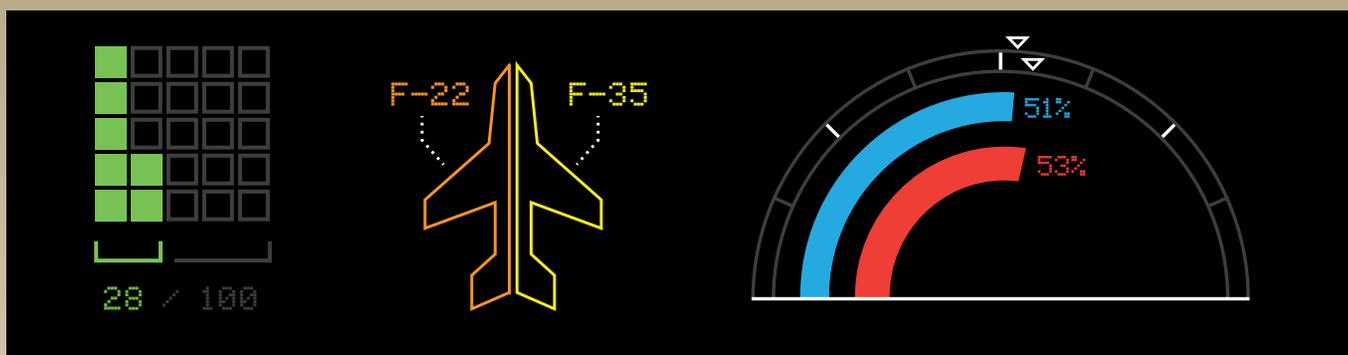


THE PROMISE OF VIRTUAL TRAINING



The specter of continued budget cuts and the rapidly evolving nature of warfare present a serious challenge to military readiness. GBC launched a research campaign, including a survey of 310 DoD personnel, to assess the promise of virtual training to help the military cope.

A BETTER WAY TO TRAIN



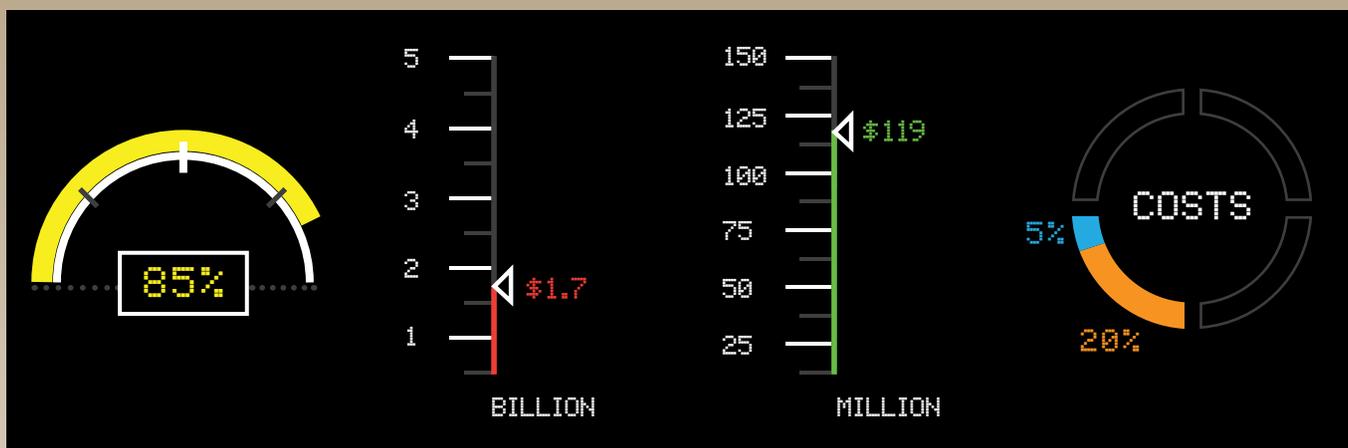
Just 28% are confident in current live training capabilities to satisfy training needs

F-22 and F-35 aircraft have capabilities that exceed those of live exercises¹

A majority (51%) says integrating live and virtual training enhances exercises involving multiple operational domains

A majority (53%) says integrating live and virtual training enhances the safety of mission operations

A LESS COSTLY OPTION



A large majority indicates blending live and virtual training would reduce training costs

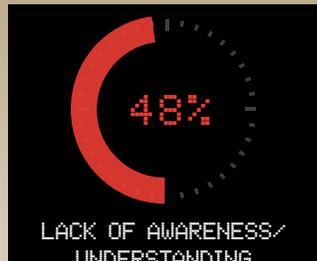
The amount the Air Force expects to save between FY 2012-2016 with more virtual training²

The amount the Navy estimates it will save beginning in 2020 by increasing virtual training for the MH-60 and F-18³

The cost of operating flight simulators is 5%-20% of the cost of flying real aircraft⁴

CHALLENGES REMAIN

DoD personnel are particularly concerned with:



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GOING VIRTUAL TO PREPARE FOR A NEW ERA OF DEFENSE



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RESEARCH METHODOLOGY

GBC conducted extensive secondary research, interviewed experts, and surveyed DoD personnel. The email-based survey was sent to a random sample of subscribers to Government Executive Media Group publications in October 2014. 310 active-duty military personnel and DoD employees from each of the service branches completed the survey.

Sources: 1. "Hostage: Virtual Training Needed to Address Limits of Red Flag," Defense News, 2014 | 2. "Air Force Training," GAO 12-727, 2012 | 3. "Navy Training," GAO 12-725R, 2012 | 4. "Why Use Simulation? - Return on Investment," NTSA