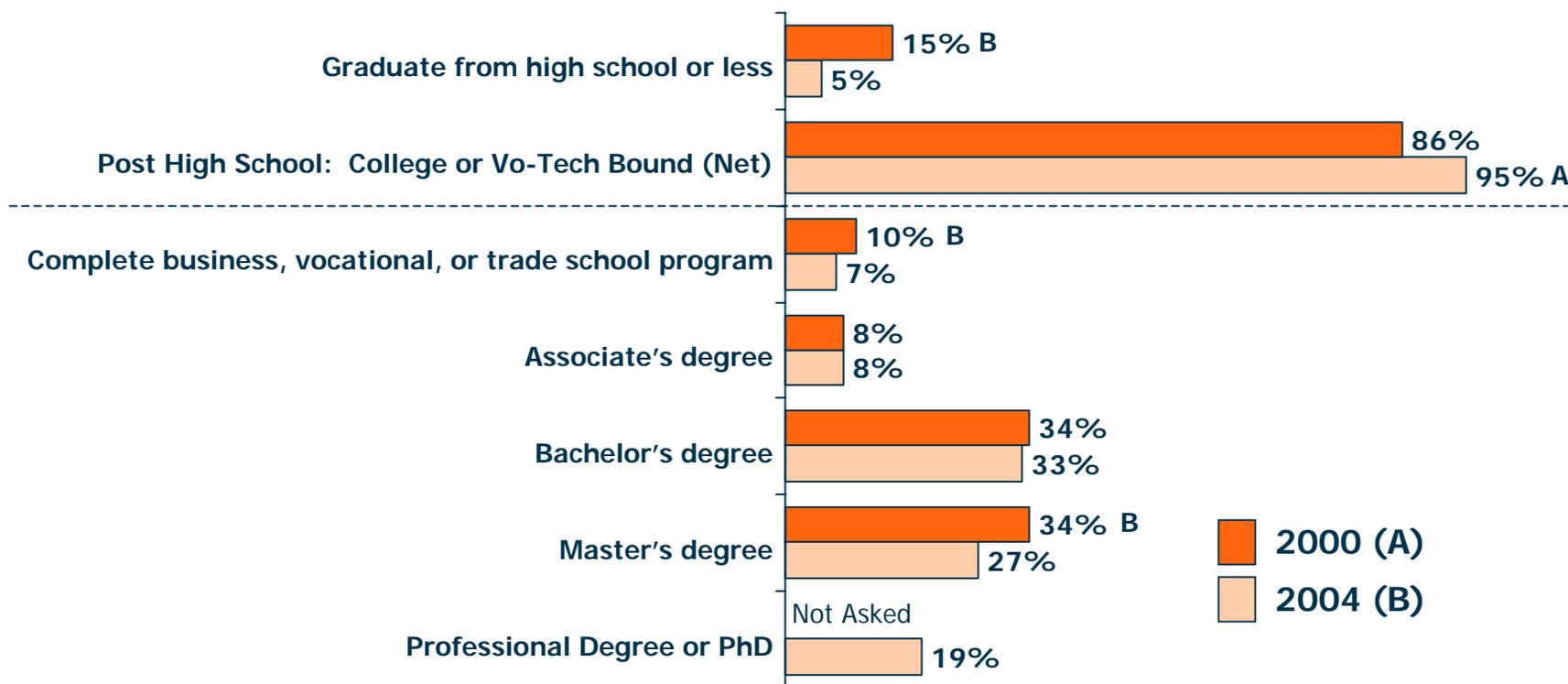


Table 224: Q10.5 Thinking ahead, what's the highest grade in school that you'd eventually like to complete?

Base = Total Sample of Interest (1388, 1828)

Letters indicate significance at 95% Confidence Level; rows tested AB

Military Motivators

Military Motivators—Top of Mind Among Total

35

Information about motivators obtained two ways:

1. Unaided/Subjective:

“What are the main reasons you might want to join the military in the next few years?”

2. Aided/Objective:

List of 33 statements, rated using an importance rating.

“Below are some reasons why a person might consider the military. Using the scale, please indicate how important each reason would be for you to consider going into the military.”

A very
important
reason

Not an
important
reason at all

10.....9.....8.....7.....6.....5.....4.....3.....2.....1.....0

Top-Of-Mind Reasons For Joining The Military—2004

Among those Not Averse to Joining

36

On a *unaided* basis, two primary reasons are offered for joining today's military: college tuition assistance and a sense of duty to country.

- Education is similar across propensity.
- Duty to country is significantly lower among those not propensed (48% to 30%).

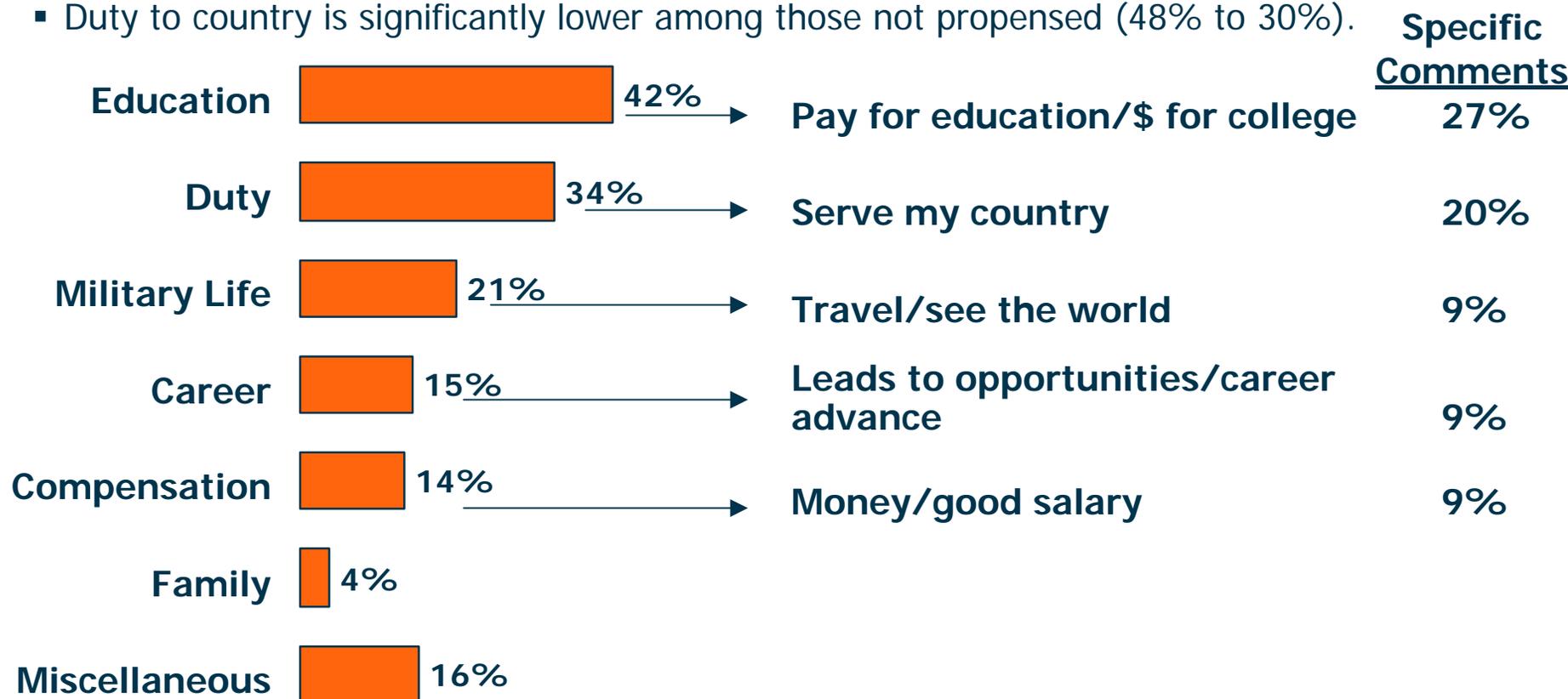


Table 001: Q15.0 What are the main reasons you might want to join the military in the next few years?

Base = 2004 Sample of Interest not adverse to joining the military (1255)

Multiple responses

Note: comparisons cannot be made between 2000 and 2004 due to many no answers in 2000 (500+) and different bases (everyone in 2000)

Key Military Motivators—2004 in Total

37

Five areas surfaced as most important military motivators from the list of possibilities provided.

Key Military Motivators 2004 Among Total Sample Of Interest	
Educational assistance	
▪ Get help paying for a college education	58%
Benefits	
▪ It offers excellent benefits, such as health care, retirement, and vacation	55%
Adventure	
▪ The opportunity to travel and see the world	54%
▪ Have exciting experiences and adventures	49%
Pride and honor	
▪ The military is an honorable occupation**	50%
▪ Be a part of something I can take pride in	49%
Experience	
▪ Gain management and leadership experience	49%

Key Military Motivators—2004 Total By Propensity

38

Money for college is a top motivator across all propensities.

- Defending and serving my country and self improvement/development are relatively more compelling to the highly propensed, as is the more tangible college tuition.
- The probably not propensed attach importance to both tangible and intangible items.
- Consider adding tangible benefits for not propensed—they value these most.

In Percent	Total Sample Of Interest 2004			
	Total	Propensity To Serve		
		Definitely/ Probably Will Will (H)	Probably Will Not Will (L)	Definitely Will Not Will (M)
Get help paying for a college education	58	71 LM	60 M	43
It offers excellent benefits, such as health care, retirement, and vacation	55	67 LM	57 M	42
The opportunity to travel and see the world	54	68 LM	55 M	40
The military is an honorable occupation**	50	73 LM	50 M	32
Have exciting experiences and adventures	49	67 LM	50 M	33
Gain management and leadership experience	49	68 LM	51 M	33
Be a part of something I can take pride in	49	70 LM	48 M	32
Good job security	48	62 LM	48 M	37
Improve myself and develop my potential to the fullest	47	69 LM	46 M	29
Defend and serve my country*	47	69 LM	47 M	29
I can get a substantial cash bonus for joining	44	51 M	47 M	35
Base = Total Sample of Interest	1828	451	828	548

Table 010b; Q20.0 Using the scale, please indicate how important each reason would be for you to consider going into the military.

Top three box ratings on an 11 point scale, where 10 = "A very important reason" and 0 = "Not an important reason"

Letters indicate significance at 95% Confidence Level; columns tested HLM Shading indicates statement in top few ranking motivators for group

* In 2000, wording of this statement was "Serve my country"; **Statement not asked in 2000; **Bold** statements are tangible motivators

Key Military Motivators—2000 vs. 2004 in Total

39

Gaining management/leadership experience and being part of something I can take pride are more likely to be top motivators in 2004.

- All top motivators are stronger in 2004 than in 2000, and these two now surface in the top few motivators.

In Percent	Total Sample Of Interest	
	2000 (A)	2004 (B)
Get help paying for a college education	51	58 A
It offers excellent benefits, such as health care, retirement, and vacation	44	55 A
The opportunity to travel and see the world	44	54 A
The military is an honorable occupation**	-	50 A
Have exciting experiences and adventures	39	49 A
Gain management and leadership experience	38	49 A ↑
Be a part of something I can take pride in	35	49 A ↑
I'd learn skills that will help me get a good job when I get out	39	48 A
I can earn some college credits*	39	47 A
Base = Total Sample of Interest	1404	1828

Table 010b; Q20.0 Using the scale, please indicate how important each reason would be for you to consider going into the military.

Letters indicate significance at 95% Confidence Level; columns tested AB

Top three box ratings on an 11 point scale, where 10 = "A very important reason" and 0 = "Not an important reason"

* Slight wording change in 2004; **Statement not asked in 2000

Shading indicates statement in top few ranking motivators for year

↑ = Draws attention, but does not indicate significant differences; **Bold** statements are tangible motivators

Military Barriers

Top-Of-Mind Reasons for Not Joining The Military— 2004 In Total

41

Fear is the biggest barrier to joining the military.

Other unaided reasons for not joining include aversion to some aspect of military life, and opposition to the military in general.

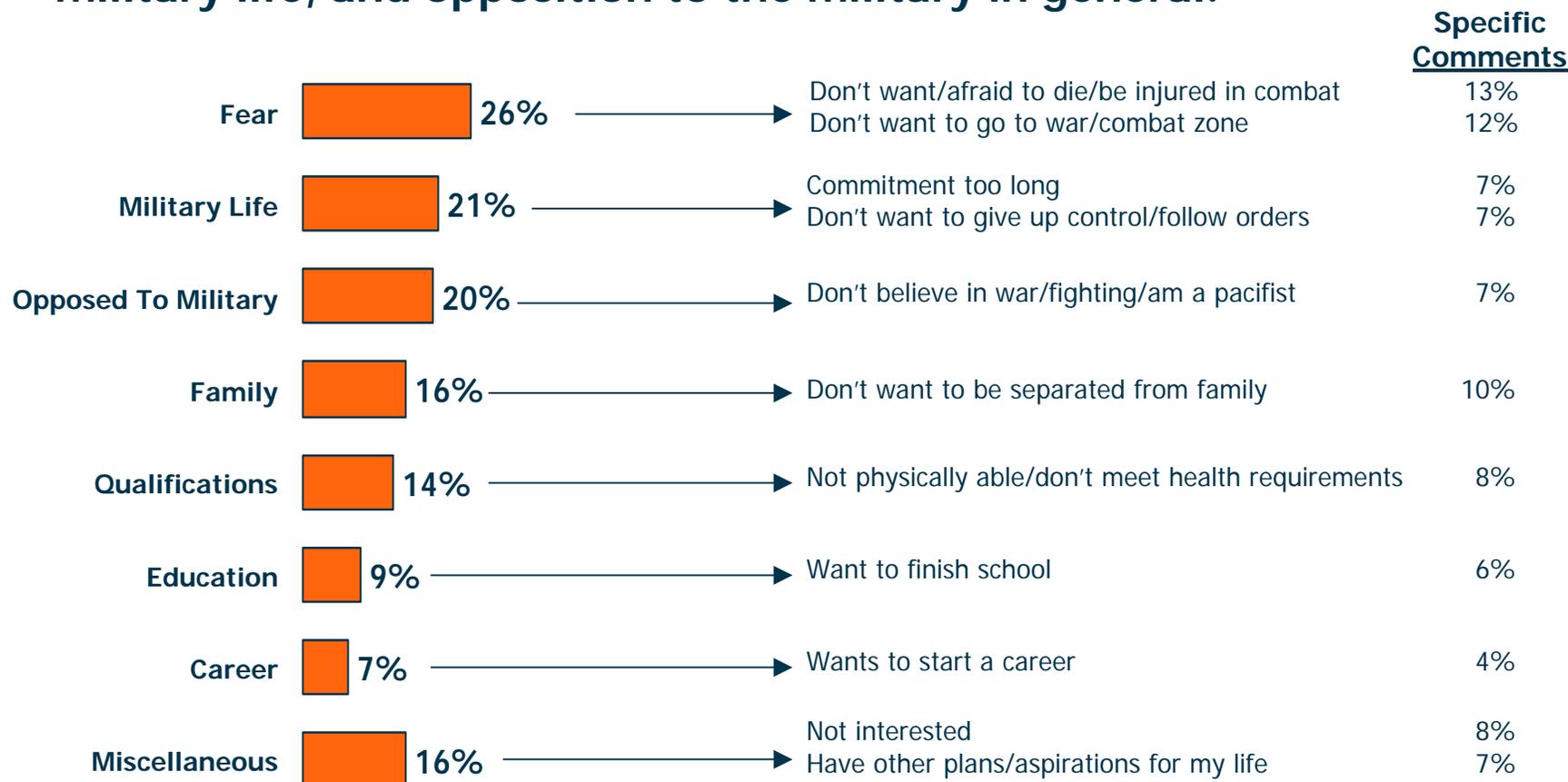


Table 002: Q16.0 What, if any, are the main reasons you might have for not joining the military in the next few years?

Base = 2004 Sample of Interest (1813)

Multiple responses.

Reasons For Not Joining The Military—2000 vs. 2004

42

Fear is a much bigger factor in military service than in the past.

- Nearly twice as many young men and women list fear of dieing, being injured or going to war as a barrier to military service for them—nearly double the level in 2000.

Conversely, concerns about military life, are down considerably.

In the past barriers were about inconvenience, or preference for another life choice. Now they have switched to something quite different—fear of death or injury.

In Percent	Total Sample Of Interest	
	2000	2004
Fear (Net)	14	26
Don't want/afraid to die/be injured in combat	9	13
Don't want to go to war/combat zone	5	12
Military Life (Net)	37	21
Commitment too long	11	7
Don't want to give up control/follow orders	14	7
Too dangerous/not safe	1	5
Opposed To Military (Net)	16	20
Don't believe in war/fighting/am a pacifist	9	7
Opposed to most military operations we are engaged in	1	5
Don't want to fight in Iraq	-	4
Don't support military policy	6	3
Family (Net)	21	16
Don't want to be separated from family	18	10
Qualifications (Net)	11	14
Not physically able/don't meet health requirements	6	8
Not suited for the military/wouldn't be good at it	5	5
Education (Net)	8	9
Want to finish school (unspecified)	8	6
Career (Net)	9	7
Want to start a career	9	4
Miscellaneous (Net)	20	16
Not interested	8	8
Have other plans/aspirations for my life	5	7
Nothing	2	4
Base = Any response among Total Sample of Interest	907	1739

Key Military Barriers—2004 in Total

43

The top military barriers in 2004 center in five areas:

- Personal injury or death
- Aversion to fighting/military
- Career
- Time commitment
- Ethical concerns

Key Military Barriers 2004 Among Total Sample Of Interest

Personal injury or death

- I might be killed in combat** 65%
- I might be captured and tortured** 57%
- I might be wounded in combat** 55%
- Possibly facing an enemy who might use chemical or biological weapons** 54%

Aversion to fighting/military

- I might have to kill innocent people** 61%
- I don't want to kill people** 59%

Career

- I have other career interests 60%

Time commitment

- I might hate it once I got in and then be stuck 59%
- The long time commitment required 56%

Ethical concerns

- May have to fight for a cause I don't support** 56%

Key Military Barriers—2004 Total By Propensity

44

Major barriers, across all propensity levels are amazingly consistent.

- The unpropensed fear combat and its risks, and loss of personal freedom. Significantly more of them claim they are just not a military person, and more are hesitant to fight for a cause they don't support.

Many critical new barriers are evident in 2004 and are deeply held by unpropensed.

In Percent	Total Sample Of Interest 2004			
	Total	Propensity to Serve		
		Definitely/ Probably Will (H)	Probably Will Not (L)	Definitely Will Not (M)
I might be killed in combat**	65	58	65 H	71 HL
I might have to kill innocent people**	61	52	62 H	69 HL
I have other career interests	60	42	63 H	72 HL
I might hate it once I got in and then be stuck	59	44	62 H	67 H
I don't want to kill people**	59	48	59 H	70 HL
I might be captured and tortured**	57	48	56 H	66 HL
The long time commitment required	56	41	58 H	65 HL
May have to fight for a cause I don't support**	56	45	57 H	64 HL
I might be wounded in combat**	55	44	54 H	64 HL
Possibly facing an enemy who might use chemical or biological weapons**	54	48	52	61 HL
There is a good chance that I'd end up in combat**	53	42	51 H	65 HL
Loss of personal freedom	52	37	52 H	64 HL
No say in choosing where I'd be stationed	52	43	53 H	57 H
I'd miss my home and family	51	43	51 H	59 HL
I'm just not a military person**	51	29	49 H	71 HL
It would be hard on my family members	50	44	48	59 HL
Base = Total Sample of Interest	1828	451	828	548

Table 011b; Q21.0 For each one, please use the scale to indicate how big a barrier it would be to your going into the military.

Top three box ratings on an 11 point scale, where 10 = "A major barrier" and 0 = "Not a barrier at all" Letters indicate significance at 95% Confidence Level; columns tested HLM

*Slight wording change in 2004; **Statement not asked in 2000; Shading indicates statement in top ten ranking barriers for group

Key Military Barriers—2000 vs. 2004 Among Total

45

Many of the barriers that exist today were not factors in 2000.

- Many items like being killed in combat or killing others were not relevant in 2000.
- Other interests, being stuck and time commitment were top concerns then and now.
- In 2000 more top concerns were focused on loss of freedom, friends, family, etc.

In Percent	Total Sample Of Interest	
	2000 (A)	2004 (B)
I might be killed in combat**	-	65
I might have to kill innocent people**	-	61
I have other career interests	56	60 A ←
I might hate it once I got in and then be stuck	51	59 A ←
I don't want to kill people**	-	59
I might be captured and tortured**	-	57
The long time commitment required	46	56 A ←
May have to fight for a cause I don't support**	-	56
I might be wounded in combat**	-	55
Possibly facing an enemy who might use chemical or biological weapons**	-	54
Loss of personal freedom	46	52 A
No say in choosing where I'd be stationed	43	52 A
I'd miss my home and family	47	51 A
The loss of a normal lifestyle - like going out with friends, having dates, partying, etc.	45	49
Loss of personal privacy	42	49 A
I'd be putting my education on hold	39	47 A
I'd lose touch with friends	38	42 A
Base = Total Sample of Interest	1401	1828

Table O11b; Q21.0 For each one, please use the scale to indicate how big a barrier it would be to your going into the military.

Top three box ratings on an 11 point scale, where 10 = "A major barrier" and 0 = "Not a barrier at all"

Letters indicate significance at 95% Confidence Level; columns tested AB ← = Draws attention, but does not indicate significant differences

*Slight wording change in 2004; **Statement not asked in 2000; Shading indicates statement in top ten ranking barriers for year

Reserve Motivators

Key Reserve Motivators—2004 in Total

47

Key motivators for the Reserve are economic: money for college, benefits, and the extra earned money.

- The compromise to be in the military while also pursuing a job or education and to be able to serve while close to home are also very important motivators.

Key Reserve Motivators 2004 Among Total Sample Of Interest	
• I'd get help to pay for college tuition	60%
• I'd become eligible for benefits like medical, health, and retirement	58%
• I could really use the extra money	56%
• It's a really good compromise. You can serve in the military, but at the same time pursue a job or education	55%
• I could serve while staying close to my home and family	55%

Reserve Motivators—2004 Total By Propensity

48

In Percent	Total Sample Of Interest 2004			
	Total	Propensity To Serve In Reserve		
		Definitely/ Probably Will Serve (B)	Probably Will Not Serve (D)	Definitely Will Not Serve (E)
I'd get help to pay for college tuition**	60	72 E	65 E	49
I'd become eligible for benefits like medical, health, and retirement	58	73 DE	64 E	44
I could really use the extra money	56	68 E	62 E	45
It's a really good compromise. You can serve in the military but at the same time pursue a job or education	55	67 E	62 E	41
I could serve while staying close to my home and family	55	68 E	61 E	43
I'd be able to serve in the military and not have to give up my lifestyle**	53	61 E	59 E	41
I'd gain some of the advantages of military service without much risk of getting into a combat situation	49	63 DE	53 E	37
It would give me a chance to try out the military for awhile and see what it's like before making a big commitment	46	63 DE	50 E	33
I'd gain skills and experiences that I couldn't really get elsewhere	46	65 DE	51 E	32
It allows me to serve my country	46	66 DE	52 E	30
My reserve military service would help me get a better job	45	62 DE	48 E	32
It lets me be part of a strong team*	45	66 DE	49 E	29
I'd be able to make a difference**	43	66 DE	45 E	29
It would add something special and exciting to my life**	42	62 DE	46 E	27
Base = Total Sample of Interest	895	168	388	339

Table 016aT2; Q29.0 Please read the description, then use the scale to indicate how important each reason would be for you to consider going into the Reserve.

Letters indicate significance at 95% Confidence Level; columns tested BDE

Top three box ratings on an 11 point scale, where 10 = "A very important reason" and 0 = "Not an important reason at all"

*Slight wording change in 2004;**Statement not asked in 2000

Shading indicates statement in top few ranking motivators for group

Key Reserve Motivators—2004 By Ethnicity Among Total

49

The importance of Reserve motivators differs a bit by ethnicity.

▪ African Americans

- Are a little **more motivated** by:
 - I'd be able to serve in the military and not have to give up my lifestyle**
- Are a little **less motivated** by:
 - I could really use the extra money

▪ Hispanics

- Are **more motivated** by:
 - I'd be able to serve in the military and not have to give up my lifestyle**
- Are **less motivated** by:
 - It's a really good compromise. You can serve in the military, but at the same time pursue a job or education

Reserve Motivators—2000 vs. 2004 Among Total

50

Top Reserve motivators are similar, although economic factors are much stronger in 2004.

- All motivators are stronger—and some are a lot stronger than in 2000.

In Percent	Total Sample Of Interest	
	2000 (A)	2004 (B)
I'd get help to pay for college tuition**	-	60
I'd become eligible for benefits like medical, health, and retirement	35	58 A
I could really use the extra money	37	56 A
It's a really good compromise. You can serve in the military but at the same time pursue a job or education	42	55 A
I could serve while staying close to my home and family	41	55 A
I'd be able to serve in the military and not have to give up my lifestyle**	-	53
I'd gain some of the advantages of military service without much risk of getting into a combat situation	30	49 A
It would give me a chance to try out the military for awhile and see what it's like before making a big commitment	33	46 A
I'd gain skills and experiences that I couldn't really get elsewhere	28	46 A
It allows me to serve my country	26	46 A
My reserve military service would help me get a better job	27	45 A
It lets me be part of a strong team*	24	45 A
I'd be able to make a difference**	-	43
It would add something special and exciting to my life**	-	42
Base = Total Sample of Interest	1374	895

Table 016a; Q29.0 Please read the description, then use the scale to indicate how important each reason would be for you to consider going into the Reserve.

Letters indicate significance at 95% Confidence Level; columns tested AB

Top three box ratings on an 11 point scale, where 10 = "A very important reason" and 0 = "Not an important reason at all"

*Slight wording change in 2004; **Statement not asked in 2000

Shading indicates statement in top five ranking motivators for year

Reserve Barriers

Key Reserve Barriers—2004 In Total

52

The possibility of active duty, combat, and the length of commitment are key Reserve barriers.

- Also many just don't consider themselves a "military person"

Key Reserve Barriers 2004 Among Total Sample Of Interest	
• I'd run the risk of being called to active duty	57%
• Getting called to active duty would put me in combat	55%
• I'm afraid I'd be deployed overseas for a long time	51%
• Just not a military person	50%
• I'd have to commit for too many years	49%
• Getting called to active duty would create too much time away from my family	49%

Table 017b; Q30.0 For each one, please use the scale to indicate how big a barrier it might be to your doing this.

Top few ranking Reserve barriers listed

Top three box ratings on an 11 point scale, where 10 = "A major barrier" and 0 = "Not a barrier at all"

Base = Random selection of about half of the respondents (895)

Reserve Barriers—2004 Total By Propensity

53

Top Reserve barriers are very similar, regardless of propensity.

In Percent

	Total Sample Of Interest 2004			
	Total	Propensity To Serve In Reserve		
		Definitely/ Probably Will Serve (B)	Probably Will Not Serve (D)	Definitely Will Not Serve (E)
I'd run the risk of being called to active duty	57	37	57 B	66 BD
Getting called to active duty would put me in combat**	55	42	54 B	63 BD
I'm afraid I'd be deployed overseas for a long time	51	35	48 B	61 BD
Just not a military person**	50	23	47 B	68 BD
I'd have to commit for too many years	49	26	47 B	61 BD
Getting called to active duty would create too much time away from my family**	49	35	47 B	59 BD
Reserve service would conflict with my job or education*	48	37	46	57 BD
It would limit my freedom	43	28	40 B	55 BD
Getting called to active duty would cause me to lose my job**	42	30	39	50 BD
My busy life doesn't leave any time for this type of commitment	41	27	37 B	54 BD
My spouse or the person I'm dating wouldn't like it	39	30	36	48 BD
Getting called to active duty would put my family at risk financially**	38	30	34	46 BD
It's just never crossed my mind to join the Reserve*	37	25	32	50 BD
I can make more money working overtime or getting another civilian job	36	21	32 B	47 BD
The really interesting jobs would go to the people on active duty, not the people in the Reserve	33	32	30	38 D
I don't want to give up one weekend a month	30	14	25 B	42 BD
Joining the Reserve is not the same as joining the real military**	26	22	24	29
All the Reserve does on weekends is drink coffee and eat donuts. It's a waste of time.	19	17	17	24 D
Base = Total Sample of Interest	895	168	388	339

Table 017b; Q30.0 For each one, please use the scale to indicate how big a barrier it might be to your doing this.

Letters indicate significance at 95% Confidence Level; columns tested BDE

Top three box ratings on an 11 point scale, where 10 = "A major barrier" and 0 = "Not a barrier at all"

*Slight wording change in 2004; **Statement not asked in 2000; Shading indicates statement in top few ranking barriers for group

Reserve Barriers—2000 vs. 2004 Among Total

54

The perceived risk of being called to active duty is a much bigger barrier in 2004.

- All barriers increase substantially—especially those related to being called up and time commitment.

In Percent	Total Sample Of Interest	
	2000 (A)	2004 (B)
I'd run the risk of being called to active duty	32	57 A
Getting called to active duty would put me in combat**	-	55
I'm afraid I'd be deployed overseas for a long time	32	51 A
Just not a military person**	-	50
I'd have to commit for too many years	28	49 A
Getting called to active duty would create too much time away from my family**	-	49
Reserve service would conflict with my job or education*	33	48 A
It would limit my freedom	33	43 A
Getting called to active duty would cause me to lose my job**	-	42
My busy life doesn't leave any time for this type of commitment	27	41 A
My spouse or the person I'm dating wouldn't like it	26	39 A
Getting called to active duty would put my family at risk financially**	-	38
It's just never crossed my mind to join the Reserve*	31	37 A
I can make more money working overtime or getting another civilian job	28	36 A
The really interesting jobs would go to the people on active duty, not the people in the Reserve	23	33 A
I don't want to give up one weekend a month	20	30 A
Joining the Reserve is not the same as joining the real military**	-	26
All the Reserve does on weekends is drink coffee and eat donuts. It's a waste of time.	13	19 A
Base = Total Sample of Interest	1380	895

Table 017b; Q30.0 For each one, please use the scale to indicate how big a barrier it might be to your doing this.

Letters indicate significance at 95% Confidence Level; columns tested AB

Top three box ratings on an 11 point scale, where 10 = "A major barrier" and 0 = "Not a barrier at all"

*Slight wording change in 2004; **Statement not asked in 2000; Shading indicates statement in top few ranking barriers for group

ROTC Motivators

Key ROTC Motivators—2004 In Total

56

College scholarships and extra money are the top ROTC motivators.

- The opportunity to serve as an officer in the military and being trained as an a military officer are also important.

Key ROTC Motivators 2004 Among Total Sample Of Interest	
• I could get a college scholarship	60%
• I could make extra money	54%
• I could go into regular military service as an officer rather than an enlisted person once I graduated from college	48%
• It would teach me to be organized, clear, and decisive	47%
• I could go from ROTC into the Reserve, serve part-time, and still be an officer	47%

Table 018b; Q31.0 Please read the description, then use the scale to indicate how important each reason would be for you to consider going into ROTC.

Top four ranking ROTC motivators listed

Top three box ratings on an 11 point scale, where 10 = "A very important reason" and 0 = "Not an important reason at all"

Base = Random sample of about one-half of the Sample Of Interest (933)

ROTC Motivators—2004 Total By Propensity

57

Being trained as a military officer is a an important motivator to the propensed.

- Getting money for college, earning extra Money, going in as a officer are top motivators, Regardless of propensity.

In Percent

	Total Sample Of Interest 2004			
	Total	Propensity To Serve In Reserve		
		Definitely/ Probably Will Serve (B)	Probably Will Not Serve (D)	Definitely Will Not Serve (E)
I could get a college scholarship	60	74 DE	62	56
I could make extra money	54	62 E	56	51
I could go into regular military service as an officer rather than an enlisted person once I graduated from college	48	70 DE	52 E	41
It would teach me to be organized, clear, and decisive	47	71 DE	53 E	38
I could go from ROTC into the Reserve, serve part-time, and still be an officer	47	62 E	53 E	39
It would give me a chance to try out the military for awhile and see what it's like before making a big commitment	46	61 E	51 E	40
I'd learn things I couldn't learn in regular college courses	45	65 DE	47	40
It would provide some structure and discipline to being at college	44	58 E	49 E	37
I'd learn a lot about teamwork	44	62 DE	48 E	38
I would be trained to be a military officer**	44	66 DE	47 E	37
I'd get lots of responsibility early in my career**	44	65 DE	46 E	37
I'd gain leadership skills that I couldn't get anywhere else	43	65 DE	45 E	37
I'd get the opportunity to lead others**	43	63 DE	47 E	36
It would be an exciting adventure	41	59 DE	46 E	34
It allows me to serve my country**	41	59 DE	44 E	35
It would provide me with a faster path to success than college alone would	40	62 DE	43 E	32
I'd get a lot of respect on campus	27	43 E	32 E	20
Base = Total Sample of Interest	933	110	333	490

Table 018c; Q31.0 Please read the description, then use the scale to indicate how important each reason would be for you to consider going into ROTC.

Letters indicate significance at 95% Confidence Level; columns tested BDE

Top three box ratings on an 11 point scale, where 10 = "A very important reason" and 0 = "Not an important reason at all"

*Slight wording change in 2004; **Statement not asked in 2000

Shading indicates statement in top four ranking motivators for group

ROTC Motivators—2000 vs. 2004 Among Total

58

All motivators are up substantially from 2000.

- Additionally, a series of new strong motivators are identified in 2004 that were not as relevant in 2000.

In Percent	Total Sample Of Interest	
	2000 (A)	2004 (B)
I could get a college scholarship	42	60 A
I could make extra money	33	54 A
I could go into regular military service as an officer rather than an enlisted person once I graduated from college	32	48 A
It would teach me to be organized, clear, and decisive	27	47 A
I could go from ROTC into the Reserve, serve part-time, and still be an officer	27	47 A
It would give me a chance to try out the military for awhile and see what it's like before making a big commitment	28	46 A
I'd learn things I couldn't learn in regular college courses	25	45 A
It would provide some structure and discipline to being at college	25	44 A
I'd learn a lot about teamwork	23	44 A
I would be trained to be a military officer**	-	44
I'd get lots of responsibility early in my career**	-	44
I'd gain leadership skills that I couldn't get anywhere else	24	43 A
I'd get the opportunity to lead others**	-	43
It would be an exciting adventure	22	41 A
It allows me to serve my country**	-	41
It would provide me with a faster path to success than college alone would	22	40 A
I'd get a lot of respect on campus	16	27 A
Base = Total Sample of Interest	1372	933

Table 018b; Q31.0 Please read the description, then use the scale to indicate how important each reason would be for you to consider going into ROTC.

Letters indicate significance at 95% Confidence Level; columns tested AB

Top three box ratings on an 11 point scale, where 10 = "A very important reason" and 0 = "Not an important reason at all"

*Slight wording change in 2004; **Statement not asked in 2000

Shading indicates statement in top four ranking motivators for year

ROTC Barriers

Key ROTC Barriers—2004 In Total

60

The inability to change your mind is a key barrier.

- Over one half say having to go on active duty when they graduate and complete ROTC, even if they lost interest or changed their mind is a major barrier

Key ROTC Barriers 2004 Among Total Sample Of Interest	
• I'd have to go on active duty when I graduate and complete ROTC, even if I had lost interest or changed my mind	57%
• I might eventually end up in combat	54%
• By the time I finished ROTC and then served on active duty, it would take up too many years	53%

Tale 019bB2; Q32.0 For each one, please use the scale to indicate how big a barrier it might be to your doing this.

Top three ranking ROTC barriers listed

Top three box ratings on an 11 point scale, where 10 = "A major barrier" and 0 = "Not a barrier at all"

Base = Random selection of about half of the respondents (933)

ROTC Barriers—2004 Total By Propensity

61

Barriers to ROTC are consistent by propensity—the inability to change your mind, threat of combat and time involved are key.

In Percent	Sample Of Interest 2004			
	Total	Definitely/ Probably Will Serve (B)	Probably Will Not Serve (D)	Definitely Will Not Serve (E)
I'd have to go on active duty when I graduate and complete ROTC, even if I had lost interest or changed my mind*	57	48	52	62 BD
I might eventually end up in combat**	54	40	51	59 BD
By the time I finished ROTC and then served on Active Duty, it would take up too many years	53	45	48	59 BD
It would limit my freedom while I was in college	49	35	44	56 BD
The really good assignments would go to the people who graduated from a military academy such as West Point or the Naval Academy, and not to the people who went through ROTC	41	40	40	43
It would be too physically demanding**	34	29	31	38
The skills and experience I'd gain wouldn't have much value in the workplace**	32	25	31	34
The ROTC program would be boring	30	24	25	35 BD
Base – Random selection of about half of the respondents	933	110	333	490

Table 019b; Q929 For each one, please use the scale to indicate how big a barrier it might be to your doing this.

Letters indicate significance at 95% Confidence Level; columns tested EFG

Mean ratings on an 11 point scale, where 10 = "A major barrier" and 0 = "Not a barrier at all"

*Slight wording change in 2004; **Statement not asked in 2000

Shading indicates statement in top three ranking barriers for group

ROTC Barriers—2000 vs. 2004 Among Total

62

The top ROTC barrier remains unchanged—they don't like that they can't change their minds.

- The possibility of seeing combat, a new item in 2004, has also become a key barrier.
- The number of years involved is also a concern.

In Percent	Sample Of Interest	
	2000 (A)	2004 (B)
I'd have to go on active duty when I graduate and complete ROTC, even if I had lost interest or changed my mind*	39	57 A
I might eventually end up in combat**	-	54
By the time I finished ROTC and then served on Active Duty, it would take up too many years	38	53 A
It would limit my freedom while I was in college	34	49 A
The really good assignments would go to the people who graduated from a military academy such as West Point or the Naval Academy, and not to the people who went through ROTC	24	41 A
It would be too physically demanding**	-	34
The skills and experience I'd gain wouldn't have much value in the workplace**	-	32
The ROTC program would be boring	24	30 A
Base = Random selection of about half of the respondents	1371	933

Table 019b; Q32.0 For each one, please use the scale to indicate how big a barrier it might be to your doing this.

Letters indicate significance at 95% Confidence Level; columns tested AB

Mean ratings on an 11 point scale, where 10 = "A major barrier" and 0 = "Not a barrier at all"

*Slight wording change in 2004; **Statement not asked in 2000

Shading indicates statement in top three ranking barriers for year

Career Options

Imagery—Which Organization Delivers Best 2004

College beats the military on delivering many desirable future benefits.

- It is believed to be the best choice to help get a good job, something you and parents can be proud of and respect, and good to prepare you for the future.

The military, however, best delivers physical benefits, including doing something challenging, discipline, and adventure.

- It also is seen as the best choice for developing leadership skills.

Military and college are at parity on making a difference and job security.

- College, Military and 2-year college/Vo-Tech are comparable on getting paid right away.

4-Year College Wins

- Help finding good paying job (74%)
- Something parents/family proud of (73%)
- Do something mentally challenging (72%)
- Prepare to achieve personal goals (71%)
- Prepare you to succeed in life (70%)
- Enjoy your life (65%)
- Do something you can be proud of (64%)
- Do something friends will respect (63%)
- Be treated fairly (59%)
- Develop personal values & qualities (53%)
- Get training in specific job skills (45%)

Military Wins

- Do something physically challenging (78%)
- Discipline (72%)
- Adventure (69%)
- Develop leadership skills (54%)

Draw

- Opportunity to make a difference
- Have job security
- Get paid well right away

Imagery—Which Organization Delivers Best 2004, continued

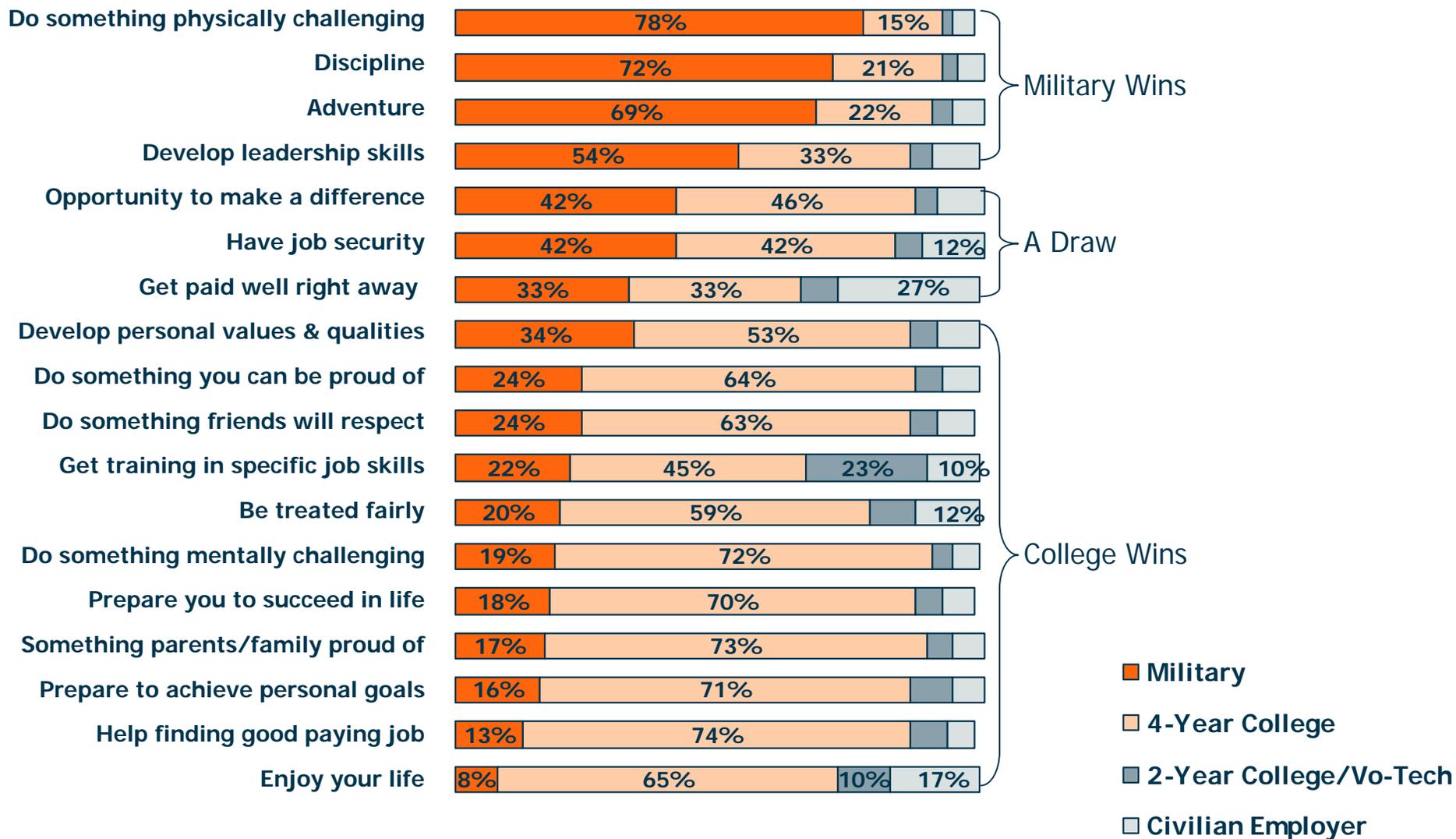


Table 012a-d; Q22.0 For each benefit below, please check the one organization you think delivers it best.
 Base = Total Sample Of Interest 2004 (1828)

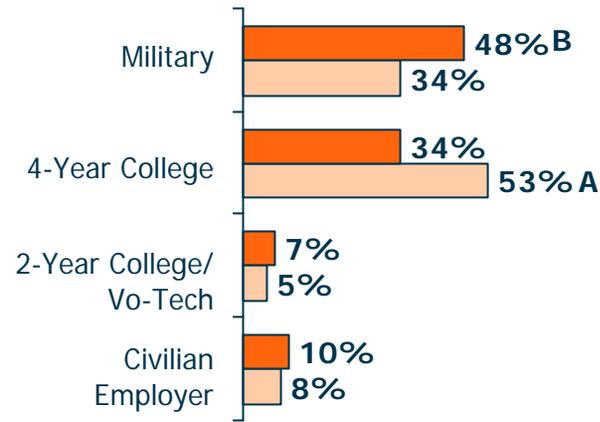
Imagery—Which Organization Delivers Best 2000 vs. 2004

Two important shifts occur from 2000 to 2004:

#1: Four Year college now wins over military on develop personal values and qualities.

4-Year College Now Wins Over Military On...

- Develop personal values & qualities* (53%, up from 34%)



#2: Military still wins, but is losing ground on develop leadership skills.

Military Still Wins, But Losing Ground On...

- Develop leadership skills (54%, down from 65%)

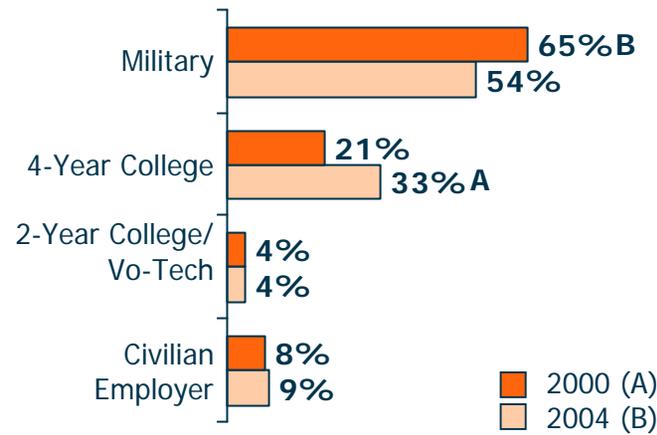


Table 012a-d; Q22.0 For each benefit below, please check the one organization you think delivers it best.

Base = Total Sample Of Interest (1828, 1413)

*Wording in 2000 was "Develop character and values"

Appeal Of Military Service By Type—2004 First Choice

67

There is a definite order of preference for military service:

- Reserve is first choice.
- College ROTC program to become an officer is second choice.
- Military College or Academy to become an officer is third choice.
- Full time active duty as an enlisted person is their last choice.

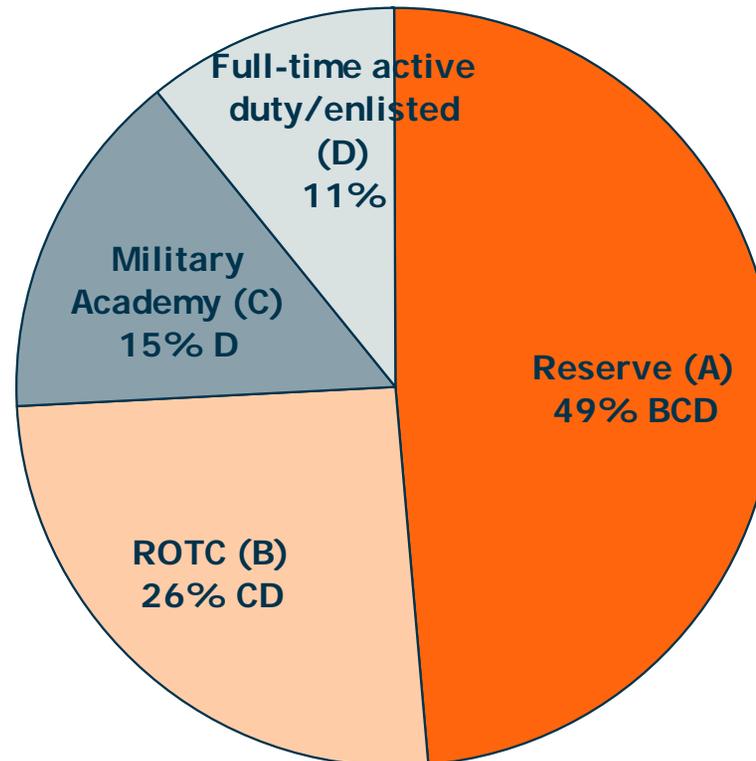


Table 004a; Q19.0 Even if it's not in your plans now, if you join the military in the next few years, which type of service below would be your 1st choice?
Base = 2004 Total Sample of Interest (1828)
Letters indicate significance at 95% Confidence Level; columns tested ABCD

Appeal Of Military Service By Type—2004 First Choice By Propensity

68

Relative to others the propensed have a much strong preference for full time active duty.

- All groups show highest interest in the Reserve.
- The propensed are relatively more interested in full time duty—the unpropensed in Reserve or Military Academy.

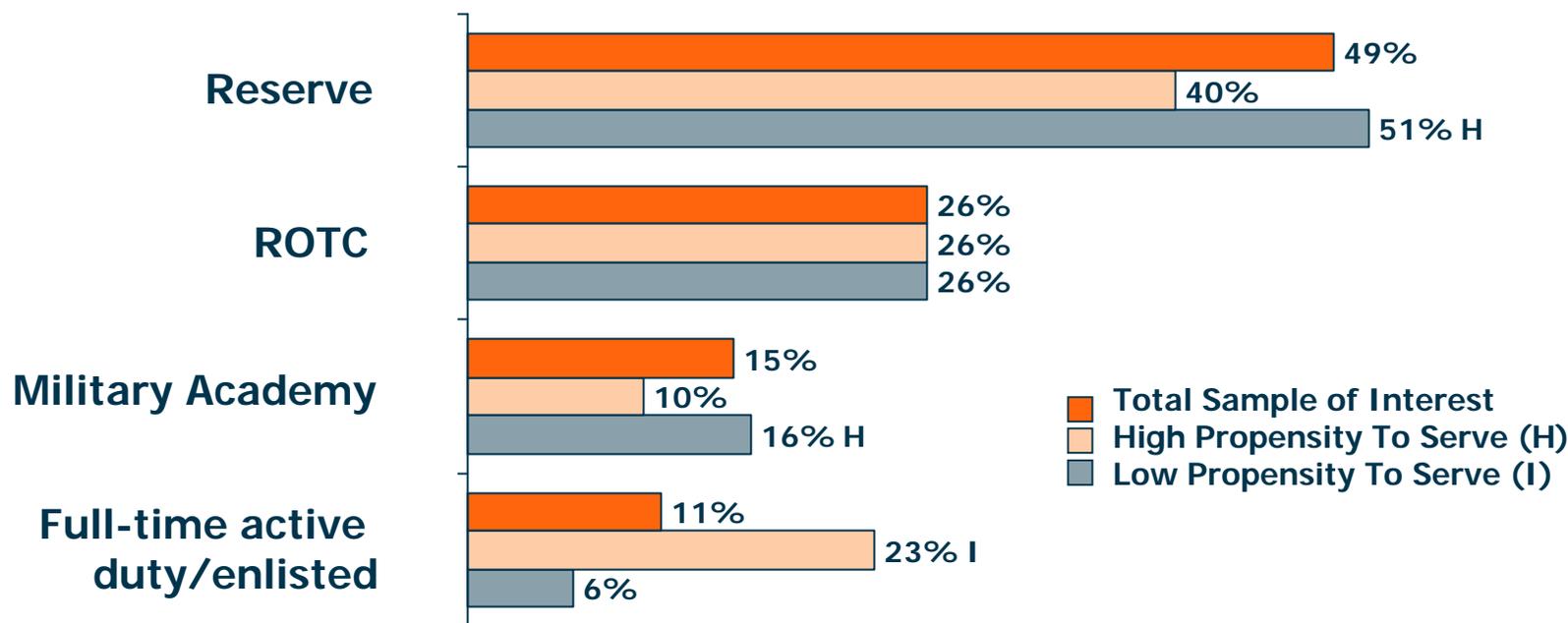


Table 004a; Q19.0 Even if it's not in your plans now, if you join the military in the next few years, which type of service below would be your 1st choice?

Base = 2004 Total Sample of Interest by propensity (1828, 451, 1377)

Letters indicate significance at 95% Confidence Level; rows tested EFG

Appeal Of Military Service By Type—2004 First Choice By Ethnicity

69

First choice is fairly consistent across ethnic groups.

- There are indications, from subsequent rankings and additional analysis that ROTC is a bit more appealing to African Americans.

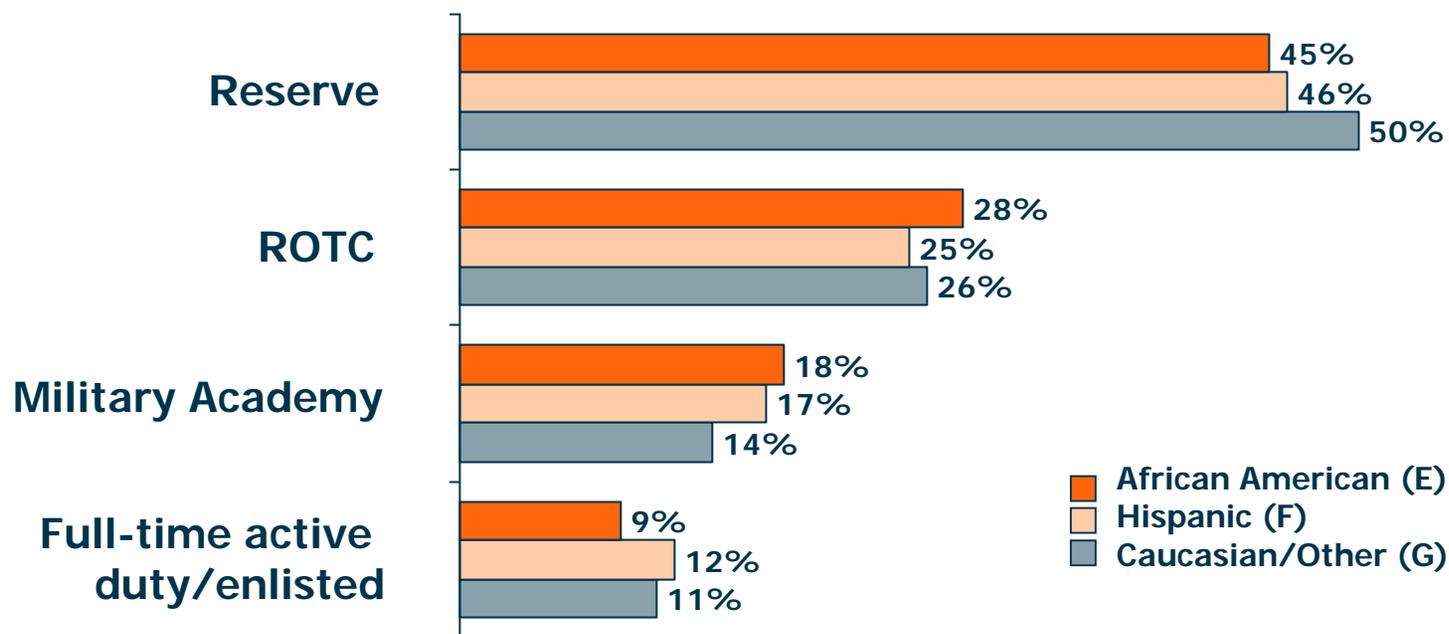


Table 004a; Q19.0 Even if it's not in your plans now, if you join the military in the next few years, which type of service below would be your 1st choice?

Base = 2004 Total Sample of Interest plus ethnic augments, African American, Hispanic, Caucasian/Others (341, 342, 1453)

Letters indicate significance at 95% Confidence Level; rows tested HI

Appeal and Imagery of Military Branches

Personal Goals—Factor Averages 2004

71

A series of 41 statements that could describe various aspects of the military were used to determine relative images of the various branches.

- Five factors were identified from a factor analysis which organized the agree/disagree statements in to groups by similarity.

Core Military Dimensions

- **Largest factor, of 24 statements, including all of the statements included to reflect the Warrior Ethos and Soldiers Creed.**

Personal and Professional Development

- **Learning, acquiring skills and expertise, use of technology.**

Equality

- **Treatment of women, minorities.**

Average/Ordinary

- **Service for average person, ordinary.**

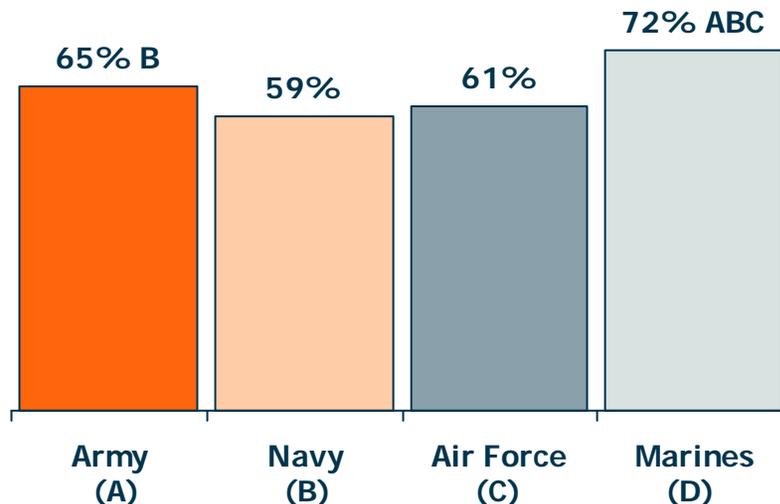
Danger

- **Combat and dangerous jobs**

Perceptions of Military Branches—Core Military Dimensions

Although the Marines are strongest on core military dimensions, the Army does well, too.

- Core military dimensions include items related to the Warrior Ethos, military readiness to engage enemies, performance, toughness, proficiency requirements, heritage of leaders and heroes, and exemplifying honor, loyalty and courage.



The Army is seen as superior to Navy in these areas, and out performs Air Force on several dimensions.

In Percent	Army (A)	Navy (B)	Air Force (C)	Marines (D)
Requires courage and bravery	73 BC	67	68	78 ABC
Stands ready to find, challenge, and defeat the enemies of the United States in combat**	71 BC	64	65	76 ABC
Requires lots of teamwork*	76 BC	71	68	78 BC
Requires proficiency in military tasks and drills	72 BC	62	65	76 ABC
Protects our nation's freedom**	75 BC	70	72	77 BC
Has a heritage of leaders and heroes	69 BC	60	59	71 BC
Best exemplifies honor, loyalty, and courage	67	63	63	75 ABC

Bolded = Warrior Ethos statements

Perceptions of Military Branches—Core Military Dimensions, continued

73

In Percent	Army	Navy	Air Force	Marines
Requires the most discipline	65 BC	52	55	78 ABC
Requires being mentally tough**	67	65	68	74 ABC
Requires being physically tough**	78 BC	58 C	51	83 ABC
Will never accept defeat**	67 BC	62	62	74 ABC
Gets involved where the real action is	71 BC	46	57 B	74 BC
Feared as a fighting force	67 BC	52	61 B	75 ABC
Always places the mission first**	65 B	59	63 B	71 ABC
Will never quit**	65	61	62	73 ABC
Best represents the US military	68 BC	53	57 B	68 BC
Builds real leaders	61	59	59	67 ABC
Will never leave a fallen comrade**	63 BC	56 C	51	70 ABC
I'd be trained by real leaders	59	57	60	66 ABC
Has the best training programs	52	54	61 AB	62 AB
Has very high standards	47	59 A	67 AB	72 ABC
Is traditional and classic*	66 BCD	60 C	48	60 C
Will send me to exciting places	57	63 AD	59	58
Elite	41	49 A	62 AB	69 ABC
Factor Average	65 B	59	61	72 ABC

Table 014b; Q25.0 Please use the scales to rate how well it describes each of them. Even if you're not familiar with a service, please rate it anyway, based on any impressions you might have.

Top three box ratings on an 11 point scale, where 10 = "Describes this service very well" and 0 = "Doesn't describe this service at all"

Base = Total Sample of Interest who rated branch (871, 807,1059, 919) Letters indicate significance at 95% Confidence Level; columns tested ABCD

*Slight wording change in 2004 **Statement not asked in 2000

Bolded = Warrior Ethos statements

Higher than average based on Indices for performance relate to average across branches Lower than average based on Indices for performance relate to average across branches

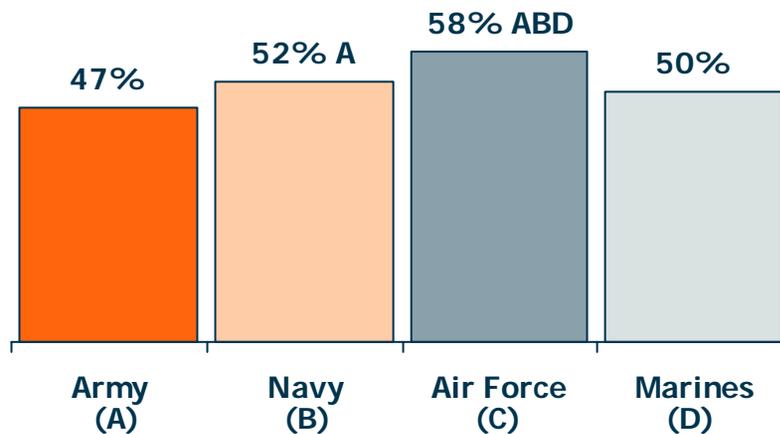
Factors shown in descending order according to amount of variance they explain

Perceptions of Military Branches—Professional and Personal Development Factor

The Air Force is seen as the leader here.

- It excels at perceptions of providing skills, becoming an expert, interesting work, training on cutting edge technology, and being for better educated people.

Army is the weakest on many of these and only on par with Navy and Air Force on having the most job specialties—a communication point of focus (e.g. 200 ways to be a Soldier).



In Percent	Army (A)	Navy (B)	Air Force (C)	Marines (D)
Provides skills that would help me get a better job once I got out*	46	51 AD	58 ABD	46
Will equip me with the qualities needed for success in life	47	50	52 A	51
I'd become a real expert in my field	49	51	57 ABD	51
Offers interesting work from the moment I start	41	45	52 ABD	47 A
Offers the most job specialties	51 D	53 D	56AD	46
Offers training in sophisticated, cutting edge technology*	56	67 AD	72 ABD	60
For better educated people	25	41 AD	53 ABD	35 A
A well-respected organization I can take pride in	59	61	65 AB	67 AB
Factor Average	47	52 A	58 ABD	50

Table 014b; Q25.0 Please use the scales to rate how well it describes each of them. Even if you're not familiar with a service, please rate it anyway, based on any impressions you might have.

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Base = Total Sample of Interest who rated branch (871, 807, 1059, 919) Letters indicate significance at 95% Confidence Level; columns tested ABCD

*Slight wording change in 2004

**Statement not asked in 2000

Higher than average based performance

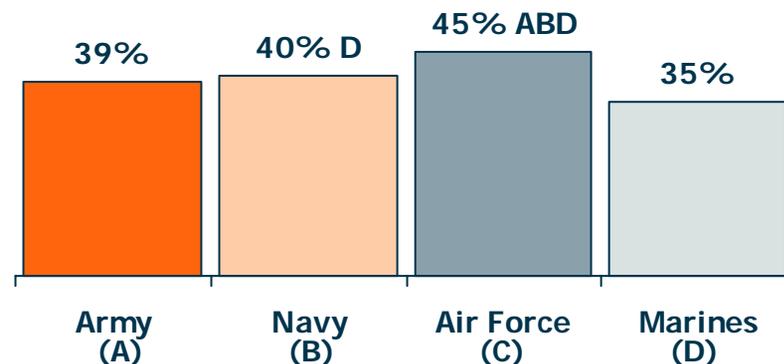
Lower than average based performance

Factors shown in descending order according to amount of variance they explain.

Perceptions of Military Branches—Equality Factor

Despite the news reports, the Air Force has a slight edge on perceptions of being best at providing fair and equal treatment for women.

- It is also seen as a better place for women, especially compared to the Marines.
- All branches are comparable on treatment of minorities.



In percent	Army (A)	Navy (B)	Air Force (C)	Marines (D)
Treats women fairly and equally	38	40	45 ABD	36
Treats minorities fairly and equally	47	44	48	46
Good for women	31 D	35 AD	42 ABD	23
Factor Average	39	40 D	45 ABD	35

Table 014b; Q25.0 Please use the scales to rate how well it describes each of them. Even if you're not familiar with a service, please rate it anyway, based on any impressions you might have.

Top three box ratings on an 11 point scale, where 10 = "Describes this service very well" and 0 = "Doesn't describe this service at all"

Base = Total Sample of Interest who rated branch (871, 807, 1059, 919); Letters indicate significance at 95% Confidence Level; columns tested ABCD

*Slight wording change in 2004

**Statement not asked in 2000

Orange = Higher than average based performance

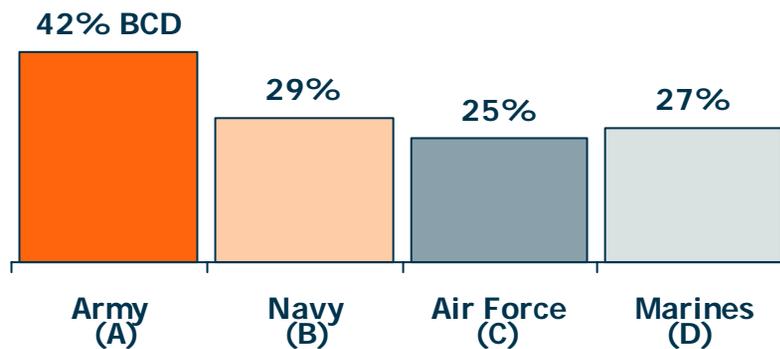
Grey = Lower than average based performance

Factors shown in descending order according to amount of variance they explain.

Perceptions of Military Branches—Average/Ordinary Factor

Relative to other branches, the Army is still most likely to be considered ordinary.

- The Army is also seen as more for the average person and not requiring a lot of skills.
- **However, on an absolute basis, only 3 in 10 describe it as ordinary.**
- Although this is higher than for other branches, it is hardly a majority opinion or universal belief.



Of concern is that one half describe the Army as a last resort for a career choice.

In Percent	Army (A)	Navy (B)	Air Force (C)	Marines (D)
For the average person	44 BCD	29 CD	22	21
Is ordinary*	29 BCD	19	17	16
I wouldn't need much skill to get in	46 BCD	29 C	20	26 C
Is a last resort as a career choice	50 BC	37	40	46 BC
Factor Average	42 BCD	29	25	27

Table 014b; Q25.0 Please use the scales to rate how well it describes each of them. Even if you're not familiar with a service, please rate it anyway, based on any impressions you might have.

Top three box ratings on an 11 point scale, where 10 = "Describes this service very well" and 0 = "Doesn't describe this service at all"

Base = Total Sample of Interest who rated branch (871, 807, 1059, 919) Letters indicate significance at 95% Confidence Level; columns tested ABCD

*Slight wording change in 2004 **Statement not asked in 2000

Orange = Higher than average based performance Grey = Lower than average based performance

Factors shown in descending order according to amount of variance they explain.

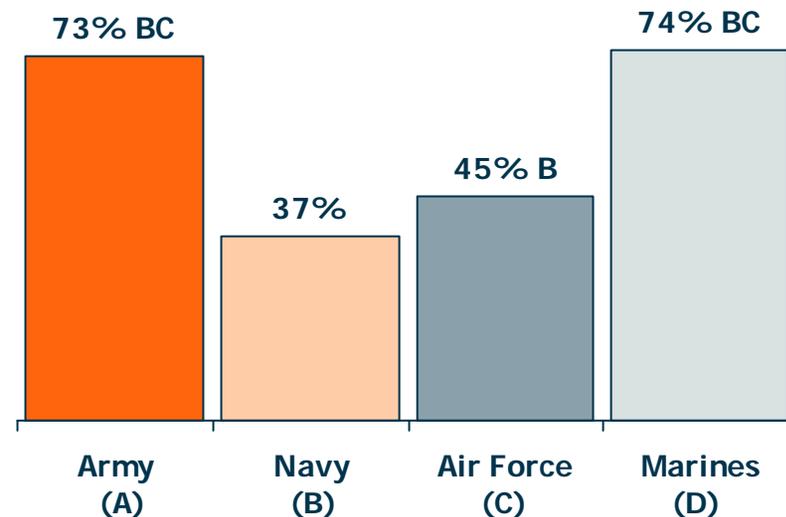
White box = Draws attention, but does not indicate significant differences

Perceptions of Military Branches—Danger Factor

77

The Army and Marines are considered the most dangerous branches

- Youth are almost twice as likely to believe they will end up in combat in these branches vs. others.
- And they believe they would also be likely to get the most dangerous jobs in times of war.



In Percent	Army (A)	Navy (B)	Air Force (C)	Marines (D)
I'd be more likely to end up in combat	74 BC	38	43 B	71 BC
In times of war, I'd be in the most dangerous jobs	71 BC	36	47 B	76 ABC
Factor Average	73 BC	37	45 B	74 BC

Table 014b; Q25.0 Please use the scales to rate how well it describes each of them. Even if you're not familiar with a service, please rate it anyway, based on any impressions you might have.

Top three box ratings on an 11 point scale, where 10 = "Describes this service very well" and 0 = "Doesn't describe this service at all"

Base = Total Sample of Interest who rated branch (871, 807, 1059, 919) Letters indicate significance at 95% Confidence Level; columns tested ABCD

*Slight wording change in 2004

**Statement not asked in 2000

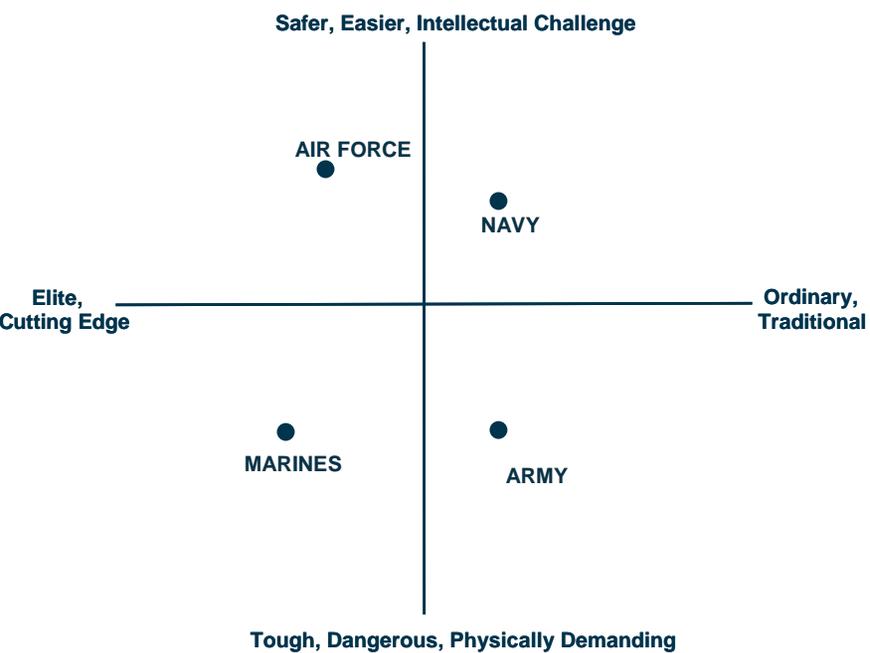
■ = Higher than average based performance

■ = Lower than average based performance

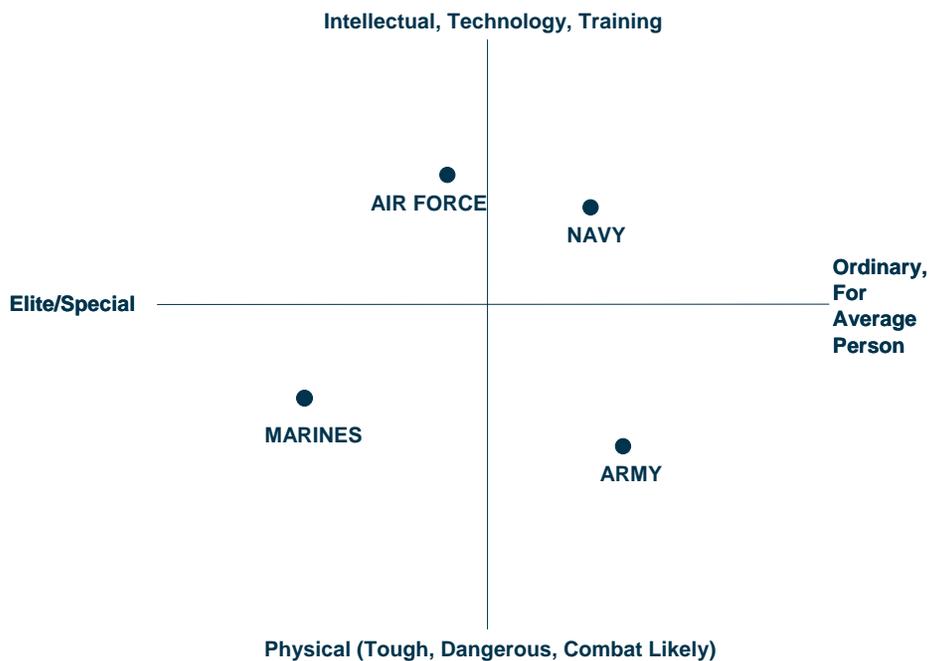
Factors shown in descending order according to amount of variance they explain.

Perceptual Maps

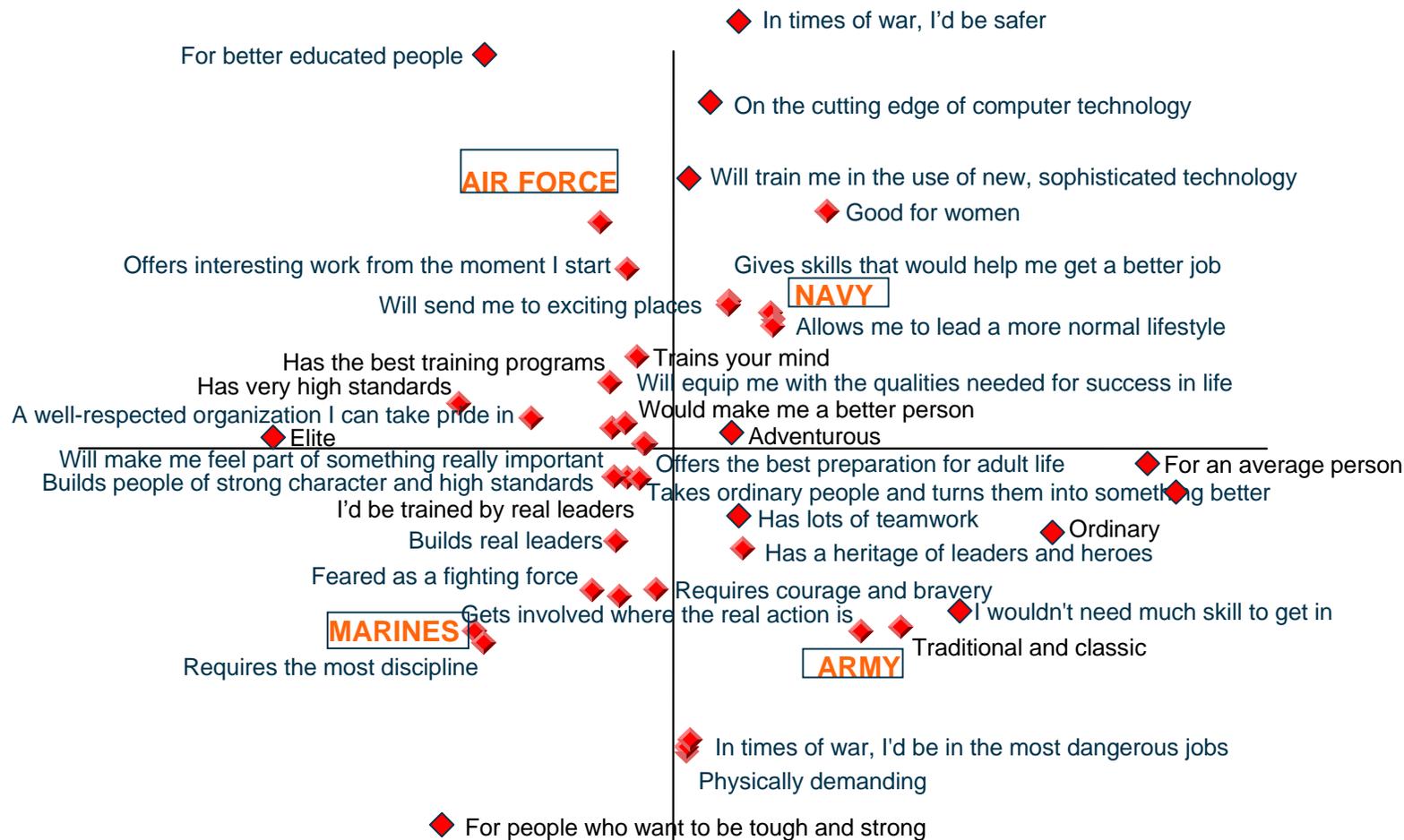
2000



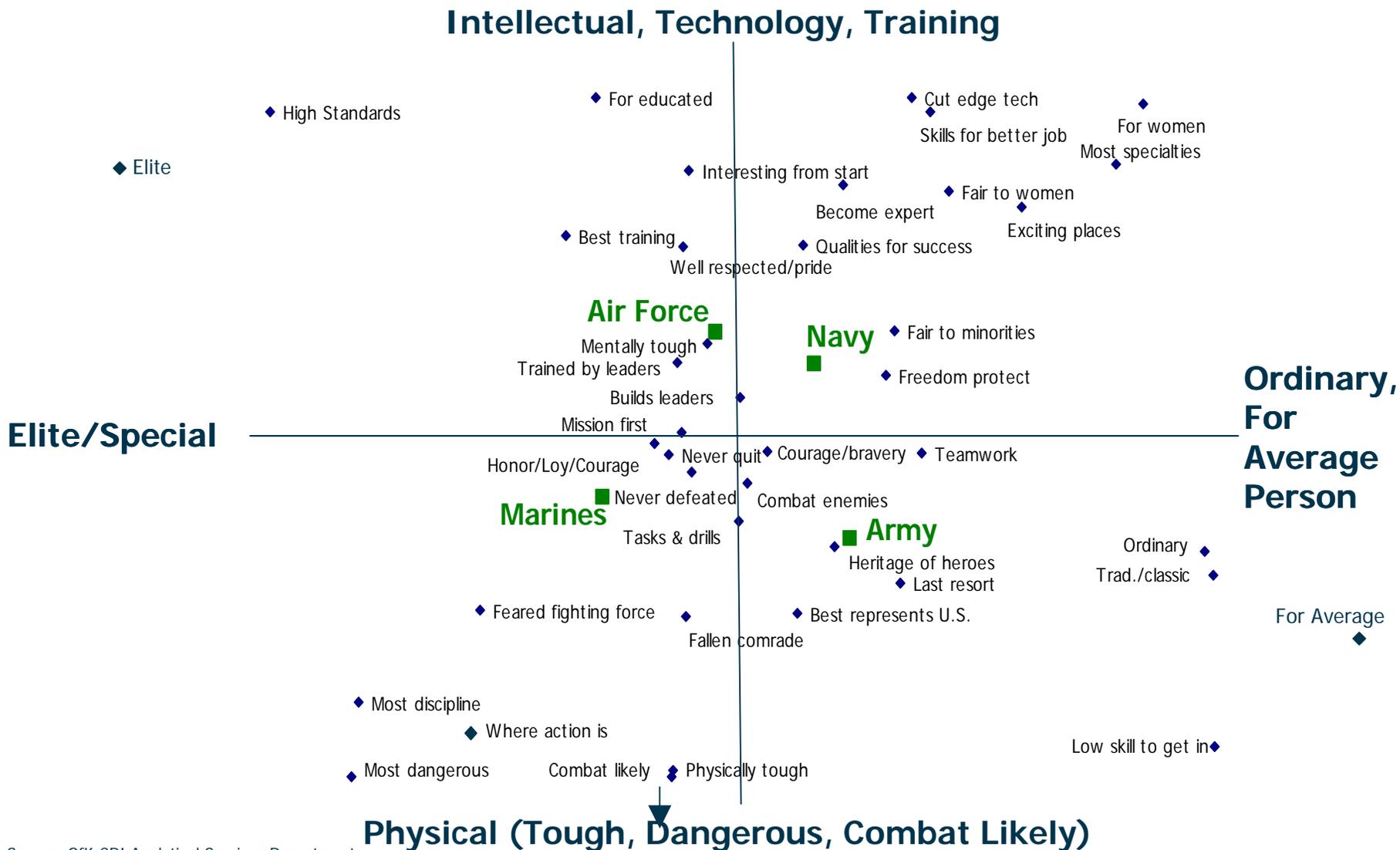
2004



Perceptual Map—2000



Perceptual Maps—2004 Blow Up of Center Of Chart



Source: GfK-CRI Analytical Services Department

Top three box ratings on an 11 point scale, where 10 = "Describes this service very well" and 0 = "Doesn't describe this service at all"

Perceptual Maps

The Army's shares many positive common traits with the Marines:

- Both these branches are seen as physically tough, where the action is, best representing the U.S. Military, and never leaving a fallen comrade behind.
- Although the Marines better personify the Warrior Ethos and Soldier's Creed overall, the Army holds its own on several of these dimensions and shares many positive traits with the Marines.

Unlike the Marines, however, the Army is also seen as more for the average person, ordinary, and not requiring a lot of skills to get in.

- The Army 's reputation and image is quite strong overall, and relative to other branches. However it suffers for not being as attractive of a career choice.
- The Army's image is weaker than the other branches on technology, high standards, being elite, or for better educated people.

The Air Force, conversely, is seen as elite, with high standards, training, and higher on use of cutting edge technology.

The Navy is more specialized, better for women, and like the Air Force, provides skills to help you get a better job, and provides training on cutting edge technology.

Relative Perceptions of Army—2004

82

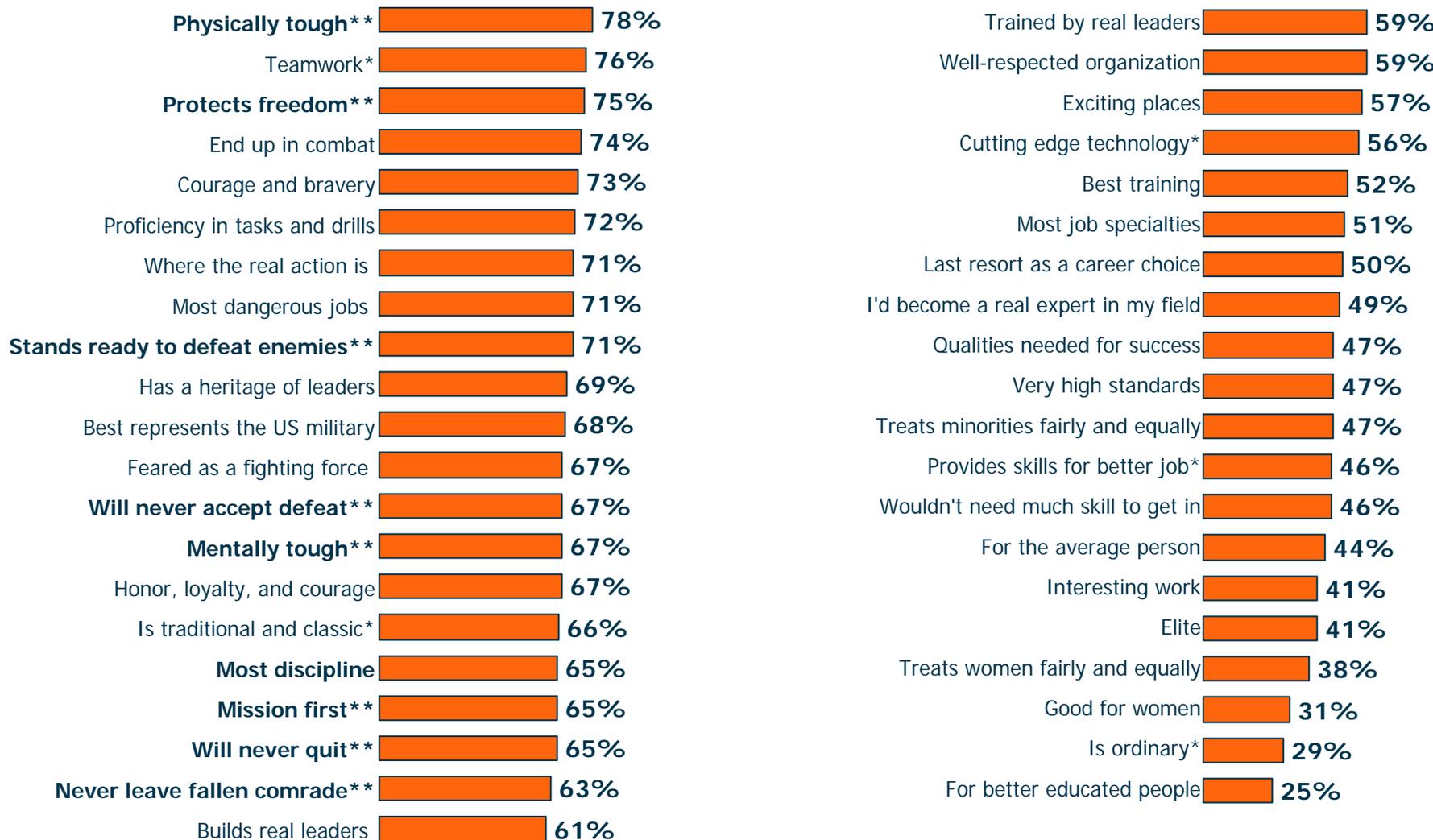


Table 014b; Q25.0 Please use the scales to rate how well it describes each of them. Even if you're not familiar with a service, please rate it anyway, based on any impressions you might have. Base = 2004 Sample of Interest Who Rated Army (871)

Top three box ratings on an 11 point scale, where 10 = "Describes this service very well" and 0 = "Doesn't describe this service at all"

*Slight wording change in 2004

**Statement not asked in 2000

Bolded = Warrior Ethos statements

Army Perceptions vs. Other Branches—2004

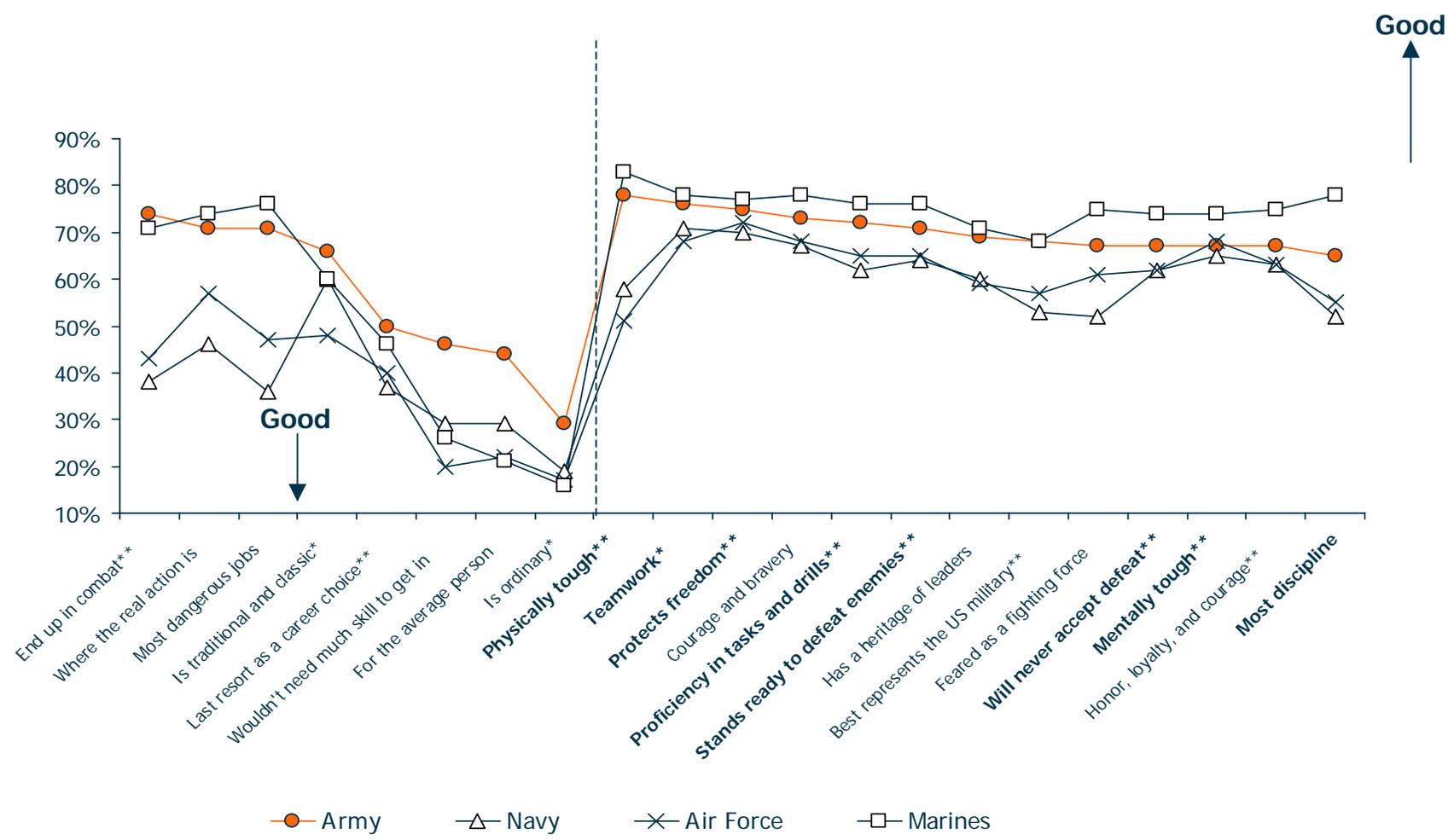


Table 014b; Q25.0 Please use the scales to rate how well it describes each of them. Even if you're not familiar with a service, please rate it anyway, based on any impressions you might have. Base = 2004 Sample of Interest who rated branch (871, 807, 1059, 919)
 Top three box ratings on an 11 point scale, where 10 = "Describes this service very well" and 0 = "Doesn't describe this service at all"
 *Slight wording change in 2004 **Statement not asked in 2000 **Bolded** = Warrior Ethos statements

Army Perceptions vs. Other Branches—2004, continued

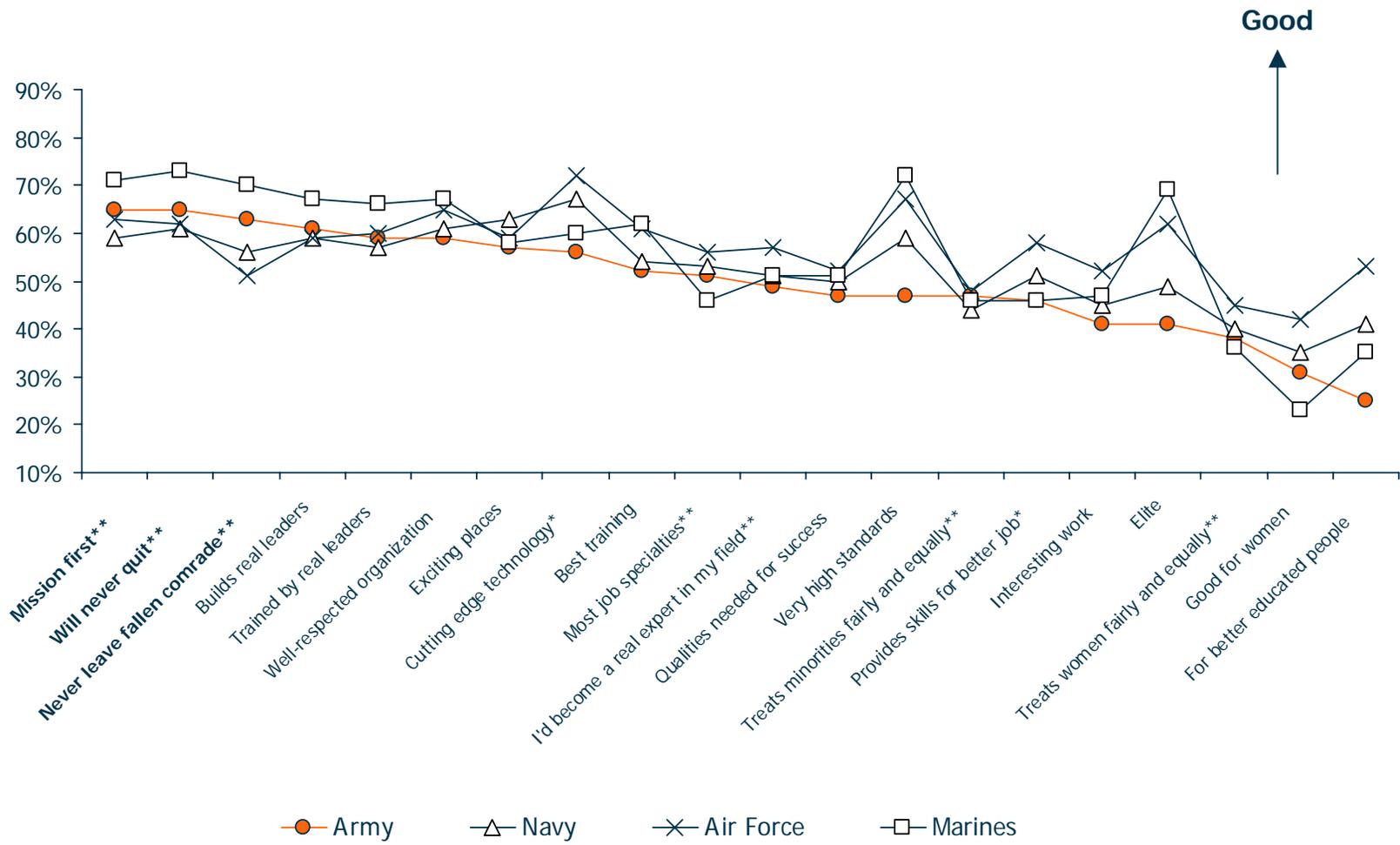


Table O14b; Q25.0 Please use the scales to rate how well it describes each of them. Even if you're not familiar with a service, please rate it anyway, based on any impressions you might have. Base = 2004 Sample of Interest who rated branch (871, 807, 1059, 919)
 Top three box ratings on an 11 point scale, where 10 = "Describes this service very well" and 0 = "Doesn't describe this service at all"
 *Slight wording change in 2004 **Statement not asked in 2000

Army Perceptions vs. Other Branches On Common Statements—2000 vs. 2004

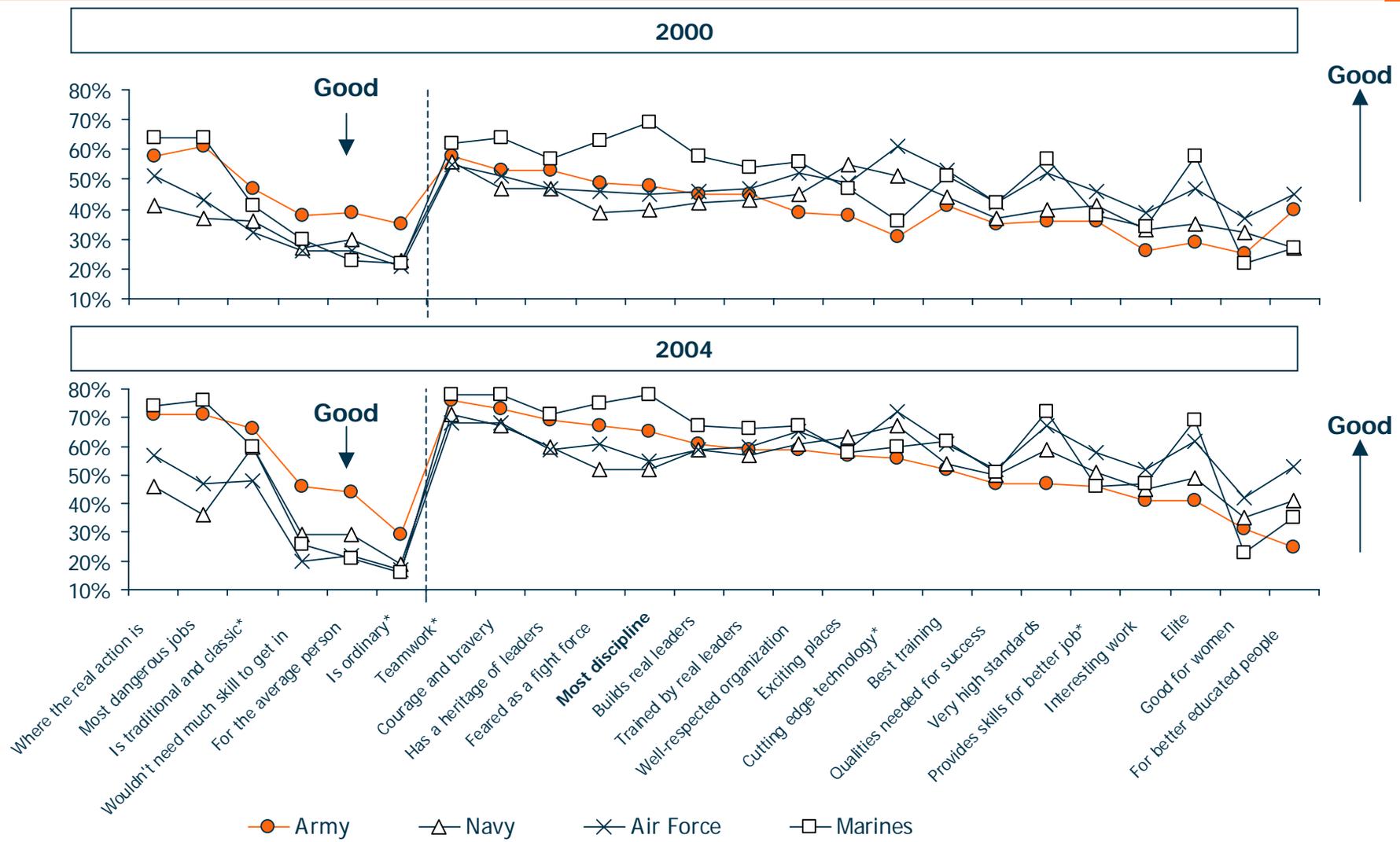


Table O14b; Q25.0 Please use the scales to rate how well it describes each of them. Even if you're not familiar with a service, please rate it anyway, based on any impressions you might have.
 Base = 2004 Sample of Interest who rated branch (871, 807, 1059, 919)
 Top three box ratings on an 11 point scale, where 10 = "Describes this service very well" and 0 = "Doesn't describe this service at all"
 *Slight wording change in 2004 **Statement not asked in 2000 **Bolded** = Warrior Ethos statements

Army Perceptions vs. Other Branches On Common Statements—2000 vs. 2004

86

Relative to other branches, the Army's profile has remained essentially unchanged across many dimensions. However, there are a few areas where the Army has narrowed the gap compared to the Marines:

- Courage and bravery
- Feared as a fighting force
- Most discipline
- Builds real leaders
- Well respected organization

The Army has lost some ground on the education dimension.

- The Army is now in last position on being for better educated people.

"An Army Of One"

Awareness Of "An Army Of One"

88

Awareness of "An Army of One" is very high across all groups.

- Eight of ten young people in the sample of interest have heard this slogan.
- No other differences occur by gender, ethnicity, or propensity.
- Youth living in the southeast are a little more aware than those in other areas (not shown).

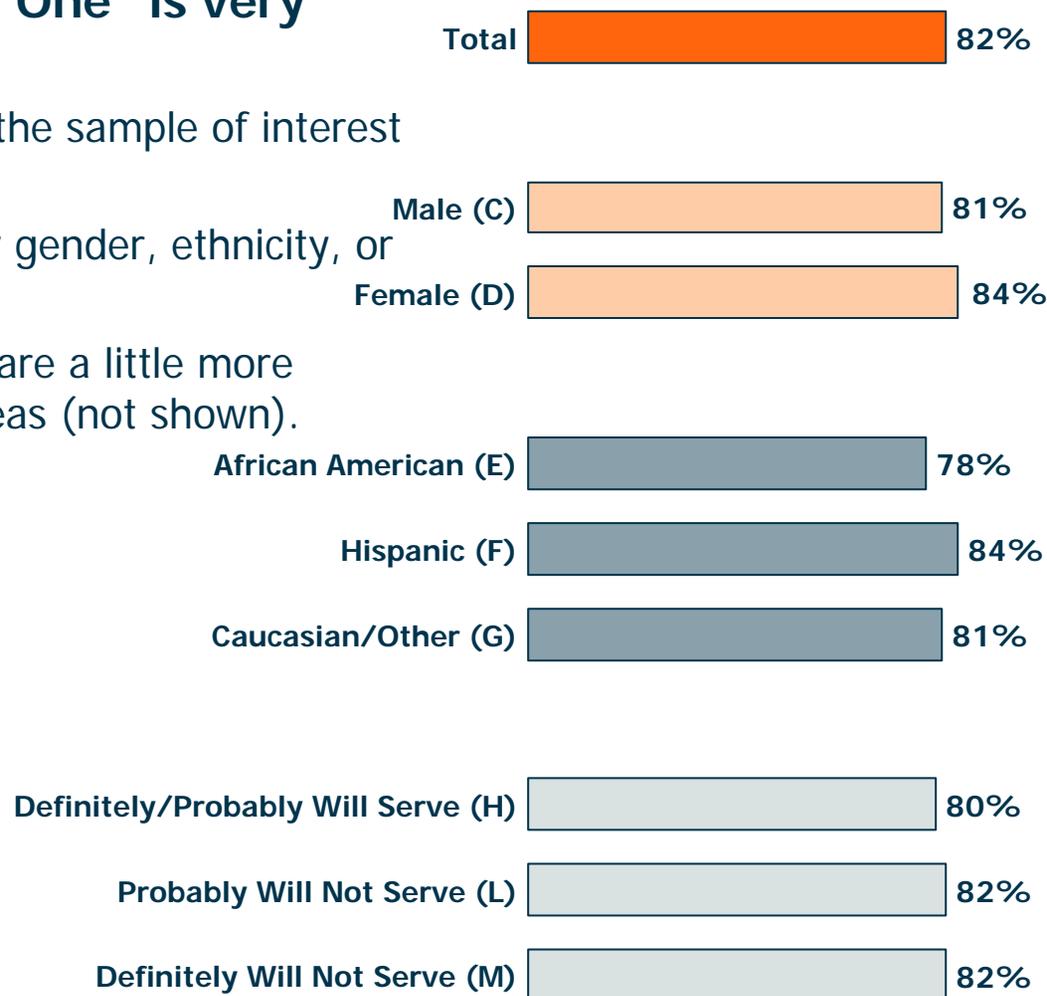


Table 005; Q19.25 Have you ever seen or heard of advertising for the Army that talks about "The Army of One"?

Base = 2004 Total Sample of Interest (1828, 1269, 559, 341, 342, 1453, 451, 828, 548)

Letters indicate significance at 95% Confidence Level; rows tested CD, EFG, HLM

What "An Army Of One" Means Among Those Aware

89

The slogan communicates importance of group *or* importance of the individual—but not the combinations of both these elements as intended.

- Roughly one half of those aware of it say it is about a *group*, a team working together.
- Interestingly, 4 in 10 think the slogan focuses on the *individual* in the Army.
- Only 8% say both group and individual.
- Very few have no impression, or consider it only a recruitment ploy.
- The propensed are a bit more likely to interpret a *group* meaning from the slogan.

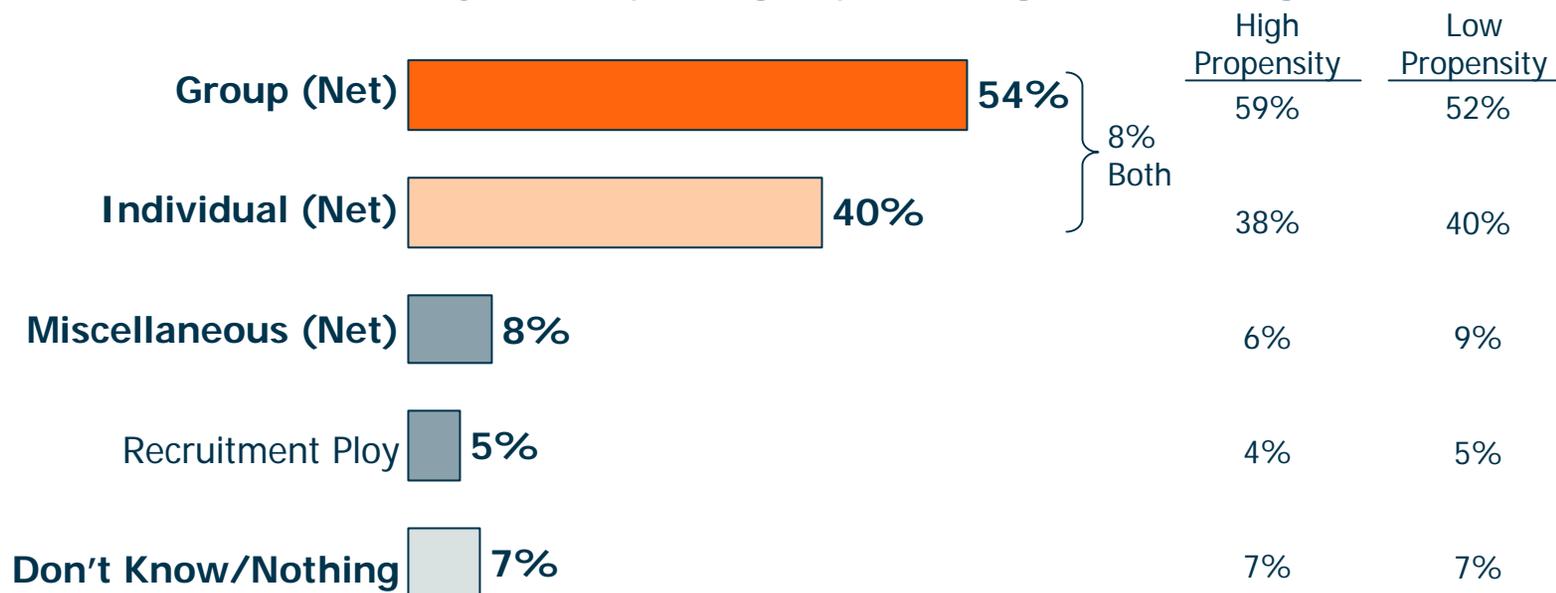


Table 006; Q19.5 What does the phrase Army Of One tell you about the Army?
 Base = 2004 Sample of Interest who have heard of Army of One (1493, 359, 1134)
 Multiple responses; comments listed if mentioned by at least 5% of respondents

What "An Army Of One" Means Among Those Aware

Interpretation of messages about a group focus on *group* effort, teamwork, a unified group of people working together for common goal.

Individual are believed to be about one person making a difference, being important, or being improved from the experience.

- African American's are more likely to interpret the message as being group/team oriented (65% among AA's).



Executive Summary

1. The Army's recruiting mission in a post 9/11 world is an extremely difficult one. There is a lot of work to be done and it will take a lot of time to make major changes in the Army experience and the Army's image.

- Although propensity remains fairly stable over time, many more, and more daunting barriers exist today.
- Today's reality is profoundly different from four years ago, and young men and women recognize this in their decision making. Heightened risk and uncertainty have changed the reality.
- The Army has a strong image, established over decades, and major shifts will involve changes in product as well as effective marketing activities.

2. The option of military service causes inner conflict in today's youth.

- Increases are seen in *both* motivators *and* barriers, but the net result is that risks of military service, and particularly the Army, are perceived to far outweigh the rewards for the vast majority of youth.
- More youth describe themselves as patriotic and feel a duty to their country, at the same time they recognize that serving is much riskier today, as a consequence of this decision could be the loss of their life.

Executive Summary

3. The competitive set of career choices for today's youth has broadened.

- There are more acceptable choices for some young adults now besides work, school, or the military—and a surprising number are planning to pursue these options.
- The new, broader possibilities include: staying at home while preparing to go to work or school, traveling for an extended period of time, and volunteering (e.g. Vista, Peace Corps).

4. College still "wins" as the preferential choice for most young adults.

- College is seen as the best choice in many areas, from enjoying your life, to personal development, mental challenge, and doing something you can be proud of.
- Military service offers advantages only in the areas of physical challenge, discipline, adventure, and leadership skills.
- Of concern is that college, not the military, is now seen as the best place to develop personal values and qualities.
- There is also an interesting phenomenon that more young adults think computer skills are important to succeed than feel that way about college. This speaks to importance of technical training as part of the Army's offering.

Executive Summary

5. Money for college remains a major motivator to joining the military, across all propensities.

- Despite the Army's de-emphasis of this tangible motivator in its communications, it remains the single most frequently mentioned motivator at every level of interest.
- Other compelling motivators include excellent benefits, opportunity to travel, experiences to be gained, training, jobs, and job security.
- The highly propensed are distinguished from the other groups by a much stronger sense of duty to country.

6. Fear of death or injury is the major barrier to joining the military today.

- Concern over going to war, being injured, or dying is a major road block to joining, with one in four volunteering fear as an inhibitor—nearly double the level of concern in 2000.
- Major barriers in 2000, on the other hand, dealt more with *inconvenience* and *control* issues, like the time commitment involved, resistance to giving up control and following orders, and being separated from family.

Executive Summary

7. The traditional expectation of Reserve service (sign up, but never go) is no longer a safe bet.

- Concern over the risk of being called for active duty remains the number one barrier to the Reserve across all propensity levels and has risen significantly in the past four years.
- Two thirds of potential recruits now share this concern.

8. The Army's image as a career choice has not changed dramatically over the past four years—although some improvements are seen in several core military dimensions.

- Like the Marines, the Army retains its image as being physically tough, difficult, and where the action is, but *unlike* the Marines, prestige and eliteness are not associated with these traits.
- To the contrary, the Army remains seen as *relatively* more ordinary, for the average person, and not requiring a lot of skill to get in. On an absolute basis, however, the Army is not perceived to be ordinary at all—only about three in ten describe it in this way.
- Indicative of the magnitude of the problem, 50% of youth say the Army is their last choice as a career.
- Specifically, the Army needs to improve perceptions of use and training in high tech areas, high standards for admission, and needs its own version of "eliteness."

Executive Summary

95

9. **The Army does not own perceptions associated with Warrior Ethos or reflecting the Soldier's Creed.**

- The Marines perform much better on most areas related to Warrior Ethos and the Soldier's Creed, except protecting our national freedom, and requiring a lot of teamwork, where the Army is at parity.
- Despite this, the Army performs very well on many core military dimensions: it is physically tough, it is where the action is, and to many it best represents the U.S. military.

10. **"An Army of One" slogan is widely recognized, but it is communicating either group effort *or* individuality—but not both of these messages, as was intended.**

- A small majority believe the message is about group effort or teamwork, but nearly as many instead think it is about the importance of the individual.
- Very few (8%) understand it is about the group *and* about the individual.
- Furthermore, there is disagreement on how well it represents today's Army.

Executive Summary

11. More African Americans identify having to fight for a cause they don't support as a barrier to military service.

- Generally, barriers are similar across ethnic groups. However some are concerns to larger numbers of African Americans, the most notable being racial discrimination, distrust of recruiters, perceived likelihood of combat, and a feeling there would be no one to watch their backs.
- Top motivators for African Americans tend to be tangible benefits, money for college, college credits, and travel.

12. Generally, Hispanics are interested in tangible benefits for joining—as well as experiential ones.

- Relative to other groups, Hispanics are more interested in experiences and adventures, as well as management and leadership experience.

Recommendations/Implications

1. One of the key challenges is to get the Army in the prospect's consideration set.

- Although the Army is a highly respected institution, it is not seen as appealing as a personal career choice.
- It cannot be staffed by "everyone else, not me".
- The challenge is to break the "Not in My Back Yard" syndrome that plagues personal consideration of Army service and make the Army attractive as a career choice, for someone just like them.

2. This work confirms that it is essential for strategic efforts to focus on defining, developing, and then elevating the concept of Soldier as a desired career.

- The Army has a long way to go before the Soldier is as respected as a Marine is—to be a feared, expeditionary force of the future.
- Currently the Marines look a lot more like the desired profile of a respected Future Force than the Army does. Can you both hold this space, and if so, what are the differences between the two branches?
- If the Marines are the Few and the Proud, what can the Army be to take advantage of the strengths it shares with the Marines, and shore up its current weaknesses (not elite, for everyone, ordinary, etc.)?
- Do youth know/care that standards are also high for the Army? Do they know it is an honor to get in? For prospects, what is the value of becoming a Soldier?

Recommendations/Implications

3. For the Army to achieve its mission goals with Future Force Soldiers, it must overhaul its image as well as its product offering.

- In today's reality, the risk/reward ratio is even more out of balance. The current Army experience is not sufficient to overcome this imbalance. Prospects must see what's in it for them to pursue military service.
- Communication of changes being made, like the overhaul of basic training, to prepare Soldiers for today's type of war, is a step in the right direction.
- However, this is not only about improved marketing, communications, or public relations, it's about taking a serious look at the product itself to determine what other desirable benefits can be offered to establish a better balance.
- Failure to make product improvements and then clearly communicate those improvements will result in sustaining the same, "Average Joe" image the Army currently has versus the Marines, Air Force, and Navy.

Recommendations/Implications

4. There is an opportunity for the Army to take advantage of the saliency of military service to improve its recruiting efforts.

- Since 9/11, the U.S. the military, and Army, have moved from semi-abstract concepts to real entities. The Army now has a face. It has names of heroes and heroines and lost comrades.
- Can/should the Army capitalize on individual stories, to support the message of a Soldier making a difference as part of a team?
- Could this personalization help accomplish the mission? Can returning Army Reservists, for example, tell positive stories of their experiences?
- At the same time, we have seen an increase in "flag waving" and patriotism and youth are not immune to this phenomenon. Is there a way to leverage the national rise in values such as "defend and serve my country", and "military is an honorable occupation" to boost recruiting efforts?

Recommendations/Implications

100

5. The Army needs to revisit how and if to communicate the money for college benefit.

- The decision was made to de-emphasize this in communications, but despite this, it remains relevant and compelling to youth.
- Given the stated plans of the overwhelming majority to pursue a college education, it begs the question if the Army is adequately leveraging its most compelling tangible benefit.
 - You are *not* talking about money for college, but prospects value it and associate it with military service.
 - The Army should explore ways to offer tuition assistance, not as a short term “gimmick” but instead as a critical tool that successfully couples Army service with advanced education.
 - Ideally, prospects can be shown that the Army and Army benefits—including money for college—give them a pathway to personal growth and development

Recommendations/Implications

101

6. Army advertising should continue to include emphasis on both tangible and intangible benefits.

- Youth are motivated by different benefits, and a combination of tangible and intangible benefits should improve the impact.
- This is important as the Army dips deeper and deeper in to the pool of potential recruits—as tangible benefits are more important to those with lower propensity.
- This is particularly true for Hispanics, where supporting tangible benefits with experiential benefits could be a more compelling proposition.

7. "An Army of One" slogan should be re-evaluated, in light of the current communication objectives.

- This work indicates it is not achieving the communication goals of individuality *linked* with team effort.
- Furthermore there is disagreement on how well it describes the Army.
- Is it supporting the communication strategy? Is it sufficiently clear and aspirational?
- If the slogan is retained, efforts to bolster the communication of the double message are recommended.

Recommendations/Implications

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8. While integrating marketing activities across ethnic groups, there should be some efforts tailored to the needs of each group.

- Level of interest in specific motivators, and strength of specific barriers differ somewhat across ethnic lines. The Army should take advantage of these differences by speaking to them.
 - For example, there is evidence that Hispanics are interested in tangible benefits (salary, money for college, travel, etc.) and also *experiences* the military can give them for personal growth and development.
 - Recruiting efforts for African Americans could emphasize education—the ability to get college credits, and Army ROTC opportunities—which are more motivating to them.
 - In addition, the Army should seek to better understand the deep mistrust felt by African Americans towards it, and create programs & policies which positively address the issue.

9. Reach the parents with the Army's new message, particularly the Moms.

- In the eyes of our prospects, parents and family far outweigh other groups as sources of influence.
- The Army should seek to leverage personal and professional development opportunities.
- In addition, reassurances about personal safety should be offered.