



2018

VETERANS WELL-BEING SURVEY

Edelman, a global communications marketing firm, conducted its third annual Veterans' Well-Being survey in May-June 2018. The survey examined audiences' perceptions of veterans' health and well-being, employment prospects and education to understand how veterans are viewed in society. In addition, the survey explored how employers and the government might better support veterans, and how issues related to military spouses and the civilian/military divide could be addressed to positively impact both the military and civilian communities.

In total, Edelman surveyed 4,945 individuals across the United States, including non-veterans, veterans/military personnel, military spouses, educators and employers. Well-being was defined as "having financial stability, being healthy (both mentally and physically), having the ability to have meaningful relationships, and possessing a desirable job/career."

For this briefing, findings regarding educators are not presented.





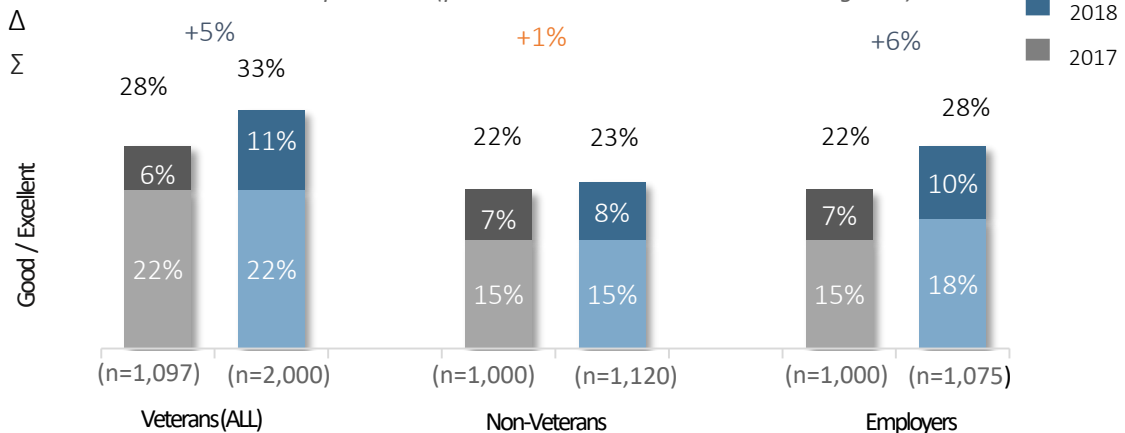
While still low, perceptions of veterans’ well-being increased modestly in 2018.

Most individuals still believe that veterans have relatively low levels of well-being, with fewer than 35% of those surveyed rating veterans’ well-being as good or excellent. However, this statistic is an improvement compared to 2017 when fewer than 30% of all audiences rated veterans’ well-being highly. Employers’ and veterans’ perceptions improved the most in 2018, with veterans’ perceptions increasing by 5-points to 33% and employers’ ratings improving by 6-points to 28%.

At the same time, veterans’ self-assessments of their well-being also improved in 2018. Veterans who rated the quality of their personal well-being as good or excellent increased by 5-points from 55% to 60%, and those who rated their financial well-being as good or excellent increased by 9-points from 39% to 48%. Finally, veterans’ self-assessments of their quality of health (63%) and employment (56%) also increased slightly (by 4- and 3-points respectively) compared to 2017. Together, these numbers indicate that both perceptions of veterans- and their reality- are slowly improving.

Figure 1. Perceptions of Veterans’ Well-Being

Shown: Top two box (percent that selected “excellent” or “good”)



Q1: Which of the following do you feel best describes the current state of the well-being for veterans in the United States?



Veterans struggle to find post-military employment, often because of a lack of skills/certifications and industry contacts.

Veterans struggle to find desirable employment after separating from the military, primarily because they lack the experience, skills, education and contacts needed to transfer to the private sector. Of the former service members surveyed, 49% say they had difficulty finding a job in the field they desired after leaving the military and 58% struggled to find a position at the level they desired. This was particularly true for post-9/11 veterans (51%), who said they not only lacked the years of experience (40%) and level education (39%) employers wanted, but also did not have the right skills or certifications (40%) and industry contacts (37%) necessary when searching for a job.

Though 66% of employed former service members say they now work in a job they prefer, their first post-military job experiences may have had a longer term impact. Today, 43% of employed former service members feel that their employers do not take full advantage of their skills and experiences- a higher percentage than any other audience by at least 5-points.

Figure 2. Reasons for Not Finding Desired Position

	Pre-9/11 (n=667)	Post 9/11 (n=637)
I didn't have the years of work experience employers wanted	41%	40%
I did not have the education employers wanted	40%	39%
I did not have the skills/certifications that employers wanted	34%	40%
I did not know anyone working in that field to turn to for advice/support	24%	37%
I was not able to obtain a job interview in that field	24%	31%

Q33: Why weren't you able to find a job in the field or at the level you desired after separating from the military?

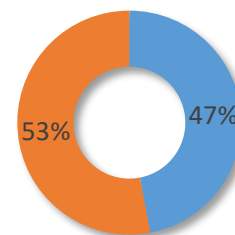


Employers' misperceptions may also impede veterans' opportunities for employment.

Despite their desire to hire veterans, many employers still have underlying misperceptions about veterans that could be inadvertently impacting veterans' employment prospects. Of those surveyed, 60% of employers believe that veterans may need additional training or education before they are qualified for public or private sector roles. In addition, 46% of employers believe that veterans do not pursue a college or vocational degree either while they are in the service or after separation. Finally, 53% of employers believe that, compared to average citizens, most veterans do not have successful careers after leaving the military. Together, these misperceptions could be impacting how employers view potential veteran applicants.

Figure 3. Employer Perceptions of Veterans

- Compared to average citizens, veterans have successful careers after military
- Compared to average citizens, veterans do not have successful careers after military



Q54: Which of the following best represents your views?
[Among Employers] (n=1075)

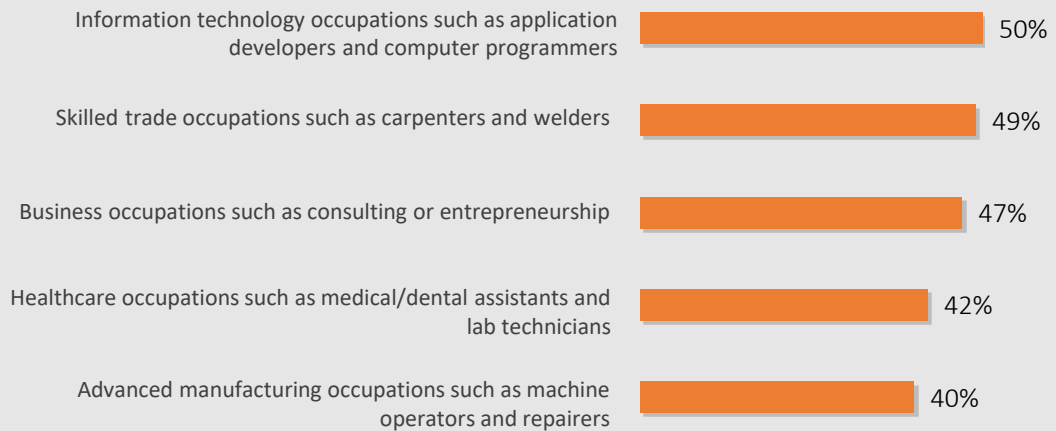


Both veterans and employers would welcome internship/apprenticeship programs, particularly in IT and the skilled trades.

Similar to 2017, both employers and veterans are interested in veteran-focused internships/apprenticeships. Most veterans (82%) say they are or would have been interested in participating in an internship/apprenticeship program after separating from the military and 75% of employers believe that this type of program would benefit their companies. Both groups are interested in seeing veteran internships/apprenticeships focused on Information Technology (50% employers, 41% veterans) and the skilled trades (49% employers, 36% veterans).

Figure 4. Types of Internships/Apprenticeships Employers Would Like to See

Shown: Percent that selected response

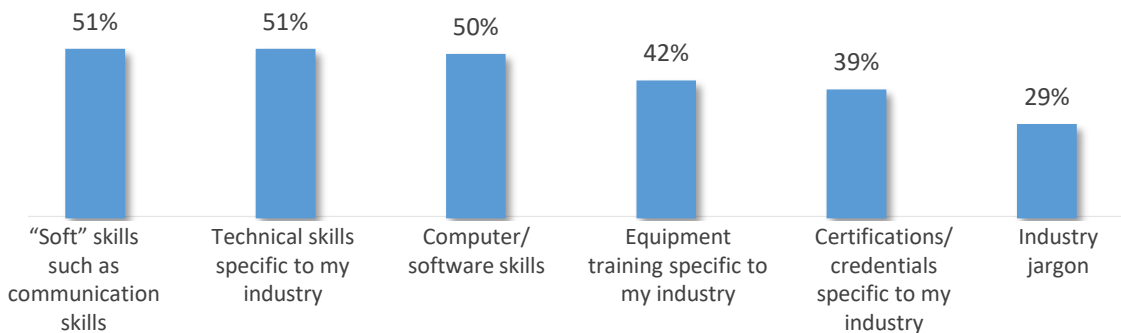


Q63: What type(s) of veteran internship or apprenticeship programs would you most like to see? [Asked among Employers] (n=805)

Overall, employers believe that internships/apprenticeships could help them to attract (56%) and retain (37%) veteran employees, and expect that veterans would acquire both the technical (51%) and “soft” (51%) skills needed to work at their companies. From the veterans’ perspective, they believe that internships/apprenticeships would help them obtain new skills/certifications (60%) and be positioned for better post-military job opportunities (57%). Ultimately, both audiences believe these programs would be a win-win for both veterans and employers.

Figure 5. Skills Employers Believe Veterans Should Obtain from an Internship/Apprenticeship

Shown: Percent that selected response



Q68: What, in your opinion, would veterans need to learn or obtain during these internship or apprenticeship programs to successfully prepare them for a full-time role at a company like yours? [Asked among Employers] (n=805)



Veterans are interested in entrepreneurship but may need more access to financial capital and mentors.

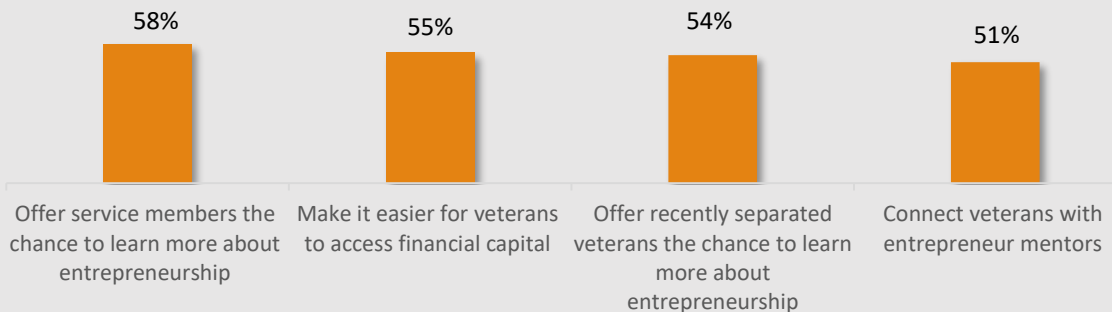
Post-9/11 veterans are particularly interested in starting their own businesses but could benefit from increased mentorship and access to financial capital. Of those surveyed, 62% of post-9/11 veterans either started (25%) or considered starting (37%) their own businesses- far more than the 29% of pre-9/11 veterans who started (13%) or considered starting (16%) a business after the military.

Interestingly, almost 30% of the post-9/11 veterans who started a business did so because they were inspired by another veteran who launched a business (29%) or by the financial support they could obtain because they are a veteran (27%). These numbers are far higher for post-9/11 veterans than pre-9/11 veterans, only 5% of whom were inspired by another veteran and only 6% of whom were motivated by the financial support afforded to them as a veteran.

At the same time, almost 50% of both pre- and post-9/11 veterans who considered starting a business say they lacked financial capital. Finally, more than 50% of former service members say that the government could better support veteran entrepreneurship by providing greater access to business education, capital and mentors. Overall, this data implies that greater access to capital and human resources could help veterans' become and succeed as business owners.

Figure 6. How Government Could Support Veteran Entrepreneurship

Shown: Percent that selected response



Q39: How could the government have better supported you to help start your own business? [Asked among Former Service Members] (n=573)



Employers support hiring military spouses, but don't always understand the benefits of hiring this group or have the resources in place to meet their needs.

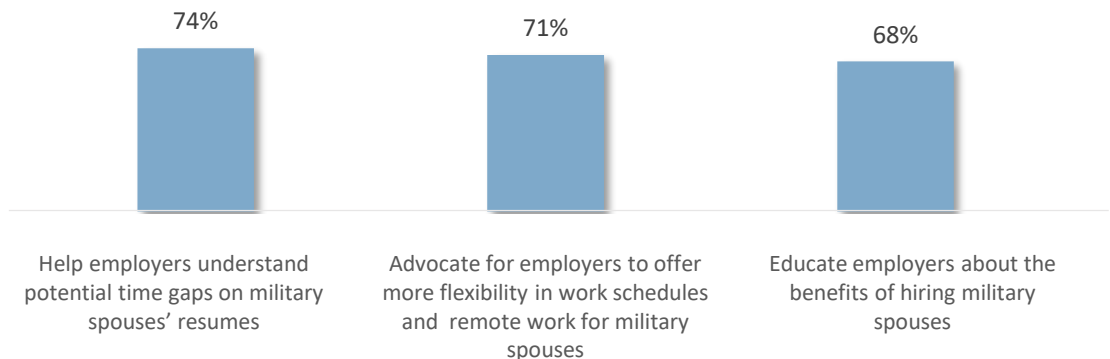
Employers like the idea of hiring military spouses, but are not always set up for success in attracting and retaining this audience. Employers' first challenge is understanding how military spouses can benefit their companies. Though 64% of employers say that hiring military spouses is a priority for their companies, 53% admit that their companies do not understand the benefits of hiring military spouses. This is a problem military spouses recognize, and 68% say the government could help them by educating employers about the value spouses bring to companies.

Employers' second challenge is having the resources available to make retaining military spouses easier. While 70% of military spouses say that employers could help them find meaningful work by offering remote work or flexible schedules, 68% of employers do not have these options available. This is why 71% of military spouses agree that the government could also help them by advocating for more flexible/remote work options among employers.

Overall, these challenges lead military spouses to report the lowest level quality employment (45%) among all audiences (50%), and could be the reason why 50% of those surveyed are looking for new job opportunities.

Figure 7. How Government Could Support Military Spouses

Shown: Percent that selected response



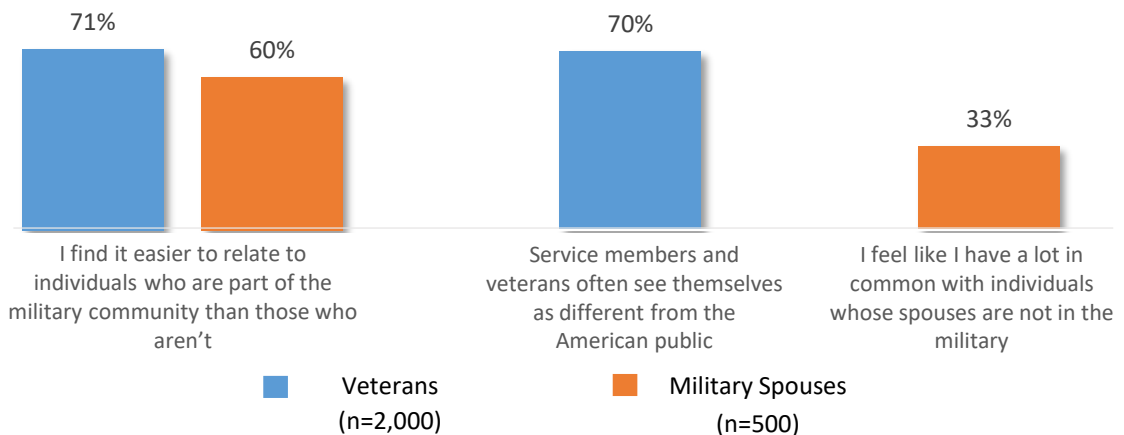


There is a continued social disconnect that exists between veterans and non-veterans, one perpetuated by a lack of understanding about veterans’ experiences and sacrifices.

There continues to be an underlying social disconnect between veterans, non-veterans and employers, which may keep veterans from feeling fully integrated into civilian life. Of those surveyed, veterans (81%), non-veterans (75%) and employers (80%) agree that average citizens often struggle to relate to veterans and understand their experiences. At the same time, more than 65% of these audiences believe that the media and popular culture portray veterans as being different from average citizens, and roughly 70% of non-veterans and employers believe veterans are viewed as heroes vs. average citizens (35% or fewer).

This portrayal of veterans and the lack of general understanding about them could be why 70% of veterans often see themselves as being different from the public and 71% say it is easier to relate to individuals in the military community. In addition, it could contribute to why 68% of veterans (and 85% of military spouses) feel that average citizens do not understand the sacrifices military families make for their country.

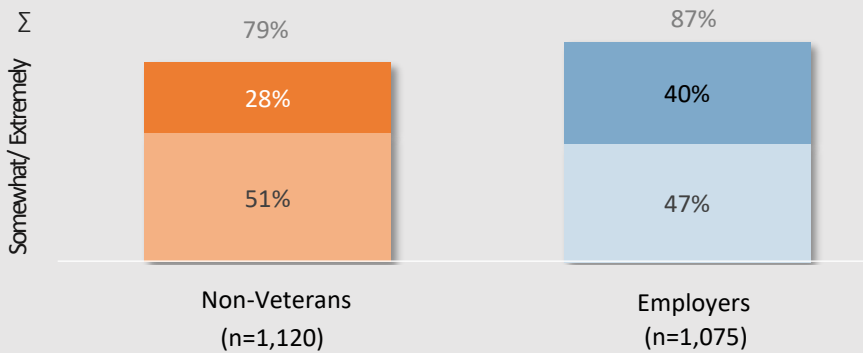
Figure 8. Civilian/Military Understanding
Shown: Top two box (strongly/somewhat agree)



The good news is that both audiences identify one way to help bridge the civilian/military divide- charitable service. Both non-veterans (79%) and employers (87%) would be interested in learning more about veterans by working along side them on a charitable project in their communities. In addition, 90% of veterans believe that this type of project would be impactful in helping civilians learn more about veterans and their experiences. This indicates that, while the civilian/military divide remains wide, both parties are willing to participate in opportunities to narrow this gap.

Figure 9. Interest in Participating in Charity Project with Veterans

Shown: Extremely/somewhat interested



Q13: How interested, if at all, would you be in participating in the following types of activities to engage with and get to know more about veterans?



Veterans’ experiences with mental health remain consistent from 2017.

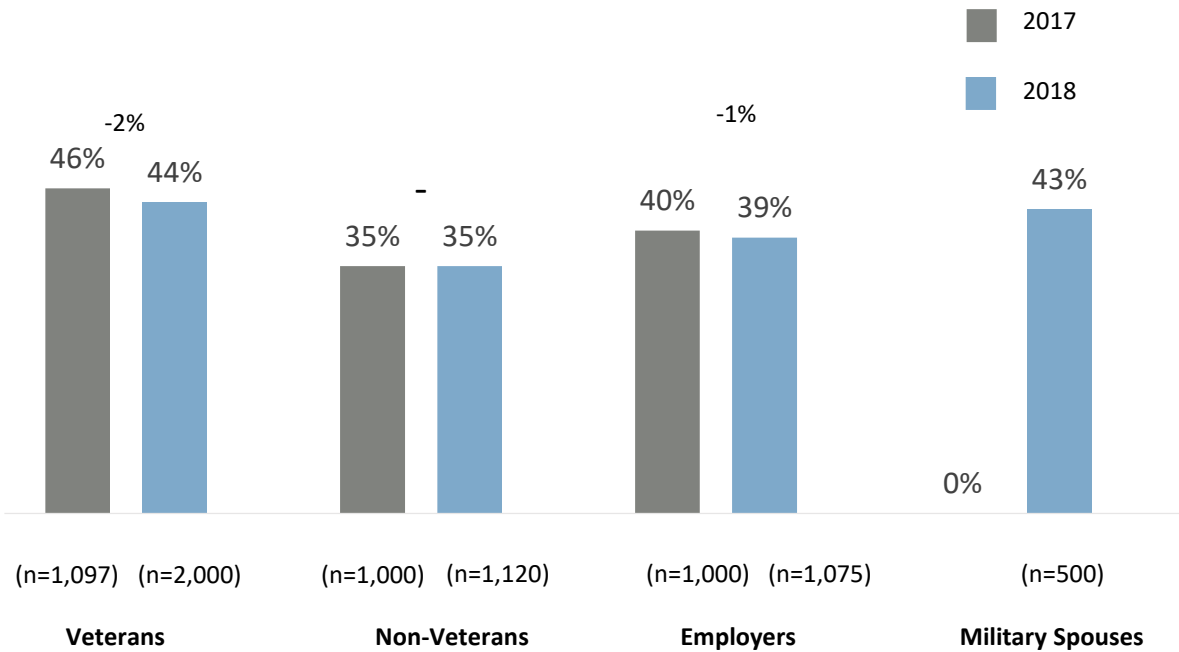
Veterans’ experiences with mental health have not changed compared to 2017, and neither have others’ perceptions of veterans’ mental health needs. Similar to 2017, 44% of veterans report experiencing a mental health challenge in the last year compared with 35% of non-veterans and 39% of employers. However, veterans (71%) report being just as likely as both non-veterans (68%) and employers (67%) to seek help for these challenges.

In addition, veterans (60%) remain more familiar with the signs of emotional suffering than either non-veterans (47%) or employers (56%).

Despite this, fewer than 25% of non-veterans (18%) and employers (23%) believe that veterans have good or excellent access to mental health support and more than 70% believe that their communities could do more to support veterans with mental health challenges. These perceptions continue to impede how veterans are viewed in society, and potentially limit veterans’ ability to successfully transition back into the civilian world.

Figure 10. Experienced a Mental Health Challenge in the Last Year

Shown: Those who selected “yes”



Q19: Please complete the following sentence with one response below: Within the past year, I have...



Overall, the study’s findings imply that misperceptions about veterans continue to exist and may impede veterans’ transitions back into the civilian world. However, these obstacles can potentially be overcome through education, outreach and programming.

Misperceptions related to veterans’ health, skills and capacity for success continue to stymie their transitions back into the civilian world and perpetuate the civilian/military divide. However, veterans’ prospects could potentially improve through a combination of employer and veteran education, access to programs (like apprenticeships/internships) and outreach to the broader community. Audiences are eager to participate in these efforts and there is the potential for targeted government advocacy and support to have a true impact.

For more information about the study and these findings, please contact Justin Platt at Justin.Platt@edelman.com

Methodology In-Depth: The Edelman Veterans Well-Being Survey was conducted from May 21- June 5, 2018. This 15-minute online survey was conducted among n=4,945 respondents. The specific breakdown by group is as follows:

Audience	Description	Sample Size	Margin of Error
Veterans/Military Personnel	U.S. adults ages 18+ who currently or have previously served in the armed forces Note: Veterans and active military personnel were analyzed both separately and in aggregate. In most instances, there was no significant difference between the groups and, as such, they have been reported in aggregate for this briefing.	N=2,000	+/- 2.19%
	Former Service Members U.S. adults ages 18+ who have previously served in any branch of the armed forces	N=1,280	+/- 2.74%
	Current Service Members U.S. adults ages 18+ currently serving in any branch of the armed forces	N=720	+/-3.65%
Non-veterans/Civilians	U.S. adults ages 18+ with no current or previous military service	N=1,120	+/- 2.93%
Employers	U.S. adults ages 18+ who have input into hiring decisions at their company. They do not work in healthcare, education or for a veteran service organization. They are non-veterans. This year's sample included n=75 Human Resource professionals.	N=1,075	+/-2.99%
Educators	U.S. adults ages 18+ who work in education and/or for a veteran service organization	N=250	+/- 6.16%
Military Spouses	U.S. adults ages 18+ whose spouses are currently serving in the military or separated from the military within the last two year. They are non-veterans.	N=500	+/- 4.38%

Respondents for the study were sourced from the following:

- Veterans, military spouses and educators were recruited from paid online panels provided by Lucid and Paradigm, as well as lists provided by Give an Hour, Student Veterans of America and other veterans' organizations.
- Non-veterans and employers were recruited exclusively from paid online panels provided by Lucid and Paradigm.