

MILITARY EXPLORER™

2023-2024



Refuel Agency's Military Explorer is the largest military community study for active duty, military spouses, veterans, and retirees. This examines their media usage, digital media consumption, advertising perception, shopping patterns, and more.

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ALMOST 40 MILLION STRONG IN THE MILITARY COMMUNITY



Active Duty & Guard/Reserves

2.1M



Veterans

18.3M



Retirees

2.2M



Spouses & Dependents

12.8M



DoD Civilians

0.9M

PRIMARY DECISION MAKERS OF PRODUCTS BOUGHT

Top Category Spend (Total Military Audience)

SPENDING POWER:
\$1.2 TRILLION



Top Loyalty Drivers by Military Audience



Made in America

#1 Motivator among Active Duty



Military Discounts

#1 Loyalty Driver among Post 9/11 Vets and Influence Loyalty of 1 in 3 Guard/Reserves



Rewards/Loyalty

Influence Loyalty of 2 in 5 Spouses

ACTIVE DUTY HAVE DEEP CONNECTION WITH ADS ON-BASE



58%
60%

Find Brands More Meaningful When They See Their Ads On-Base

More Likely to TRY or RECOMMEND A Brand After Seeing Its Ads On-base

On-Base Facilities By Monthly Visit Frequency



16.8x Gym/Fitness Centers



15.9x Commissary



15.2x Recreation Center

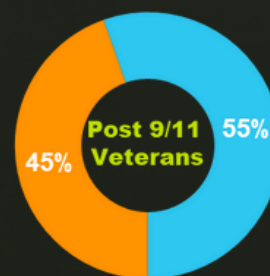
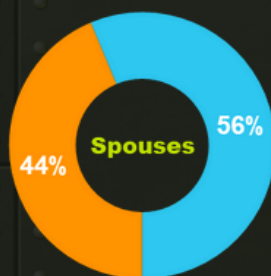
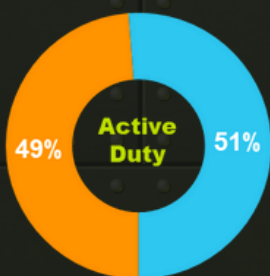


14.9x Outdoor Recreation



14.6x Auto Skills Center

MIX OF TRADITIONAL AND DIGITAL MEDIA CONSUMPTION ACROSS AUDIENCES



Traditional Media Digital Media

Standard/Satellite Radio	10.5%
Basic Cable TV	9.9%
On-base OOH	9.6%
Short Online Video Content	6.8%
Social Media	6.7%

Standard/Satellite Radio	10.3%
Basic Cable TV	10.3%
Social Media	8.1%
Streaming Video Content	7.8%
Short Online Video Content	7.7%

Standard/Satellite Radio	9.5%
Basic Cable TV	9.5%
On-base OOH	9.4%
Short Online Video Content	7.9%
Social Media	7.9%

Active duty compared to Men 18-34; Post 9/11 Veterans compared to Men 21-44; Military media consumption compared to general market media consumption

GROWING IMPACT OF SOCIAL INFLUENCERS AMONG MILITARY

% OF MILITARY AUDIENCE WHO PAY ATTENTION TO SOCIAL INFLUENCERS



Active Duty

38%

+4% pts increase vs last year



Post 9/11 Veterans

43%

+19% pts increase vs last year



Spouses

43%

+14% pts increase vs last year

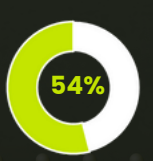
RESPONDS TO ON-BASE AND DIGITAL ADVERTISING (ACTIVE DUTY)



Who Saw Digital Monitor Ad On-Base



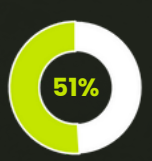
Visited The Mentioned Website



Who Received Product Sample On-Base



Researched The Product



Who Saw Streaming Video Ad



Visited A Retail Store



Who Saw On-Base OOH Ad



Researched The Product



Who Saw Ad On Social Media



Visited The Mentioned Website

MILITARY AUDIENCE OUTCOMES

Higher Education Interest: Enrolled/ Planning to Enroll in College



81% Active Duty

*19% more likely enrolled



86% RNG

*29% more likely enrolled

72% RNG

*7% more likely planning to enroll

Life After Military and Military Connection



42% Active Duty

will pursue a federal government job

*68% more likely

RNG, Spouses and Post 9/11 aim to pursue higher education



72% Active Duty

are influenced by their military connection

*29% more likely