



NAVAL POSTGRADUATE SCHOOL

MONTEREY, CALIFORNIA

**RECRUITING, ADVERTISING AND MARKETING
STRATEGIES IN ALL-VOLUNTEER FORCE NATIONS: CASE
STUDIES OF CANADA, AUSTRALIA, THE UNITED
KINGDOM, AND THE UNITED STATES**

by

Carol Stoker and Stephen Mehay

December 2011

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ABSTRACT

The recruiting environment in all-volunteer force (AVF) nations has changed dramatically in recent years. Low awareness of the Navy in each nation, combined with rapid changes in the media consumption habits of youth, present serious challenges to traditional military marketing approaches. The goal of this study is to provide a comparative analysis of marketing and advertising strategies that have been developed in four AVF nations in response to these challenges. The study focuses on the marketing strategies adopted by each nation's Navy for active duty enlisted recruits. The study is organized around four major areas. First, we assess social, demographic, and economic trends in each nation's external recruiting environment. Second, we discuss the structure of each nation's recruiting organization and its strategy development process. Third, we document various recruiting, marketing, and advertising initiatives in each nation. Finally, the study examines efforts to evaluate the effectiveness of specific marketing initiatives.

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EXECUTIVE SUMMARY

RECRUITING AND MARKETING STRATEGIES IN ALL-VOLUNTEER MILITARIES: CASE STUDIES OF AUSTRALIA, CANADA, THE UNITED KINGDOM, AND THE UNITED STATES

I. BACKGROUND

The goal of this study is to assess the recruiting, marketing and advertising strategies that have been adopted in nations with all-volunteer forces (AVF). To meet the goals of the research, we restrict the scope of the study along several dimensions. First, we confine our attention to four AVF nations – Canada, Australia, the United Kingdom and the U.S. Second, even though many of the policies we discuss apply to all of the military branches, we focus primarily on the Navy. Third, although analysts historically have been concerned about the level of compensation necessary for the military to be competitive in the youth labor market, modern militaries also spend heavily on marketing and advertising. Although we survey an array of recruitment tools in each nation, we concentrate on marketing and advertising efforts. While recruiters perform the difficult tasks of tracking down leads, processing applicants, and completing the ‘sale,’ marketing and advertising programs affect the attitudes and behavior of youth as well as the attitudes of the adult influencers of youth. The study seeks to address the following questions:

- What recruit market trends pose the greatest challenges to Navy recruiting?
- How should the Navy be branded to promote recruiting?
- How can awareness of Navy been increased?
- What is the impact of joint-service marketing on Navy recruiting?
- What marketing programs are the most cost-effective?
- What is the role of marketing in long-term recruiting strategies?

We find significant differences in the marketing and advertising policies adopted across nations. However, perhaps somewhat surprisingly, we often find significant differences in recruitment initiatives between the Navy and the other branches within each nation.

II. TRENDS

Demographic trends in the four AVF nations are similar in direction, but not necessarily in magnitude. Each has experienced an aging of the population due to declining birth rates. Slower population growth of natives has been offset to some extent by immigration. These demographic shifts have created multiple concerns for military recruiting. Military propensity of immigrants is often lower than that of natives as their primary motivation for immigrating most

often is based on economics. In addition, national identity is often weaker among immigrants so that certain marketing approaches are less effective among these groups. Another issue is that military eligibility is lower among some immigrant groups, in part due to inability to acquire security clearances, and in part due to fitness, and aptitude (due to language) issues.

The demographic trends noted above have affected the ability of all AVF nations to implement long-standing diversity goals. AVF countries are aware that the military is not representative of the national population and have struggled to devise marketing strategies that help achieve diversity goals. A tradeoff exists in all of the AVF nations covered in this study between meeting overall recruiting targets and meeting diversity goals. Some nations are expending increased resources to meet diversity goals

The entry of the 'Millennial' generation (GEN Y) into the prime recruiting market has had a major impact on marketing practices. GEN Y members are generally perceived to be impatient, demanding and marketing savvy. They expect to know what they will be doing in their military jobs, what training they will receive, and what they can expect throughout their careers. Also, friendships are very important to this generation. GEN Y has forced the adoption of new marketing strategies and shifted the emphasis across media types, particularly from mainstream media to digital channels. Also, because GEN Y members resist long term commitments, Australia and other nations have developed programs that allow GEN Y members to 'try out' the military before making a commitment. For example, Australia provides recruits with a 60-day trial period in boot camp.

The recent (2008-2011) global recession has impacted recruitment in all of the surveyed nations, with the exception of Australia. The average unemployment rate in OECD nations was 9.5% in European nations and 9.8% in the U.S., but only 5.2% in Australia (Organization for Economic Cooperation and Development 2010). Although high unemployment favors short-term recruitment, many secular trends have negative implications for long-term recruitment.

All four nations contributed troops to the wars in Iraq or Afghanistan, or to both. The length of the Afghanistan war appears to have contributed to a downward trend in youth propensity. In the U.S., prior to the current global recession, military propensity had dropped among all demographic groups, but especially among Blacks and Hispanics, who traditionally held more positive views towards military service.

The most important long-term factor contributing to declining youth interest in military careers has been a sustained upward trend in post-secondary enrollment in western nations. In the U.S., among those aged 25-34, the share of high school graduates who enrolled in college increased from under 50% in 1975 to over 68% in 2009 (Bound and Turner 2010). This trend has been fueled by a growing earnings gap favoring college-educated workers and has forced AVF

militaries to develop marketing programs that focus on the technical jobs and education programs available in the military.

The falling number of military veterans in the population also has impacted marketing and advertising strategies. The lack of military role models in local communities has directly affected the visibility and awareness of the military. Outreach activities improve visibility among specific target groups and have become a more important component of marketing strategies in AVF nations.

Perhaps one of the most surprising findings is that in each of the AVF nations the Navy has an unclear identity, weak brand, and suffers from low public awareness. In most nations, this has presented a major challenge to development of marketing and advertising strategies. For example, even though the use of lower-cost digital media has expanded rapidly, all of the nations continue to utilize TV ads. Such ads improve awareness by reaching both youth and adult influencers and by promoting the Navy brand.

In most AVF nations, and especially in the Navy, there is a persistent pattern of manning shortages in certain skills. Recruiting and marketing initiatives have been adopted that target applicants who can qualify for these skilled occupations. For example, all nations (except the U.S.) have adopted direct entry program for recruits with prior technical training. They also have developed specialist recruiting cells which concentrate on recruiting individuals with specific skills.

Finally, a persistent trend in health problems, such as a rising rate of obesity, has affected military eligibility rates in all Anglophone nations.

III. RECRUITING STRUCTURE AND PROCESSES

The differences in the recruiting organizations among the AVF nations are striking. Canada and Australia utilize joint military structures with a single organization performing recruiting functions for all branches. At the opposite end of the spectrum, the U.S. and the U.K. maintain separate recruiting organizations for each branch. Thus, even though all AVF nations have experienced common external demographic and other changes, the recruiting and marketing initiatives adopted in response to these changes are filtered through vastly different recruiting organizations. AVF nations also have notable differences in the background of the personnel assigned to recruiting duty. Royal Navy recruiters are retired active duty personnel who are permanently assigned to recruiting duty. They are also assigned permanently to a given local area. Canada uses a mix of CF active duty and reserve personnel as recruiters. Australia combines civilian contractors and active duty personnel as recruiters. The U.K. recruiting structure recently was decentralized to regional areas to improve the ability of field recruiters to tailor their efforts to the local population and its needs. Early assessments of this

structure indicate some problems with communication and planning between Navy Recruiting headquarters and the regions. Table 1 summarizes the differences in the recruiting structures and the composition of the recruiting force.

Table 1. Structure of Recruiting Organizations

Country	Recruiting Command Structure	Recruiter Control	Recruiting Force
Australia	Joint (ADF)	ADF/MOD	Hybrid: Civilian Contractors and Active Duty
Canada	Joint (CF)	CF/MOD	Active Duty
United Kingdom	By branch	By branch— Policy at HQ; recruiters at local level	Retired Active Duty (on Reserve Duty)
United States	By branch	By branch	Active Duty

Although centralized recruiting appears to offer a cost-effective organizational model, it has not been without issues. In Canada and Australia, Navy recruitment has been a serious concern. In part this is because of low public awareness of the Navy, which has been traced to the absence of service-specific advertising. To combat low awareness, the Canadian Navy has created its own “Navy Attractions and Recruiting Support” cell. Similarly, the Australian Defence Force (ADF) has begun to develop and promote separate brands for the individual services.

The recruiting process itself has been integrated into recruitment strategy as most nations have attempted to reduce the length of the process. These improvements include developing online or “e-recruiting” programs which allow candidates to submit and track the status of their applications via the Internet. Canada also permits recruiting centers to conduct on-site selection for many military occupations in an effort to reduce processing time.

IV. DEVELOPMENT OF RECRUITING AND MARKETING STRATEGY

This study examines the process of developing recruiting and marketing strategies in the four AVF nations and how the strategies are implemented in the short-run and the long-run. In particular, we focus on the relationship between recruiting strategies and marketing initiatives.

As Table 2 shows, the process of developing recruiting strategy varies widely across the four AVF nations. Australia maintains a long-run strategy and attempts to ensure that short-run plans adhere to this strategy. Recruiting strategy is defined by MOD strategy in *Defence White*

Paper 2009. Also, the *Defence Strategic Workforce Plan (DSWP) 2010–2020* is a 20-year plan that describes the workforce requirements for Force 2030. *The ADF Recruiting Strategic Plan 2007–2017* describes how ADF will meet the demand for people specified by the MOD-level strategy over the next decade.

The other nations include some elements of the highly-structured Australian process, but generally not all of the components. The CF recruit marketing strategy, “Canadian Forces Recruiting Strategic Level Guidance on Winning the War for Talent” (2007), flows from MOD guidance in the *Canada First Defence Strategy* (2008) and the *Military HR Strategy 2020* (2002). In the U.K., the strategy development process encompasses several levels of the MOD, including the Armed Forces Overarching Personnel Strategy, the Defence Recruiting Committee, and the Naval Strategic Plan.

TABLE 2. Development of Strategy

<u>Country</u>	<u>Defense Strategy- -MOD Level</u>	<u>Personnel/HR Strategy</u>	<u>Recruiting Strategy</u>	<u>Navy Recruiting Plan</u>
<i>Australia</i>	Defence White Paper; Defence Strategic Reform Program	Defence Strategic Workforce Plan	ADF Recruiting Strategic Plan	In-year Marketing Plan
<i>Canada</i>	Canada First Defence Strategy	Military HR Strategy; Defence Strategic Workforce Plan	CF Recruiting Strategy; Chief of Maritime Staff Strategic HR Plan	Efforts by Navy Attraction and Recruiting Support
<i>United Kingdom</i>	Armed Forces Overarching Personnel Plan		RN Recruit Marketing Strategy	As prescribed by RN Recruit Marketing Strategy
<i>United States</i>	CNO Strategic Initiatives		Commander’s Guidance	AAMP

V. MARKETING AND ADVERTISING PLANS: IMPLEMENTING THE STRATEGY

The U.K. Royal Navy’s Recruit Marketing Strategy develops marketing principles for RN recruiting. The original marketing model assumed that the target audience would be inspired to contact a recruiter after being exposed to an advertisement on TV or in a cinema. However, research found that potential recruits desired interactive communication to better understand what the Navy is about and to identify a possible role model in the Navy. The current strategy, entitled *Life without Limits*, has been in effect since January 2008.

In Canada, the current *Fight with the Canadian Forces* campaign (*Fight Fear. Fight Chaos. Fight Distress*) is a rebranding of the CF. The current message focuses less on the

military's combat mission and more on humanitarian and global assistance missions. This theme echoes the U.S. Navy's *A Global Force for Good* campaign. CF advertising also aims to communicate career opportunities in the CF, as well as opportunities for professional and personal growth. The *Fight* awareness campaign is complemented by a CF Priority Occupations campaign with job-specific advertisements designed to drive "job-seekers" to certain occupations. The CF campaign also promotes Navy teamwork to address Gen Y perceptions about the isolation of the Navy. Canada still relies on TV advertising in part due to its large geographical size. Also, Canada has developed a Virtual Recruiting Center, which makes it possible for an applicant to have no personal contact with a recruiter until the final screening interview. Canada feels that increased use of the internet and social media has reduced the number of field recruiters.

To address shortages in technical skill areas, most AVF nations, with the exception of the U.S., offer direct entry programs that allow qualified applicants to bypass lengthy initial skill training. Specialist /Technical Trades Recruiting Cells also have been established in Canada and Australia for health, engineering and technical fields.

Extensive joint advertising programs have raised important issues in Canada and Australia. Joint ADF advertising had adopted two different approaches: advertising specific jobs and advertising to generally attract people to the military. However, joint ADF advertising allowed misperceptions to emerge about the individual service brands. Recently, the individual services have been allowed to develop new advertising and marketing campaigns to address their indistinct images and brands.

The Royal Navy stresses the importance of ensuring that advertising is integrated across all media channels. Navy Recruiting Command considers the level of overall public RN awareness to be based on three components: Outreach events, cinema advertising, and education efforts. The RN stresses that no one element of marketing, media or advertising can cover all of the target markets, without the others.

The Royal Navy also suffers from low awareness, although the problem does not stem from a joint recruiting structure. The current *Life without Limits* campaign attempts to address the low awareness of youth. The RN directs its recruiting messages to the primary market segments based on the central proposition "One Career Many Opportunities." The campaign customizes this message for specific market segments.

In the U.K., the Royal Navy 'Marketing and Advertising Plan' is based on market segmentation research. RN recruiting focuses on three or four (of seven) market segments and selects the media most used by each market segment (e.g., TV, cinema, online, social media, Pub TV) to reach the target audience. The RN considers digital channels to be a key part of its communication strategy and intends to have a totally digital marketing strategy by 2015.

The Royal Australian Navy seeks to improve general (and youth in particular) awareness of the RAN and its career options through specific outreach programs with the community and schools, as well as sporting event sponsorships. In addition, the Gap Year Program is an ADF program designed to give recent school leavers a taste of military life for 12 months while paying them a salary. The program seeks to win over recruits who might resist making a military commitment without first experiencing military life. Similarly the ADF is considering changing the initial service obligation for new recruits. Currently, the initial minimum service obligation is four to six years for enlisted personnel. However, studies indicate that GEN Y values flexibility and might not want to make a long commitment.

In addition to the U.K., Australia uses target market segmentation research to customize communication plans to reach and motivate different segments (such as those segments deemed most likely to apply for certain priority jobs). While the U.S. Navy employs niche marketing, its marketing plan does not appear to integrate target market segmentation research to as great an extent as do the U.K. and Australia.

The U.S. recruiting mission currently is dictated by 'fit.' Traditionally, recruiters sold the Navy, not jobs. Today, GEN Y members demand to know the specifics about Navy life and jobs—what will I do in the Navy? What is shipboard life like? The Navy website and a huge presence in social media attempts to provide answers to these questions. The U.S. Navy has reduced TV advertising due to a reduction in the ad budget and currently is focused more on digital media. One perceived advantage to the more fragmented digital landscape is that it facilitates targeted, niche marketing via the media channels frequented by each target segment. However, advertising builds awareness, interest and involves long-term dynamics. The USN fears that reducing advertising spending will reduce awareness even further and harm the future supply of applicants.

VI. MEASURING MARKETING EFFECTIVENESS

Although AVF nations have developed metrics in an attempt to measure the direct effect of advertising on enlistments, the causal effect of military advertising and marketing has been elusive. One reason for this is that advertising tends to have a lagged effect on youth enlistment decisions (Bicksler and Nolan 2006). Also, disentangling the relative contributions of

advertising and other recruiting weapons – e.g., bonuses, educational benefits, and the number of recruiters – has presented problems for researchers (Dertouzos and Garber 2003).

The responsibility for conducting assessments of advertising effectiveness varies across nations. In the U.K., marketing assessments are not conducted by the ad agency responsible for a campaign, but rather by the RN or by private research organizations. The U.K. government's Central Office of Information (COI) also contracts with independent research companies to conduct audience research. Navy Recruiting provides Key Performance Indicators (KPI) to marketing agencies to be used to gauge the effectiveness of each campaign (e.g., TV, web, cinema). If an ad agency fails to meet the KPI, it risks renewal of its contract. For example, the ad agency might be instructed that the goal of a website campaign is to obtain 20 engineers. After the website campaign, KPI's are collected on the number of responses, the number of expressions of interest, the number of telephone calls made to recruiting, the number of applicants, and ultimately the number of engineers who enlist. The "conversion rate" -- the ratio of the number of enlistments to the number of responses to the website ad -- are also evaluated.

In the U.S., much of the on-going assessment of advertising is conducted by the Navy's ad agency. The agency is held responsible for generating leads, but not contracts. The Navy Recruiting Command provides guidance to the ad agency on the various missions and the resources available. The ad agency uses the guidance to develop an annual marketing and advertising plan. However, DOD also conducts joint market research via the Joint Advertising Market Research & Studies (JAMRS) program. JAMRS conducts national surveys to gauge Service awareness. The Navy launched the *GFFG* brand in 2009, but JAMRS surveys indicate that Navy brand awareness is very low. Awareness appears to be around 1% for the *GFFG* campaign as compared to about 8-9% under the *Accelerate Your Life* campaign.

All AVF nations conduct surveys of potential and new recruits. The Royal Navy surveys every recruit to determine how they learned about the RN and what motivated them to join. There are also efforts to measure the results of investments in outreach efforts. In the U.K., pre-wave and post-wave tracking of advertising campaigns is done via surveys. Also, the RN administers a Potential Applicant Survey as well as a new recruit survey. The RN evaluates the overall effectiveness of its initiatives via an annual Omnibus survey, which tracks the public's opinion of the RN. In Canada surveys are conducted to evaluate post-campaign ad recall, as well as to understand behavior and propensity of the target market. Also, most nations conduct focus groups and surveys of new recruits to learn what factors (including advertising) attracted them to the Navy.

The U.S. Navy conducts marketing at both the national and the regional level. Local advertising is used to generate leads for recruiter follow-up. National advertising is intended to

generate awareness as well as produce leads. Both types of leads are tracked and are coordinated via the web-based Navy Advertising and Leads Tracking System. The Navy calculates a “combined National and Local Leads Contribution to Goal” for each of its active/reserve and officer/enlisted categories. Each Recruiting District (NRD) must meet minimum acceptable metrics for leads. For example, with respect to active enlisted leads, each NRD should achieve the following three metrics: (a) A Combined National and Total Leads Contribution to Goal equal or greater than 34%; (b) National Leads Conversion Rate equal to or greater than 5%; (c) Local Enlisted Leads Conversion Rate equal to or greater than 5%.

Historical conversion rates indicate how many leads result in a signed enlistment contract. The number of leads is further broken down from “gross leads” into “eligible leads.” Conversion rates change as the number of contacts increases. The advertising agency reports that when seeking to generate less than 35,000 contracts, the eligible conversion rate is 4.4%.

While all countries track metrics on marketing effectiveness, the U.S. is further along than the other nations in measuring marketing ROI. In addition, the U.S. Navy is using optimization models to guide resource allocation decisions.

VII. CONCLUSIONS AND RECOMMENDATIONS

The study found that fluctuating advertising budgets present a major impediment to implementation of long-term marketing strategies. To avoid a reactive approach, the Australian Defence Force developed a long-term recruiting strategy that is designed to guide policies even during short-run swings in budget and personnel. Adopting this approach could help the USN avoid the frustration of frequent strategy changes in response to budget fluctuations. Also, brands need continual reinforcement. All the AVF countries suffered weakened Navy images as a consequence of reduced advertising in the post-cold war period and have had to ‘reinvent’ their brands during the subsequent decade. A long-term strategy that addresses the need for sustaining a strong Navy brand provides support for a stable base of resources for marketing and advertising.

As part of a long-term strategy, Navy-specific advertising is essential to address Navy awareness and to distinguish the Navy brand from the other services. While U.S. Navy advertising is already service-specific, it is worth stressing that joint advertising, based on the experience of Canada and Australia, while possibly providing cost savings, is not likely to meet Navy’s strategic recruiting objectives.

The Royal Navy’s integration of market segmentation research directly into its marketing practices provides a useful model. Although the USN conducts market segmentation research (via JAMRS), it would be worthwhile to explore ways to more directly integrate the results of this research into its marketing plans.

Advertising via digital media is overwhelmingly being used by the AVF militaries. Nonetheless, while digital media is cost-effective and fosters targeted niche marketing, it is clear that mass media is still needed to cultivate general awareness of the Navy. In addition, frequent fluctuations in funding for awareness-style mass media advertising can harm the effectiveness of the more targeted digital-based media.

The study also finds that the traditional 'join the Navy' focus is no longer sufficient to attract today's recruits. Increasingly, other nations' advertising, websites and outreach efforts are promoting specific jobs and occupations. In addition, there appears to be high value in promoting educational benefits to counter the trend toward more post-secondary education by high school graduates.

In non-U.S. nations, appeals to patriotism or service to country do not appear to be strong motivators of youth. Rather, it is travel, adventure, jobs, learning marketable skills and further education that appear to be important motivators. Advertising in these nations seldom addresses patriotism or service to country. This is especially important in nations with growing immigrant populations.

Different recruiting models— both in terms of organization and processes – are being used by AVF nations. While no single model suits all nations, the USN would benefit from exploring potential advantages of utilizing civilian and/or military retiree as field recruiters. In addition, USN should continue with efforts to improve or shorten the customer's recruiting process. All AVF countries are improving the recruitment process, both to reduce costs and to help ensure that quality recruits stay in the recruiting process until accession. Interestingly, other AVF countries appear to be farther along than the U.S. in terms of e-recruiting. Efforts to improve and streamline the process should be continuously explored, even in a strong recruiting market. Lastly, it would be prudent for USN to continue to explore a system where responsibility for assessment of advertising and marketing effectiveness is independent of the ad agency conducting the advertising campaigns.

Some of the important questions posed in studies of military advertising are as follows: (a) is there a minimum level of advertising necessary for a cost-effective long-run recruiting program? (b) What is the most efficient mix of joint and Navy-specific advertising? (c) What is the proper mix of marketing media? Recent reviews of the literature on the effectiveness of military advertising conclude that the pool of knowledge about this relationship is limited (Adams 2009). Part of the problem is that the incidence of advertising, as well as its direct effects, is inherently difficult to measure. Experimental evidence is rare, thus comparative analysis of the experience of similar nations can provide some evidence on the effects of advertising.

The literature shows that advertising spending is effective in generating contracts and is generally more cost-effective than alternative recruiting weapons (e.g., recruiters, enlistment bonuses, educational benefits) (Dertouzos 2009). However, the effect of advertising expenditures on contracts is characterized by an S-shaped (logistic) curve. This relationship indicates that expenditures are ineffective at low levels of spending because the advertising does not produce the required number of exposures per person. Thus, there is a threshold level of spending below which advertising is relatively ineffective. As spending levels increase beyond the threshold advertising reaches more people and the frequency of exposure also increases. Eventually, a saturation point is reached where additional advertising does not reach a new audience and each individual has received the message many times. At low levels of spending, the optimal mix of advertising favors non-TV media, whereas at higher levels the optimal mix shifts towards general TV and cable advertising.

The Canada and Australia case studies support the findings in Dertouzos (2009) that a minimum level of advertising spending is important in maintaining the long-term viability of a military's recruitment program. One reason for this conclusion is due to the lag effects in advertising whereby current expenditures affect future interest in the military, and earlier spending has some effect on interest and awareness today. The evidence is based on cyclical variation in advertising expenditures, and recruitment, between the drawdown of the 1990s and the manpower buildup after September 2011. Although this buildup was accompanied by increases in other recruiting resources, the case studies strongly suggests that the growth of advertising spending after 9/11 generated a significant improvement in recruitment. Most nations also change the mix of media when advertising budgets decline, generally away from costly TV advertising toward less costly media. The Canadian experience also supports the view that overall it may be cost-effective to maintain a minimum level of advertising expenditures over time, even in the face of fluctuating recruit market conditions. A minimum level of spending is necessary to maintain an awareness of the Navy, even when the recruiting market is robust and goals are easy to achieve. Advertising affects awareness not just of youth, but also of adult influencers. Allowing expenditures to decline drastically in a given period often requires costly increases in recruiters and other resources in later periods. The costs associated with the boom-and-bust cycle in recruiting resources might be reduced by a policy of maintaining marketing and branding efforts.

The literature provides little direct empirical evidence on the effects of joint advertising (Adams 2010). However, the case studies of Canada and Australia suggest that joint marketing was a factor in the declining public awareness of the Navy and manning shortfalls in numerous skills. Both Canada and Australia have been forced to adopt new service-specific marketing strategies aimed at offsetting decreased Navy awareness. Their experience highlights the weaknesses of joint advertising policies.

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I: INTRODUCTION

The goal of this study is to review and assess the recruiting, marketing and advertising strategies that have been adopted in nations with all-volunteer force (AVF) militaries. To achieve the goals of the research, we restricted the scope of the study along several dimensions. First, we confined our attention to four AVF nations—Canada, Australia, the United Kingdom and the U.S. Second, even though many of the policies discussed apply to all of the military branches in each nation, we focus primarily on each nation's Navy. Third, although analysts historically have been concerned about the level of compensation necessary for the military to be competitive in the youth labor market, modern militaries also spend heavily on marketing and advertising. The focus of this study is on marketing and advertising strategies and policies rather than on compensation or other policies. While recruiters perform the difficult tasks of tracking down leads, processing applicants, and completing the 'sale,' marketing and advertising programs are equally important recruiting weapons in AVF nations. Marketing and advertising programs affect the attitudes and behavior not only of youth in the target market but also of the key adult influencers of youth. Although it is difficult to disentangle the recruitment effects of advertising from those of field recruiters, the importance of marketing in generating awareness and establishing brands cannot be understated.

Since the events of 9/11, numerous shifts have occurred in the recruiting markets of AVF nations. The wars in Iraq and Afghanistan have increased operational missions and manpower requirements of nearly all of the All-Volunteer Force (AVF) nations covered in this report. Military occupations also have become more complex with a concurrent increase in the number of technical jobs. The new missions have created changes in force sizes, force structures, as well as in the quality mix of military forces. These changes have posed significant new recruiting challenges for AVF nations. While AVF nations have increased their overall demand for personnel, they have had to confront numerous demographic, social, and economic changes that have forced them to adopt new marketing and advertising approaches. The past decade has undoubtedly been the one with the greatest rate of change in recruiting conditions since the establishment of volunteer military forces in these nations.

Against the backdrop of these trends, the goal of this report is to analyze recent policies that have been adopted by AVF nations to attract the required number of personnel, with the necessary skills and qualifications, in the most efficient manner. The study analyzes recruiting initiatives that have been adopted to address the recent trends in demographics, the labor market and economy, educational patterns, youth attitudes, and military propensity. The initiatives we examine have been developed in nations that all have somewhat different recruiting organizations. In some cases, the initiatives were adopted in response to unique

challenges and problems, whereas in other cases, the challenges and issues were similar across all AVF nations but the responses differed. The report seeks to compare and contrast the marketing strategies and practices in the selected nations, as well as to identify their best marketing practices. In addition, the report differentiates between strategies developed to address long-run trends versus those designed to deal with short-run issues.

We find significant differences in the policies that have been adopted across nations. However, perhaps somewhat surprisingly, we often find significant variation in recruitment initiatives between the Navy and the other branches within each nation. Sustaining Navy recruitment often presents some of the greatest challenges to defense planners.

The study seeks to address the following questions:

- What recruit market trends pose significant challenges to recruiting?
- How should Navy be branded to promote recruiting?
- What is best mix of advertising and marketing media?
- What are the best practices of these AVF militaries?
- How can awareness of Navy been increased?
- What is the effectiveness of joint-service marketing approaches for Navy recruiting?
- What policies and initiatives are most cost-effective? How is effectiveness measured?
- What is the role of advertising in long-term recruiting strategies?

The research attempts to identify and document strategies used by the selected group of AVF nations. It also attempts to analyze the unique circumstances that may have given rise to those strategies in individual nations, especially for the Navy. One goal is to assess the likelihood of success of adopting the recruiting strategies of other nations in the U.S. setting. The study explores the cost and effectiveness of these strategies in the home context and the likely cost and effectiveness if adopted in the U.S. context and suggests potential trials or pilot studies to assess the potential effects of each strategy.

The study utilizes several methods to collect information. First, the study reviews the available literature on recruiting in other nations. Second, the study relies on information provided by personnel in the manpower and recruiting commands in the selected nations. The study focuses on four English-speaking nations -- Australia, Canada, the U.S. and the United Kingdom. In part, this is because research on recruiting has been more extensive in those nations than elsewhere, the literature is readily accessible and demographic and socioeconomic characteristics tend to be similar to those in the U.S. For example, all of these countries have experienced rapid growth of immigrant groups from other nations that has impacted their traditional recruiting demographics. In addition, these nations have all been involved to some

degree in the military operations in the Middle East, especially Afghanistan, which has impacted recruiting success. Moreover, some of these nations, especially Australia, have recently experienced serious recruiting shortfalls that have triggered the need to adopt new and innovative recruiting solutions.

This study will provide information to U.S. Navy analysts and planners in terms of new marketing strategies that may be feasible in the U.S. recruiting market. It attempts to identify the cost and potential effectiveness of marketing strategies that have not been tried in the U.S. From a longer-run strategic perspective, it may lead to implementation of trial or pilot efforts to test the costs and effects of recruiting incentives or communication strategies.

The study is organized as follows after this introduction. Chapters II through V provide case studies of the marketing and advertising practices of Australia, Canada, the U.K. and the U.S., respectively. Each case study attempts to survey the social, demographic, and economic trends in each nation. This background sets the stage for the discussion of current recruiting structure and processes in each nation. Although these nations are similar in many respects, their recruiting organizations vary widely in terms of structure and processes. Each case study then discusses the development of both long-run and short-run recruiting and marketing strategies in each nation. This is followed by a section on the marketing and advertising policies and initiatives adopted in each nation in pursuit of the strategy. In particular, we focus on branding and marketing of each nation's Navy and how public awareness is impacted by advertising and marketing. We also discuss attempts by each nation to measure the effectiveness of advertising campaigns and marketing efforts. In particular, we examine who conducts the assessments, what metrics are used, and the results of such assessments. The final section of each case study summarizes the lessons learned in each nation and what policies, strategies, or initiatives might be applicable in the U.S. recruiting environment.

II: RECRUITING AND MARKETING STRATEGIES IN ALL-VOLUNTEER FORCE NATIONS: THE CASE OF AUSTRALIA

I. TRENDS AND RECRUITING CHALLENGES

The Australian Defence Force (ADF) faces numerous challenges in recruiting. These challenges were significant in recent years, as the ADF attempted to expand its force size, while also retaining its skilled, experienced personnel. The challenges are still prominent, as ADF now strives to maintain, rather than increase, the larger force size. Key challenges are described below.

A. Economic and Demographic Trends

Unlike other AVF nations, the global financial crisis seems to be having only a short-term, dampening effect on the Australian economy. The average unemployment rate during 2010 was 9.5% in European OECD nations and 9.8% in the U.S., but only 5.2% in Australia (Organization for Economic Cooperation and Development 2010). In addition, strong economic growth is forecasted for Australia in the next decades, which will increase the demand for workers and create additional challenges for ADF recruiting and retention (Australian Department of Defence 2010g).

The average age of the Australian work force has been increasing, which impacts the pool of potential military recruits. The target age range for recruits is approximately 16.5–29 year olds (Vass 2007). This challenge is described below:

[Australian Defence Association director] James says the underlying demographic problems—an ageing population—will result in slimmer pickings in the years ahead. ‘As a proportion of the population, we now have fewer 18- to 25-year-olds than at any other time since white settlement’ (Callaghan 2009).

Similarly, the ADF itself is aging. Unlike the U.S. military’s “up-or-out” career management model, the ADF has an “up and stay” model, in which members may serve until age 60 without being promoted (Australian Department of Defence 2010a). In addition, ADF workforce policy recently extended the retirement age, which may increase the proportion of older members of the force (Australian Department of Defence 2010a, 74). The ADF realizes that it may need to increase future enlistments to compensate for losses due to high expected separations (Australian Department of Defence 2010g).

Lastly, ADF recruiting is finding the pool of potential recruits to be increasingly constrained by the health of many in the target age group. “Of those inquiring about ADF careers, 1 in 12 is unable to meet the required minimum health or physical standards. The rate

of childhood obesity in Australia is one of the highest amongst developed nations with 25% of children meeting the criteria for overweight or obesity. Many of these children present with risk factors for Type II diabetes and cardiovascular disease” (Hearps et al. 2006, 37).

B Recruitment of Women

ADF struggles to increase the representation of women, which constitute only 13.5% of the ADF. Recruitment efforts are frustrated as women are also relatively less likely to progress to an enlistment decision. It is noted that” . . . of every 20 women who start the enlistment process, only one completes it” (Farr 2009). Factors that contribute to the low representation of women include the protracted application process (which appears to discourage women more than men), women’s perceptions of ADF life, and the fact that women comprise the majority of youth in full-time postsecondary education (Hearps et al. 2006).

Research has found that the ADF has not been effective in advertising to women. Women perceive that the ADF is a male-dominated organization with few females in leadership roles and are concerned about the potential for sexual harassment, as well as about potential career barriers. The research concluded that these factors, combined with the low public knowledge of the benefits offered by the military, have contributed to the low image of the ADF among women (Hearps et al., 2006, 37).

C. Demand for Technical Skills—A Hollow Force

The ADF has an increasing demand for skilled recruits, such as engineers and technicians, many of which are in high demand by private industry (Vass 2007; Australian Defence Force 2011). The mining industry is considered a direct competitor, as it has experienced rapid employment growth for skilled personnel, such as technicians, mechanics, and engineers (Defence Force Recruiting 2010a).

Exacerbating this challenge is the fact that current technology has reduced the need for people to enter the military to gain a skill, as in the past. The ADF leadership is concerned not only by the shortage of combat-ready troops, but also with shortages in critical areas, such as engineering, aircraft and ship maintenance, and heavy vehicle diesel mechanics. Because of the complexity of communications and weapons systems, the military requires individuals with the aptitude for skilled jobs. This change has reduced the opportunities for less skilled persons to enter the military to gain trades training (Callaghan 2009).

D. Diversity Issues

The combined percentage of the population of Australia comprised of Asian, European, African, and Aboriginal ethnic groups is expected to rise by 2025—with implications for the ADF

recruitment strategy. The ADF is keenly aware of this trend, particularly since minority groups are under-represented in the ADF. The vast majority of ADF applicants are Anglo-Australians, despite the fact that the relative size of the Anglo-Australian applicant pool is shrinking, while that of other cultural groups is growing (Hearps et al. 2006, 38).

One barrier to attracting recruits from ethnic groups is the negative image of the military held by minorities. The Defence Personnel Environment Scan reports that “Members of many minority cultural groups in Australia have undergone conflict or disruption in their country of origin (or their parents have), and many may associate the ADF with their prior negative experiences involving the military. Many may also perceive the military to be biased against and not understanding towards their religious beliefs and cultural differences and may expect that they will be treated in a discriminatory fashion” (Hearps et al. 2006, 38). The other recruiting barrier for ethnic groups is that service in the military implies family separation. Close bonds within ethnic families may preclude many young people from considering a military career (Hearps et al. 2006, 38).

E. Public Image of ADF

A significant challenge is the image of the ADF among youth. While Australians, in general, seem to admire the ADF and respect its important role in national security, they are not inclined to join the military themselves. The public image problem is at least in part due the fact that current operations are more peacekeeping in nature, as compared to the World War II type of operations, with a single, obvious enemy. In addition, the typical Australian family today does not include a current (or former) military member. These factors have caused the general population to be increasingly distanced from the military (Callaghan 2009).

F. Characteristics of Generation Y

Like other AVF nations, the recruit market in Australia largely consists of members of Generation Y or Millennial Generation (Australian Defence Force 2011). The unique characteristics of this group are connected to the ADF public image problems, so Defence Force Recruiting (DFR) takes the Gen Y effect into account when marketing its services. DFR finds that members of Gen Y are “independent, impatient, demanding and marketing savvy” and that this they cannot be attracted with a generic offer—such as, ‘join the Army, complete your training and we will tell you what job you can do’” (Defence Force Recruiting 2010b). Openness and authenticity, as well as friendships, are also important to this youth group. Generation Y also reflects changing career expectations. The current youth generation’s attitude towards the traditionally long-term commitment of the military is considered a challenge for recruiting.

One challenge facing ADF recruiting appears to stem from its own internal process. Some potential recruits leave before enlisting due to frustration with the recruitment process. Ziesing (2009) notes “...the timeline is intolerable for people used to walking into a job within a few weeks rather than months.”

G. Navy-specific Recruiting Challenges

While, in general, the Navy faces the same issues as the ADF, the Navy’s problems seem more acute. Based on studies that track propensity-to-join among 16 to 24-year olds, the propensity level toward the Navy at 22% is the lowest of all the services, with the Army and Air Force at 29% and 33%, respectively. Similarly, tracking studies reveal that the general market has a higher level of negativity towards the Navy (31%) than it does towards the Army (21%) and the Air Force (20%). Research also reveals that one obstacle the Navy faces is that the public lacks an understanding of what the Navy does and views life in the Navy is “isolated, lonely and boring” (Defence Force Recruiting 2011).

In recent years, the Navy has faced significant recruiting challenges, particularly in certain occupations. Australia’s current low unemployment rate impacts the ability to fill certain Navy jobs, including Marine Technicians, Electronics Technicians, Engineers, Medical Officers, Cryptologic Systems, Hospitality roles, Officers, Aviation, Combat Systems Operators, Communicators and Submariners (Defence Force Recruiting 2011). These shortages have affected the Navy’s operational capabilities:

So far this year, the navy has only managed to achieve 71 per cent of its desired recruitment total...The staffing shortages are already putting a brake on some defence activities: most glaring is the inability of the Royal Australian Navy to man more than three of its six Collins class submarines at any one time (Callaghan 2009).

II. RECRUITING ORGANIZATION AND FORCE SIZE

A. Recruiting Organization

The Australian Defence Force (ADF) was established in 1976. It is a tri-service organization comprised of the Royal Australian Navy, Australian Army, and Royal Australian Air Force (Vass 2007). The recruiting function is centrally managed by Defense Force Recruiting (DFR) and combines military personnel with civilians who work for a private contractor (Manpower Inc). DFR is under the ADF People Strategies and Policy Group (PSPG). The advertising budget for all services is centralized by the PSPG; however, each service chief sits on the high-level recruiting board and injects his service-specific priorities into the overall budget decisions. DFR provides recruiting services to the three service chiefs, who are obligated to raise and sustain forces in their services. Recruiting services are performed cooperatively for all

services, as well as the Australian Public Service—i.e., for the entire Australian Defence Force (ADF) (Australian Defence Force 2011). All job inquiries and job applications for positions in the ADF are centrally processed by DFR (Banko and Holden 2007). DFR also has its own marketing team, which uses information from applicable market research and contracts with an advertising agency (Banko and Holden 2007). Within DFR, “Navy Marketing” is responsible for marketing Royal Australian Navy careers and recruiting for most Direct Entry Officers and all General Entry and Navy Reserve positions (Defence Force Recruiting 2011).

The ADF employs a systems approach to recruiting.

ADF recruitment is not solely the responsibility of the Defence Force Recruiting Branch (DFR). Recruitment for the ADF involves a whole system of elements from within Defence, linking policy, targets, recruiting operations, training schools and capability. Working with the Services across many levels, DFR helps to ensure that the ADF recruiting system meets its mission to provide the right people, in the right numbers and at the right time, in order to generate Defence capability (Hawke and Gorny 2006).

Most cities in Australia have a Defence Force Recruiting Centre where applicants can obtain information about military careers. In addition, cities that lack a permanent recruiting office are visited by Career Promotion Teams and Specialist Promotion Teams. These teams are comprised mostly of uniformed military personnel. However, the overall DFR force is a blend of in-house and contractors. Unique to the AVF nations, Australia out-sources the bulk of its recruiting force. Most recruiters are contract employees of Manpower Inc. However, the DFR maintains that the contractors consider themselves foremost to be dedicated members of the Defence Force Recruiting organization. As an example of how integrated the organization is, the uniformed Career Promotion Teams are managed by Manpower Inc. (Defence Force Recruiting 2010c). Recruiting outreach efforts are managed in-house, but the bulk of advertising is outsourced to an advertising agency (Defence Force Recruiting 2010c).

DFR recently has undergone significant changes. A new recruitment model was established in 2008 in an effort to streamline the process and take advantage of economies of scale, shared IT systems, and to increase coordination across the system (Banko and Holden 2007). In addition, the DFR was restructured in 2008-09 in effort to create a more “responsive, candidate-focused recruitment process” (Australian Department of Defence 2009b).

In 2002 the ADF first outsourced its recruitment function to Manpower Inc. In 2008 the Chandler MacLeod Group won the contract to run the ADF recruiting program, but it opted out of the contract in 2009. Manpower Inc was then awarded a \$200 million, 27-month contract to run the recruiting program in what the company calls the biggest recruitment outsourcing program in the world. Manpower performs all recruitment functions, from marketing and

promotion to candidate screening and hiring (Zieminski 2009; Berkovic 2010; Manpower Inc. 2009).

The ADF provides recruits with a 60-day “trial period” in boot camp. As the ADF does not conduct significant initial screening, this trial period serves as a filter to screen out recruits with motivational and other disqualifying characteristics.

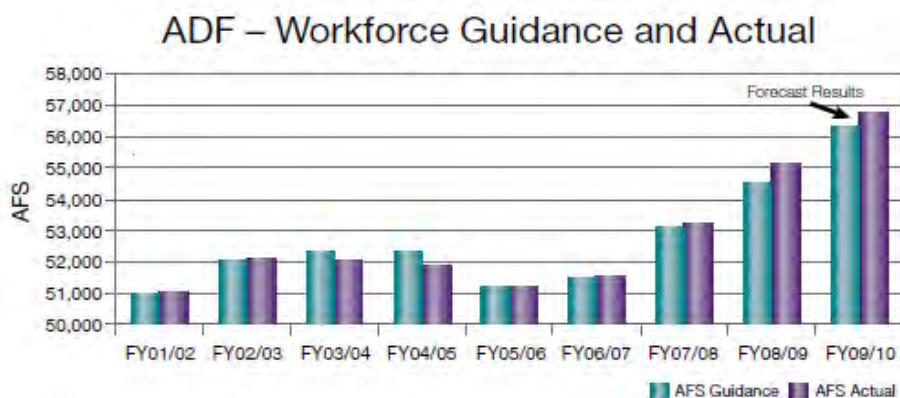
B. Force Manning Levels

1. Post-Cold War Manning and Effects on Recruiting

During the 1990s, the size of the ADF decreased from 70,000 full time personnel to only 51,500 in 2000. Due to increased conflicts world-wide, the 2000 Defence White Paper outlined a plan to expand the ADF to 54,000 by 2010. The ADF implemented measures to attract and retain qualified personnel, including pay raises (Australian Defence Magazine 2008).

The ADF uses the term “workforce guidance” to refer to the government-approved size or allocation of the military and civilian workforce. The guidance is the target manning level for each fiscal year. These targets help drive recruiting goals. In the previous decade, the ADF was unable to meet its annual manning target. Figure II-1 illustrates the force goals as compared to actual force size during the past decade.

Figure II-1. ADF Workforce Guidance and Actual



(Australian Department of Defence 2010h)

In an effort to meet recruiting targets, the *DFR Business Improvement Plan 06/07* proposed activities to increase the number of “quality enquiries for an ADF job to over 125,000 this year, while improving the conversion rate of these enquiries to ADF enlistments” (Hawke and Gorny 2006). Subsequently, the Defence Strategic Workforce Plan (DSWP) 2007-2017 contained plans to combat recruiting problems. The Navy, in particular, faced serious workforce challenges; ADF had over 30 “critical categories” that have unfilled positions. Of these over 30 categories, most were in the Navy and most of these in the Navy’s submarine community. Table

II-1 provides a snapshot of how each of the services has fallen short of its recruiting targets in 2008–2009.

Table II-1. ADF Recruitment: ADF Permanent Force, 2008–09

	Navy	Army	Air Force	ADF
Total enquires	13,391	38,315	21,250	72,956
Formal Applications	3,651	8,229	3,868	15,748
Initial enlistments	1,294	3,130	1,027	5,451
Target enlistments	1,802	4,143	1,194	7,139
Enlistments achieved (%)	72	76	86	76

(Australian Department of Defence 2010h)

2. Recent Force Size and the Hollow Force

ADF manning is in a stronger position than it was a few years ago. The total ADF force reached 77,115 in 2010 and is allocated as shown below in Table II-2.

Table II-2. ADF Workforce Allocation: 2009–2010

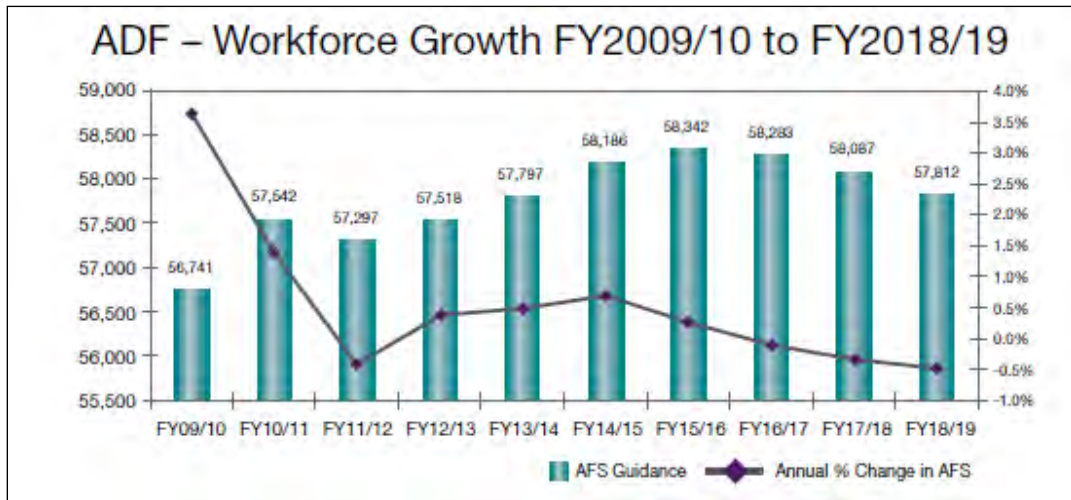
	ADF Permanent Forces	Reserve Forces
Navy	13,902	2,250
Army	28,246	15,840
Air Force	14,177	2,700
Total	56,325	20,790

Note: estimated allocation; does not include ADF Civilian Employees

(Australian Department of Defence 2010h)

AS Figure II-2 shows, growth is planned for the ADF over the rest of this decade.

Figure II-2. ADF Workforce Growth FY2009/10 to FY2018/19



(Australian Department of Defence 2010g)

The manning plan for 2010–2020 is more optimistic than the previous plan (Australian Department of Defence 2010a) due to the results of the 2006 Retention and Recruitment (R2) Program. The goal was to grow the ADF to 58,310 by 2016/17, with about two-thirds of this growth to be achieved by 2009/10 (Australian Department of Defence 2010g).

The ADF refers to its current condition as “workforce hollowness” representing a gap between the number of approved positions and actual manning (Australian Department of Defence 2010a, 46). Thus, while overall manning is adequate, a significant number of vacancies in certain positions have created a hollow force. DSWP 2010–2020 states that the greatest challenge currently is not achieving required overall growth but rather acquiring personnel with skills to fill shortages in “critical” categories, such as submarine-skilled recruits, medical professionals, technicians and intelligence specialists. The Navy, with six critical officer categories and 14 critical enlisted categories, has more critical categories for both officers and enlisted than the other services combined. The Navy’s inability to fill about 1,250 vacant positions could limit some naval capabilities (Australian Department of Defence 2010g).

Current (2011) recruitment has been favorable. DFR reduced its recruiting targets in 2010–2011 and beyond, as a result of lower attrition and higher retention. However, there are still problems in filling skilled occupations—particularly skills for which the military must compete with the transportation, mining, engineering, construction and health sectors (Defence Force Recruiting 2010b).

The Navy met many of its recruiting targets in early FY2010/11, thanks to a combination of the impact of the Global Financial Crisis (GFC) and of the Navy-specific recruiting marketing initiatives introduced during FY2009/10. The recruiting success (and lower

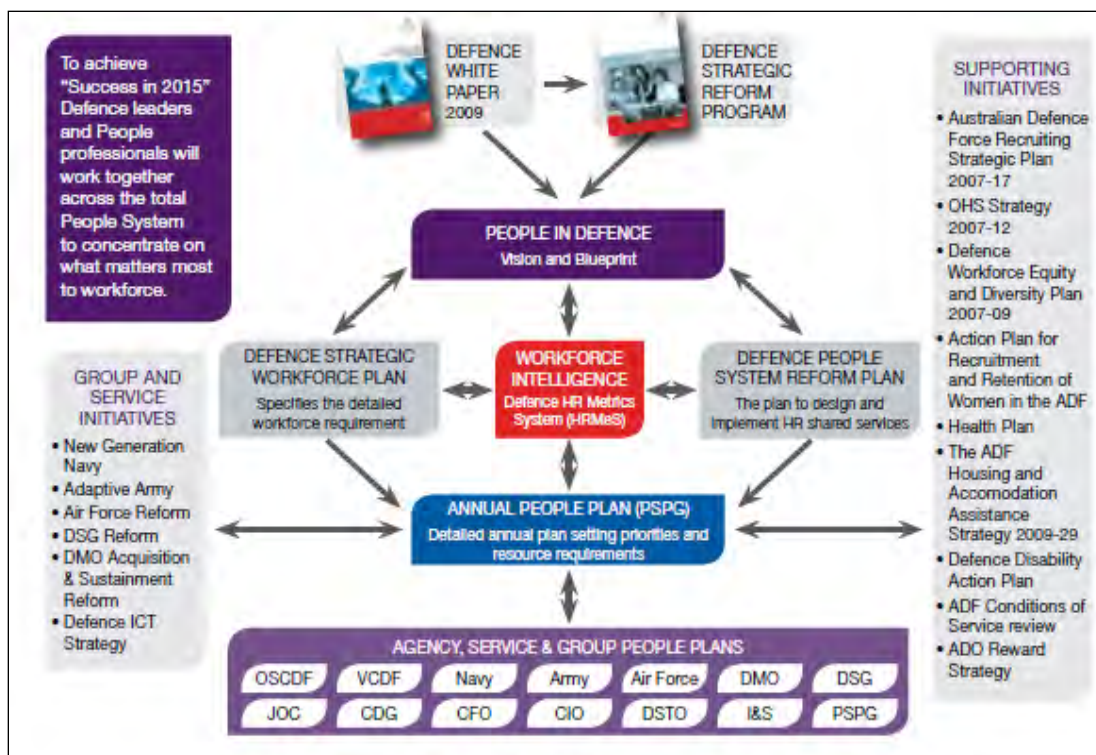
separation rates) experienced during FY2010/11 led to the reduction of recruiting targets for FY2011/12.

III. RECRUITING MARKETING AND ADVERTISING STRATEGY

A. ADF Recruiting Strategy

People Strategies & Policy Group (PSPG) in ADF is responsible for recruiting the workforce necessary to execute the Defence strategy (Australian Department of Defence 2009c). Figure II-3 shows the entire strategic, integrated hierarchy of guidance within the PSPG. While this report focuses on the hierarchy more directly related to recruiting, it is useful to see how these People Strategies and initiatives all fit together in a top-level view.

Figure II-3. The DSWP in the Hierarchy of People Strategies and Plans



(Australian Department of Defence 2010g)

Within the overall hierarchy, ADF recruiting strategy involves a four-step flow of documents.

- 1) Defence White Paper 2009 (plus the Defence Strategic Reform Program (SRP))
- 2) Defence Strategic Workforce Plan 2010–2020
- 3) Recruiting Strategic Plan 2007–2017 (describes how ADF will meet the demand)
- 4) In-Year Recruiting Ops Plan (1-year) and In-year Marketing Plan (Australian Defence Force 2011)

There also are numerous supporting initiatives, such as the *Defence Workforce Equity and Diversity Plan 2007–09* and the *Action Plan for Recruitment and Retention of Women in the ADF*. This section will discuss pertinent recruiting-related aspects of the White Paper 2009 and the Defence Strategic Workforce Plan 2010–20, and the ADF Recruiting Strategic Plan 2007–17.

The defence white paper, *Defending Australia in the Asia Pacific Century: Force 2030* (2009) scans the horizon to the year 2030. The white paper addresses several recruiting-related goals, including making the ADF more competitive in the marketplace and positioning the ADF as an employer offering rewarding careers. The white paper also calls for clarifying the ADF brand. Other goals are to attract people into specific occupational areas and to increase diversity to better reflect the Australian population (Australian Department of Defence 2009d).

The *Defence Personnel Environment Scan 2025*, administered by the Directorate of Strategic Personnel Planning and Research (DSPPR), reports internal and external challenges facing the military in future decades. It looks at how demographic, workplace, and socio-economic trends might impact recruiting. The ADF took these various issues into consideration when developing its subsequent recruitment strategy.

In conjunction with the White Paper 2009, the Strategic Reform Program (SRP) attempts to reshape workforce management to achieve the desired 2030 ADF force. The SRP addresses four areas: civilianization of military support positions, conversion of contractors to APS, improvement of personnel systems and processes, and use of a more effective business model (Australian Department of Defence 2010g).

The second key strategic guidance underlying the recruiting strategy is the *Defence Strategic Workforce Plan 2010-2020* (DSWP), which outlines strategies and actions to address key workforce challenges and provides guidance to make the necessary organizational changes. The 20-year plan describes how to attain the workforce required for the capabilities of Force 2030. This plan will be revised every five years to align it with the Defence strategic planning cycle (Australian Department of Defence 2010g).

The current DSWP has a more optimistic picture of ADF workforce levels than did the previous plan. The DSWP2007-17 reflected an environment of declining force size, problems with recruitment and retention, and a threat of not attaining the previous White Paper's goal of 54,000 full-time military personnel by 2010. This plan was basically replaced by the Retention and Recruitment (R2) Program. The current DSWP reflects an environment in which the military is meeting overall targets, but experiencing shortages in certain critical areas. The new DSWP includes establishment of a Defence Workforce Planning Cycle to help the workforce better adjust to demand and supply signals.

In 2006, the government inaugurated initiatives to boost recruiting and retention over a 10-year period, referred to as the “R2” strategy. The goal of the R2 program was to make major reforms to establish the ADF as the “employer of choice,” to streamline recruiting processes, and to attract more people to the ADF (Noetic Solutions 2010). One of the reforms enacted was the “Marketing and Service Branding” initiative. In 2007, the DFR model was changed, introducing service-specific brands. The objectives of this move were to increase awareness of both the ADF and the three services to a wider pool of people. The goal of the move to single-service branding was to address the public’s misconceptions of service life and to increase knowledge of the diversity of ADF careers. By 2010, the R2 program had met its targets (Noetic Solutions 2010).

Several other studies underlie the formulation of strategy to address top level goals (and, ultimately, to drive recruitment strategy.) The *Defence Personnel Environment Scan 2025* assesses the internal and external environments affecting Defence personnel well into the future (Hearps et al. 2006; Smyth 2006). The document serves as a first step to address the White Paper themes in order that the Defence People Plan, the Defence Workforce Plan and Service Personnel Plans take into account key demographic, workplace, and socio-economic trends (Hearps et al. 2006).

Also, the *Future Workforce Concept* informed the development of the DSWP by examining ways to develop and maintain a workforce that meets the current, changing operational demands and changing military technology. The DSWP also draws from service-specific initiatives, such as the Navy’s Sea Change Program (Smyth 2006). The Sea Change Program, introduced in 2005, is a work/life balance initiative and addresses “flexible-crewing” and other personnel management programs.

The primary target group for recruitment consists of Australians aged 16.5 to 29 years old. In addition the DFR promotes enlistment into the “Gap Year” program (ADF 2007). In addition, DFR recruits eligible ex-serving members, mature entrants, and overseas lateral transfers (Australian Department of Defence 2007). The secondary target demographic consists of those who have a “positive disposition to joining the ADF” (Banko and Holden 2007).

The Recruiting Strategic Plan is driven by the DSWP and describes how ADF will meet the demand for people specified by the top-level strategy. Defence Force Recruiting establishes its recruiting strategy for a 10-year horizon (Australian Defence Force 2011). Fine-tuning of recruiting strategy involves mapping out the “demand side” with respect to required skill sets and methods of entry. Then, the DFR develops a strategy for attracting these people. The DFR is aware that the military is not representative of the Australian nation. Hence, further fine-tuning of the strategy involves efforts to broaden the recruiting pool (Australian Department of Defence 2008). It is worth noting that there is on-going discussion regarding the tradeoff

between meeting recruiting goals and meeting diversity goals (Australian Defence Force 2011). This tradeoff exists in all of the AVF nations covered in this study.

The Recruiting Strategic Plan 2007-17 delineates specific plans for five stakeholder groups in the wider recruiting system.

- “Strategic partners” include government agencies, employers, schools, the Defence Force Academy, DFR advocates, and the services. DFR plans to build alliances to help promote the ADF brand and implement a strategy that addresses the recruiting priorities of the single services.
- “Influencers” include parents, teachers, peers, career advisors, and the media. The DRF plan calls for engaging with career advisors, developing a plan for engaging with parents, teachers, principals and others in the educational network, and exploring how to develop an ADF reality television show, to raise awareness of real-life in the ADF.
- The “target market” includes youth, technically skilled individuals, Indigenous persons, multicultural persons, women, ex-serving members, mature entrants, and overseas lateral transfers. DFR’s action plan for this critical group is to attract members of these markets through targeted marketing strategies.
- ADF recruiting personnel represent a stakeholder group. The action plan calls for improving selection of military members to non-administrative roles, making ‘best practice’ DFR training widely available, recognizing DFR staff achievement; and internally promoting the DFR as a ‘preferred employer’.
- Finally, the candidates themselves are considered stakeholders. The DFR strategic plan is to increase the efficiency of the recruiting process, provide the pre-recruits with more realistic exposure to the military, use best-practice models of testing and assessment, and fine-tune entry standards.

ADF Recruiting Strategy is designed to be long-term in nature and not to be altered when marketing budgets fluctuate. However, tactical implementation of the strategy may change as the budget changes (Australian Defence Force 2011).

B. ADF Communications Strategy Framework

Advertising is viewed as the first step in the recruiting process. Its goal is to make the target market aware of ADF job opportunities, thus generating inquiries and applications. Advertising is an important component of ADF efforts to meet its current overall targets, as well as to meet shortfalls in specific occupations (Defence Force Recruiting 2010b).

The propensity to join is viewed as a commitment ladder. DFR seeks to advance people up the ladder—from “positively disposed” to “serious considerers” to “converted.” Of the entire target demographic group, about 7% are considered to have a ‘natural propensity’ to join the ADF, and about 64% are considered ‘outright rejecters.’ The remaining 29% of the target

audience are 'either positively disposed or unsure' of joining. DFR advertising focuses on influencing persons in this 29% group (Defence Force Recruiting 2010b). For example, one DFR marketing effort is the "Youth Connection Program." In general, there is a high enlistment rate from participants of this program, and many of them become good recruits. However, most marketing efforts are not directed towards youth like those in the Youth Connection Program, as they are already favorably inclined towards the military (Australian Defence Force 2011).

It is helpful to view the DFR advertising and communication system as a four-step communications model (Banko and Holden 2007, 17):

Level One—Corporate Communications. At this level, ADF is promoted as a "general brand." The branding effort is managed by Defence Public Affairs, rather than Defense Force Recruiting. An example of an initiative at this level is the "The Youth Connection Program," which attempts to increase ADF awareness among youth. This initiative involves a multimedia teaching program geared toward 15-18 year olds in which "presenters share experiences in which they overcame adversity to achieve their career goals" (Banko and Holden 2007).

Level Two—Career Communications. At this level, the individual services are promoted. Careers in each service are promoted in national and regional TV and print media campaigns. Efforts are also made to increase presence and visibility in rural areas, as well as at high profile community activities, such as sports events and on-line internet activities. ADF advertising reflects three distinct service brands, which is important for "dispelling misperceptions about the Service brands that cause members of the target market *not* to consider the ADF among their career options" (Defence Force Recruiting 2010b).

An example of Navy-specific branding is seen in a recent advertisement which shows footage of busy Navy sailors on ships (a boarding party, activity on the ship, etc.) and includes footage of sailors motor biking around an interesting foreign city. After the footage, the voice-over states: "That was 7 days in the Navy. Imagine what it would be like in a career" (Australian Defence Force 2011).

Level Three—Job-specific Communications Promoting Occupations/Trades. The job-specific communications level involves national and regional TV and print campaigns that focus on 'hard-to-recruit' occupations. Also, Careers Promotion Teams conduct regional community events (Banko and Holden 2007). The ADF recruits for over 330 specific jobs, but not all of these jobs receive advertising support (Defence Force Recruiting 2010b).

Level Four—"Below the Line Marketing." This grass-roots level attempts to encourage potential prospects to apply for enlistment. Candidate Relationship Management personnel, including recruiters and Career Promotion Teams, provide one-on-one communications to prospects (Banko and Holden 2007).

ADF recruiting strategy at the national level seeks to drive the ADF and service-specific brands to the target market. National marketing efforts include large-scale campaigns that focus on a specific service or specialty. At the regional level, the focus is more on local-area target marketing, outreach efforts and promotional opportunities, and newspaper advertising (Banko and Holden 2007).

As mentioned above, the characteristics of Generation Y present challenges to ADF recruiting. Research indicates that this generation wants to know, “What is in it for me?” The DFR communications strategy includes efforts to highlight specific benefits of a career in each service, including information on job responsibilities, training, and expectations for future military careers (Defence Force Recruiting 2010b).

To address Gen Y’s desire for friendship, ADF advertising campaigns convey the message that teamwork and camaraderie are inherent in military life. In response to Gen Y’s low awareness of the military, the communications strategy seeks to correct misconceptions about each branch. This is particularly important for the Navy, as the DFR finds that misconceptions about the Navy have been the single greatest factor in making the Navy historically a much harder sell than the Army or Air Force (Defence Force Recruiting 2010b).

C. The Navy Strategy: Navy Marketing Plan FY2011–2012

As mentioned above, the Navy Marketing arm of DFR is responsible for marketing the Navy. Hence, under the guidance of the fairly long-range ADF Recruiting Strategic Plan, Navy Marketing has developed a one-year Navy-specific marketing plan, based on strategic objectives developed for the Navy.

After a successful recruiting year during FY2010/11, Navy Marketing faces a combination of lower recruiting targets, fewer candidates in the recruiting pipeline, and a smaller media budget for FY2011/12. Hence, Navy Marketing strives to implement a strategy that will carefully balance the need for maintaining consistent enquiry levels, fostering a healthy flow of candidates through the pipeline and creating attractive job opportunities in a very competitive labor market. This section of the report discusses the elements of the Navy marketing strategy.

1. Market Segmentation

The primary recruit market for DFR is eligible 16-24 year olds, segmented as ‘Generation Y’ (born between 1981 and 1991) or ‘Generation Z’, born between 1991 and 2001). DFR is cognizant of the characteristics of this ‘millennial’ generation – specifically their need to be considered as individuals, while still part of a team.

In its marketing plan, Navy Marketing further defines its own primary market as:

- 14 to 16-year olds in school
- 16 to 24-year olds who are working but looking for a career change
- 18 year olds who have completed 12 years of education and are surveying career opportunities in a “buyers’ market”
- 19-24-year olds who are either in college or starting a career, as well as those in that age bracket who are in unskilled jobs (Defence Force Recruiting 2011).

DFR’s secondary market is eligible 25 to 35-year olds who are considering a career change, possess qualifications or skills deemed relevant to the defence forces, or have completed university but are pursuing a career outside of their chosen field. DFR also recognized a tertiary market of influencers over the age of 35, such as parents and academic advisors.

Navy Marketing further categorizes its target market based on profiles of typical enquirers into the Navy’s six broad occupational areas. Historical enquiry data reveals typical locations, genders, and other characteristics of enquirers for specific Navy jobs. Navy Marketing uses this information to build attraction activities for different segments. An example summarizing the market profile for one occupational area is provided below:

General Entry—Technical Trades (GE Tech): There are over 400 specific jobs in this broad ADF occupational area, including Navy Technical Trade jobs such as various kinds of Marine Technicians, Electronics Technicians, and Aviation Technicians. These jobs are typically filled by persons seeking a trade qualification and those currently working in the industry, as well as those seeking a career change.

GE Tech Enquirer Profile: Most enquiries are from males (94%) and from 16-25 year olds (83%). Enquirers’ locations are roughly split between metropolitan areas (53%) and regional areas (47%), with New South Wales (16%) and Sydney (20%) being the strongest locations.

Based on the nature of each job, advertising and media plans are created to attract those reflecting the characteristics of the historical enquirer profiles.

Beyond (and overlapping with) the primary, secondary and tertiary market segments, Navy Marketing also identifies four “special audiences” to whom marketing is to be targeted (Defence Force Recruiting 2011):

- Internal Navy Personnel: As this audience ‘embodies’ the Navy brand, their ability to promote the Navy through personal communications is a valuable marketing asset.
- Women: Women hold a higher opinion of the Navy and the Air Force than of the Army. The Navy seeks to leverage this finding in appealing to women.

- Multicultural: The Navy seeks to promote diversity in its ranks and integrates images of and messages from members of diverse ethnic and cultural backgrounds in its marketing material.
- Passive Enquirers: This groups represents persons who have enquired about a Navy job through the online application at the defencejob.gov.au website, but have not taken the next step of scheduling an in-person “YOU” session.

2. Objectives and Targets

The DFR Navy Marketing Plan FY2011/12 presents strategies and tactics to recruit quality candidates. The plan addresses the challenges facing Navy recruiting (discussed earlier in this report) including the negative image and misperceptions of the Navy held by the target market, the reduction of candidates in the recruiting pipeline, and the competitive labor market. The specific objectives of the marketing strategy are to (Defence Force Recruiting 2011):

- (1) Improve recruitment to Navy priority jobs.
- (2) Maintain and build propensity among the target audience.
- (3) Improve brand health and remove barriers to consideration.
- (4) Maintain the success of the existing Navy brand and continue to synchronize across all Navy marketing platforms.
- (5) Stimulate conversion from enquiry to application.

The Navy’s current recruiting priority jobs include: Maritime Warfare Officer, Pilot, Maritime Aviation Warfare Officer (including Submariner), Marine Technician (including Submariner), Electronic Technician (including Submariner), Air Technician Aircraft, Air Technician Avionics, Acoustic Warfare Analyst, and Cryptologist Systems. In addition, jobs that are hard-to-fill or otherwise focused on in the Recruiting Operations Plan include: Steward - Submarine, Reserves, Musician, Cook, Hydrographic Survey, and Electronic Warfare.

The Navy has a goal of 1,154 enlistments for FY2011/12. Navy Marketing contends that a minimum of 7,570 enquiries are required to achieve this enlistment goal, a conversion rate of 6-7 to 1. The specific level of enquires targeted for each general Navy job community are as follows:

Table II-3. Targets for FY2011/12 Enquiries

<u>Navy Job Community</u>	<u>Target Number of Enquiries</u>
Full-time General Entry Tech	1,286
Full-time General Non Tech	1,956
Full-time Officer	3,834
Part-time Officer	380
Part-time General Entry	114

The marketing objectives and the known challenges facing recruiting in turn drive the objectives for the communications strategy, which are to (Defence Force Recruiting 2011):

- (1) Educate the target audience about job options in the Navy.
- (2) Dispel negative misconceptions about the Navy amongst the target audience.
- (3) Communicate what the Navy actually does to the target audience.
- (4) Engender an emotional connection with the Navy amongst the target markets.

To achieve these marketing and communications objectives, Navy Marketing has adopted a three-pronged approach, employing a combination of Navy brand messages, job specific communication, and efforts to progress enquirers to the application stage.

3. Messages and Brand Positioning

Research (from contracted agencies) uncovered what perceptions the target market holds regarding the Navy and what characteristics of the Millennials are pertinent to Navy recruiting. Navy Marketing has taken the four communication objectives and developed seven key messages to be communicated to the target market through creative material.

Each key message addresses one or more communications objectives. The seven key messages are (Defence Force Recruiting 2011):

- The Navy provides an important contribution to the Defence of Australia.
- A Navy career is interesting and exciting.
- The Navy provides a worthwhile and meaningful career.
- The Navy work and life are grounded in teamwork.
- The Navy provides quality training and qualifications.
- The Navy provides good pay and benefits.
- A career in the Navy would provide a good lifestyle.

For example, research found that the target market perceives the Navy to be lonely and isolated and that Millennials desire connection with others at work and through friendships. The message to be sent to the market is “the Navy work and life are grounded in teamwork,” which links to communications objectives #2 (“Dispel negative misconceptions about the Navy amongst the target audience”) and #4 (“Engender an emotional connection with the Navy amongst the target markets”). Each key message is communicated through advertising and communications material to generate attraction to the Navy by the target market. The impact of communicating these seven messages is tracked quarterly.

As mentioned above, service-specific brands were launched in 2007. The first prong of the Navy marketing strategy is to convey the distinct identity of the Navy through both the Navy-wide brand and community-specific brands. The goal of this effort is to position the Navy as a relevant and diverse organization that offers members an opportunity to work together and do worthwhile, meaningful jobs and to clarify what the Navy actually does – including differentiating the Navy’s identity from that of the other services. The Navy’s basic position statement, “People work in teams to achieve amazing things” is translated into the current tagline: *Navy. The Team Works*, often followed by: *Be part of something bigger*.

The Navy brand seeks to marry its inherent environment of teamwork to satisfy GEN Y desires for friendship and to do something meaningful. Advertising portrays Navy members working together on teams to achieve rewarding goals. This communications effort is important, as one of the commonly held perceptions of Navy life is that it is isolated and boring.

DFR considers its Navy brand platform to be successful in dispelling negative Navy images and in generating enquiries for Navy jobs (Defence Force Recruiting 2011). The branding and advertising efforts have helped the Navy fill some of its hard-to-fill jobs. However, DFR is concerned that the reduction of the advertising budget—and resulting reduction in advertising support for the Navy—will undercut the brand campaign and cause a return of shortages.

Since research showed the public lacks an understanding of and connection with the Navy, the brand communication efforts also describe the Navy’s lifestyle and the opportunities the Navy offers. The goal is, through a variety of communication approaches, to demystify the Navy and to help people visualize themselves in the Navy. For example, the Defence Jobs website offers a link to a Navy site that gives a sample job announcement for Cryptologist including a video interview of Navy cryptologists about their jobs.

The “All Navy” brand positioning is further tailored to provide unique brand identities for seven main career categories: Technical Trades, Submariner, Combat Console, Hospitality, Officer, Aviation, and Reserve careers (Defence Force Recruiting 2011). The idea behind this “category positioning” is that each career has unique features and potential appeal as well as its own misconceptions and recruiting challenges. By creating individual brand identities within the Navy brand, Navy Marketing seeks to customize efforts to convey the overriding key messages and the four communication messages. The Technical Trades category faces intense competition from the civilian labor market. The Navy’s positioning efforts seek to highlight the pay, benefits, training and potential to earn civilian qualifications. In contrast, pay is not found to be a key driver in attracting Submariners; rather, this category is considered best communicated with an emotional approach, appealing to the rich history and individualized, secretive nature of this career. The Combat Console careers suffer from a particular lack of

awareness among the target market, so this group's branding seeks to clarify the jobs while also appealing to the computer-minded Millennials. The Hospitality branding portrays the job diversity and civilian-transferrable qualifications, as well as the chance to do things completely outside of the job's core responsibilities. Communications efforts geared at attracting officers present the target market with a package that encompasses job satisfaction, personal development, leadership opportunities, and an opportunity to make meaningful contributions to the world. The branding of the Aviation category is important in distinguishing Navy Aviation careers from those of the Air Force.

The category-specific advertising approach (whereby jobs are grouped together in communications) appears to be a fairly new approach for Navy Marketing and is an attempt to advertise effectively with smaller media budgets. This effort is at the national level and is part of the overall awareness and attraction campaigns (Defence Force Recruiting 2011).

4. Job Specific Communication

The second prong of the Navy's marketing strategy focuses on attracting candidates into hard-to-fill jobs (Defence Force Recruiting 2011). While the Navy positioning is primarily communicated at the national level, job-specific communication is largely at the regional level. The Regional Advertising Coordinators are provided with an array of advertisements for hard-to-fill jobs, including press, radio, online display banners, electronic direct mail, job description sheets, and testimonial interview-style ads. Market research identifies historical applicant profiles – including media consumption habits, gender, age and location - for different Navy jobs. Research of the target market for each priority job, as well as for each career category, helps identify the media channels for the different ads.

Job-specific advertising and recruiting efforts can be adjusted frequently as priority jobs change. The primary media channels for the job-specific communications are online advertising banners, radio commercials, electronic and direct email.

5. Consumer Relationship Management

Candidates enter the recruitment process by calling the information phone number and leaving personal information with a customer service operator, or by entering the Defencejob website and making an online inquiry or application. One audience targeted by Navy Marketing is the "passive enquirers" market, comprised of enquirers who have not yet applied to the Navy. Active inquirers are those who have submitted an application and attended a 'YOU' (Your Opportunities Unlimited) session at a recruiting center. Navy Marketing is particularly interested in converting passive enquirers to applicants who apply for priority jobs. These recruits represent "low hanging fruit" as they have already indicated an interest in

the Navy. However, as all the enquirers in the recruitment database may not have the same likelihood to apply, let alone apply to the hard-to-fill jobs, DFR seeks to develop a strategy to efficiently identify the preferred enquirers.

DFR plans to launch a pilot consumer relationship management (CRM) program to communicate with high-potential passive enquirers. The first step is to identify passive enquirers who are most likely to respond to recruiting efforts. This step will entail analysis of the conversion rate of the passive-to-active enquirers and of the characteristics of the passive enquirer, such as their characteristics, location, the reason they enquired, and the likelihood that they will actually apply. The second step involves selecting the most appropriate media channels. The pilot program will employ a recruiting message at designated points in time in the pipeline to encourage applicants for the hard-to-fill jobs. Communication media is expected to include a high-profile Navy Technical Trades Webinar, Facebook chats, electronic Direct Mail and Direct Mail “post packs”, personalized for the enquirer (Defence Force Recruiting 2011).

D. Media and Marketing Mix

1. Media Strategy

As mentioned above, DFR moved away from joint advertising and now offers each service the ability to develop its own service brand. DFR finds single-service branding is a more effective way to attract recruits (Defence Force Recruiting 2011). DFR advertising and media strategy now attempts to maximize gains from both single-service branding and complementary joint activities.

DFR recently implemented two significant changes to its advertising strategy, which seem to be improving recruiting success and reducing cost. The media strategy previously followed a ‘burst’ sequence, in which high weights of advertising were concentrated over short periods. The media strategy now follows a ‘continuity’ approach, in which lower weights of advertising are sustained over longer periods. One benefit of this approach is that it allows for television presence for 40 weeks a year, whereas under the ‘burst’ approach the television presence was for only about 18 weeks per year (Defence Force Recruiting 2010c). In addition, digital media has become an increasingly important part of the media strategy.

This continuity approach has joint service implications, as all services will together run ads with lower weights for longer periods thus creating a spillover effect. Each service’s ads – in essence different brands of the same general type of product – will have a spillover effect on the other services, in the form of increased enquiries, even if one of the other services is not actively advertising.

The second recent change to DFR media strategy is that, when possible, DFR seeks to leverage “free” news media, typically via local media. An example of this might be to announce the presentation of an ADF award to a local individual. Social networking and gaming portals are also considered low-cost media channels (Defence Force Recruiting, 2010c).

The media strategy has three tiers. “Foundational media” activities attempt to foster joint, service-wide continuity across the services. This approach uses the most efficient media channels, such as TV, online TV, radio cinema and online media.

In marketing communications, “activation” refers to communications activities that foster interaction or involvement between the sponsor and the consumer. In contrast, passive communications, such as signage, do not encourage interaction. Research has found that engaging customers in brand activational websites better promotes favorable attitudes towards the sponsor than do passive, non-activational websites. (Weeks, Cornwell and Drennan 2008)

The second tier of the media strategy is to employ Navy-specific media activation. This effort builds upon the foundational media effort by having a Navy-to-audience connection and conveying the Navy brand across the media channel. The FY2011/12 Navy media activation plan promotes Navy Technical Trades. The goal is to generate deeper engagement between the Navy and the target audience (trades people) to increase awareness of Navy Technical Trades (Defence Force Recruiting 2011).

The third tier of the FY2011/12 media strategy involves portraying the ADF as an employer of choice by promoting training and development. This effort complements single service branding by promoting ADF as offering common benefits (Defence Force Recruiting 2011).

2. Marketing and Media Mix

The bulk of the Navy’s media activity for FY2011/12 is geared towards the Technical Trades campaign. Media activation includes mass media ads across a selected TV, radio, or cinema venue. In addition, more targeted media efforts will try to move passive enquirers towards priority jobs, as part of the CRM strategy. The Navy employs a range of media in its campaign, including traditional mass media, digital media and websites, and direct email (Defence Force Recruiting 2011).

As is found in all AVF nations, media consumption habits continue to change. While the target market (16 to 24-year olds) continues to frequent the traditional media channels of TV, magazines, cinema and out of home media, this audience increasingly spends

its time on the internet. DFR and Navy Marketing reflect this trend in their selection of advertising media.

a. Traditional Mass Media Advertising

Television: Television offers a wide reach, exposing a broad demographic spectrum of the population to the Navy brand. Navy Marketing considers television, as compared to other media channels, to more effectively raise awareness of and encourage enquiries of Navy careers.

DFR uses applications which leverage internet technology to this traditional media. One application involves using mobile phone messaging (SMS) technology to link viewers with DFR by prompting viewers to obtain more in-depth information of a Navy career highlighted in the ad. For example, the end of a submarine TV ad displays “SMS ‘Sub’ to 13 19 02 for more information,” which provides the viewer with a direct link to the submariners page and trailer on the ADF website. Another internet-to-TV application involves replay TV, whereby viewers can watch a TV show on the internet after the show’s original broadcast. DFR has been running regular 30-second TV ads on this media channel, but expects to run shorter (15 second) versions instead to reduce cost and to capture the attention of impatient Catch-Up TV viewers.

Radio: While Navy Marketing uses TV as a vehicle for raising brand awareness, it finds radio is effective in promoting specific jobs. Radio also provides Navy Marketing with greater flexibility than TV to change ads to respond to changes in recruiting requirements. Accordingly, Navy Marketing focuses radio commercials on the current priority occupations.

Press: Press advertising can both cover a wide reach (like TV) and target specific market segments. Regional Advertising Coordinators run Navy awareness ‘recruiting now’ press ads for priority occupations in their areas.

Cinema: Navy Marketing runs Navy brand commercials in cinemas, as this channel is suitable for creating emotional experiences to captive audiences.

b. Digital/Web-based Media Advertising

As in other AVF countries, the internet plays an important role in recruiting efforts. The ADF has launched its promotional campaign over the internet and mobile phones to connect with the Gen Y market (Callaghan 2009). DFR employs digital, web-based media and email-based marketing in a wide variety of applications.

Online Banners: Online banners allow DFR to target ads to their desired audience and to closely measure response rates. Banners, which encourage viewer response, provide links to the job specific Navy websites.

Search Engine Marketing (SEM): The Navy uses search engine optimization (SEO) to improve visibility of its website, as well as to promote specific priority jobs on SEO lists, based on key words associated with Navy occupations.

Social Media: The FY2011/12 Navy Marketing strategy addresses the perception that the Millennials increasingly look to social media for information and connection with others. Social media sites such as LinkedIn and VisualCV are considered several of various advertising venues to connect this generation's job-seekers with the Navy.

Webinar: The CRM program strives to build interaction with passive enquirers - particularly those targeted for Technical Trades occupations. One tactic is to conduct webinars (web-based seminars allowing participant interaction) led by a Navy Trades representative, to motivate applications among passive enquirers. Navy Marketing also envisions using webinars to extend the momentum from the Navy media activation. Prospective invitees for the webinar could be drawn from databases housing names of passive enquiries and current candidates, Regional Advertising Coordinator prospects, and members of Navy affiliation groups.

Facebook Chat: Research shows that GEN Y members have a poor understanding of the role of the Navy and of daily life in various Navy careers and that they are not acquainted with many Navy people. In addition, research reveals that Facebook's 11 million active Australian users largely fall into the Navy's target market group. DFR intends to expand its use of its Navy Facebook platform to provide personal interaction between Facebook users and Navy members. For example, it plans to conduct scheduled Navy Facebook chats hosted by Submariners to promote submariner careers and answer questions from the public.

Submariner Campaign: One interesting tactic launched in 2008 is a digital submarine simulator providing real-time interaction of submariner life. Users follow a variety of realistic scenarios in which they learn about the submarine lifestyle, and are offered the opportunity to earn a virtual submarine qualification, known as 'dolphins' (The Inspiration Room 2009).

Direct Mail: Direct mail ads fall into the Consumer Relationship Management tool bag and also are used by Regional Advertising Coordinators. Direct mail is customized and personalized, using job preference and personal information from the database of enquirers to the Navy's priority jobs website.

Defencejobs Website: The Defencejobs website is foundational to the Navy's marketing strategy. Navy Marketing seeks to help the target market connect with the Navy through web-site based testimonials, games, and images of the Navy conducting humanitarian efforts. The ADF uses both job-specific and target market-specific approaches on its website. There is a recruiting website, which emphasizes and profiles specific jobs. There is also a microsite called Defencejobs Games, designed to appeal to GEN Y members. This website features interactive games, such as the two-player 'Extreme Battleships' game. This game—particularly designed to promote the Navy—is considered to be successful in generating impressions based on a high volume of visits. The Navy has its own Navy Lifestyle website, which offers viewers a chance to gain real-life, 'behind-the-scenes' glimpses into the Navy. The website offers 3D models of ships, including ship tours and videos of ship operations.

Electronic Direct Marketing: Navy Marketing further tries to attract passive enquirers through personalized email. This 'rapid response' product is sent at times corresponding to demand signals for underperforming and priority jobs.

Online Job Advertisements: Navy Marketing's strategy includes visibility on various employment/ job listing websites, such as SEEK, a leading jobs website in Australia. Priority Navy jobs in particular will be highlighted through this channel.

c. Collateral Advertising

The marketing strategy also includes use of a variety of materials to support recruiting. Interactive DVDs present television commercials, recruiting videos, documentaries, testimonials, and ship tours and can be mailed or given away at outreach events by Career Promotion Teams and other recruiters. Recruiters are also equipped with presentation-ready job listings and brochures. Of note, across the spectrum of advertising media just described, DFR provides a way to drive the viewer to the website for follow-up information (Defence Force Recruiting 2011).

E. Marketing and Media Budget

1. DFR Budget

DFR has attempted to meet recruiting goals despite falling advertising budgets. ADF marketing and media budget for FY10–11 was forecasted to be \$36 million, which represents a reduction of \$4 million from FY09–10 (Defence Force Recruiting 2010b). During FY09–10 the total advertising and marketing budget was \$40 million, of which \$27 million was spent on advertising (Defence Force Recruiting 2010b). Table II-4 breaks recent marketing expenditures into phases that involve establishing, building, and maintaining the brand.

Table II-4. DFR Total Marketing Expenditure: 2006–2011

FY06-07	Pre current brand strategy	\$38.3 million
FY07-08	Foundational phase	\$49 million
FY08-09	Building phase	\$51.5 million
FY09-10	Maintenance phase	\$40 million
FY10-11	Maintenance phase	\$36 million (forecast)

Table II-5 shows ADF media expenditures for the six-month period of February to June 2011. While the table reflects only six months, it provides a sense of the relative expenditures across media channels.

Table II-5. ADF Proposed Media Expenditures for Six Month Period (Feb–Jun 2011)

Television	\$4,855,794
Activations *	1,970,000
Digital	1,597,527
Radio	617,940
Out of Home *	291,150
Cinema	250,000
Magazines	142,449
Newspapers	<u>96,368</u>
Total:	\$9,821,227

*Activation refers to brand-consumer interactive platforms; Out of Home media includes billboards and signage.

(Defence Force Recruiting 2010c)

Currently (2010), DFR concludes it is unable to identify other ways to cut media expenditures while still achieving recruiting success. Brand advertising requires reinforcement over time or risk brand erosion. The DFR feels that the ADF brand is already eroding, due to recent advertising budget cuts. Similarly, the ad agency, Universal McCann, feels that the current (FY10–11) level of funding is a bare minimum (Defence Force Recruiting 2010b).

2. Navy Budget

During FY2011/12, the Navy's portion of the overall DFR campaign media budget is expected to be about 30%. Table II-6 shows the Navy's estimated media budget for 2011.

Table II-6. Navy Campaign Media Budget FY2011/12 (estimated) in Australian Dollars

Type	Expense	Explanation
Media Total	\$5,000,245	Universal McCann purchases
Foundation	\$4,000,000	
Activation	\$1,000,245	
Production Total	\$600,000	Tactics and estimated costs
Service	\$520,000	
Sprint	\$80,000	
Digital Production	\$200,000	Tactics and estimated costs
Printing	\$200,000	Collateral Ad materials
Alliances/Sponsorships	\$405,000	
ASRL/GBSM		Naming rights sponsorships
Leverage Materials		Promotion, prizes, merchandise, etc.
TOTAL	\$6,405,245	

(Defence Force Recruiting 2011)

A summary of the Navy's actual advertising expenditures in 2008-09 is shown in Table II-7.

Table II-7. Navy-Specific Advertising Expenditures 2008-09 (\$ millions)

Advertising		
HMA Blaze Pty Ltd	\$68,235	Recruitment advertising
Universal McCann Australia	24,920	Recruitment advertising
Navy Newspaper	32,356	General advertising
Media Advertising		
Universal McCann Australia	92,560	Advertising - Fleet Air Arm Museum & RAN Heritage Collection
HMA Blaze Pty Ltd	20,840	Advertisement placements including dissemination fees
Spatchurst Design Associates Pty Ltd	20,826	Advertising - Fleet Air Arm Museum & RAN Heritage Collection
Total Navy	259,737	

(Australian Department of Defence 2009d)

IV. IMPLEMENTATION OF STRATEGY: MARKETING AND ATTRACTION PROGRAMS

A. Attraction Initiatives

Defence Force Recruiting (DRF) and Navy Marketing have developed several initiatives based on the ADF Recruiting Strategic Plan and in the Navy Marketing Plan. These initiatives were designed to generate awareness of and attraction to ADF and Navy careers.

Initiatives to attract women:

Efforts to attract women address the reason many women do not choose the ADF as a career. “Worries about raising a family are only one reason women don’t enlist. They were more likely to second-guess what life would be like in the military and the aim is to counter a lack of knowledge about life in the ADF by connecting civilians with women in uniform” (Farr 2009). To generate awareness of the ADF among women the DFR has launched several specific initiatives. The “Women in the ADF” website provides a link to a “Frequently Asked Questions” page for women interested in ADF service. The women’s micro-site presents stories that profile ADF women and offers a view of their lifestyle in the military. The DFR has also tried to increase the number of women recruiters, based on research that women are the best at recruiting other women (Australian Department of Defence 2008).

In an effort to connect with women, in 2006 DFR bought sponsorship of the Women’s National Basketball League (WNBL), including Australia’s national team, the Opals. The sponsorship was timed to promote the launching of the defencejobs website. This effort attempted to project the ADF brand before fitness-minded Australian women in the target age group and promote the services as an attractive employer (Australian Minister of Defence 2006).

The Royal Australian Navy has made strides to increase female representation among its members. The Navy has its own specific link under the “Women in the ADF” website. The Navy-specific website provides a testimonial-style video of a female medical officer, as well as several print and picture description/testimonials of a female officer and female enlisted Navy member.

Initiatives to attract technical skills:

ADF recruiting strategy specifically addresses recruiting to fill shortages in technical skills. One initiative involves collaborating with job seeking networks established through the Department of Education Science and Training (DEST) and the Department of Employment and Workplace Relations (DEWR) to promote careers in the ADF trades. The government employment organizations have networks to help place youth in jobs, apprenticeship programs, and technical courses. The ADF pays these organizations to help redirect technically minded youth into the ADF (Army News 2007).

Part of the marketing plan is for recruiters to encourage youth ages 16 to 17 to obtain technical training in civilian institutions, and instill in these youth the goal of joining the ADF technical trades when they reach enlistment age. The recruiters are to impress upon these youth that after completion of two years of technical training they can complete their training in ADF schools or on the job. The goal is to position the ADF as the “the preferred employer for those considering a trade” (Army News 2007).

Initiatives to attract Indigenous, Aboriginal and other culturally diverse persons:

DFR is reaching out to Indigenous Australians, who represent only about 1.4% of the ADF. There is a micro-site on the ADF website for Indigenous persons. The website includes a history of Indigenous contributions to Australian defence, job and study opportunities for Indigenous peoples, and links to Indigenous-specific support programs in the ADF. Marketing efforts aim to improve the perception of the ADF and to help ease concerns regarding transition into the military. A range of programs help build positive perceptions of life of an Indigenous ADF service member including the Defence Aboriginal and Torres Strait Islander Network (which provides mentorship), observance of a variety of cultural events in the ADF, the presence of Indigenous recruiters, and a high-level panel of ADF leaders tasked with monitoring Indigenous progress in the ADF. One interesting initiative is the ADF Ambassador Program, in which the ADF partners with prominent Indigenous Australians (such as famous athletes) who serve as ‘ambassadors’ to Indigenous communities for the ADF. Another initiative is the eight-week Indigenous Pre-Recruitment Course, designed to help prepare Indigenous Australians for the ADF recruiting process.

DFR also makes concerted efforts to attract Aboriginals and other persons with culturally diverse backgrounds, including the many second- or third-generation immigrants. A recent advertising campaign directed towards the Indian and Arabic communities included print ads in cultural newspapers with testimonials from the military members from these communities (Australian Defence Force 2011).

The ADF Youth Connection Program is an initiative designed to raise community awareness of the ADF and its job opportunities. This program recognizes achievement in youth in Years 10, 11 and 12 by presenting them with leadership and teamwork awards, including cash prizes and a certificate of commendation. This program seems to be successful, as nearly two-thirds of all Australian secondary schools have registered for the program. The Youth Connection Program also involves a program of motivational speakers and various multimedia resources designed to spark interest and discussion about the military among this youth audience (Hawke and Gorny 2006).

Navy-specific Initiatives:

Efforts to raise awareness of the Navy include Navy Community Engagement Program and several sponsorships and alliances. DFR (on behalf of the Navy) has sponsored the Australian Surf Rowers League (ASRL), which annually holds a series of high-profile surfboat competitions for men and women. In recent years the Navy obtained the naming rights, which provide a platform to leverage popularity and image of the event with the target market. The ASRL is considered a positive “Aussie icon” and the ASRL image is that of young, healthy Australians working as teams on boats and caring for the environment. The demographic profile of the ASRL closely matches that of the Navy’s target market. The Navy’s objectives include building brand exposure among the target market, affiliating with an organized sport that reflects healthy, fit 18 to 34-year olds, and engaging with the target market at the local level (Defence Force Recruiting 2011).

Navy sponsorship of the ASRL is considered to be a success. The overall target market’s propensity to join the Navy is about 22%, lower than that of the other services, whereas ASRL participants display a 59% propensity to join the Navy, higher than the other services. The Navy further leverages this alliance with a related Facebook page which was open during the competition and which is credited with boosting traffic to the Navy website during those periods. Navy Marketing estimates that media coverage of the ASRL events provided Navy brand coverage to about 6.5 million people, resulting in a cost-effective advertising investment.

Navy Marketing also acquired naming right sponsorship on behalf of the Navy for the George Bass Surf Boat Marathon (GBSM) since FY2007/08. This marathon, held every two years, showcases the men’s and women’s world champions and is held in New South Wales. Through its sponsorship, the Navy seeks to increase brand awareness and promote the message that the Navy is a “worthwhile organization where people work in teams to achieve amazing things” to the top tier of the target market. This alliance also gives Navy an opportunity to engage in a region, New South Wales that has traditionally been a productive recruiting area for the Navy.

DFR investments in the Navy alliances with the ASRL and GBSM build off the ongoing base of Navy advertising. Through an array of event media coverage, merchandise and promotions the Navy brand is communicated directly to the desired audience (Defence Force Recruiting 2011).

The Navy Community Engagement Program (NCEP) offers a chance for community members to meet and personally interact with Navy personnel to learn first-hand about Navy life. This program seeks to communicate that the Navy is a vital element of the national defence. The NCEP brings the Navy to the people via presentations to schools, business and community groups, ship visits, career fairs, naval ship or facility ‘open days’, sporting events, and displays at public events (Royal Australian Navy 2010). Two other Navy-specific initiatives -

The Navy Marketing and Service Branding initiative and the Navy's participation in the GAP Year Program - are discussed elsewhere in this report.

Incentive and Direct Entry Programs:

Incentives and targeted direct entry programs are tools to attract certain market segments and to help fill occupational shortages. The DFR promotes the ADF's educational and financial incentives to women, minorities, Indigenous Australians, skilled candidates, as well as to the general market. While Indigenous Australians may join the ADF through the regular entry channels, the ADF encourages this group to follow a more gradual, transitional entry from civilian life into the military by means of the Regional Force Surveillance Units (RFSU) or by means of starting in the reserves and then transitioning to active duty. In fact, nearly half of some RFSU units are comprised of Indigenous members (Defence Magazine 2009).

One goal of marketing to the Indigenous market is to promote the many ADF-sponsored educational opportunities and trades and apprenticeship training, as well as the ADF GAP Year program. In addition, the DFR promotes the Indigenous Cadetship Program and ADF scholarships to schools with high Indigenous enrollments. To attract technically skilled recruits, the ADF offers educational incentives, including Defence Technical Scholarships.

The Australian "Gap Year Program" addresses the recognition that the traditional continuous 20-year career could be varied somewhat to increase appeal to join. While an ADF-wide program, GAP program accepts applications for candidates for a specific service. This program offers youth, who have finished year 12 (or equivalent) within the previous two years, to experience continuous military training and lifestyle before going on to study or a selected career. It provides recent school-leavers with a salaried, one year work experience program in the Navy or Army, rather than a long-term career commitment. This shorter-term incentive is designed to address the Gen Y's reluctance to enter into the military's traditional notion of lifetime-service (Callahan 2009).

Navy candidates in the GAP Year Program are trained to be Sailors (General Entry), but may later be considered for Officer and General Entry (enlisted) programs if, after completing their Gap Year, they enter the military. The Gap Year Program is considered competitive and does not offer candidates a guarantee of continued employment with the ADF beyond the 12-month Gap Year. The Navy does not require its Gap Year candidates to actually complete the 12-month program; they are allowed to resign from the program at any time. The Gap Year program appears to have been successful in recent years, with many more applicants than spots in the program. While considered a fairly small program, it appears to be a cost-effective program for the Navy as it has a conversion rate of about 25–30%—better than that of the other services' Gap Year programs. However, the RAN does not know how many of the Navy

Gap Year Program participants who enlist would have enlisted anyway, regardless of their participation in the program (Australian Defence Force 2011).

The Navy also offers direct entry programs, which allow enlisted recruits with specific skills to 'fast-track' into a community, bypassing the lengthy A-school-equivalent training and jumping directly into specialty training. For example, the Navy offers such a program to attract skilled recruits into its submarine community. Under the normal training pipeline, it takes approximately three and a half to four years for a new recruit to become qualified in the submarine community. However, under the direct entry program, a qualified recruit could achieve qualification in only 18 months (Australian Defence Force 2011).

The ADF Cadet program is an important source of recruits. As mentioned above, the DFR recognizes that cadets are already interested in the ADF, so this ground is relatively easier to till than other youth market segments. The ADF recruiting framework for cadets includes providing the cadets with ADF career information, such as motivating DVD testimonials of real-life ADF members who were Cadets (Hawke and Gorny 2006).

DFR is interested in widening their candidate pool as much as possible. One initiative, the Alternative Educational Entry Scheme (AEES), is designed to attract candidates who might not possess standard educational credentials. This effort aims to widen the applicant pool to candidates who might not possess certain Year 10 or Year 13 credentials (such as some older candidates or those who were educated outside of Australia). Such candidates' educational qualifications can be evaluated through nationally comparable tests, to determine if they possess the equivalent education level required for enlistment.

While DFR does not design the service-specific incentives, it is considering changing the package ADF offers to the target market (ADF Information 2011). Currently, the initial minimum service obligation is four to six years for enlisted. But GEN Y Studies show that this generation likes flexibility and might not want to lock themselves in for up to a six year commitment. DFR is commissioning research into attributes of the target market to find out what appeals to them and which "packages" they like. DFR has challenged the services to try to remove some elements of the 1950's style employment model (Australian Defence Force 2011).

The ADF is also making efforts to entice separated members with desired skills. An ADF 'alumni program' helps the services stay in contact with separated members. A 're-entry program' is designed to absorb certain separated members with critical skills back onto active duty, and place them at a level commensurate with their civilian experience gained since leaving the military (Australian Defence Force 2011).

B. Recruiting Process Improvements

In addition to addressing external marketing efforts, DFR is trying to make the recruitment process a more efficient and positive experience for candidates. Particular focus is on attempts to shorten the recruitment process and increase the conversion rate (Hawke and Gorny 2006). One of the 2006 R2 initiatives addressed creation of a new recruitment model that would be more candidate-focused and would reap economies of scale through a centralized, streamlined system of processing applicants (Noetic Solutions 2010). One result of this initiative was establishment of a Candidate Relationship Management Center in Melbourne, which houses various administrative processes.

The Navy recruiting process benefited from recent efforts to shorten the recruiting process timeline and to remove candidates deemed unlikely to successfully complete the process. Candidates who are in the often lengthy “recruiting pipeline” have started the process but have not yet signed a Letter of Offer. DFR recognizes that a shorter waiting period is important to the now fewer number of Navy candidates in the recruiting pipeline, as employers in the labor market increasingly compete for job candidates (Defence Force Recruiting 2011).

Another recruiting process-related effort involves ‘data-mining.’ The DFR has developed an ‘enquiry management’ capability within its website; this capability allows interested visitors to build a relationship with recruiters before they formally enter the recruiting process. This feature helps interested persons learn about ADF jobs, so they are better prepared candidates. It also allows persons to provide information about themselves, which helps recruiters to ‘data-mine’ candidates (Defence Force Recruiting 2010b).

DFR has established several recruitment cells that focus on critical skills (e.g., medical, engineering, and technical trades). These cells make direct contact with influencers in the educational arena to promote the ADF as an employer of choice. The ratio of uniformed members to civilian recruiters is higher in these specialist recruiting cells (Defence Magazine 2008). The ‘rapid response’ capability is intended to move candidates who are eligible for critical jobs through the recruiting pipeline in more quickly in hopes of increasing the conversion rate into these occupations (Defence Force Recruiting 2010b).

The FY2011/12 marketing strategy also addresses the need to further synchronize the DFR national marketing efforts with those of the regional marketing and advertising functions. For instance, DFR National Marketing will communicate plans for upcoming national campaigns to the Regional Advertising Coordinators to allow them to leverage the national efforts locally (Defence Force Recruiting 2011).

V. MEASURING EFFECTIVENESS

DFR uses a variety of metrics to assess the impact of marketing on recruiting outcomes. These metrics include: the number of enquiries, the number of applications, the level of traffic to the website, analysis of the recruiting pipeline, the conversion rate, propensity, advertising awareness, the impact of advertising on the decision to consider, the correlation between media spending and enquiry rates, and marketing expenditures per recruit (Defence Force Recruiting 2011; Defence Force Recruiting 2010b). In addition, advertising brand tracking and other studies provide information to help determine effectiveness of advertising.

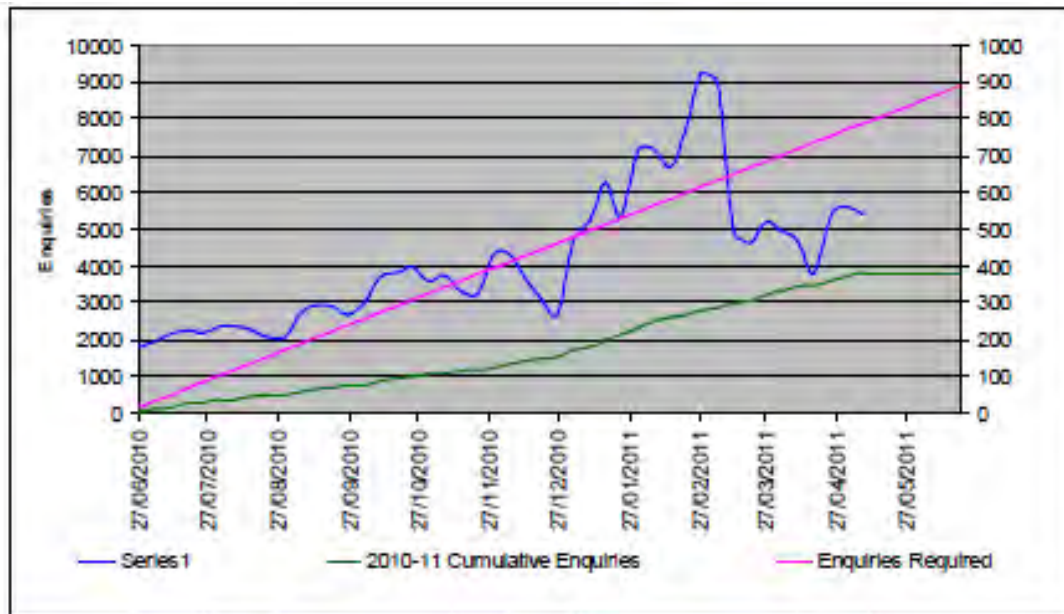
Evaluation of effectiveness is conducted both internally and externally to DFR. ADF conducts a variety of workforce analyses to support its human resources strategies, including a Defence Human Resource Metrics System (launched in 2009) “providing, in electronic dashboard form, a variety of HR measures to monitor and enhance policies and initiatives” (Australian Department of Defence 2009c). Advertising effectiveness analysis is conducted by the Market Research group, which conducts pre- and post- studies and other analyses (Australian Defence Force 2011).

A. Metrics

1. Number of Enquiries

The number of enquires is a key performance indicator as it reflects the success of ad campaigns in attracting potential candidates. At the beginning of each fiscal year, an estimate is made of the number of enquires required to achieve the target, based on the historical conversion rate. In FY2010/11, for example, it was determined that 47,792 enquires were required to achieve the target of 5,158 Tri-service accessions (Defence Force Recruiting 2010b). For Navy the FY2011/12 target is 7,570 enquiries (Defence Force Recruiting 2011). Enquiries are calculated for each specific job, are reported monthly and are tracked against annual enquiry targets, conversion rates, enquiries required and year-to-date enquiries. Figure II-4 illustrates enquiry tracking for one Navy job over 12 months.

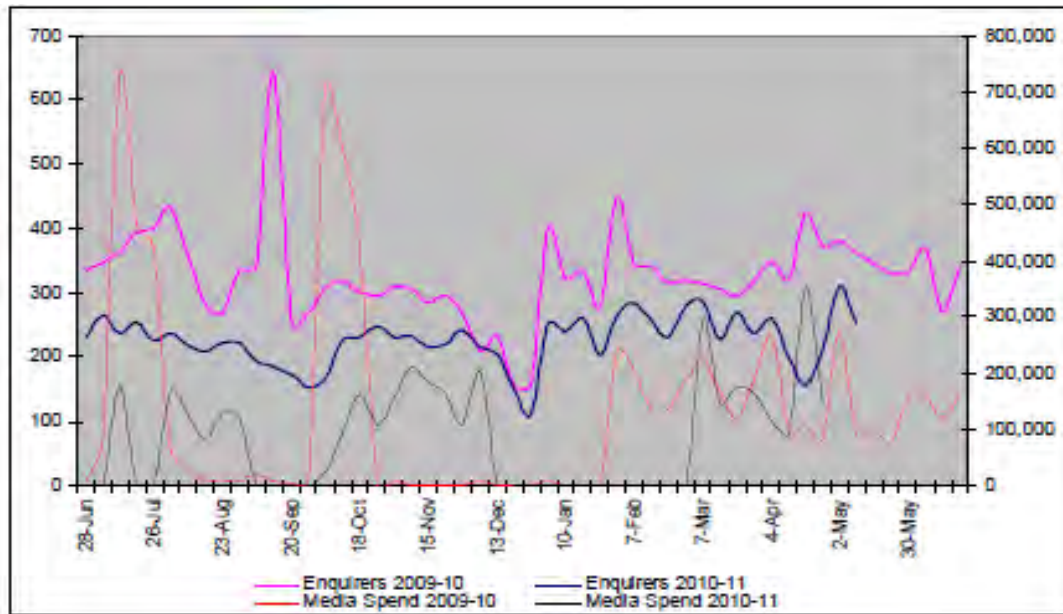
Figure II-4. Navy Enquiries for GE Full Time Marine Technician at 16 May 2011 (Defence Force Recruiting 2011)



Annual Targets	202	Conversion Rate	4	Enquiries Required	889
Enquiries to date 2010-11		383			
Enquiries Required to date		786			

Tracking helps Navy make marketing decisions. In addition, the number of enquiries serves as an on-going report card of investment in advertising, as there is a lagged correlation between media activity and advertising and the number of enquiries. Figure II-5 below illustrates this correlation.

Figure II-5. Navy Enquirers and Media Spend for 2010/11 at 16 May 2011 (Defence Force Recruiting 2011)



Totals To Date:	2009-10	2010-11
Media Spend	\$6,140,099	\$3,698,431
Enquiries	14,877	10,240

As indicated above, during 2009–10, the media spending per enquiry was about \$413 compared to \$361 in 2010–11.

2. Applications and Pipeline Analysis

DFR monitors the applications pipeline—particularly the number of applications and candidates. As mentioned earlier, DFR categorizes inquiries as either ‘passive’ or ‘active’. DFR finds that about 20% of passive inquiries advance to active inquiries (Defence Force Recruiting 2010b). Analysis tracks the number of candidates in the Navy pipeline against job targets, year-to-date enquiries and the shortfall (if any) in enquiries. An enquiry shortfall for a specific job could be addressed by increased marketing activity, such as efforts to move passive enquirers toward the application phase or by redirecting candidates for a non-shortage job toward a job facing an enquiry shortage (Defence Force Recruiting 2011). Table II-8 displays a pipeline analysis for a set of Navy jobs. The “enlist shortfall” column reveals three jobs to which immediate marketing efforts may be directed.

Table II-8. Pipeline Data GE Non Tech at 16 May 2011 (Defence Force Recruiting 2011)

	unfilled tgts next 6mths	Total Pipeline	pipe probable enlists	enlist shortfall	enqs reqd	weekly enqs reqd	average weekly enqs
Navy GE Non-Tech							
Acoustic Warfare Analystist SM	1	34	8	0	0	0	1.1
Boatswains Mate	0	272	66	0	0	0	4.2
Clearance Diver	0	112	27	0	0	0	2.4
Combat Systems Operator	12	144	34	0	0	0	4.5
Combat Systems Operator MW	0	20	5	0	0	0	0.6
Communications Info Systems	28	143	34	0	0	0	3.2
Communications Info Systems SM	2	23	6	0	0	0	1.1
Cook	7	124	29	0	0	0	3.4
Cook - SM	0	53	12	0	0	0	1.3
Cryptologic Linguist	7	51	12	0	0	0	1.0
Cryptologic Systems Submariner	2	33	8	0	0	0	0.8
Cryptologic Systems	3	4	1	2	13	1	0.1
Dental Assistant	0	4	1	0	0	0	0.2
Electronic Warfare Sailor	9	19	4	5	28	2	0.5
Hydrographic Survey Operator	0	20	5	0	0	0	0.4
Medical Assistant	0	56	13	0	0	0	1.2
Musician	8	11	2	4	23	2	0.4
Sailor NCSE	0	9	2	0	0	0	0.3
Steward	16	101	24	0	0	0	5.3
Steward SM	0	16	4	0	0	0	1.0
Stores Naval	0	62	15	0	0	0	1.1
Writer	0	36	9	0	0	0	2.7

DFR also uses the candidate pipeline as an indicator of recruiting success and of potential service-specific recruiting problems. While the in-year (FY10/11) and future (FY11/12) recruiting targets are lower than in previous years, some trends in the pipeline raise concerns over the ability to meet these targets. Table II-9 illustrates the downward trend in requirements from FY04–05 to FY10–11.

Table II-9. Applications by Service

FY	04/05	05/06	06/07	07/08	08/09	09/10	10/11
NAVY	3217	2968	3828	3398	4161	4796	1732
ARMY	12412	11705	12535	11379	13718	15543	6237
RAAF	3413	3915	3968	3707	4594	3987	1153
ADF	19042	18588	20331	18484	22473	24326	9122

(Defence Force Recruiting 2010b)

3. Website Traffic

Another indicator of the success of the Navy advertising efforts is viewer traffic to the Navy website. While an enquirer can enter the pipeline in a variety of ways, a large percentage of candidates first enter the process through the DFR's Navy website. DFR tracks not only 'hits' on the website, but also time spent on the website. Factors like the seasonality and the level of media spend are found to be correlated to website traffic (Defence Force Recruiting 2011).

4. Conversion Rate

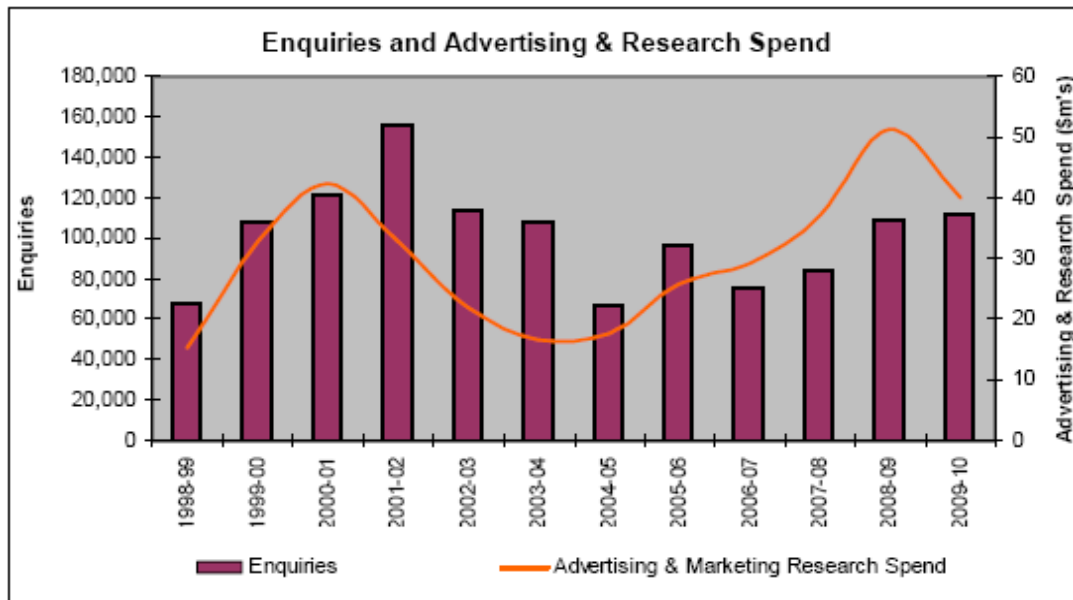
Like other AVF recruiting organizations, DFR uses a conversion rate to help understand the dynamics of the advertising-to-enlistment process. The DFR 'backwards plans' its advertising program, by first identifying the in-year and projected future accession target, which is driven by the application rate, which is driven by the enquiry rate. The DFR finds that advertising, especially TV advertising, is the primary driver of enquiries. This process is captured in the conversion rate, which DFR defines as, "the ratio of: enquiries to attendance at a YOU [Your Opportunities Unlimited] session; to applications; to letters of offer; to enlistment/appointment" (Defence Force Recruiting 2010b).

5. Correlation between Media Spend and Enquiry Rates

Figure II-6 shows the positive correlation over time between advertising spending and enquiries. The chart also shows an approximate one-year lag between advertising spending and subsequent enquiries. The correlation between advertising, enquiries and applications is closely measured by the DFR and is used to assess recruiting achievement.

There is a lag-effect of advertising on applications. DFR uses advertising to pull candidates into the pipeline to fill jobs more than six months after the advertising effort. Understanding this lag effect is important in scheduling advertising, since some ADF occupations only accept accessions once or twice a year. Hence, DFR must schedule advertising at certain times to produce the desired impact later (Defence Force Recruiting 2010b).

Figure II-6. Correlation between Media Expenditure and Enquiries (FY98–99 to FY08–09)



(Defence Force Recruiting 2010b)

6. Cost of Marketing per Recruit/Contract

Another metric used by DFR to assess marketing is the cost of marketing per recruit or per contact. During FY2009/10, 24,326 ADF enlistment applications were submitted and 8,971 persons actually enlisted (Defence Force Recruiting 2010b). DFR reports that \$26,975 million was spent on campaign advertising in FY2009/10, resulting in an advertising cost per recruit of \$3,007.

B. Other Research Efforts and Studies

DFR employs a variety of research to gauge the effectiveness of marketing efforts, including internal research on advertising awareness, propensity, and brand tracking.

1. ADF Market Research (Impact of Advertising on Propensity)

The ADF conducted the “Defence Personnel Environment Scan 2025” in 2006, as well as a “Defence Attitude Survey” in 2008 to help identify the reasons personnel choose to stay or leave the ADF (Vass 2007). The Defence Personnel Environment Scan 2025 raised a number of issues that impact recruiting and DFR took these issues into consideration when developing its subsequent recruitment strategy.

DFR has found that using test media markets has helped it understand the spillover effect of each service’s advertising on the other services. Test media markets have also

helped DFR understand the impact of specific media channels, as well as that of different combinations of channels. Based on this research DFR has transitioned from an advertising approach where each service scheduled advertising independent of the others, to a 'tri-service media scheduling' approach, in which the three services' advertising schedules are coordinated. DFR has found that combined-scheduling reduces overall media spending (Defence Force Recruiting 2010b).

The ADF regularly monitors the general propensity to enlist among its target market. This research provides insight into the influence of advertising on people's interest in an ADF career. A 2010 survey on advertising impact found that advertising influenced 28% of respondents "a lot more" to consider military careers and influenced 55% either "a lot more" or "a little more."

The Directorate of Strategic Personnel Policy Research conducted *Longitudinal ADF Study Evaluation Research* (Project LASER). This project surveyed members of the ADF at four career points: enlistment, initial training, completion of their Initial Minimum Period of Service, and separation from the ADF. The 2008 (Tri-service) cohort claimed that TV advertising was the second most important influence (28.1%) on their enlistment decision. Those in the 2008 cohort who joined the Navy also felt TV advertising was a top influencer (22.1%). Interestingly, while the 2009 cohort again ranked TV as their second most important influence (27.5%), the 2009 cohort of Navy enlistees cited TV as the most important influence (35.4%). The most current results show that 'the opportunity to travel' is the top reason people choose to join the Navy. This is considered a result of the decision to make 'Navy lifestyle' one of the pillars of Navy advertising (Defence Force Recruiting 2010b).

2. Advertising/Brand Tracking Studies

Since the advent of service-specific brands in 2007 DFR has attempted to measure the effectiveness of these branding efforts. Advertising and Brand Tracking Studies are conducted to measure the impact of advertising and to forecast service brand health. Navy Marketing is particularly interested in tracking how well the advertising is succeeding in correcting the misconceptions of the Navy held by the target market. DFR conducts a monthly online survey of 350 respondents comprised of 15 to 24-year olds. The survey results track positive and negative aspects of each service's brands, as well as reasons why respondents might or might not consider joining the armed forces (Defence Force Recruiting 2011).

3. Digital and Mobile Media Advertising Tracking

DFR's advertising agency, Universal McCann, tracks several metrics that reflect effectiveness of its digital advertising. These metrics include the number of impressions, clicks

and passive enquiries, the cost per click and the cost per passive enquiry. Data is tracked for every digital ad, from banners to ads on catch-up TV. Analysis of the metrics helps inform decisions regarding cost, site placement, timing, and comparative analysis of different DFR advertisements (Defence Force Recruiting 2011).

Another external company, Google Analytics, informs DFR about how visitors find and are directed to the defence website. This analysis helps DFR understand which online referring tool (such as search engines, display advertising, pay-per-click networks, or direct emails) are most effective in steering visitors to the website, thus increasing the website traffic rate. The digital advertising tracking analysis also helps DFR make cost decisions about and improvements to the website (Defence Force Recruiting 2011).

DFR also conducts analysis of SMS response to ads on mobile channels. DFR ads present SMS codes so interested viewers can connect directly to a specific defence website promoting priority jobs. Tracking of SMS responses to ads helps DFR measure the impact of the ad, as well as characteristics of responder (Defence Force Recruiting 2011).

4. Other Attempts to Measure Effectiveness

DFR considers it more difficult to measure the effectiveness of what they call the “softer” efforts, such as the “Youth Connection Program.” In this program, youth receive an award for leadership at their school. Another example of a “soft” program is the “Defence Technical Scholarship” program. This scholarship, which can be worth several thousand dollars, is awarded to youth who desire to enter a skilled trade. These youth are given a tour of military people working in trades. This effort has been well received by the schools, as it encourages a segment of youth who normally do not receive much encouragement to pursue careers as tradesmen. DFR stresses that much of the public does not realize that a person can be a tradesperson in the military. The Defence Technical Scholarship program allows DFR to market both generally (military) and specifically (job) simultaneously (Australian Defence Force 2011).

C. Implementation Plan for Monitoring Methods

The effectiveness of many of the Navy’s marketing activities is measured by several monitoring methods. Table II-10 lists the currently planned marketing activities and their corresponding monitoring methods.

Table II-10. Marketing Activities and Monitoring Methods for FY2011/12

<u>Navy Marketing Activity</u>	<u>Monitoring Methods</u>
ASRL Alliance	Brand health tracking, media Advertising Equivalent Value (AVE), Consumer Promotion, Defencejobs Survey
ASRL Editorial Support Complete	AVE, Media monitor reports, brand health tracking, Defencejobs Survey
ASRL Consumer Promotion Complete	Reach, brand health tracking, Careers Promotion Team (CPT) leads
ASRL Consumer Promotion Prize	As per ASRL Consumer Promotion
ASRL Merchandise	Brand exposure
George Bass Surfboat Marathon (GBSM)	Reach, brand health tracking, CPT leads, media coverage
GBSM Merchandise	Reach, brand health tracking, CPT leads Poscat monitoring of dispatch to regions
Brochure updates	
Submariner Facebook Chat	Number of participants, passive to active conversions, type of questions asked
Brochure & DVD reprints	Poscat monitoring of dispatch to regions
Tech Trades Material (press, radio)	Enquiries, applications, Adcorps tracking
Navy Officer Material (radio, online banner, press)	Enquiries, applications, Adcorps tracking
Tech Trades Media Activation Creative Material	Enquiries, applications, brand health, ad agency campaign measurement
Navy Combat Console (press, EDM, radio, online banner)	Enquiries, applications
Team Works DVD Upgrade Navy	Feedback from DFRCs, Poscat monitoring of dispatch to regions
TVC 15sec TVC cut downs for preroll	Ad agency campaign tracking report
Hospitality material (press, EDMs, radio, online banners)	Enquiries, applications, Adcorp tracking
Navy Tech Trades Webinar	Subscribers, passive to active conversions, applications, types of questions asked
Media (Universal McCann)	Brand health tracking, UM digital tracking, enquiries, applications

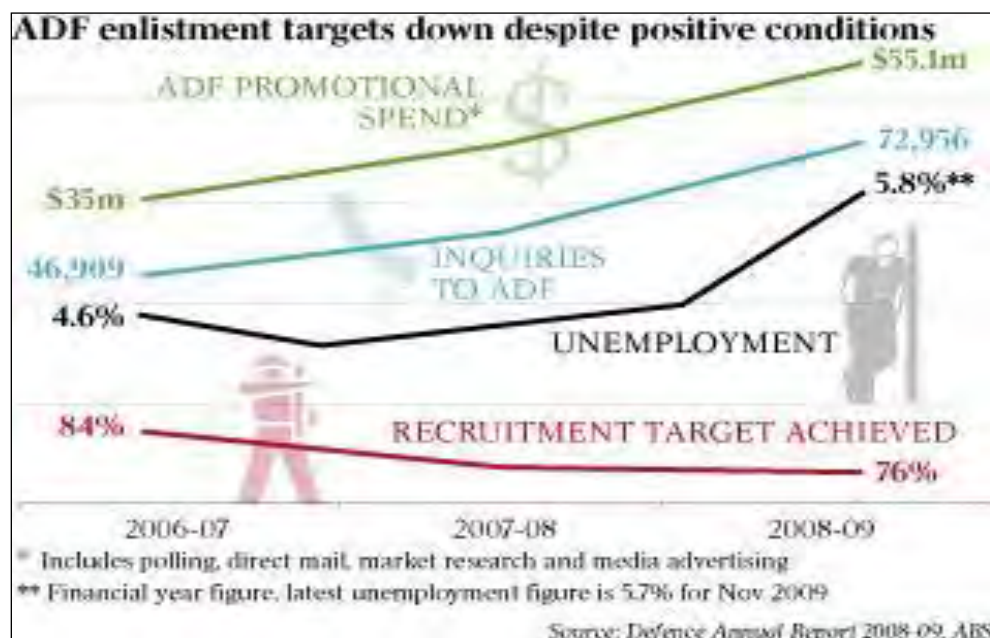
(Defence Force Recruiting 2011)

D. Effectiveness of Recruiting and Marketing Strategies

Each advertising campaign has specific objectives, reflecting the requirements and goals of the Navy. Advertising campaigns are evaluated with respect to how well they meet their stated objectives (Defence Force Recruiting 2011).

While it appears that overall ADF recruiting goals currently are being met (2010), it is unclear whether recent recruiting efforts have produced the desired results. Figure II-7 shows that recruiting decreased in 2009, despite increases in advertising, unemployment, and inquiries (Berkovic 2010). While 2010 appears to have ended on an optimistic note, as the recruiting target was met, the ADF—and even more so, the Navy - is still struggling to attract high qualify recruits.

Figure II-7. Trends in Enlistment Factors, 2006–2009



(Berkovic 2010)

VI. SUMMARY, CONCLUSIONS AND IMPLICATIONS

The ADF has faced significant challenges in meeting its enlistment goals. The recent increase in force size—a recovery from a sizable earlier force reduction—combined with a high separation rate have accentuated these challenges, as the ADF strives to acquire sufficient qualified recruits.

Unlike the other AVF nations, Australia enjoys a relatively healthy economy and low unemployment rate, which has placed the ADF in stiff competition with other employers. As an aging force, the ADF must actively recruit to maintain a healthy balance of younger and older

members. Compounding this factor is the overall aging of the Australian population, which is shrinking the proportion of persons in the recruiting target market.

Australia's population is changing steadily with minority groups being forecasted to comprise an increasing percentage of the population. The ADF does not reflect the ethnic diversity of the country and faces challenges in becoming an attractive career choice for minority youth. In addition, the ADF struggles to increase representation of women in its ranks.

Similar to other AVF nations, Australian youth have low awareness of the ADF and a low propensity to join the military. Australia must recruit Generation Y members who are technically savvy, desire teamwork and relevance, and are reluctant to make long-term commitments. The health and lifestyles of youth (reflected in a relatively high incidence of obesity and diabetes) shrinks the pool of interested applicants who can meet the military's physical standards.

The ADF has an increasingly strong demand for skilled recruits, such as engineers and technicians. The Navy, in particular, has critical shortages in its technical fields. The ADF is currently meeting its overall recruiting goals, but suffers from "workforce hollowness" due to numerous critical job vacancies.

ADF recruiting is performed jointly by Defense Force Recruiting (DFR), which is comprised of military and civilian personnel. Unique to Australia, DFR out-sources the bulk of its recruiting force. The civilian firm provides start-to-finish recruitment functions, including marketing and promotion, as well as candidate screening and hiring.

Development of marketing strategy is largely driven by: 1) the *Defence White Paper 2009*, which projects the needs of the military to the year 2030 and includes several long-term recruiting-related objectives to meeting future needs, and 2) the *Defence Strategic Workforce Plan (DSWP) 2010–2020*, which describes how to attain the workforce required for the capabilities of Force 2030. The *ADF Recruiting Strategic Plan 2007–2017* (Australian Department of Defence 2007a) is based on three overarching strategic objectives: to strengthen the ADF employment offer; to clarify the ADF brand, and to target specific groups. The strategy specifically targets technically skilled youth, Indigenous and culturally diverse Australians, and women—as well as influencers of these groups.

ADF recruiting strategy is translated into action at different levels. ADF-wide awareness and branding are built by national advertising campaigns. The individual services communicate service-specific opportunities and slogans through national and regional advertising, as well as through print and digital media. Job-specific advertising is conducted through ad campaigns, as well as via outreach efforts. The ADF seeks to establish itself as an "Employer-of-Choice" by advertising the benefits and rewards of an ADF career. Advertising is designed to meet the

desires and needs of the Gen Y market by, for instance, promoting ADF teamwork and job relevance, as well as informing the audience on job responsibilities, training opportunities, and providing real-life glimpses into lives of ADF members.

Service-specific brands were introduced in 2007 in response to the ADF's desire to increase the target market's understanding of the unique features of the different services and to allow each service to position itself to best promote and attract to its own career opportunities. The objectives of the Navy's own one-year marketing plan are to improve recruitment to Navy priority jobs, to build the target market's propensity to consider a Navy career, to strengthen the Navy brand and to increase the conversion from the enquiry to the application phase.

The Navy seeks to correct the market's misperceptions of Navy jobs as boring and isolating. The Navy's taglines, *Navy: The Team Works* and *Be Part of Something Bigger*, reflect its basic position statement, "People work in teams to achieve amazing things." Communication efforts focus on providing the public with an accurate understanding of what the Navy does and what opportunities it offers. The Navy strategy has a three pronged approach. Brand positioning involves the "All Navy" brand as well as unique brands for each of the main career categories. The second element, job specific communications, focuses on attracting candidates into the Navy's priority jobs. Thirdly, a Consumer Relationship Management effort strives to help passive enquirers progress to the application stage.

The ADF media mix encompasses television (the largest expenditure by far), as well as digital, radio, cinema, print, and other media. One recent change to media strategy reflects an attempt to maximize results from a limited budget. The media strategy previously followed a 'burst' sequence, in which high weights of advertising are concentrated over relatively short periods. The media strategy now has transitioned to a 'continuity' approach, in which lower weights of advertising are sustained over a longer period of time. The new approach allows for television presence for 40 weeks a year, whereas under the 'burst' approach, the television presence was only 18 weeks per year. Digital media, which is relatively less expensive than traditional, mainstream media, has become an increasingly important part of the media strategy. DFR has pursued various cost-cutting advertising measures and concludes that advertising is currently at a bare minimum level and should not cut further.

The Navy's media strategy involves three tiers. Foundation media efforts foster joint, tri-service continuity across the Navy, Army and Air Force. Navy-specific media activation attempts to generate deeper levels of Navy-audience engagement to particularly increase knowledge of and attraction to the Navy Technical Trades careers; the focus of the Navy's current media efforts is on this Technical Trades campaign. The third communications tier portrays the ADF as the employer of choice in efforts to complement the single service branding.

The Navy is expected to represent about 30 percent of DFR's campaign media budget. The media mix reflects DFR and Navy Marketing's realization that media consumption habits are changing. Television and other wide-reaching media are employed to raise awareness and encourage enquiries. DFR also increasingly uses digital and internet-based applications, particularly in ways to generate audience engagement. All ads attempt to lead the audience to the ADF. As in other AVF nations, the website is a key to marketing efforts in terms of informing the audience of opportunities in the military, and also as a means of connecting with Gen Y.

DFR has developed and implemented a number of marketing initiatives to achieve its strategic objectives. To attract women, the aim is to inform women about the reality of life in the ADF, to correct misperceptions, and to allay concerns about military life. A "Women in the ADF" website offers real-life profiles of female members and conveys information about opportunities.

DFR has a variety of efforts to increase awareness and interest among Indigenous and other minority groups. Particular focus is on building positive perceptions of the ADF and to promoting ethnic culture in the ADF. One initiative is the eight-week Indigenous Pre-Recruitment Course, designed to help prepare Indigenous Australians for the ADF recruiting process. The ADF Youth Connection Program attempts to raise community awareness of the ADF and its job opportunities by recognizing achievements of 15–18 year olds, as well providing motivational speakers to events.

The ADF appears to employ both job-specific and target market-specific approaches on its website. There is a recruiting website, which emphasizes and profiles specific jobs, as well as individual micro-sites customized for women, indigenous persons, and incentive programs, as well as a games site. Promotional campaigns are launched over the internet, as well as mobile phones, to reach the Gen Y target market.

Similarly, service-specific websites offer job-specific information, as well as more personal, real-life slices of military life. The Navy has a link for women under the Women in the ADF website, which is designed to meet the needs of the GEN Y market. The Navy has a Navy Lifestyle website, which offers viewers 'behind-the-scenes' glimpses into the Navy. The website offers 3D models of ships, including ship tours and videos of ship operations, and interactive military-related games, such as the two-player, interactive 'Extreme Battleships' game.

The Navy Community Engagement Program (NCEP) raises awareness of the Navy by offering community members a chance to meet and personally interact with Navy service members. The Navy has also obtained naming rights sponsorships to two sporting events for which the audience is closely aligned with the Navy's target market.

The ADF “Gap Year Program” is a unique program which is based on the idea that the ADF traditional 20-year career could be varied somewhat to increase the appeal of the military. It offers youth who have finished 12 years of schooling an opportunity to experience salaried, military life for 12 months, without making a full-time career commitment. The Gap Year program appears to have been successful, with many more applicants than spots available. Moreover, the conversion rate of participants has been around 25–30%, which is a successful outcome for the ADF.

DFR has established several recruitment cells focusing on critical job categories. These specialist cells seek to contact with influencers in education institutions to promote the ADF. The ‘rapid response’ capability is intended to move eligible candidates for critical jobs through the recruiting pipeline quickly—in hopes of increasing the conversion rate into these high-demand occupations.

DFR uses a variety of metrics to assess the impact of marketing and to assist decision making. Specific metrics that DFR focuses on include: the number of enquiries, the number of applications, the level of website traffic, analysis of the recruiting pipeline, the conversion rate, the propensity to consider, the level of advertising awareness, the correlation between media spending and enquiry rates and the cost of marketing per recruit.

Evaluation of effectiveness is conducted both internally and externally to DFR. Advertising effectiveness is measured by the Market Research group, which conducts pre- and post- studies and other analysis. Research efforts include surveys, modeling, and test media markets. Australia launched a Human Resource Metrics System in 2009, which provides, in electronic dashboard form, a variety of HR measures to monitor policies and initiatives.

III. RECRUITING AND MARKETING STRATEGIES IN ALL-VOLUNTEER FORCE NATIONS: THE CASE OF THE CANADIAN FORCES

I. RECRUIT MARKET TRENDS AND RECRUITING CHALLENGES

The Canadian Forces (CF) attracts between 24,000 and 26,000 applicants annually—40% applying for the Regular Force and 60% for the Reserve Force. About 8,500 to 10,000 of these applicants enter the CF. The ratio of applicants to contracts is 2.5:1 (CRF Strategic Level Guidance 2007, 10). Current recruiting goals are 10,000 Regular/Reserve recruits per year (Grandmaison 2010). The Canada First Defence Strategy has established an end-strength of 70,000 Regular Force and 30,000 Reserve Force personnel by 2027-28 (Canadian Forces 2010a).

Although the CF is currently meeting its overall recruiting goals, it faces serious challenges in manning the force, due to such factors as the retirements of baby boomers from the military, a shrinking labor pool, and the growth of minority groups that are underrepresented in the military (Padvaiskas 2008). The Canadian Navy in particular faces difficult personnel issues including recruiting shortfalls, rising attrition, and overall manning shortages. Over 50% of naval occupations are below the 90% manning level (Tanner 2011).

A. Demographic and Economic Trends

Canada's aging population presents a challenge for CF recruitment. Canada currently has a below replacement fertility rate of 1.66 (OECD 2010). While the Canadian population is growing, this growth is driven largely by immigration (McCullan et al. 2009). However, the age cohort of potential recruits is expected to decline as a proportion of the population.

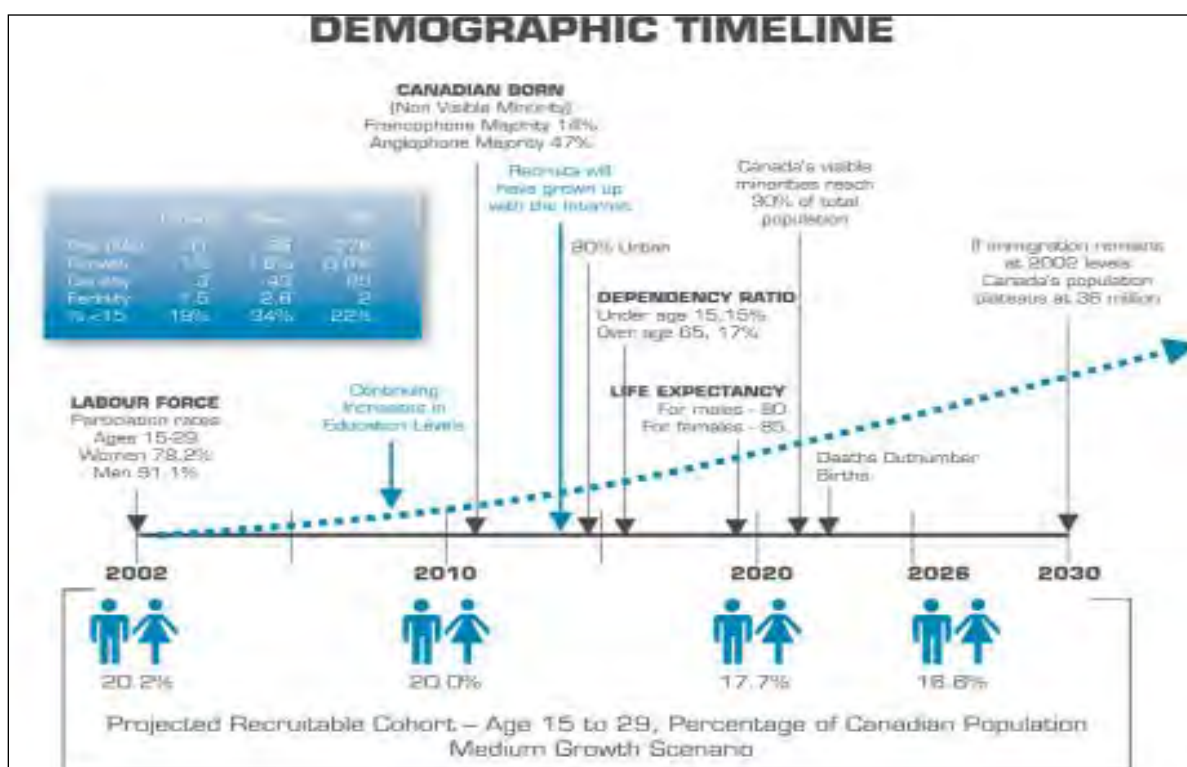
In 2007, 50% of the CF was in the retirement zone, leaving a relatively small portion of the CF in the 9–15 years of service range, which represent the most skilled and experienced segment of the work force. To increase retention, the CF increased the mandatory retirement age from 55 to 60 and changed the terms-of-service policy such that members were not eligible for a pension (in some career paths) until after 25 years of service (rather than the traditional 20 years).

Canada's multiculturalism presents a challenge in branding the CF (McCullan et al. 2009). Its population is comprised of Anglophones, Francophones, Aborigines, and immigrants. The foreign-born population comprises over 18.4% of Canada's population, but the CF is not representative of this diversity (Scoppio 2009). There are several challenges to improving diversity. First, the CF does not recruit non-citizens due to problems of security clearances. Also, some immigrant groups are unlikely to join because they fled countries with oppressive military regimes. In general, it does not appear that many ethnic minorities view the CF as an

employer of choice (Scoppio 2009). Also, the importance of education, family, and ethnic identity limit the participation of immigrants and many minorities in the military (Jung 2007). Moreover, the military ranks rather low among minorities as a career option

Figure III-1 shows the “Demographic Timeline” for the recruitable population in Canada (Department of National Defence 2002). The demographic timeline highlights the various demographic factors, such as the birth rate, life expectancy, the labor force, and immigration that affects the recruitable population between ages 15 and 29 as a percentage of the total population. Figure III-1 shows that the portion of the population considered ‘recruitable’ is expected to fall between 2010 and 2026.

Figure III-1. Demographic Timeline



(Department of National Defence 2002)

A positive influence for recruiting is the recent record high unemployment in Canada (Canadian Forces 2011a). “Of the ten Canadian provinces, a disproportionate number of new recruits come from the four Atlantic Provinces, which traditionally have been economically depressed” (McMullan 2009, 479). However, the continuing growth in college enrollments in Canada continues to negatively impact CF recruiting (Canadian Forces Recruiting 2007, 3). In addition, today’s Canadian youth has shorter-term career aspirations, which could also be a challenge to enticing persons into a longer-term military career.

Military propensity among youth appears to be low. Market research in 2002 found that CF has a low profile as an employer and that only about one to five per cent of Canadians were inclined to join the armed forces (McMullan et al. 2009, 480).

The increased demand for “high-quality” recruits to meet the CF’s new focus poses recruitment challenges. The Minister of Defence stated that “the concept of failed and failing states [is] the organizing principle for Canada’s future foreign military operations.” The implication is that the increased need for “high quality recruits” further shrinks the pool of potential qualified enlistees (McMullan et al. 2009). As will be discussed later, the Navy, in particular, needs technically skilled recruits.

There are differing views as to the recruitment effect of the Afghanistan war. McMullan et al. (2009) claim it has a negative influence on CF recruiting. However, others feel that Afghanistan is not a negative influence and suggest that navy recruiting appears to be experiencing an unexpected “bounce” from the war (Canadian Forces 2011a). However, any positive impact of the conflict might not be equally shared by the three services. “Through media coverage the Army has been quite prominent in the public’s eye since Canada’s involvement in Afghanistan began in 2002 (Canadian Navy Attractions and Recruiting Support 2010).

On the other hand, research indicates that many, particularly younger, Canadians question Canada’s high-risk, combat role in foreign operations and are wary of Canada “allying itself too closely with the United States” (McMullan et al. 2009, 481–2). Also, market research indicates that an overarching problem is the CF is not considered to be the employer-of-choice among most Canadian youth (McMullan et al. 2009).

B. Navy Recruiting Challenges

Many of the challenges to CF recruiting described above appear to be even more pronounced for the Navy. The Navy’s main challenges are a particularly low awareness among the population, an unclear image and identity, and pronounced staffing shortages, particularly in skilled and technical trades. The awareness issue is particularly challenging to recruiters. While Canada has the world’s longest coastline, many Canadians do not perceive of Canada as a maritime nation. The Navy’s presence is concentrated on the coasts, with little visibility in the rest of the country. The Canadian Navy has dubbed its low public awareness “maritime blindness” (Baute 2009). The image of the CF is a fighting force mostly associated with the Army, not with the Navy. In fact, the CF overall does not have an awareness problem—it is mainly a Navy problem (Canadian Forces 2011a).

Compounding this low general public awareness of the Navy is the fact that the Navy has a relatively low recruiting presence compared to the other branches. Of the over 700 recruiters, less than 10% are Navy personnel. Applicants are more likely to be in direct contact with an Army recruiter—who may have very little knowledge of Navy careers.

The Navy is facing critical shortages in some occupations, most of which are technical jobs. The source of the problem is the stiff competition in the labor market for technically skilled persons. These shortages directly impact the Navy's mission. Tanner (2011) states that the Navy now must "manage its day to day business with the equivalent of four ships' companies' worth of vacant billets."

II. RECRUITING PROCESSES AND FORCE-LEVEL GOALS

A. Recruiting Organization

In 1968, Canada merged its three armed services, - Navy, Army and Air Force—into the Canadian Forces (CF), a joint organization. The CF umbrella includes Canadian Forces Recruiting Group (CFRG), which supports all three military branches. At the policy level, no distinction is made between the three branches. However, as discussed below, action can be taken to address recruiting-related challenges unique to a single branch (Grandmaison 2010).

Canadian Forces Recruiting Group is part of the Military Personnel Command (MILPERSCOM) and reports to the Chief Military Personnel (CMP). The attraction, recruiting, and selection functions are led by the Director General Recruiting and Military Careers (DGRMC). All CF recruiting-related advertising and marketing are centralized under the Assistant Deputy Minister For Public Affairs, which "manages and leads the Strategic Attraction Campaign and the development of Public Affairs and advertising products to attract individuals" (Government of Canada 2008). The CF's marketing and advertising strategies are developed by CF Director, Marketing & Advertising Services whose role is to inform Canadians about career opportunities available in the CF, as well as to support the Canadian Forces Recruiting Group's objectives and efforts (Canadian Forces 2010a). Advertising expenditures by the Department of National Defence (currently the single largest advertiser amongst Canadian government departments) has increased in recent years. In fiscal year 2008-2009, \$21.4 million was spent on advertising—up from \$13.1 the previous year (Public Works and Government Services Canada 2007 and 2008).

CFRG operates 39 recruiting offices (10 recruiting centers and 29 detachments) and is responsible for attracting, processing, selecting and enrolling recruits and officer candidates in the Regular Force, and processing applicants for the Reserves. Approximately 760 CF members are assigned to recruiting positions for generally three or four years (Grandmaison 2010). Recruiters are drawn from all military branches. The diversity of their backgrounds creates a

steep learning curve, as they must be knowledgeable about the 100 different CF occupations, as well as the various entry programs. Reservists comprise approximately half the total recruiting force and are assigned to the recruiting center in their local area (Grandmaison 2010).

B. Post-Cold War Manning

After the Cold War, the CF downsized dramatically, from approximately 89,000 Regular Force personnel to less than 60,000 by the late 1990s (Canadian Forces 2008, 15). This force reduction was achieved through a combination of early release/retirement incentives under the Force Reduction Program and through reduced recruiting (Vass 2007, 17). The military is perceived to have lost recognition and support from the Canadian public during this period (Padvaiskas 2008). By 2001, end strength had shrunk dramatically to roughly 52,000 (Grandmaison 2010).

The post-9/11 period brought increased operational requirements, such as the need to respond to new crises and Canada's expanded role in Afghanistan, but the small force size threatened the CF's ability to perform its missions. During this period, the CF embarked on efforts to expand and strengthen the force (Padvaiskas 2008). Between 2002 and 2005 the Regular Force recruited approximately 4,300 people annually; however, as a result of force expansion, recruiting targets were increased (Canadian Forces News Room 2007). Even though end strength increased to 64,000 Regular and 26,000 Reserve personnel, the military still encountered difficulties meeting its operational requirements at home and abroad (Canadian Forces 2008, 15). The 2008 top-level strategy dictated new goals of 70,000 Regular Force and 30,000 Reserve Force members, placing additional pressure on recruiting (Grandmaison 2010).

To meet the new goals, several recruiting initiatives were launched, including increasing the recruiting budget, expanding the target audiences to include visible minorities, women and aboriginals, and marketing the CF as an attractive career option (Vass 2007, 5). In addition, the CF revamped its recruiting process to create a more accessible, streamlined system and greatly increased recruiting capabilities via the internet including the introduction of an "e-Recruiting" system. These initiatives were part of an overall recruiting strategy with a goal of attracting the right quantity and quality of recruits for current and future demands. As of 2010, the CF consists of approximately 68,000 Regular Force members, 35,000 Reservists, and 4,000 Canadian Rangers (Grandmaison 2010).

As Table III-1 below shows, the CF has generally been meeting its recruiting intake goals over the last few years, even though goals increased nearly 70% between 2003 and 2009. Under the Canada First Defence Strategy, the CF will expand to 100,000 personnel (70,000 Regular Force and 30,000 Primary Reserve) by fiscal year 2027 (Canadian Forces 2010a).

Targeted recruiting efforts have increased enrolment in many hard-to-fill occupations, although some professional and technical occupations still face a gap (Grandmaison 2010; Ward 2010).

Table III-1. Regular Force Recruiting, 2003–2010

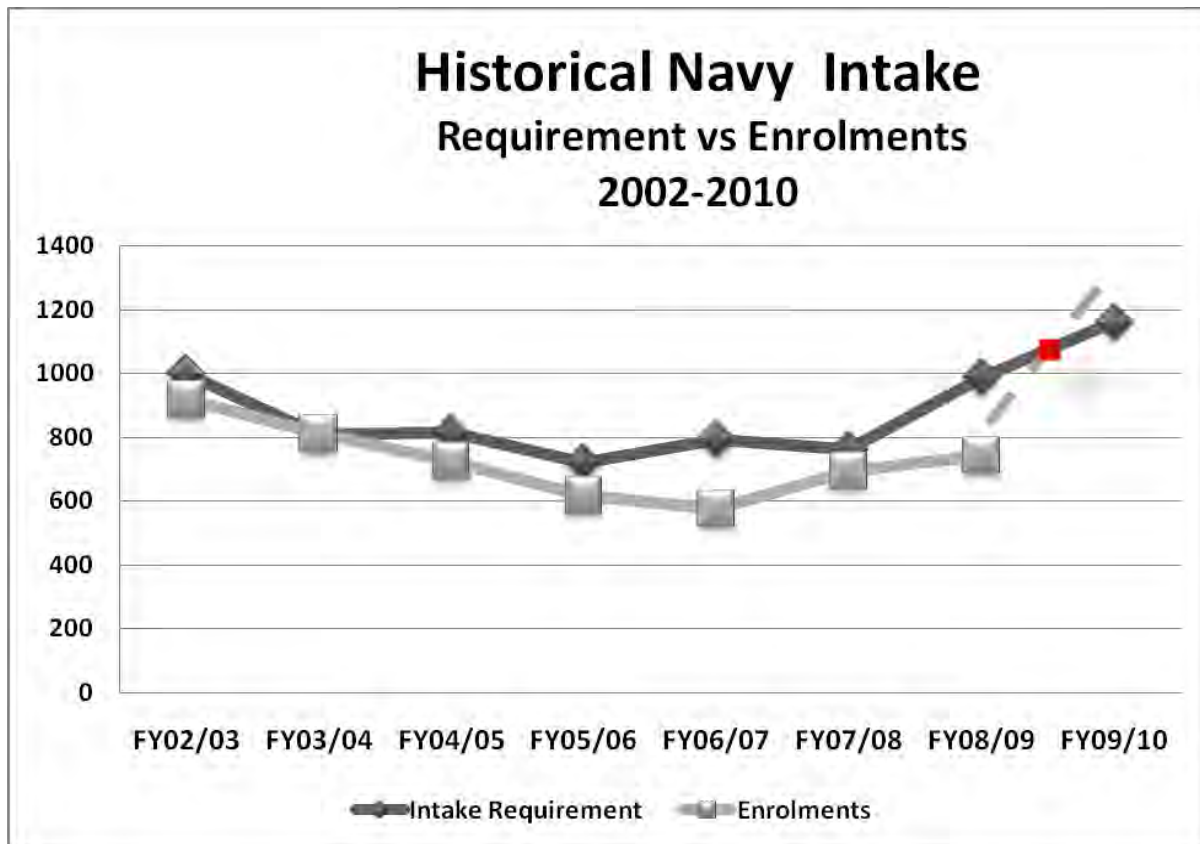
Fiscal (April 1 - March 31)	YearRecruiting Goals	Recruiting Results
2009–10	7,454	7,522
2008–09	7,995	7,701
2007–08	6,865	6,716
2006–07	6,426	6,517
2005–06	5,527	5,644
2004–05	4,622	4,333
2003–04	4,440	4,339

Canadian Forces Newsroom 2010)

The Navy recruits approximately 10% of its total strength annually, or about 1,000 new accessions (Canadian Navy Attractions and Recruiting Support 2010). The Navy’s “Attraction Cell” monitors how closely actual enrolments match the goals. Figure III-2 summarizes this comparison over approximately the past decade and is marked by two transition periods: FY02/03–FY05/06 and FY06/07 to present. During the first period, Army accessions increased, possibly due to the media coverage the Army received as Canada became involved in Afghanistan in 2002. While this ‘Afghanistan Effect’ increased public awareness of the Army, Canadians continued to be largely unaware of the Navy, and Navy recruiting intake decreased during this period.

During the second transition period, Navy recruitment increased. In 2005, the Chief of Maritime Staff committed to support recruiting efforts and provided resources to the Canadian Forces Recruiting Group. The Navy’s positive recruitment during this period resulted from three factors—the CFRG’s efforts made to increase public awareness of the Navy’s job and educational opportunities, the decrease in Army requirements, and the weak labor market associated with the current recession.

Figure III-2. Historical Navy Intake: Requirements vs. Enrolments, 2002–2010



(Canadian Navy Attractions and Recruiting Support 2010)

In the past year, the Navy’s actual enrolments surpassed the target, as is shown in Table III-2 below:

Table III-2. Canadian Navy Enrolments and Target, FY2010/2011

	<u>Target</u>	<u>Enrolments</u>
Enlisted	821	841
Officers	249	246
Total Navy	1070	1087

(Canadian Forces 2011a)

Although the Navy’s overall recruitment is currently meeting target, it still faces challenges (Canadian Forces 2011a). Continued low public awareness of the Navy threatens its ability to meet longer-term targets. Also, the Navy needs to fill its critical, hard-to-fill (“distressed”) occupations—many of which are technical jobs. “Over 50% of naval occupations are in the “red” category, which is defined as being at less than 90% of the preferred manning level (St-Pierre and Williams 2009). These include Marine Systems Engineering Officer, Naval Combat Systems Engineering Officer, Marine Engineering Mechanic, Naval Communicator,

Naval Electronics Technician, Naval Electronics Technician, Naval Weapons Technician, and Sonar Operator”(Tanner 2011). The Navy appears to be the only service that is unable to meet its specific recruitment needs for certain occupations—a situation that has caused under-manning on ships (St-Pierre and Williams 2009).

III. RECRUIT MARKETING AND ADVERTISING STRATEGY

A. Development of CF Recruiting Strategy

During the past ten years, the CF adopted a rapid, rather than incremental, approach to addressing the recruiting crisis (Grandmaison 2010). A Production Oversight Committee was created with the goal of implementing a recruitment strategy to attain the goal of recruiting 10,000 combined Regular and Reserve Force members annually for three years (Grandmaison 2010).

One area of strategic focus was public affairs. During the force reductions of the 1990s CF advertising campaigns were severely reduced. By the beginning of the next decade a “generation of potential applicants were not sufficiently aware of opportunities available in the CF and consequently did not consider the CF as a career option” (Grandmaison 2010). The CF public affairs efforts were aimed in two directions: advertising and recruiting team support. The goal of CF advertising was to increase general CF awareness and to promote specific CF occupations.

Two key defence strategic documents that underpin the current recruiting strategy include the following: (1) *Canada First Defence Strategy* (released in 2008); and (2) *Military HR Strategy 2020* (released in December 2002, last modified in 2005). The *Canada First Defence Strategy* was a 20-year plan “to ensure the Canadian Forces (CF) have the people, equipment, and support they need to meet the nation’s long-term domestic and international security challenges” (Office of the Prime Minister of Canada 2008). The strategy sets a goal for CF to expand to 100,000 personnel (70,000 Regular Force and 30,000 Primary Reserve) by fiscal year 2027-28. The *Canada First Defence Strategy* specifically addresses several recruiting goals: rebuilding the Forces into a first-class, modern military; striving for diversity; providing world-class technical training and advanced education; and encouraging the continued development of a knowledge-based workforce (Canadian Forces 2008, 16).

CF recruiting objectives include growing the force while focusing somewhat on already trained applicants (“recruits of higher quality with the right knowledge and skills”), and emphasizing skills in technical specialties and Special Forces. It also implies a need to recruit demographic segments that are under-represented in the CF.

The Military HR Strategy 2020 identifies long-range strategic HR objectives and links them to the current CF planning process (Department of National Defence 2002). In addition, the Military HR Strategy shapes the recruiting strategy. The Recruitment Strategy is a major initiative to correct critical shortages in the short- and long-term. The critical elements of the strategy are the following:

- 1) Improved advertising and attraction by branding the CF as an "employer of choice" and targeting shortage occupations
- 2) Establishment of effective relationships and partnerships with educational institutions
- 3) Use of recruiting incentives on a selective basis to improve attraction into short-staffed occupations
- 4) Use of the full range of direct entry programs
- 5) Improved efficiency of recruiting procedures

Beyond the *Canada First Defence Strategy* and the *Military HR Strategy 2020*, several other processes contribute to the formulation of specific goals and plans. The Annual Military Occupation Review (AMOR) (Canadian Chief of Military Personnel 2008) states that recruiting goals are based on the "strategic intake plan," which lists open and closed jobs. This job listing, combined with the applicant's score on an aptitude test, directs applicants to a job offer (Canadian Forces 2011a). The AMOR production and intake recommendations are the starting point for development of the Strategic Intake Plan (SIP), which defines CF recruiting requirements.

"Canadian Forces Prospect Surveys" were fielded between 2003 and 2006. The survey results help CF improve position itself and to know which issues on which to focus. A key conclusion of the survey is that "visible minorities and Aboriginal prospects are less likely to make the decision to join the CF as compared to their Caucasian counterparts" (Goldenberg 2007).

B. Target Market

The CF attraction strategy prioritizes target markets (NATO 2007, 2B–4) into: (a) Skilled and experienced candidates (in order to bypass training), and (b) Semi-skilled candidates (who have some relevant civilian or prior military skills or experience). In addition, the CF also is targeting minorities and females, as described by Jung (2007):

...the recruitment pool for the CF traditionally has been fit young men between the ages of 17 and 24, coming from rural areas or from urban areas with a population of less than 100,000. Recruits generally have been white males with previous familial CF ties, possessing a high school education or less. Since the majority of [Metropolitan Areas] which constitute the bulk of the Canadian population, are not the traditional

recruitment bases for the CF, it is questionable whether the CF has ever been truly reflective of Canada (Jung 2007).

The pool of potential CF applicants is impacted by national security policy which “restricts enrolment of Canadian citizens who travel to, or have immediate family in all but a few favored nations.” Minorities constitute 20% of the population, but only about 3% of the total CF, while women constitute about 15% of the CF (McCurdy 2008, 13).

C. CF Recruiting Strategic Guidance on Winning the War for Talent

In 2007, the Canadian Forces Recruiting Group released the current recruiting strategy: *Canadian Forces Recruiting Strategic Level Guidance on Winning the War for Talent*. The recruiting strategy recognizes that the CF must adapt to various realities to achieve its goals. To compete with the private sector, the CF plans to focus on:

- Offering meaningful careers that make a difference
- Offering career-long high quality education and training
- Improving the recruiting process
- Recruiting women, Aboriginals and visible minorities.

In the *Canadian Forces Recruiting (CFR) Strategic Level Guidance on Winning the War for Talent* (2007) the strategic goal is to expand the CF. Expansion of both full and part-time members will be conducted concurrently. Achievement of the strategic goal will be accomplished through the implementation of plans developed in support of five strategic objectives: (1) Connect with Canadians to attract recruits and inform Canadians about the CF; (2) Continue spiral development of an effective and efficient recruiting system; (3) Develop and sustain diverse applicant pools to increase representation; (4) Recruit to retain committed members; and (5) Excel nationally as a competitive employer.

One goal is to ensure that all Canadians recognize and value the CF. Another goal is to ensure the enrolment of committed CF members by selecting high quality applicants and assigning them to the right occupation. The intent is to recognize that recruiting and retention are complementary activities. A third goal is to achieve national recognition of CF as an employer of choice (Canadian Forces Recruiting 2007).

The CFR Strategic Level Guidance (2007) provides a “Strategy to Action Matrix,” which delineates the mission, intent, theme and message for each of its strategic objectives. Figure III-3 displays the strategy to action matrix.

Figure III-3. Strategy to Action Matrix

EXAMPLE OF STRATEGY TO ACTION MATRIX					
INCREASE CANADIAN FORCES, REGULAR AND RESERVE, BY 2010					
STRATEGIC OBJECTIVE	CONNECT to ATTRACT	EFFECTIVENESS	CF and SOCIETY	ENROL to RETAIN	COMPETITIVENESS
MISSION	Connect with potential applicants and influencers at all levels (municipal, regional, provincial and national) to build national and community pride in the CF.	Conduct all recruiting and supporting activities quickly, efficiently and effectively.	Underrepresented groups in the labour market who have the propensity and interest in joining the CF will have attraction plans customized to meet their attraction needs.	Select the right high quality applicants into the right person / environment / occupation fit to expand and sustain the CF while contributing to the continued retention of members.	The CF will aggressively market its competitive advantages and attain recognition as the best employer in Canada.
STRATEGIC INTENT	Conduct activities to ensure that Canadians across the country recognize and value the CF.	All policies and processes shall be high quality, measured and aligned to the objective while eliminating redundancies, inaccuracies and inefficiencies.	Demonstrate the inclusive nature of the CF to help create a diverse applicant pool reflective of the composition of Canadian Society.	Attract and select applicants for enrolment who will make the CF a career.	Conduct activities that maximize the attractiveness of the CF and ensure applicants understand the highly competitive nature of CF benefits and opportunities.
STRATEGIC THEME	Increase Attractiveness	Strong Recruiting Infrastructure	Representative Diversity	The Right Job for the Right Recruit	Best Employer in Canada
STRATEGIC MESSAGE	People hold CF employment in very high esteem	Eliminate or Streamline Processes	Everyone has a Place in the CF	Enrol Applicants Committed to Staying in the CF	Win the War for Talent with Everyone You Meet
OPI	CMP	DGR+++	DGR	DGR	ADM PA
OCI	All Lts	DGP GP, CFHS, ADM PA, DGPA, DRes	LT GENSDUMAIS, LESLIE, LUCAS CF CHAMPIONS FOR VISIBLE MINDRITES, ABORIGINAL PEOPLES AND WOMEN, DG Conditions of Service, ADM PA, DGMP STRAT, DGP GP,	DMP STRAT, DGMC, DGP GP, DGCB	DMP STRAT, DGR, DRes
OCI					
OCI					
Timing - Start					
Timing - End					
Strategic Metric	Annual Share of Mind Survey ++	Time to process and enrol applicants ++	Number of CFRC AOR attraction plans	Retention Tracking	CF independently affirmed as Best Employer in Canada
RESOURCES (PERS)					EX - Total Pers
RESOURCES (FIN)					EX - Total Fin

OPI Office of Primary Interest

OCI Office of Collateral Interest

++ Do people think of recommending or applying for a career in the CF as one of the first and best options?

+++ Director General Recruiting

(Canadian Forces Recruiting, 2007)

While the CFR Strategic Guidance was published in 2007, the current CF broad recruiting goals include addressing the low interest in CF and generating increased population representation (by ethnicity and gender). Specific emphasis is placed on the following: (1) Three-year recruiting recovery plan of enrolling 10,000 Regular/Reserve recruits per year; (2) New advertising and marketing campaign; (3) Revised recruiting processes; (4) Enrolment incentives and allowances; (5) More flexible entry plans; (6) Enhanced focus on colleges and universities; and (7) Reaching out to Canada's ethnic communities (Grandmaison 2010).

D. CF Advertising Campaign: “Fight with the Canadian Forces”

In the 1990s, the CF advertising theme was -- *There's No Life Like it*, which gave a relatively peaceful portrayal of military life. In 2005, the CF decided to reinvent and clarify its brand. There were indications that the advertising might be ineffective, the concern being that the theme presented a boring image of military life. At the same time, there was concern that portraying too strong a “militaristic” image could be a deterrent for many families of potential enlistees (McMullan et al. 2009). Beyond the objective of attracting desirable recruits, the CF wanted to reinvent its brand to improve perceptions of the military.

In 2006, the newly launched CF recruitment ads followed a “fight” theme by conveying slogans of *Fight fear*, *Fight chaos*, *Fight distress*, and *Fight terror*. The somewhat combat-oriented advertisements were considered edgier and darker than those of the previous campaign, as they portrayed an adventurous, exciting military lifestyle. In 2008, a new series of *Fight* ads were launched, which focused less on combat and more on search, rescue and relief missions. The *Fight terror* tagline was removed due to possible negative connotations (McMullan et al. 2009). The goal of the new campaign was to provide “a better breadth of expression for Canadians as to what the Canadian Forces are doing for them....There was some concern ...that we were highlighting the combat aspect too much.” In contrast to the CF combat-oriented advertising message, the new ads intend to show potential recruits the full range of how the CF defends sovereignty throughout the world. In addition to changing the theme to a less combat-oriented message, the style of ads changed from a hard-edge, fast-paced video game style ads (which were considered to appeal to younger audiences) to ads with blinking images set to moodier music (CANWEST News Service 2008).

The *Fight* campaign is based on two elements. First, the campaign projects *authenticity* and *reality* through images of the mission of CF members, how they help others (both Canadians and people in other countries) and how they solve real-life problems. Second, the campaign projects *relevance* through images that show how people benefit from the aid and life-saving intervention provided by deployed CF members. The superimposed text “Fight Distress, Fight Fear, Fight Chaos” reinforces the relevant images (Canadian Forces 2011a).

The objectives of the *Fight with the Canadian Forces* campaign were “to position a career in the Canadian Forces as a compelling and desirable choice, [and] to motivate Canadians to contact the Canadian Forces”(Public Works and Government Services Canada 2009). The “Fight” campaign has been considered successful in raising awareness and increasing accessions among the 18 to 24-year old market. CF applications increased 25% after the new campaign was launched (McMullan et al. 2009). However, there was concern that the campaign was less effective in inspiring those in the older 25 to 35 year old segment, a group that is particularly interested in learning of real-life daily tasks associated with specific jobs in

the military. A new campaign was launched in 2010, which focuses on professional opportunities within CF and profiles several priority occupations. The TV and video ads portray a day-in-the-life of CF members (Laird 2010). Hence, there currently are two ad campaigns: the “Fight” campaign, designed to increase awareness, and a priority occupations campaign, designed to attract applicants into select occupations (Canadian Forces 2011a).

The Priority Occupations campaign, while a tri-service campaign to promote the CF as an employer of choice, also showcases the Navy, as well as other services. The campaign highlights priority occupations and provides exposure to CF life through testimonials. During 2010-2011 there were six television ads – two Air Force, two Army and two Navy – which were designed to meet the high priority needs of each service. The Priority Occupation campaign also included print and Internet advertisements.

E. CF Branding and Communications Plan

The CFRG is positioning the CF as the “Employer of Choice.” The group offers initiatives to “position employment with the Canadian Forces as the first choice for young Canadians looking to make a difference in the world” (Canadian Forces News Room 2007). The CF’s Communications Plan includes advertising, as well as external and internal communication. The message is: “to gain a different work experience in the CF, as well as opportunities for both professional and personal development and short-term and long-term careers. Competitive salaries, benefits and quality of life were also highlighted.” The campaign includes “six TV spots, six web videos and 14 print executions, focusing on six priority occupations: air traffic controller, aircraft technician, artillery soldier, mechanic, electronic technician and sonar operator” (Laird 2010).

External communication includes TV, internet, newspaper, radio, cinema, journal/magazine articles, as well as interviews and press releases. TV advertising traditionally has promoted only the CF, but recently Navy-specific TV ads have been shown that stress jobs in short-staffed occupations (Laird 2010).

The CF website (www.Forces.ca) is particularly important to the marketing plan (NATO 2007). The CF seeks to encourage its 18 to 34 year-old target market to learn about the CF through portrayals of CF life, as well as detailed information on career opportunities. In addition, information-seekers may “chat” online with a recruiter. The number of visits to the website and to individual web pages is tracked (Public Works and Government Services Canada 2009). The redesigned CF website incorporates the most current multi-media technology to promote the CF brand image (Canadian Forces News Room 2007). Ward (2010) discusses the CF’s growing emphasis on the internet (including YouTube), noting, “Increased online

availability to recruitment information—including social networks, such as Facebook and Twitter—has decreased the number of recruiters needed to hit the pavement.”

Internal communication (within members of the CF) includes keeping CF members informed of recruiting initiatives so they can pass the word. One interesting key internal communication effort is “Operation CONNECTION” which has a theme of “Recruiting is everyone’s business.” Under this public affairs program, the whole chain of command is encouraged to be recruiters by connecting in various ways with civilians. This includes connections at major national events regionally across Canada, as well as individual-level efforts. The idea behind this effort is to instill a ‘recruiting culture’ within CF (NATO 2007).

F. Navy-specific Strategy

While the Canadian Navy is embraced by the CF-wide strategic guidance, there are few Navy-specific ads. The Canadian Forces Maritime Command addresses recruiting issues in Navy strategy documents, including: (a) *Maritime Command (MARCOM) Strategic Assessment for 2008, including Maritime Commander’s Intent for 2009 to 2012*; (b) *Maritime Command (MARCOM) Strategic Assessment—2010 Amendment*; and (c) *Chief of the Maritime Staff (CMS) Strategic HR Campaign Plan for 2009 to 2013*.

Overall, the strategic objectives of Navy recruiting are: (1) to increase awareness of the Navy, and (2) to promote the Navy as a viable career choice (St-Pierre and Williams 2009, 2). Addressing the Navy’s recruiting issues is considered critical to the Navy’s ability to succeed in its current operations (Tanner 2011). The Navy seeks to combat its “maritime blindness” problem by increasing public awareness of the Navy. The Navy believes the employment and educational opportunities they offer are good products - to sell them, however, involves increasing awareness via a marketing strategy.

NRC is trying to marry the need to fill its technical shortages with the need to re-brand the CF and the Navy. There is a recent effort to move away from positioning the Navy as “an adventure” to a technical jobs employer. It is too early to see how successful this shift has been (Canadian Forces 2011a).

G. Marketing Budget

The total 2010–2011 CF advertising budget was \$14 million. The budget allocation reflects the CF’s current media mix, as displayed below in Table III-3 (Canadian Forces 2011a):

Table III-3. Composition of CF Advertising Budget: 2010–2011

<u>Percentage</u>	<u>Media Channel</u>
33%	TV (“Fight” and Priority Occupations)
17%	Internet (Priority Occupations banners, job postings, Adwords)
17%	Navy Centennial; (TV and print)
12%	Cinema (“Fight”)
11%	Print/Out-of-Home (Priority Occupations, Recruitment Centers)
10%	Production
0.5%	Sporting Events
(Note: DND/CF was unable to provide specific information for Navy other than the Navy Centennial Campaign.)	

In addition to these CF-funded marketing and advertising activities, as mentioned above, the Navy funds several Navy-specific recruiting marketing initiatives. The cost to the Navy of these marketing efforts is shown below (Canadian Forces 2011a):

Table III-4. Navy-funded Navy Recruiting Marketing Costs, FY2010–2011

Navy Display Buses (5)	\$250,000
Staff persons (5)	\$250,000
Staff travel to recruiting events	<u>\$250,000</u>
	\$750,000

IV. MARKETING AND ATTRACTION PROGRAMS

The CF marketing plan attempts to be aggressive in attracting “Canada’s best.” The plan includes a revamped www.Forces.ca website, commercials, and a variety of outreach activities (St-Pierre and Williams 2009).

A. CF Outreach Efforts

CF outreach activities are aimed at educating Canadians on CF careers and at cultivating relationships with key influencers. The main outreach activities include visits to educational institutions, job fairs and government employment centres, community fairs, and sporting events (Banko and Holden 2007, 23). Other advertising tools include ads in movie theaters, Navy recruiting busses, and efforts to increase visibility of Navy at big media events. The goal of the outreach plan is to go where the applicant pool is located.

As mentioned earlier, the OP Connection program attempts to increase CF exposure (McMullan 2009, 481; Canadian Forces 2010b). This effort connects CF with the population through community-based activities in which CF personnel and equipment are showcased and

is based on the idea that all CF organizations (not just recruiters) must be part of a successful recruiting drive (National Defence and Canadian Forces Ombudsman 2006).

The Canadian Forces Cooperative Education Program (Co-op) offers secondary school students the opportunity to earn academic credit by training with a CF Reserve (including Navy Reserve) unit. This program exposes youth to military life, while contributing to their training towards a potential CF career (HMCS GRIFFON 2011).

B. Efforts Targeted to Designated Groups

Diversity and designated groups are considered in recruiting efforts, policies and procedures throughout the CF (NATO 2007, 2B-2). In response to the need to increase force size and to regain public recognition, the CF has rebranded itself as an “employer of choice.” It is trying to establish itself as a more inclusive employer to appeal to “Designated Group Members” whose presence in the military are not representative of the nation—namely, aboriginals, visible minorities and women (Padvaiskas 2008).

The CF is trying to create an environment that is attractive to minority culture groups. For example, it has established policies that accommodate varying dress, dietary, and religious practices. It also has strategic attraction efforts targeting minority groups, as will be discussed later. However, recruiting of minorities is still considered to be unsatisfactory, indicating that the CF brand of “employer of choice” has not yet been established among these groups (Padvaiskas 2008).

One impediment to attracting some minorities is that many of these persons originate from war-torn countries and are reluctant to affiliate with the CF. There is concern that the current “Fight” campaign might therefore be unappealing to these target minority groups. The CF is therefore trying to simultaneously reach out to visible minority groups through such efforts as outreach events, the CF website, and promotional literature that reflect diversity in the military (Padvaiskas 2008).

The CF has a variety of special recruiting initiatives designed to increase representation of females and minorities (King 2008). Since 2000, all occupations have been available for women. As of 2008, 13% of the regular force was female and 16% of 2008 enrolments were female. The CF women’s outreach campaign” is intended to convey the message: “unlimited opportunity” and includes such efforts as:

- Women’s History Month (October)
- International Women’s Day (in March)
- Event Partnerships with national Women’s organizations
- Participation at local women job fairs and trade shows

- Regular contact with women's student organizations at colleges
- Networking with coaches and players at women's athletic events

Marketing and advertising that specifically target women includes the following:

- Internet ads promoting "unlimited opportunity"
- Multimedia products ("Women in the CF" CD-ROM and poster, as well as imagery integrated into all other recruiting information products.)
- Family-oriented products (brochures, pamphlets; development of family-oriented policies; Military Family Resources Centers).
- Recruiter for a Day Program: Opportunity for currently serving women, aboriginal and visible minority members of the CF to volunteer to be involved in recruiting events

There are numerous recruiting and training programs aimed at attracting Aboriginal peoples into the CF, which include the following: (Canadian Forces 2011b):

- Aboriginal Leadership Opportunities Year—A one-year program through the Royal Military College which offers Aboriginal youth the chance to participate in courses, leadership development, military training, and cultural events.
- Youth Development Programs are summer programs that offer an exposure to the military without any commitment.
- CF Aboriginal Entry Program—A three-week recruiting program which offers interested applicants the chance to experience military life, including ship tours and military drills, before making a full-time commitment. A bonus of \$1,200 is awarded upon completion of the program (Scoppio 2009).

Despite extensive efforts to increase diversity, it appears that success has been limited (Jung 2007). The 2006 Report of the Auditor General of Canada states that since their 2002 audit even though the youth population of Aboriginals, visible minorities and women had increased, the CF had not improved its recruiting of any of these groups. Rather, the number of recruits in each of these three groups has steadily decreased since 2002.

C. Navy-specific Marketing Initiatives

The Navy's particular challenge is to increase awareness and to establish a unique image. The CFRG funds advertising for all three services. Over the last decade, CFRG has had relatively low success in recruiting for Navy occupations. Consequently, the Navy became dissatisfied with joint-force recruiting efforts. Due to recent recruiting problems, the Navy recently started using its own funds for additional Navy-specific efforts, such as TV advertisements and buses. "In order to increase public awareness of the Navy the Chief of Maritime Staff made a long term commitment in 2005 to support Navy-specific recruiting

operations. Resources were identified and allocated to assist the Canadian Forces Recruiting Group. With the resources in place the recruiting numbers for the Navy started to recover in FY06–07” (Canadian Navy Attractions and Recruiting Support 2010).

A “Navy Attractions and Recruiting Support” cell (outside of CFRG) was established to help bring the Navy presence inland and supports CFRG recruiting efforts in a variety of ways.

- Using eight full time sailors to coordinate Navy involvement in recruiting events (bringing sailors to inland communities)
- Using five Naval Display Buses (NDB) as rolling class rooms to educate inland Canadians about the Navy
- Assisting CFRG in organizing Influencer (educators) visits to coastal naval bases (Canadian Forces 2011a).

All participation in events by Navy Attraction cell staff is performed in conjunction with CFRG; the Navy cannot conduct a recruiting effort that is not in tandem with CFRG policies. The Navy’s attraction cell does not receive its own marketing/advertising budget from CF; the cell is funded by a set-aside from the Navy to support the CFRG (Canadian Forces 2011a). All marketing and advertising is done by the Public Affairs group.

The 2006 *Fight with the Canadian Forces* campaign is very generic and the military branches (Army, AF, and Navy) are not entirely satisfied with the message, since it does not attract recruits to a specific service. The Navy has endeavored to attract recruits through a variety of Navy-specific marketing efforts including those described below (Tanner 2011).

Great Lakes Deployment: The Great Lakes Deployment is a month-long Navy frigate tour along Canada’s shoreline (the Windsor to Quebec corridor) including port visits to numerous cities, during which visitors may tour the ship. The objective of the deployment has traditionally been to highlight the Navy’s contributions and to raise its public profile. More recent objectives have included efforts to boost recruitment into critically undermanned occupations (Canadian Navy Website 2010).

Subsidized education plans (SEPs) for Navy Occupations: While SEPs are CF-wide initiatives, the Navy has benefited from this program. The Navy has made efforts to promote the Non Commissioned Member SEP to technical students. The Navy enjoys a disproportionate share of the occupations offering subsidized education (Canadian Forces 2011a).

Navy Attraction Coordinators: These coordinators have been established to assist in attracting Canadians to join the navy. They arrange for sailors from the fleet to participate in recruiting events. They also have access to five naval display buses, which provide a realistic job preview through the use of interactive videos and other multimedia products (Canadian Navy

Attractions and Recruiting Support 2010). This effort is entirely separate from the CF's generic OP Connection program, which was started in 2006 and appears to be gradually fading away.

CO-OP programs for the Navy: The Naval Reserve Co-op provides qualified secondary school students with exposure and introductory training to life in the CF as part of the Reserve. Participants can train with the crew of a Navy Ship, a member of a Port Security Unit, a Port Inspection Diving Team or a Naval Intelligence Team. Benefits to participants include earning secondary school credits and training towards potential future qualification in CF.

Other initiatives to increase Navy awareness include:

- Job-specific advertising campaign: In 2009 a new Navy-specific campaign was launched. New commercials highlight the Navy's distressed, undermanned occupations (St-Pierre and Williams 2009, 2).
- Webinars: The Navy is initiating "webinars" so discussions can be broadcast to classrooms and elsewhere.
- Recruiter posts: Sailors are a small portion of all CF recruiters, but the Navy tries to select sailors for recruiting duty who are fresh off deployments and to send them to their hometowns.

The current Navy-specific recruiting drive is *Bring the Navy to Canadians* (St-Pierre and Williams 2009). The year 2010 marked the Navy Centennial anniversary, which was leveraged with the "Bring the Navy to Canadians" efforts through events and publicity designed to honor the Navy's past, to portray the current Navy (and to attract into priority jobs), and to reinforce the need for the future Navy (Canadian Forces 2011a).

D. Incentives Packages

During the last ten years, the CF explored different ways to attract recruits through incentive programs. New initiatives were introduced and existing programs were modified. Traditionally, CF recruiting allowances were offered only to specialists, such as physicians and dentists. However, recently the CF has introduced a series of recruitment allowances for eligible enlisted applicants. Enlisted recruiting allowances are typically designed to attract recruits to under-strength, high-demand occupations (such as Naval Electronics Technician). The recruiting website describes three categories of allowances: (1) post-secondary diploma or certificate NCMs (\$10,000 signing bonus); (2) civilian trade-qualified NCMs (\$20,000 signing bonus); and (3) MOC-qualified NCMs (\$20,000 signing bonus).

Applicants for these allowances may be new enrollees, re-enrollees and Reserve Force members who are transferring into the targeted Navy job. As an added incentive, qualified

recruits might be eligible for promotion to the rank of acting corporal after they complete basic training (Canadian Forces 2010a).

The CF offers subsidized education to attract both officers and non-commissioned members. The Non-Commissioned Member Subsidized Education Program (NCMSEP) seeks to attract personnel with desired skills. New recruits in the program attend a Canadian college during the school year, where they learn advanced technical training. During the summer, they participate in basic training and on-the-job training. The recruits receive full pay with medical and dental care, as well as vacation time (Canadian Forces 2010a). The NCMSEP has been a successful vehicle to recruit needed technicians and has been particularly effective for the Navy, as discussed below (Canadian Forces 2011a).

Various CF Entry plans are offered, including subsidized education and initiatives for aboriginals. Technician and Operator Entry Plans are customized for applicants who are skilled/semi-skilled and those with prior experience or no prior service. The various incentive plans are promoted on the CF website.

E. Recruiting Process Initiatives

Because Canada covers a vast geographical area, there is a growing emphasis on the “Virtual Recruiting Center.” This internet-based system allows interested persons to contact CF recruiters by means of chat technology. All capabilities offered by the Virtual Recruiting Center are conducted via internet or phone. With this system, a potential recruit can submit an application electronically and receive timely feedback that he might otherwise not receive without travelling to a recruiting center or waiting for a local visit by a mobile recruiter (Grandmaison 2010). A candidate cannot fully enroll in the CF via the Virtual Recruiting Center. However, an applicant might not have personal contact with a recruiter until the final screening interview. The CF now appears to be shifting manpower to support online recruiting and away from physical recruitment centers (Ward 2010).

There are also efforts to increase Navy representation at recruiting centers. Recruiting Centers are jointly manned and there is low representation of Navy recruiters. It is difficult for Army recruiters to promote or explain Navy opportunities. The Navy is also trying to place recruiters who are more knowledgeable about technical jobs. One big advantage of the new Virtual Recruiting Center is that the Navy can connect an applicant with a Navy recruiter.

The CFRG is implementing numerous other initiatives to improve the recruiting process, including those listed below (Canadian Forces News Room 2007).

- E-recruiting - an interactive and real-time tool that allows those aspiring to a Canadian Forces career to initiate their applications on-line, and then track the status of their applications over the Internet;
- Creation of a National Recruiting Contact Centre to respond to e-mail queries and send out information packages
- Streamlining procedures for processing applications;
- Regular Force applicant physical fitness test shifted from pre-enrolment, where it was used to screen-out candidates, to a progressive post-enrolment approach that promotes physical fitness and a healthy lifestyle;
- On-site selection: selection authority for most of the military occupations decentralized to recruiting centres meaning less delay before offers of employment are issued;
- No-obligation aptitude testing at job fairs and other attraction events;
- Improvement in the process of transferring between CF components

Also, a CF College Opportunities Database (CFCOD) now exists, enabling colleges to perform an on-line comparison of Navy qualification standards versus their own training programs. It is anticipated that the CFCOD will ultimately help provide the basis for civilian career accreditation (Tanner 2010).

V. EFFECTIVENESS OF MARKETING AND ADVERTISING STRATEGIES

A. Market Research on Navy Recruiting

An analysis of the various factors impacting Navy recruitment was conducted in 2009 on the results from a survey and focus groups of new recruits (Director General Military Personnel Research and Analysis 2009). The surveys asked respondents about the type of advertising that encouraged them to inquire about joining Navy. Internet had the greatest influence, followed by (in order of influence) TV and recruiting displays. Of lesser influence were CF shows, posters, cinema ads, print media and radio. (This order paralleled that of CF-wide advertising.) While the internet and the CF recruiting website are deemed very influential in the initial inquiry stage, the research indicated that it was still important for recruits to have one-on-one personal communication with a recruiter (St-Pierre and Williams 2009, 6–7).

The research also found that advertising was not a substantial influence in the initial inquiry decision. Rather, recruits were already predisposed to inquire about the Navy or CF. However, advertising was effective in “planting a seed” in potential recruits’ minds and also appeared to be effective in steering candidates’ interest toward certain military occupations.

The surveys also asked respondents for reasons why recruits chose the Navy over other services: Top reasons were “career opportunities” and “pay and benefits”, followed by “for adventure” and “pride in the job.” The two main reasons applicants chose to apply are grouped

into those reasons that apply to the CF in general, and those reasons that apply specifically to the Navy.

Finally, focus group research revealed that the Navy has an indistinct image and low awareness among Canadians. Focus group research also found that family and friends were a major influence on the decision to join the Navy. The research indicates that among top recruiting agencies, efforts are most effectively spent on the following vehicles for delivering information to potential candidates: employee referral programs, internet presence (advertising and website), selection of appropriate recruiters, recruiter training, and a streamlined personnel selection process.

Based on this research, specific recommendations were adopted to raise Navy awareness and to improve the Navy's image (St-Pierre and Williams 2009):

- Improve the recruiter selection process and training program, and establish an evaluation process;
- Consider implementing an employee referral program;
- Develop more targeted TV commercials that appeal to the following groups: technically-inclined youth; those in technical occupations; women; older individuals who may already have technical/technological training; and parents. Also, use TV media to inform on the variety of Navy missions and the Navy life style;
- Expand and improve the use of the internet:
 - Create forums designed for members, potential applicants and parents of potential applicants and new recruits;
 - Increase the amount and type of Internet-based advertising, including YouTube and, social networking sites; and
 - Conduct research to monitor information requested on the CF website to guide improvement of the site
- Conduct research to determine media used by the target market and advertise on those media.
- Expand outreach efforts by increasing visits to all levels of schools (junior high, high school, college and university) or strategically visit schools in the geographic locations that will provide the most return on investment.
- Ensure that applicants receive more accurate Navy information through recruiters and online on topics, such as: What courses they will need to take; What to expect during basic training; the military/Navy lifestyle; posting locations; salary; deployments; and, services that are available for families.
- Examine extending realistic job previews to a wider audience

Overall, results from the study include: confirmation of the low level of awareness of and knowledge about the Navy; validation of the value of the internet as an attraction tool, as

well as the need to balance it with face-to-face interaction with a recruiter; career opportunities and pay/benefits are top positive influencers.

Attraction and recruiting-related research conducted by DRDC includes (Tanner 2011): *The Navy Recruitment Study*, which assesses factors impacting Navy attraction and recruitment, *The Post Great Lakes Deployment Report*, which uses a Geographic Information System (GIS) capability to study how to tie socio-demographic factors to the addresses of visitors to the Great Lakes Deployment and a study on minorities' perceptions of the CF and the effectiveness of CF policies in recruiting minorities.

B. Effectiveness of Strategies

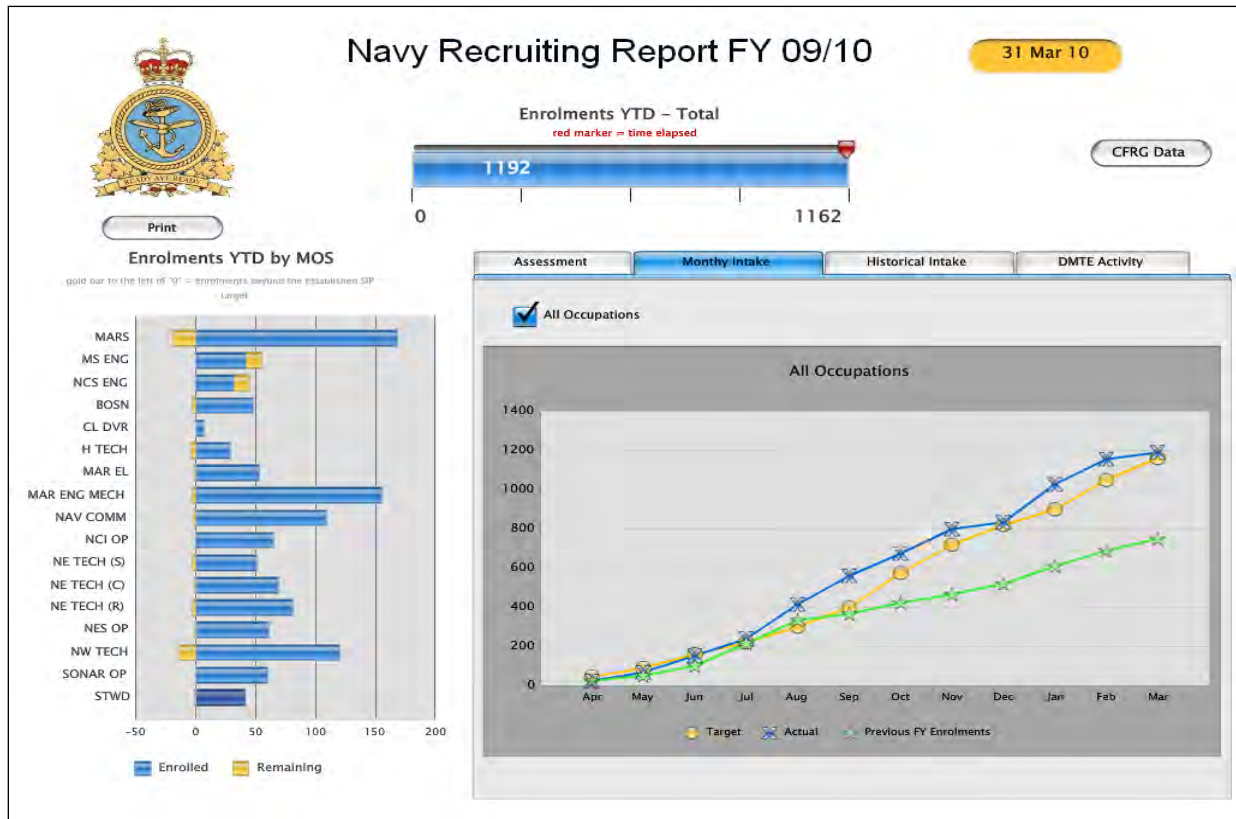
DND/CF uses several tools to measure marketing effectiveness. The Canadian Government requires an "Advertising Campaign Evaluation Tool" (ACET) be applied to government advertising campaigns which cost more than \$1 million (Public Works and Government Services Canada 2008). The post-campaign evaluation tool, a telephone survey using standardized questions, tracks audience recall of, understanding of, and response to the campaign advertising. Unaided CF recall of TV ads has been 35-40% over the past three years, which compares favorably to the industry benchmark for a successful campaign of 20% (Canadian Forces 2011a).

CF employs Google Analytics to measure effectiveness of its Internet-based advertising – specifically traffic to the FORCES.CA website. For example, recent tracking indicates that AdWorks generates 30% of traffic to the FORCES.CA website. CF also collates statistics of results from advertisements in Job postings, AdWords and banners placed on various websites (Canadian Forces 2011a). In addition to the tools described above to access the impact of marketing, the CF graphs the correlation between visits to the FORCES.CA recruiting website and the occurrence of CF advertising campaigns.

The CF does not calculate the cost of marketing and advertising per accession. The reasoning behind this is that CF's objective of investing in marketing and advertising is not only to create current accessions, but also to create CF awareness among the overall Canadian public. Hence CF appears to feel it unrealistic to isolate the impact of marketing dollars on accessions (Canadian Forces 2011a). While CF also does not currently calculate the cost of marketing and advertising per lead, it is establishing a Customer Relationship Management system to help track leads.

Overall it appears that Navy efforts have been effective in helping attain Navy enrolment targets. Figure III-4 illustrates the recent improvements in enrolments, as well a snapshot of the needs by certain occupations.

Figure III-4. Navy Recruiting Report FY09/10



(Canadian Navy Attractions and Recruiting Support 2010).

As discussed above, the Navy's current recruiting success —following several years of below-goal attainment—is credited to three factors: increased public awareness efforts (promoting the Navy's job and educational opportunities), the Army's decreased accessions, and the effects of the recession. However, it appears that of these three factors, only one—increased public awareness—is a result of Navy marketing efforts. It would likely not be possible to isolate the independent effect of marketing on the Navy's current success. Therefore, despite the current recruiting success, the Navy may continue to be challenged by low awareness and other issues.

CF Marketing finds that a suitable mix of advertising and marketing tactics has been effective for recruiting success. The CF mix includes: targeted advertising that reaches the target market "where it lives" (i.e., print and out-of-home advertisements at colleges/universities, and select TV, cinema and Internet venues frequented by the target market); outreach efforts (i.e., recruiter presentations at schools and job fairs), other media placed in college-age, and a robust FORCES.CA recruitment website (Canadian Forces 2011a).

VI. SUMMARY, CONCLUSIONS, AND IMPLICATIONS

The Canadian recruiting environment has experienced demographic, social, and economic changes that mirror those experienced in most other AVF nations. Canada has experienced an aging of the native population as birth rates of natives have dropped. The slower population growth of natives has been offset to a varying extent by immigration. These demographic shifts have created multiple issues for recruiting. First, the growth in ethnic minorities has created challenges for the military to be representative of their national populations even though diversity-related personnel policies and recruiting targets are a long-standing feature of recruitment strategies. Second, for a number of reasons, military propensity tends to be lower among many immigrants than among natives.

The single most important long-term factor contributing to declining youth interest in military careers has been a strong and persistent upward trend in western nations in post-secondary enrollment among high school leavers. The trend has been fueled by a growing civilian earnings gap favoring college-educated over other workers as technology makes such skills more valuable in the labor market. In response to this trend, Canada has adopted marketing and recruiting policies that focus on the available technical jobs and educational programs, as well as the transferability of military training to the civilian sector.

While the Canadian Forces (CF) is meeting overall recruiting goals, Navy recruitment has experienced shortages in several, mostly technical, occupations. In addition, it faces challenges in meeting longer-term overall recruiting goals. One source of the problem is a declining awareness of the Navy. This decline is often not shared by the land-based branches, due to their greater visibility in Afghanistan. Another contributing factor appears to be the joint unified military organization which performs recruiting functions for all branches. There are no Navy-specific recruiting centers, recruiters, or advertising budget.

The CF recruit marketing strategy is guided by the *Canada First Defence Strategy* (2008) and the *Military HR Strategy 2020* (2002). The Canadian Forces Recruiting Strategic Level Guidance on Winning the War for Talent (2007) identified the strategic recruiting objectives for the CF: (a) Connect with Canadians to both attract recruits and inform Canadians about the CF; (b) Develop, implement and maintain an effective, efficient and modern recruiting system; (c) Build a force that reflects the diversity of Canada; (d) Ensure that recruiting efforts result in enlistment of committed CF members (recognizing that quality recruits improve retention); and (e) Establish the CF as the employer-of-choice. Beyond reaching the overall recruiting target market, CF has several specific targeted segments, including women and ethnic minorities. In addition, the CF attraction strategy prioritizes skilled and experienced candidates (to bypass technical training) and semi-skilled candidates (who have some relevant civilian or prior military skills or experience).

The current version of the *Fight with the Canadian Forces* campaign (*Fight Fear, Fight Chaos, Fight Distress*) focuses less on the military's combat mission and more on humanitarian and global assistance mission. In addition, the CF seeks to establish itself as the "employer of choice" among the target market and emphasizes specific job opportunities in the CF. The campaign slogan in 1990s was ' *There's No Life Like it*' which was fairly peaceful. Then in 2006 they launched the Fight campaign (*Fight fear, fight chaos, fight distress, fight terror*). The first two years it included 'fight terror,' but this was dropped in 2008 as being too combat oriented.

While the objective of the *Fight* campaign is to raise awareness, a simultaneous "Priority Occupations" campaign aims to attract candidates into priority jobs in each service. The CF media mix places greatest emphasis on television advertising with strong emphasis also on Internet advertising, such as Priority Occupations banners, job postings and Adwords.

The CF website is particularly important to the overall marketing plan. Web-based programs include using multi-media on the website, conducting 'webinars' at a virtual recruiting center, and increasing the use of YouTube and social networking sites. Canada feels that increased use of the internet and social media has reduced the need for field recruiters. Due to its large geographical area, Canada increasingly relies on a "Virtual Recruiting Center." It is possible for a prospect to have no personal contact with a recruiter until the final screening interview. Canada appears to be relatively more reliant on the internet, and somewhat less on recruiters, than other AVF countries.

CF outreach efforts are intended to establish relationships with educational institutions and influencers, such as guidance counselors. Outreach activities are held at schools, fairs, community fairs, and sporting events. The "OP Connection program" was created to address the public's limited knowledge of the CF via community-based activities. The CF also developed a "Diversity Outreach Campaign" to foster awareness of the CF among women and minorities.

Numerous marketing initiatives have been launched to counter declining awareness of the Navy. The Navy recently initiated separate efforts to increase awareness, including Navy-specific advertising themes. These efforts augment CF efforts to increase awareness. They Navy leveraged the 2010 Navy Centennial anniversary with a variety of advertising efforts. The theme of the advertising was "Bring the Navy to Canadians." The Navy was able to leverage this theme in conjunction with commemorative efforts for the 2010 Canadian Navy Centennial. As part of CF's Priority Occupations campaign, two Navy-specific TV ads have been developed and internet ads also promote specific occupations. Also, a "Navy Attractions and Recruiting Support" activity now has added eight sailors to CF recruiting events, and added five Naval Display Buses as "rolling class rooms" to educate Canadians about the navy. Navy marketing efforts include: A Navy-specific jobs campaign, which highlights the Navy's distressed

occupations; participation in “Webinars” conducted at a virtual recruiting center, and a Great Lakes Deployment of Navy ships.

The recruiting process itself has become an element of the marketing strategy in Canada. Improvements include developing an on-line or “e-recruiting” program which allows candidates to submit and track status of their applications over the Internet. Canada also has established a central contact center which responds to e-mail inquiries and sends information packages, relieving recruiters of these tasks, and streamlined procedures for processing applications. Canada is probably the only nation that conducts on-site selection for many military occupations at the recruiting centers in an effort to reduce processing delays.

The CF uses monetary incentives on a selective basis to improve attraction into critically manned occupations. Since the Navy has most of the critical shortages, it offers more incentives than the other services. Recruiting allowances are offered to skilled applicants, which vary in size depending on the applicant’s qualifications. Also, there is a wide range of entry programs, including opportunities for inter-component transfer, occupational transfer (within the same component) and lateral entry programs that recognize civilian skills and training to reduce in-service training. Also, the CF offers subsidized education to attract both officers and non-commissioned members into desired occupations. The Non-Commissioned Member Subsidized Education Program (NCMSEP) has been particularly successful in recruiting needed technicians into the Navy.

Canada employs an Advertising Campaign Evaluation Tool, which is a post-campaign survey that measures audience recall of advertisements. In recent years the CF advertising campaigns have produced a relatively strong unaided recall average. Other effectiveness measurement tools include using Google Analytics to evaluate traffic on the FORCES.CA recruiting website, and tracking of statistics of responses to advertising on the Internet and other venues. The CF does not currently calculate the cost of marketing and advertising per accession or per lead. However, in addition to building a system to improve lead-tracking, the CF does track correlation between visits to the recruiting website and advertising campaigns.

Some of the important questions that have been posed in studies of military advertising and marketing are as follows:

- What is the minimum level of advertising necessary for a cost-effective recruiting program?
- What is the most efficient mix of joint and Navy-specific advertising?
- What is the proper mix of marketing media?

While final answers to all of these questions are beyond the scope of this project, some evidence can be adduced from each nation’s experience.

A review of the literature on the effectiveness of military advertising concludes that much is unknown and lays out an ambitious future research agenda (Adams 2009). Part of the problem is that the incidence of advertising, as well as the direct outcomes, are difficult to measure, due in part to notoriously unreliable data. Good experimental evidence is practically non-existent, thus comparative analysis of the experience of similar nations can provide some evidence on the effects of advertising.

The Canada case study suggests that a minimum level of spending is important in maintaining the longer-term viability of a military's recruitment program. The reason stems in part from the lag effects in advertising wherein current expenditures affect interest in the military well into the future, and earlier spending has some effect on interest and awareness today. In particular, a minimum level of spending is necessary to maintain an awareness of the Navy, even when the recruiting market is robust and goals are easy to achieve.

Another reason for this conclusion is that advertising affects awareness not just of youth, but also of 'influencers', such as family members, teachers, and counselors who help youth make career decisions. Again, maintaining awareness among this group requires a sustained minimum level of spending.

The evidence from Canada is based on a cyclical variation in advertising expenditures between the drawdown of the 1990s and the manpower buildup after 9/11. Moreover, the evidence shows that the ramp-up of advertising after 9/11 generated a significant growth in recruitment, although this ramp-up was also accompanied by increases in other recruiting resources. The Canadian experience suggests that it may be more cost-effective to maintain advertising expenditures at a minimum level rather than to allow them to decline and then to compensate for their absence by increasing recruiters and other resources. The costs associated with the boom-and-bust cycle in all recruiting resources (especially recruiters) might be reduced by maintaining advertising and marketing efforts.

Adams (2009) also points out that there is little evidence on the effects of joint advertising. However, once again Canada provides some light on this subject. The low awareness of the Navy suggests that joint service advertising has some limitations in promoting specific services that may be experiencing manning shortfalls, either in general or in specific occupations.

Thus, two conclusions appear warranted. First, general awareness advertising should not be allowed to fall below a minimum level. Second, joint service advertising is not as efficient in promoting service-specific awareness as service-specific marketing efforts.

Assessing the proper mix of advertising media has become much more complex with the advent of the internet, mobile phones, and social networking sites. Currently, it is easier to

target specific markets because of the expanding number of media available. Conversely, choosing the media mix depends on the specific target market that needs to be reached, the media habits in that market, and the specific message that needs to be delivered.

Can advertising and marketing alone counter the multiple problems faced by the Canadian Navy—the low Navy awareness, low youth propensity, increasing population diversity, tight labor markets for skilled, technical workers, and youth not viewing the Navy as an employer of choice? The answer is, of course, no. However, the multi-pronged approaches adopted by the CF and the Canadian Navy—such as expanding outreach programs, multi-media advertising, etc.—go a long way toward addressing many of these problems. A full solution, however, requires other resources—monetary incentives, allowing lateral entry for skilled civilian workers, and simply increasing recruiters. Nonetheless, it appears clear that marketing and advertising set the baseline awareness and broad interest in the military lifestyle and military careers for youth.

IV. RECRUITING AND MARKETING STRATEGIES IN ALL-VOLUNTEER FORCE NATIONS: THE CASE OF THE UNITED KINGDOM

I. TRENDS AND RECRUITING CHALLENGES

A. Awareness of the Royal Navy

Although opinion polls indicate that the U.K. public respects the Armed Forces, some respondents consider the military and its culture to be “anachronistic.” Britain’s involvements in Iraq and Afghanistan generally have had a negative effect on military recruitment (Directorate of Naval Recruiting 2007), especially by discouraging many parents from recommending a military career. A recent report found that “a significant proportion of [our marketing budgets] must be spent on removing ill-informed perception and opinion” (Select Committee on Defence 2008).

The U.K. public also has a declining understanding of the military—especially of the Royal Navy (RN). Public memory of naval battles is low. Some of the public also does not perceive the British coastlines as borders that need to be protected (Directorate of Naval Recruiting 2007). The Ministry of Defence (MoD) has been concerned about the steadily falling visibility and awareness of the military and its impact on recruiting success (Parliament 2008). The combination of having fewer former RN members in one’s family or social circle, the overall decreasing proportion of veterans in the general population, and weak public memory of the Navy appears to have created a shrinking “Naval footprint” in society.

Particularly troublesome for the Royal Navy is low awareness within its target market. The Directorate of Naval Recruiting has found that 85% of 16 to 24-year olds would not consider a career in the U.K. military. Also, there is low awareness and understanding of the Royal Navy among the remaining 15% – referred to as the “non-rejecters” – and awareness among this group is lower for the RN than for the other services (Directorate of Naval Recruiting 2007). One study found that the overriding image of the RN held by this group was that of “a big grey ship becalmed on a dull grey sea” with its people “scrubbing decks” for an organization that exists merely as a “carrier service for the two other Armed Forces” (Directorate of Naval Recruiting 2007).

B. Demographic and Economic Trends

Despite the negative recruiting effect of the Afghanistan war, in the past two years, recruiting performance has improved due to the global recession (CNR 2010). In November 2010, the overall unemployment rate was 7.9 percent. However, the unemployment rate among 16–24 year olds was 20.3%, the highest since 1992 (Office of National Statistics 2011).

The target market also is impacted by several important demographic trends. For example, while the population is aging and the number of 16- to 24-year-olds is shrinking (Directorate of Naval Recruiting 2007; Frontier Economics 2005), the number of ethnic minorities is growing rapidly. Ethnic minorities accounted for 8% of the U.K. population in 2001, but is expected to grow to 20% by 2051 (Tran 2010). The percentage of minorities in the armed forces has been growing slightly each year (Parliament 2008).

Several characteristics of GEN Y also impact recruiting. Today's youth are less interested in life-long or long-term career commitments. Also, the proportion of British youth pursuing full-time post-secondary education has grown dramatically (Frontier Economics 2005). This trend is enhanced by Government policies that incentivize youth to stay in school for further education (Directorate of Naval Recruiting 2007). The number of military-eligible youth also is being affected by changes in health habits. Rising levels of obesity, decreasing fitness levels, and increased health problems associated with the Playstation Generation signal higher potential disqualification rates of youth (Directorate of Naval Recruiting 2007).

The Royal Navy's Recruit Marketing Strategy (2007) reflects societal trends among the current youth generation. The traditional recruiting slogan, "Join the Navy and see the world," is less appealing today as travel is more accessible to the current target market than to previous generations. Also, the Royal Navy's hierarchical structure appears to be at odds with the current generation's more democratic leanings. In addition, the life styles of today's youth may be at odds with shipboard life.

II. RECRUITING ORGANIZATION AND FORCE-LEVEL GOALS

A. Recruiting Organization

The British military, which consist of the Royal Navy (which includes the Royal Marines), the British Army and the Royal Air Force, has been an all-volunteer force since 1963 (Hartley 2000). Recruiting is service-specific, although the Royal Navy conducts recruiting and marketing for both the RN and the Royal Marines. The Royal Navy's recruiting and marketing functions are separate activities. Director of Naval Personnel is responsible for personnel strategy (Royal Navy Recruiting 2010), while RN recruiting is led by the Captain Naval Recruiting (CNR). The RN Directorate of Naval Recruiting (DNR) provides coordination and oversight to navy recruiting. CNR performs marketing for both officers and enlisted in the Royal Navy, Royal Marines, Royal Fleet Auxiliary, and the Reserves (Royal Navy Recruiting 2010).

RN recruiting was reorganized in 2007 to a decentralized structure. Field recruiters are now managed by four Naval Regional Commanders (NRC). The Recruiting Field Force, which includes Regional Outreach Teams, Careers Advisers/Liaison Officers and Recruiting Offices now

report to the NRCs. The goal of the decentralization was to improve the ability of field recruiters to tailor their efforts to the local population (Royal Navy 2009a).

CNR is still responsible for setting recruiting and marketing policy and strategy. CNR also continues to guide, coordinate and train the field force and to set accession targets (Royal Navy Recruiting 2010). DNR allocates recruiting-related budgets to each Regional Business Manager (RBM). This new organizational structure appears to have encountered some issues in setting the direction of marketing activities (Royal Navy Recruiting 2010).

Recruiting is conducted by two types of personnel: Naval Careers Service and the Recruiting Field Force which are under the Naval Regional Commanders (Director Naval Personnel Strategy 2009). Career Advisors are field recruiters for non-commissioned personnel (called 'ratings'). Recruiters are retirees from active duty (typically after 22 years of service) who enter "Full-time Reserve Service" and hold a civilian-style rank structure. There are about 140 Career Advisors permanently assigned to the roughly 40–50 recruiting centers, called Armed Forces Career Offices (AFCO), which are used by all three military services.

Permanent assignment to recruiting duty and to a given location has benefits and costs. Research has shown that recruiter productivity increases with experience on the job (Asch 1990). Based on this research, average recruiter productivity may be as much as 50% higher when using permanent recruiters as compared to a policy of rotating recruiters every 3 years as in the U.S. Navy. Permanent assignment allows recruiters to establish ties in the local community and customize their activities. On the other hand, being retirees the recruiters are older than potential recruits and might not connect as well with young applicants as younger recruiters (Royal Navy Recruiting 2010).

Requirements for naval personnel are determined by the fleet operational commands and the resulting accession requirements are passed to recruiting. NRC must meet the quantitative and qualitative goals set for current and future years (Director Naval Personnel Strategy 2009). All inquiries from potential applicants are routed to the RN Contact Center, which is the initial filter for applicants. The applicant is screened on four eligibility criteria: (a) 16–36 years of age; (b) British resident; (c) Must be a British, Irish or Commonwealth citizen or citizen with a dual British nationality; and (d) Free of specified medical conditions. Eligible applicants may then schedule an appointment at an AFCO where they receive additional information on the RN and can take applicable tests and interviews. An applicant can be under consideration by multiple services until he signs a contract with one of them (Royal Navy Recruiting 2010).

There are several issues with the current recruiting process. The current (2010) weak labor market has impacted the recruiting process in several ways. The recession has generated

an above-average volume of applications from people who were not in the core market and who, normally, would not have considered the RN. The number of non-serious applications increases during recessions because the unemployed need only apply to the RN/RM in order to qualify for government unemployment benefits. One potential weakness in the system is an inability to quickly “sort out” ineligible applicants, as well as those who are not truly serious about joining.

Another area for improvement is the timing of applicant selection. The RN currently processes applicants on a ‘first in, first out’ system of prioritization. This system, however, cannot expedite applicants who might qualify for high-demand technical jobs, and who often decide to forgo the lengthy wait and seek employment elsewhere. In addition, once processing has been completed, an applicant may wait as long as 12–24 months to be sent to Phase I training (Royal Navy Recruiting 2010). Although there are some efforts to engage the applicant in the Navy through meetings and activities, many applicants drop out.

The MoD has recently tried to nudge the services into more joint recruiting efforts. The MoD’s “Recruiting Partnership Project” is an attempt “to outsource the entire process of recruitment for the U.K.’s armed forces from initial marketing to the first day of training” (Ri5 Recruitment Intelligence Services 2009). The British Army has already started outsourcing some recruiting functions. However, at this time (2010), neither the RN nor the RAF has joined this effort. The RN fears that the Navy’s awareness problem cannot be solved via a joint recruiting approach (Royal Navy Recruiting 2010).

In addition to CNR, several other agencies support recruiting. Fleet Media also works with NRC. The Flag Officer Scotland, Northern England and Northern Ireland (FOSNNI) Regional Media and Communications unit supports the Naval Regional Commanders and oversees media relations. The Centralized Office of Information (COI) is a government agency that offers a range of communications services to all government departments, including the military. COI provides evaluation of communications efforts, including data collection, analysis and reporting. The COI Evaluation Team’s specific services include dashboard creation, target setting, benchmarking, forecasting and scenario planning. The COI also evaluates communications and marketing activities (Central Office of Information 2010). The MoD Defence Analytical Services and Advice (DASA) maintain statistics on accessions and produces service-specific results on the Armed Forces Continuing Attitude Survey.

B. Post-Cold War Manning

At the end of the Cold War, the U.K. military downsized considerably – between 1990 and 1998, defence spending fell by 23% and personnel was cut by approximately one-third (Vass 2007, 64). This trend began to reverse in the late 1990s when the British military found

itself increasingly committed abroad. It was also being frequently sent on short notice deployments, which put a strain on its reduced force (Vass 2007). The post-9/11 security environment saw further increases in operational commitments globally for all three military branches. As the military struggled to meet requirements, it also saw a high outflow of personnel. In 2007, the Armed Forces had a 3.2% manning shortfall (Pung et al. 2008).

The U.K.'s military end strength requirements decreased over the past five years—from 191,090 in 2005 to 178,750 in 2010. The Royal Navy's manpower requirement declined from 38,190 in 2005 to 35,790 in 2010 (Defence Analytical Services and Advice 2010). At the start of 2009, the RN had less than 35,000 service members, yet over 36,000 available jobs, resulting in a manning shortfall of about 3.5% (Broadsheet 2009). At that time the RN was comprised of 6,600 officers and over 28,000 enlisted, distributed among the surface fleet (18,580), the submarine service (4,300), the fleet air arm (5,440), and the Royal Marines (6,600) (Royal Navy 2009b). Table IV-1 shows the manning deficit between full-time trained strength and requirements for the Royal Navy during between 2005 and 2010.

Table IV-1. Royal Navy Full-time Trained Strength versus Requirement

	2005	2006	2007	2008	2009	2010
Requirement	38,190	36,830	36,800	36,260	35,760	35,790
Strength	36,400	35,620	34,920	35,070	35,020	35,500
Deficit	-1,790	-1,220	-1,880	-1,190	-740	-290
Deficit as a % of requirement	-4.7%	-3.3%	-5.1%	-3.3%	-2.1%	-0.8%

(Defence Analytical Services and Advice 2010)

A recent (2010) defence review calls for a drawdown in response to substantial budget cuts. The plan calls for reducing RN personnel by around 5,000 to a total of about 30,000 by 2015, and to about 29,000 by 2020 (GlobalSecurity.org 2010). Currently, about 5,000 persons join the Royal Navy annually (Ipsos 2010a). While the RN is meeting its overall recruiting goal it still experiences shortages in specific skills. Although the 2010 forecast for the RN calls for overall downsizing and decommissioning of several ships, new platforms will be introduced over the next decade, which will increase the demand for skilled manpower. The anticipated entry of new aircraft carriers later in the decade also will expand the range of skills needed by future sailors (Royal Navy 2009a).

III. MARKETING AND ADVERTISING STRATEGY

A. Development of RN Marketing Strategy

In 2000 the military developed the *Armed Forces Overarching Personnel Strategy* (AFOPS). The AFOPS addresses 28 Personnel Strategy Guidelines (PSG) including Recruitment Policy (Ministry of Defence 2003, A-5). The Royal Navy's Recruit Marketing strategy is driven by

the most recent (2003) AFOPS. The AFOPS provides strategic direction to each of the three services as they prepare their own service-specific personnel strategies. The Defence Recruiting Committee (DRC) formulates strategic recruitment policy for the entire Armed Forces. Each service branch builds a personnel strategy upon the framework provided by the AFOPS (Alexandrou, Bartle, and Holmes 2001). The Naval Strategic Plan (NSP) lays out strategy to attain its objectives over a 10-year horizon. Based on the higher-level personnel strategy, the Royal Navy develops its own Recruit Marketing Strategy.

NRC implements the strategy with the assistance of Naval Personnel Management Book Reference (BR3), which provides policy guidance to Navy recruiting and serves as a reference for Navy personnel strategy, policy and doctrine (Director Naval Personnel Strategy 2009, 1–2). As the AFOPS defines its strategic pillars, the Navy personnel strategy, in turn, bases its personnel plans upon six pillars: Organization, Recruiting and Training, Career Management, Conditions of Service, Health, and Welfare and Recreation and Recognition.

B. Target Market

The Royal Navy defines its target market by age and by demographic background. The RN focuses on the 16-24 year-old market segment (Directorate of Naval Recruiting 2007). As in other AVF nations, the government expects the military to reflect the ethnic diversity of the population (Royal Navy 2009b, 32). The number of minority recruits more than doubled between 1998 and 2003 (Ministry of Defence 2003). However, in 2007, while ethnic minorities comprised about 7% of the population, they constituted only about 1.7% of the military (Jung 2007, 30). Also, 60% of ethnic minorities in the military came from Commonwealth Countries, rather than from within the U.K. (Parliament 2008).

Table IV-2 illustrates recent difficulties in meeting recruitment targets for minorities. The current Royal Navy ‘Diversity Target’ stipulates that 3.5% of all recruits in 2010 should be from minority groups. However, the RN has been unable to meet this target, and has averaged a minority recruitment of about 2.2% for the past few years (Royal Navy Recruiting 2010).

Table IV-2. Armed Forces United Kingdom Minority Recruitment (%)

	2006-07	2005-06	2004-05
	Target Achieved	Target Achieved	Target Achieved
Naval Service	3.5% 2.1%	3.5% 2.0%	3.0% 2.3%
Army	4.1% 3.8%	3.9% 3.6%	3.4% 3.7%
RAF	3.6% 1.6%	3.6% 1.5%	3.1% 1.7%

(Parliament 2008)

The diversity challenge is exacerbated by the competition between the military and other public employers (Parliament 2008). In addition, there is a perception that discrimination

and harassment persists in the military. Some research indicates that it is unrealistic to expect truly equal representation of ethnic minorities (especially Asians) in the military. In part this is due to the strong influence of parents on their children's career and educational plans, and the perception among some ethnic groups (such as Asians or Hindus) that a military career is a low-status profession. Also, many ethnic groups hold different values and cultural expectations than the mainstream population. Education is particularly important to the U.K.'s ethnic minorities; for example, Pakistani and Indian youth might stay in school until they are 23 years old. In addition, ethnic minorities who are interested in military careers show a preference for the Army or the RAF over the Royal Navy (Alexandrou, Bartle, and Holmes 2001). Some analysts believe that the British military should continue to support ethnic diversity, but should not set unrealistic recruiting targets (Jung 2007).

Rather than attempt to seek statistical representation of women, the approach of the British Armed Forces' toward women is "declarative." The emphasis appears to be on ensuring that women have an opportunity to enter the military, rather than attempting to make their presence proportional to their representation in the population or workforce. The RN has no target for female accessions.

The RN implements specific recruiting measures to target potential recruits with skills in aircrew, submarines, Royal Marines and surface warfare (Royal Navy 2009b). However, it appears that the RN does not attempt to measure the quality of its recruits. Recruit "quality" is based on the results of the Recruit Test (RT), a cognitive ability test that serves as a proxy for how well an applicant will perform in Phase II Training. However, the Recruit Test is considered to be a limited indicator of quality—which, some argue, supports the current practice of recruiting to quantity (meeting set numerical targets), rather than attempting to meet quality targets (Royal Navy Recruiting 2010).

As noted above, DNR considers the RN's core target market to be the 15% of the population who had not rejected a military career—i.e., the "non-rejecters" (Directorate of Naval Recruiting 2007, 10). To better understand this core audience and to design marketing strategy, the RN categorizes this group into five segments according to their attitudes towards risk-taking, self-confidence, career ambition, and career planning.

1. Optimistic Achievers: Individuals in their late teens in further education who have a planned approach to their career choice and desire a career offering professional challenge and rewarding leadership. Future RN officers are most likely to be in this segment.
2. Enthusiastic Followers: A group comprised of late teens that are employed, (or still in school) that enjoy close relationships with friends and sports. They are team players but not leaders, are less academic than Optimistic Achievers, prefer local jobs, but wish to take control of their future.

3. Unfulfilled Potentials: Individuals who are in their early twenties and might be in their second or third job. They are intelligent, highly confident, and seek personal and professional challenges, but are still searching for a career niche.
4. Skilled Settlers: This group consists of those in their early- or mid-20s who are skilled and qualified, have a career niche, are likely to hold blue collar jobs, and possibly have started a family.
5. Low Horizon Grafters: These are individuals in their late teens or early twenties with low ambitions for career advancement, and who prefer holding fairly undemanding jobs.

The first three segments are considered prime RN markets. The RN also recognizes a secondary audience comprised of persons who play a significant role in guiding or influencing youth's career decisions. The current RN Careers website includes a section targeted towards these key influencers.

C. Objectives and Core Principles of RN Recruit Marketing Strategy

The key document that guides RN recruit marketing is the Recruit Marketing Strategy. The current strategy is entitled *Life without Limits*, which has been in effect since January 2008. Market research indicated that the RN needed to adopt a new approach to recruit marketing. In the past, it was assumed that the target audience would be inspired to contact a recruiter after being exposed to an RN advertisement over a fairly impersonal channel, such as on TV or in a cinema. However, more recent research indicates that GEN Y members desire communication with greater interaction—allowing them to better understand what the Navy is about or to identify possible role models in the Navy. The greater level of interaction is made all the more important as GEN Y members are less likely to personally know a family member or friend in the Royal Navy.

The marketing objective of the Royal Navy recruitment campaign focuses on 'lifting the lid' on the Royal Navy, exposing the opportunities (both professional and personal) that it offers, and inspiring people to learn more about RN careers (Directorate of Naval Recruiting 2007, 4). The objectives of the marketing strategy are: (a) To provide as much information as possible to help youth in their career decision-making process; and (b) To do this via a coherent program of communications and activities that systematically progresses potential recruits along a defined customer journey (Directorate of Naval Recruiting 2007, 4).

Based on these objectives and market research, the Royal Navy Recruit Marketing Strategy *Life without Limits* uses the following core principles as the basis for the strategy.

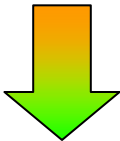
- The Royal Navy attempts to ensure that all marketing activity is aligned to each demographic group's media habits.

- RN attempts to communicate what roles exist in the Navy and what kind of person could undertake those roles.
- RN needs to provide accessible online information to help broaden the understanding of the wide variety of career options available. Communications must focus on the breadth and depth of career choices, and take into account future planned initiatives, such as the flexible career structure and changing branch structures.
- RN needs to ensure that the recruit marketing messages are compelling to our audience, and are delivered using the most effective media channels. The media consumption habits of 16- to 24-year-olds have changed significantly over the past five years, with a much greater emphasis on online activity and social networking sites in particular (Naval Recruiting 2007, 8).

D. The Communications and Advertising Strategy

The goal of the RN Recruit Marketing Campaign is to move individuals along a “journey,” from general awareness of the RN to applying to join. Table IV-3 is the illustration of the customer journey and the marketing efforts that create the progression along the journey (Directorate of Naval Recruiting 2007).

Table IV-3. “Customer Journey” Communications Model for Recruit Marketing Strategy

OBJECTIVE	DNR ACTIVITY	DESIRED OUTCOME
1. Raise awareness of the Navy as a viable and compelling career option	- TV - Cinema - Press - Online (Outreach, Media Relations and Website are secondary though vitally important activities for this phase)	Audience is inspired to find out more information from the website or via telephone enquiry 
2. Provide a more in-depth encounter with the RN to allow potential recruits to gather more information without commitment	Website Outreach activities Careers publications DVDs Dataforce (Contact centre)	Audience begins to consider the RN as a viable career option 
3. Encourage potential eligible recruits to find out more about a career in the RN through face-to-face encounters	AFCOs Careers fairs Outreach activities Dataforce (Contact Centre)	Eligible potential recruits begin to make an emotional commitment to joining the Navy 

In Table IV-3, advertising, along with outreach efforts and the RN website, address the first step in the customer’s journey—that of raising awareness. The second step in this journey, providing more in-depth information, is largely addressed by the website, as well as by various information resources, outreach efforts, and the Call Centre. The third step in the journey is the face-to-face part and is supported by the AFCOs, the Contact Centre and various outreach events and fairs.

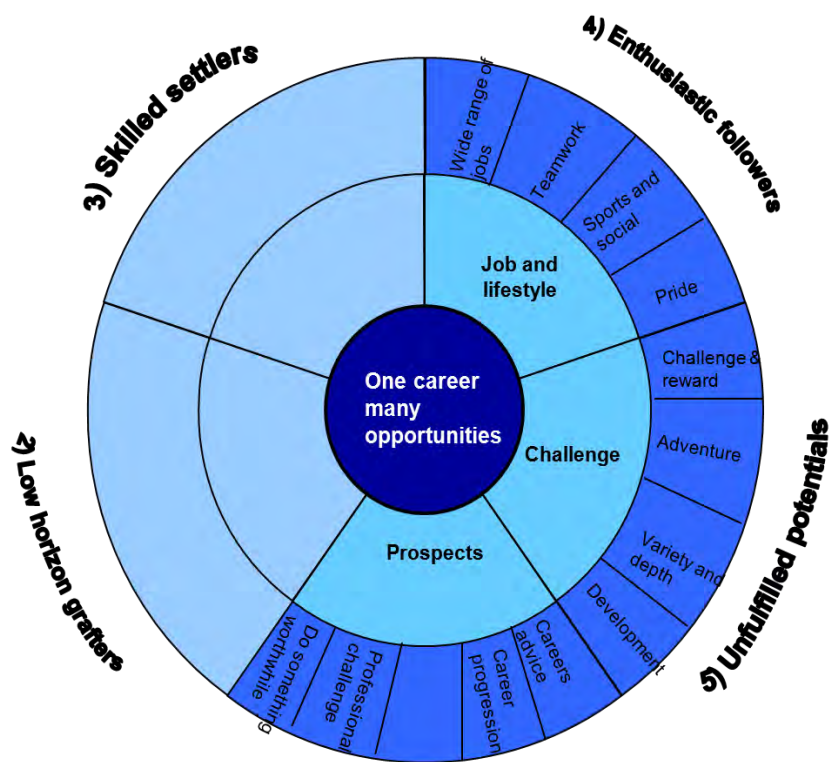
The current *Life without Limits* recruitment campaign was specifically designed to address low awareness and misperceptions among youth (Parliament 2008). The RN directs its recruiting messages to the three primary target segments (described earlier) on the central proposition “One Career Many Opportunities.” This overriding message conveys the depth and breadth of Navy careers. The *Life without Limits* campaign translates and customizes this

foundational message to appeal to specific target market segments (Directorate of Naval Recruiting 2007, 12).

DNR's Recruit Marketing Strategy outlines six different communications activities to raise awareness of the RN and its opportunities (Directorate of Naval Recruiting 2007). The intent is that all six activities will be integrated and provide a consistent message to help an individual progress along the path from awareness of the RN to a desire to join the RN. Based on the core market segments described above, the RN has developed a "messaging wheel," which serves as a visual overlap between the segments and the intended appeal (messages) of the overriding proposition. Figure IV-1 displays the wheel and illustrates how primary messages are translated into lower-level messages to best motivate different target segments.

Figure IV-1. Messaging Wheel

Royal Navy: Proposition and messages



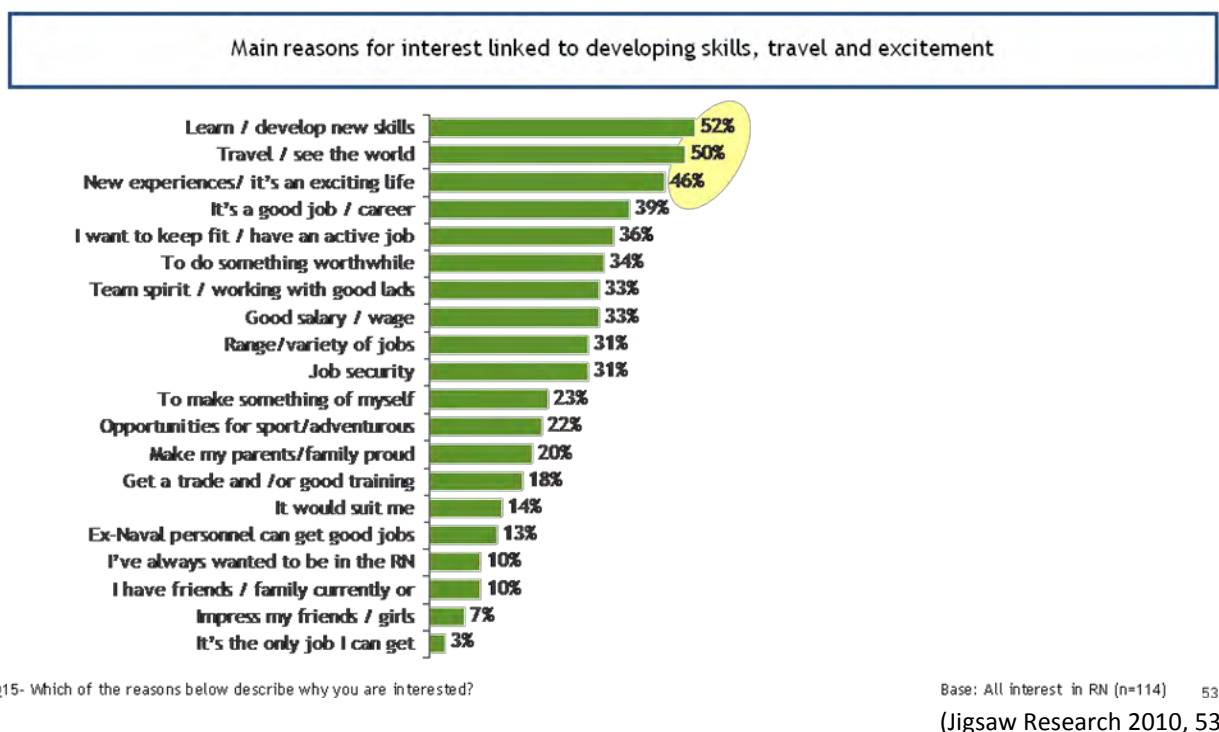
(Directorate of Naval Recruiting 2007, 12)

In addition to educating the public on the RN, the marketing campaign seeks to establish a unique brand image for the RN that distinguishes it from the other services. In January 2010, the Royal Navy launched the latest phase of the *Life without Limits* campaign. The two-word voice-over phrases serve to convey "defining moments in a young Royal Navy recruit's life" (The

Inspiration Room 2010). The intent is to promote both the practicality and relevance of a naval career, as well as the personal growth factors (Jigsaw Research 2010). This focus appears to reflect the primary motivators for interest in a naval career, as determined by market research. Figure IV-2 shows the primary reasons cited for interest in a Naval Career. The most frequently cited reasons include: “learning new skills;” “travel;” “new experiences;” and “career.”

Figure IV-2. Reasons for Interest in the RN as a Career

Reasons for interest in the RN as a career



E. Advertising and Marketing Budget

During 2004-2008, all three services increased spending on recruitment. The largest piece of the Navy's recruiting budget (which includes manpower, marketing, recruitment offices and other expenses) is manpower. During 2007-08, the Navy spent £35.16 million on recruitment, £16.25 million of which was for manpower and £12.68 million for marketing (Parliament 2008).

RN's overall annual marketing budget does not change within a fiscal year. However, a funding line is available for “shortage campaigns,” which gives CNR the flexibility to direct an ad agency to conduct a shortage campaign as needed during the budget year. CNR finds that campaign changes can be made relatively easily when working in the online environment as it

can quickly move campaign material among different sites. One budget-related challenge is that over the course of a year, CNR must make trade-offs between two kinds of marketing—high-level awareness advertising versus targeted advertising for the short-staffed specialties (Royal Navy Recruiting 2010).

The advertising budget and the recruiting budget are separate which prevents CNR from making trade-offs across recruiting weapons. This appears to be because CNR does not control field recruiters, who instead are directed by the regional commands. Hence, NRC cannot, say, reduce spending on recruiters in order to expand marketing. The regional business managers have their allocation of marketing funds to conduct regional marketing, as they desire. However, RN Marketing (CNR) does provide the regions with the marketing policy (Royal Navy Recruiting 2010).

IV. IMPLEMENTATION OF THE STRATEGY: MARKETING AND ATTRACTION PROGRAMS

A. Advertising

RN advertising campaigns run in four primary media—television, cinema, digital and press. Each medium plays a unique role in reaching and attracting targeted segments.

1. Television and Cinema Advertising

Television is the most far-reaching medium for the RN and is considered cost-effective for increasing overall awareness of the RN—both among potential candidates and key influencers (Directorate of Naval Recruiting 2007). However, TV does not play a large role in the overall media mix, as TV ads are very costly

An important, current trend in television is a transition from the traditional “terrestrial five-channel model” to digital TV. The vast majority of the three market segments have already switched to multi-channel digital TV—which offers a much broader spectrum of broadcast than the traditional TV model. Advertising on channel-diverse digital TV offers the ability to target specific TV stations and programs that best coincide with the target market’s viewing habits. The most recent phase of the *Life Without Limits* campaign includes nine 10-second TV ads which highlight specific job opportunities in the Navy (The Inspiration Room 2010).

“Pub TV” is a TV network in the U.K. which typically airs sporting events in pubs. Typically a Pub TV audience views the ads in a group, which promotes group discussion of the ad in a social setting. Research indicates that this type of shared-viewing in a social environment helps to increase recall of the ad. In addition, a favorable response to the ad by peers can have a positive influence on the ‘Enthusiastic Followers’ segment.

The RN buys cinema screen time to broadcast ads that target 16- to 24-year-olds. RN selects the films based on the likelihood that the film will foster social group discussions of the ads, and that it will capitalize on the socially reaffirming influences of shared viewing (Directorate of Naval Recruiting 2007).

2. Digital, Web-based Advertising

The new media landscape fragments the RN's target audience into "Digital Natives" who have grown up with the Internet and digital media, and Digital Immigrants" who have not grown up with new media, but have adopted it. The target market is increasingly selective regarding what information they wish to view and they can screen out unwanted information (Directorate of Naval Recruiting 2007, 6). Of all media, digital-based advertising appears to be most critical to the RN recruit marketing strategy as 16- to 24-year-olds are very connected to digital technology. They spend more time on-line than watching TV, 85% of them own a mobile phone, and they increasingly engage in "social computing"—where web users interact with each other in digital communities (Directorate of Naval Recruiting 2007, 14).

The RN can target this core market with online advertising designed to appeal to GEN Y and strategically placed on the specific web sites they visit. For example, ad placement capitalizes on findings of on-line behavior research which reveals that "Optimistic Achievers" favor visiting task-driven sites (e.g., e-mail or planning sites), "Unfulfilled Potentials" visit sites that offer entertainment during a study break (e.g., YouTube or Kontraband sites) and "Enthusiastic Followers" typically visit lifestyle sites (e.g., sporting, gaming or music sites).

On-line ads fall into different categories depending on the message. Role-specific ads highlight jobs in the RN and portray people performing their jobs in a way that might intrigue the viewer. The role-specific ads are also used in shortage campaigns to feature specific jobs in occupations with manning shortfalls. The role-specific ads are categorized into themes and each group of ads is launched in phases. For example, Phase One advertisements promoted positions for IT Specialist, Air Traffic Controller, Electrician, Steward, and Engineering Officer, while Phase Two ads promoted positions as a Diver, Dental Nurse, Chef and Warfare Specialist. The role-specific ads use "media-rich formats," such as streaming video content and sound. Website selection for the role-specific ads reflects known online behavior of each market segment.

Generic RN ads promote the entire range of RN careers and are designed to attract people who might not be interested in the specific jobs. Website selection for the generic ads favors general interest websites frequented by "Optimistic Achievers" and "Unfulfilled Potentials" who might be exploring broad career options. The generic ads and the role-specific ads run simultaneously during online campaign efforts.

The digital arena offers several notable potential growth areas for RN advertising. One relatively new and growing area of digital advertising is “in-game” advertising. The core audience is increasingly participating in games where players play against each other online (“community online gaming”). The in-game advertising potential is being explored by the RN. Another potential growth area is streaming videos, which are increasingly common on news, sports and other websites. The RN is evaluating the potential benefits of purchasing advertising space just before the start of streaming videos on high-traffic websites. Viral videos are made popular through the sharing among internet users via websites, e-mail and, increasingly, via mobile phones. The RN is also trying to establish a series of imaginative viral videos in an effort to connect with the core audience in a way that engages them through use of one of their increasingly popular electronic devices.

Efforts are also underway to optimize the likelihood that the RN appears at the top of site listings provided by search engines. Another way of capitalizing on digital communications uses the target audience’s growing interaction with social networking sites. Sites, such as MySpace and Facebook provide opportunities for the current youth generation to socialize. The RN is experimenting with planting links to the RN website on popular social networking sites, as well as establishing a profile page of a naval pilot who became a public figure as a result of an RN broadcast advertisement.

The popularity of smartphones and interactive web applications has greatly increased even since the 2007 Recruit Marketing Strategy. The RN is currently increasing the use of interactive web ads, as well as pop-up ads and e-mails on smartphones. An RN mobile phone application portrays the “*Life without Limits*” campaign via a personalized video message targeted to 16–24 year olds (Eurobest Advertising 2010).

The Royal Navy is increasingly recognizing the value of the popular internet site YouTube as a potential recruitment tool. The RN has a channel on YouTube and posts videos designed for recruitment purposes. The site is considered to be a relatively low-cost medium to attract new recruits. In addition, by including video footage of military operations in Iraq and Afghanistan, the site offers a way to show the public the work the military is doing in these areas (McKenzie 2007). The Navy’s *Life without Limits* campaign has advertisement videos on YouTube.

The Royal Navy considers digital channels to be a key part of its communication strategy. In addition to plans to revamp the corporate website, the Navy plans to explore its use of semantic web, e-mail, mobile and different social media channels—all considered key avenues to reach the target audience (The Inspiration Room 2010). One example of how the Royal Navy has leveraged the mobile marketing trend is a new social media game called “Engineer Officer Challenge,” designed to recruit marine engineers. The game, played using an

iPhone application and a Facebook widget, puts potential recruits through various training exercises and allows friends to interact about the game (O’Hear 2009).

3. Press Advertising

The RN views national print advertising in newspapers and magazines as an opportunity to address the poor understanding of the RN by the public. When advertising in the national press, the RN prefers to use “advertorials,” which are advertisements that resemble editorials rather than traditional ads, and “pen portraits” which offer personal descriptions of life in an RN job—typically in a hard-to-fill skill. Regional advertising typically highlights local RN events. While not technically “press,” the Royal Navy also includes taxicab advertising in its efforts.

B. Royal Navy Website

Traditionally, after exposure to an RN advertisement, individuals interested in learning more about RN careers would contact a call center and request that information be mailed to them. The RN Career section on the website now provides career information in real-time to interested persons. The RN now considers this website to be the “central hub for the recruit marketing campaign” and the “lynchpin of the *Life without Limits* recruit marketing campaign” (Directorate of Naval Recruiting 2007, 20). The website expands the scope and detail of information presented in advertisements and connects potential recruits with the Armed Forces Career Offices (AFCOs), the Dataforce call centre, and the online application form.

An interesting (and very beneficial) trend regarding the website is the presence of “user-generated content”—in which site viewers also provide and produce website material, such as blogs and YouTube videos. The user-generated content gives viewers access to the lives of RN personnel, and provides a sense of authenticity to the information. Part of the strategy of the RN user-generated content is to highlight RN heroes (such as a female helicopter pilot), with detailed personal and professional profiles, personal blogs, audio files, and—most importantly - video-diaries which depict job duties and adventures over a fairly long period of time. This gives viewers a true sense of the hero’s daily life.

Plans to expand this multi-media profile of a hero include live chat capability. Within the hero’s personal profile, viewers are guided to in-depth information on the hero’s specific job as a means of pulling the viewer into the job application process. The RN intends to continue to build on its cadre of website heroes to ultimately depict a full range of RN jobs. This type of web-based personal glimpse into an RN member’s life aims to counteract the shrinking “Naval footprint.”

Another advantage to an interactive website is that it offers more engagement between inquirers and the RN, helping to “bring the reality of the job to life” to the target audience who often lack an understanding of the RN. The digital media platform also allows different segments of the target market to seek information they need—whether it concerns social aspects of the RN or career information (Directorate of Naval Recruiting 2007, 4).

Also worth mentioning is the Royal Marines’ website which includes “parallax motion photography, video diaries and direct contact with service members via live chat sessions.” Video diaries track a recruit’s progress through the Marine recruit training program, in an effort to inform and attract potential recruits viewing the website (Royal Marines, 2011).

C. Outreach

Outreach efforts aim to raise awareness and understanding of the RN in the target market. Outreach efforts are conducted at both national and regional levels and include activities associated with the “Royal Navy in the Public Eye” (RNIPE) initiative, a public relations effort which focuses on raising awareness of the RN (Directorate of Naval Recruiting 2007).

The RN attempts to measure the results of investments in outreach efforts. Return on investment (ROI) is measured in terms of recruitment results. The impact of an event on recruiting is based on the return of an “Expression of Interest” by event attendees. The DNR also evaluates the overall effectiveness of the RNIPE initiatives via an annual Omnibus survey, which tracks the public’s opinion of the RN. Despite these efforts, accurate evaluation of the impact from an outreach event is considered problematic (Directorate of Naval Recruiting 2007).

The Navy is trying to increase its public awareness with a variety of events. In a recent year, the Royal Navy conducted 4,000 school visits, which were not directly related to recruiting. However, the armed forces are constrained by their budgets, but also by the need to balance their direct recruiting efforts with a more tempered approach that might emphasize the softer side of the military (Directorate of Naval Recruiting 2007). The following is a list of numerous outreach-related resources and assets.

- Trailers—Includes simulators (submarine, ship, etc.) and interactive modules
- RN Student Presentation Teams—Three-member teams (enlisted plus one junior officer) that explain the Navy’s role and describe life in the Navy to schools.
- Sports Presentation Teams—Teams representing RN or RM visit target audience event and provide presentations, coaching, and training (mostly rugby, boxing and football).

- Diversity Action Teams are located in areas with large ethnic populations. They give presentations and organize events that encourage RN careers to ethnic audiences.
- Royal Navy PTI (Physical Training Instructor) Team—Work at schools, events engaging in sports to promote RN as a career.
- Specialist Recruiters—Offer presentations that promote Engineer, Fleet Air Arm, RM Band Service and Medical career at events, and schools.
- Mobile Recruiting Vehicles—Serve as a recruiting office on wheels at events.
- Field Force Activities—Personnel from Armed Forces Careers Offices provide presentations at schools and exhibits at events.
- In an effort to reach out to youth and their influencers, the MoD supports four Cadet Forces: the Combined Cadet Forces, the Sea Cadets Corps, the Army Cadet Forces and the Air Training Corps (Parliament 2008).
- The Bournemouth Air Festival is an RN outreach event aimed at increasing understanding of Navy operations. As part of the festival a mine hunter and an amphibious ship provide the base for Royal Marines and Royal Navy to stage an amphibious assault on the beach at Bournemouth (Directorate of Naval Recruiting 2007).

D. Improvements to the Recruiting Process

In 2009, the military started merging the officer and enlisted (ratings) recruiting processes. The different branches have not yet concluded how successful this change has been in terms of improving recruiting. A recent successful recruiting campaign, along with the economic downturn, has increased the number of applications received by the RN, making it difficult to isolate the effect of the new recruitment process (Royal Navy Recruiting 2010).

In an effort to standardize and streamline the marketing and recruitment pipeline and to improve “customer relationship management” a centralized contact center operation has been established. By providing an interface between the marketing and recruiting systems, this enterprise now provides DNR with management information to help in decision making. Features of this new Customer Response Process have been (or will be) phased in, such as strategies concerning e-mail, web chat, and online application forms.

After a potential recruit indicates an interest in the RN he/she is directed to make an in-person visit at an Armed Forces Careers Office (AFCO) where a recruiter provides additional information. If the candidate is qualified, he/she enters the candidate selection process. Potential enlisted personnel (ratings) take the Naval Service Recruiting Test (RT), which evaluates various competencies. The RT score determines which branches of the RN the candidate may consider. The U.K. administers a national standardized test in 8–10 subjects for all 14 to 16 year-olds called the “General Certificate of Secondary Education.” While the RN typically uses the Recruit Test (RT) to determine a recruit’s aptitude for military service and to

best match him/her with a rating, it also uses the GCSE. Because the educational system in the U.K. differs from the U.S., the RN does not have a mission for high school graduates, nor are there any 'quality' marks in the sense of aptitude test scores or educational attainment. Also, the military recruits youth as young as 16, which is the U.K. school-leaving age.

E. Other Marketing Trends

CNR attempts to integrate advertising across all media channels. In fact, CNR considers the level of overall public RN awareness to be based on three components: Outreach (events, career fairs, etc.), cinema advertising, and education efforts. While advertising is important, the "tipping point" (the point at which youth actually make the decision to join) is when they talk to someone face-to-face. The CNR stresses that no one element of marketing can meet all the needs of the customer journey alone without the others (Royal Navy Recruiting 2010).

The RN is also embracing "e-recruiting" or on-line recruiting. One important benefit of on-line recruiting is its role in helping to "de-select" potential applicants who would not be a good fit for the RN much earlier in the recruiting process. It is important to note that while the 2007 RMS is being updated to reflect the growing digital media emphasis, the overriding strategy and segmentation (shown above in the "Message Wheel") remain unchanged today. Even though where the audience is connecting to the media is changing, the audience and the RN message have not changed (Royal Navy Recruiting 2010).

One challenge facing CNR is assessing whether their advertising campaigns are being interpreted as intended. The marketing strategy is successfully bringing the core audience to the RN website, but now needs to ensure that it keeps the audience at the website by meeting their "social needs." Research indicates that 94% of today's 16 to 24-year olds own a mobile phone and that half of them use this device for other than phone calls. In the future, the CNR seeks to "drip feed" the RN messages to this core audience, while letting them stay on their social networks, by overlaying RN advertising efforts on the new "social networking" technology.

All military branches struggle with shortfalls in specific skills and each also targets these skills in their marketing strategies. The Navy recently ran campaigns highlighting Aircrew, Royal Marine and Submariner occupations (Parliament 2008). In light of this need to address emergent requirements, it should be noted that while RN strategy does not change, its implementation is flexible. The staff meets with agencies weekly and makes adjustments to specific ad campaigns, as needed. For example, the CNR might direct an ad agency to run a "shortage campaign" for a specific occupation, but the overriding strategy, corporate objectives and corporate messages remain the same (Royal Navy Recruiting 2010).

There is some indication that the focus of recruiting might change (or at least expand). The on-going Integrated Recruiting and Retention (IRR) program is asking “What will the sailor look like in 2015?” With this information, CNR wants to start recruiting for that sailor now. Hence the emphasis might broaden from a strictly numbers-focus to include quality, based on knowledge of the best type of sailor to recruit (Royal Navy Recruiting 2010).

F. Incentive Packages

AVF nations offer various incentives, such as subsidized education, training opportunities, bonuses, and targeted entry programs. In the U.K., one perception of the public is that joining the military hinders one’s ability to pursue postsecondary education. Thus, the MoD is interested in promoting the educational opportunities offered in the military. Funded education programs are offered that the military hopes will be attractive to those youth (and their parents) who might not otherwise be able to afford postsecondary education. There is particular interest in promoting educational opportunities to ethnic minorities (Parliament 2008).

The Royal Navy appears to make limited use of enlistment bonuses. To attract entrants into the Submarine Service, the RN offers a Golden Hello of up to £5,000 payable after the member successfully completes submarine training. Some occupations also offer specialist pay (as opposed to an entry bonus) to attract persons into those fields.

The Royal Navy promotes a range of training and educational benefits to attract education-minded persons to the Navy. Different programs are designed for four different categories of prospects (Royal Navy 2010). Three of these are for officers to earn university degrees. However, “Fully Funded Apprenticeships” are designed for enlisted persons (ratings). These apprenticeships offer training and qualifications which are promoted as being transferrable to civilian employment.

The RN also promotes ‘lifelong learning’ opportunities to help attract and retain, recruits. The RN offers a Standard Learning Credit Scheme, in which £175 is made available to all service members each year. In addition, RN recently offered all service members who have served at least six years free tuition towards ‘A’ levels or a first degree (Broadsheet 2009, 33). The MoD encourages the services to further expand offerings of educational courses to other ranks, such as warrant officers and senior rates with specialized and/or technical skills and to base recruiting strategies on the growth of interest in higher education (Parliament 2008).

RN Marketing has found it to be particularly beneficial to “sell” the education benefits of the Navy to the parents of candidates. There is a perception among U.K. parents that their children need to earn a university degree, not to enter the military. The RN’s response is to

offer an “in-service degree program,” which allows service members to progress towards a degree through their work in the Navy (in aviation or warfare). RN Marketing also stresses that the Navy degree program does not leave the candidate burdened with college debt, unlike a civilian university (Royal Navy Recruiting 2010).

V. MEASURING EFFECTIVENESS

RN conducts research studies to better understand its target markets, the reasons why recruits made the decision to join, and the effectiveness of its marketing and advertising efforts. Data analysis, new recruit surveys, and focus groups are instruments used in analyses conducted both in-house by CNR, by other government organizations, and by private research organizations. The advertising agency performs research to create the ads, while the contract organizations perform research to make recommendations on which media channel the advertising should be placed (Royal Navy Recruiting 2010). The Central Office of Information (COI) also conducts or assists in conducting evaluations of the effectiveness of the advertising or marketing initiatives by the private firms (Central Office of Information 2010).

One initiative that focuses on both recruiting and retention is the Integrated Retention and Recruitment (IRR) program. First launched in 2007, the IRR program seeks to meet its recruiting targets more efficiently. Its goal is to ensure that RN recruits the best people in the right slots, and ultimately to keep people longer in the Navy (Royal Navy 2009b). During the first stage of the IRR program occupational psychologists sought to identify the characteristics of successful, long-serving members by analyzing selection tests, training assessments and other tools. Now embarking on its second phase, the IRR is developing personnel selection and assessment policies. In 2010, the IRR started conducting trials that involve new assessments of the recruiting tests currently administered to potential recruits. The hope is to use results of these assessments to monitor and track new recruits’ career progression and to identify the characteristics of recruits who are more likely to stay in the service. In addition, the IRR seeks to gather some “lessons learned” from those who chose to separate; a departure system was developed to gather data on the reasons behind a decision to leave the RN (Royal Navy 2009a, 99; Royal Navy 2009b, 30).

A. Evaluation of Effectiveness of Advertising Campaigns

The Centralized Office of Information (COI) contracts with independent research companies to conduct target audience research of RN advertising campaigns. In addition CNR has produced key performance indicators (KPIs) for COI and the marketing agencies to use in measuring the performance and effectiveness of specific ad campaigns (Royal Navy Recruiting 2010). This section discusses how these approaches, as well as other tools, are used to assess advertising and marketing.

1. Key Performance Indicators

CNR developed key performance indicators (KPIs) to evaluate the effectiveness of the “product” from the advertising agencies. Research on advertising effectiveness is currently performed by Jigsaw Research, as the RN has attempted to avoid having the advertising agencies conduct such assessments. CNR might instruct the ad agency that the objective of an ad campaign is to obtain 20 engineers to meet the current requirement shortfall. The media agency then develops a marketing campaign. After the website campaign is run, the KPIs applied to the campaign might reflect: the number of responses to the website, the number of subsequent expressions of interest, the number of telephone calls made to recruiting, the number of applicants, and the number of engineers recruited. The “conversion rate” is as the ratio of the number of engineers who join to the number of responses to the website ad. The KPIs also include measuring the “spikes” in the number of website “hits” the day after the campaign (Royal Navy Recruiting 2010). Figures IV-3 and IV-4 illustrate how the research agency compares KPI’s generated from a sample of the target market from pre- and post-advertising wave (Jigsaw Research 2010, 68, 69). The KPIs are broken down by five market segments.

Figure IV-3. Summary of KPI’s across Segments-Pre

Summary of KPI’s across Segments - Pre

	Low-horizons Grafters	Skilled Settlers	Optimistic Achievers	Enthusiastic Followers	Unfulfilled Potentials
Spontaneous Advertising Awareness	24%	30%	29%	36%	36%
Prompted Slogan Awareness	39%	41%	39%	43%	37%
Campaign Recognition (Definitely)	-	-	-	-	-
Consideration of Royal Navy career	3%	5%	3%	9%	7%
Interest in Royal Navy career (Going to apply/ very/ quite interested)	9%	8%	13%	19%	17%
Knowledge of the Royal Navy (score 7-10)	9%	12%	11%	12%	11%
Parental encouragement (Strongly/ Tend to)	20%	32%	28%	30%	30%
Peer approval (Strongly/ Tend to)	24%	30%	35%	39%	23%

Figure IV-4. Summary of KPI's across Segments-Post

Summary of KPI's across Segments - Post

	Low-horizons Grafters	Skilled Settlers	Optimistic Achievers	Enthusiastic Followers	Unfulfilled Potentials
Spontaneous Advertising Awareness	35%	49%	44%	40%	41%
Prompted Slogan Awareness	55%	67%	58%	57%	54%
Campaign Recognition (Definitely)	63%	80%	68%	68%	65%
Consideration of Royal Navy career	3%	3%	5%	10%	7%
Interest in Royal Navy career (Going to apply/ very/ quite interested)	15%	5%	16%	24%	20%
Knowledge of the Royal Navy (score 7-10)	8%	8%	18%	7%	17%
Parental encouragement (Strongly/ Tend to)	29%	33%	24%	39%	29%
Peer approval (Strongly/ Tend to)	27%	23%	23%	38%	25%

2. Evaluations of Advertising Campaigns

RN advertising campaigns are evaluated along four dimensions (Directorate of Naval Recruiting 2007).

- 'Reach and Frequency' data indicates how many viewers see the ads and how often.
- 'Awareness' data indicates any shifts in the perception of what Navy jobs are available, as well as perception of the type of people who comprise the Navy.
- 'Response' data indicates how many people express an interest in the RN by means of the RN website or Dataforce (the call center).
- 'Conversion' data indicates the ratio of recruits to responses.

The following section provides background on the elements of each media channel employed in advertising campaigns (Directorate of Naval Recruiting 2007, 28–30).

Television ads. TV ratings (TVRs) are based on 'reach' (how many in the target market see the ad) and "frequency" (how often they see the ad): 1 TVR =1% of target audience viewing one ad one time. The goal is to achieve 600 TVRs with their TV ad campaign, based on reaching 71% of the target market who have an 'opportunity to see' (OTS) the ad an average of

4.2 times. A sub-set of TV ads are the 'PUB TV' which run during major European football (soccer) matches and have the same goal as regular TV ads

Cinema ads. Cinema ads also run only in specific months and on films that appeal to 16-24 year olds. The goal is to reach 19% of the market who have an OTS of 2.1 times.

Advertorials. Magazine advertorials are run in four lifestyle magazines, two that appeal to men and two that appeal to women. The advertorials are placed in the January-March period. The goal is to reach 42% of those ages 16-24 with an OTS of 3.3 times.

Regional press. Newspaper ads are run in the classified section of major newspapers. The goal is to reach 40% of the target age group with an OTS of 4.3 times.

Online activity. Online activity includes ads on lifestyle websites, recruitment websites, in-game advertising, 20-second online versions of the TV ads, partnership activity with websites, search activities, and viral marketing. The goal is to reach 96% of the 16-24 year olds with an OTS of 15 per user (= 5 executions displayed 3 times each).

Metrics also are used to track how viewers are reacting to the online ads and shifts in awareness levels and in perceptions of the ad campaign and of the RN. Data describing the impact of the online ads are collected weekly during the specific ad activity. They include:

- The number of impressions delivered
- The number of unique users reached
- The number of clicks per format
- The number of interactions with rich media creative
- The frequency of adverts seen by each user
- The number of unique arrivals to the careers homepage of the RN website
- The number of requests for more information.

RN Website. The following metrics used for weekly evaluation of the website:

- The number of unique visitors to the website as a whole
- The number of unique arrivals to the careers homepage
- The number of unique arrivals from each online activity
- The pages visited by those exposed to the online advertising
- The information downloaded by those exposed to the online advertising
- Pages visited on the site by all users
- User journeys through the site
- The number of information packs downloaded
- The number of requests for more information.

a. Pre- and Post-wave Tracking Research

Jigsaw Research conducts the Royal Navy Brand and Advertising Tracking studies. The agency is informed of the motivators for choosing a career for each of the five market segments (Optimistic Achievers, etc.). Surveys are used to track the impact of advertising campaigns on the target audience's awareness and perceptions of the RN brand. Pre-wave and post-wave surveys compare awareness and brand perception before and after the campaign.

The research agency administers questionnaires to determine respondents' recognition of the Navy before the campaign runs. The same audience is surveyed post-wave, about three months after the advertising campaign (Royal Navy Recruiting 2010). As an example of the advertising effectiveness evaluation, the RN launched the new campaign ("Life without Limits") in January 2010 based on 30-second TV ads (=365 TVRs) and 10-second ads thereafter for specific occupations (=555 TVRs). Pre-wave and post-wave surveys found that awareness of the RN rose by 10 percentage points (between Dec 2010 and Feb 2010) and about one-third of those who recalled the ad took some action (Jigsaw Research 2010). Also, 88% saw the RN advertising on TV rather than online or on some other media. The surveys used three Key Performance Indicators: "RN have peer/family approval" (KPI1), the respondent considered "the RN a good career choice," (KPI2), and the respondent "is interested in an RN career" (KPI3). Only 6% of respondents picked the RN out of a long list of possible careers (compared to 9% for the Army and RAF) and interest in the RN did not appear to be linked to awareness of the RN advertising. On the other hand, positive perceptions of the RN were linked to awareness of the advertising.

The overall conclusions of the 2010 RN Brand Pre-and Post-Wave Tracking study are that awareness of the advertising significantly increased from pre- to post-wave, particularly among women. Similarly, awareness of the slogan increased and campaign recall was positive. Despite the positive results for advertising awareness, the pre- and post-wave interest in a Navy career remained stable at about 16 percent. While the study indicated that the target market holds generally positive views of the Royal Navy, knowledge of the Navy remain low. However, those who saw the RN ad hold more positive views of the Royal Navy than do those who did not see it (Jigsaw Research 2010, 65).

What does the research say about how well the advertising is working? The 2010 Brand and Advertising and Tracking study conducted both pre-wave and post-wave surveys to determine the impact of the ad on interest in the armed forces. The results reveal that 78% of the target market is not interested in a career in the RN (Jigsaw Research 2010). Only 5% were "very interested" or "plan to apply to the RN."

b. Response Data

Dataforce Ltd. (the call center) records the number of inbound and outbound calls weekly and reports the number of interest forms completed on the website. Dataforce filters all responses for eligibility. Their reports analyze the number of eligible information seekers generated by each media channel. Online activity is tracked to individual executions and sites where advertising has been placed. The RN calculates the cost per response by activity as well as the cost per recruit.

c. Conversion

The RN anticipates being able to track the ‘customer journey’ from the point of responding to an ad campaign, to the point of actually joining the RN. This conversion analysis will be possible once the call center and applicable databases are aligned. It will also be able to calculate the cost per recruit and return on investment. RN Marketing calculates the “conversion rate” through the whole process (the number who engage in the website, the number who proceed to complete and submit a form, the number eligible, the number who pass the screening exam, the number who take an interview, and the number who join).

3. Potential Applicants Survey (PAS)

The PAS survey was launched in 2008 and provides feedback from potential recruits on what influenced them to join the RN and their expectations about naval service. By learning about potential recruits’ expectations, RN Marketing hopes to design strategies that attract the desired audience. The following highlights key findings of the 2010 PAS:

- Sources of Information about RN/RM Career: Respondents learned about RN/RM careers from the website (90%), by visiting AFCOs (59%) and from RN/RM brochures and informational resources (46%).
- Decision Influencers: The decision to pursue an RN/RM career was most strongly influenced by the internet (72%) and by a visit to an AFCE (53%). Word of mouth from family and friends with RN/RM experience is also influential.
- Motivators: Factors that motivated respondents to join the RN/RM were the challenge and nature of the job (70%), opportunities to travel (67%), service to country (65%), and developing personal skills (64%).
- Career/Life Expectations: Most respondents (83%) consider an RN/RM career as a life-long career. Nearly all (92%) respondents feel the skills they will gain from the RN/RM will be transferable to civilian life after they leave the military.
- Expectations: When asked what they desire to achieve by age 37, most respondents (82%) indicate they want additional qualifications, half (47%) want to be in a senior management position, and 27% hope to be in a middle management position. (Ipsos MORI 2010a).

4. First Contact Front Line Data Collection Questionnaire (Captain Navy Recruiting 2010a)

This one-page questionnaire is administered to potential recruits at the AFCOs and asks seven questions:

- “At what age was the info-seeker first aware of the RN as a career option?”
- “What prompted the info-seeker to contact us today?” (open-ended)
- “What RN/RM marketing has the info-seeker seen/heard? “ (Respondents are asked to check all that apply on a list that includes various kinds of advertisements, outreach events, etc.)
- “What is the single most important factor that attracted the info-seeker to a RN/RM career?” (open-ended)
- “Is the info-seeker looking for a short or long term career in the RN/RM?” (open-ended)
- “In the info-seekers opinion, what is the single most important thing that would make a good sailor/royal marine? (i.e., personal quality/attribute)” (open-ended)
- How does the info-seeker interpret the term “fighting spirit” and why does he/she think it is important in today’s RN/RM?” (open-ended)

The questionnaire not only provides feedback on marketing effectiveness but also informs segmentation research, which attempts to identify what type of person is interested in the RN and what motivates them to inquire (Royal Navy Recruiting 2010).

5. Outreach Event Report (Dashboard Reporting) (Captain Navy Recruiting 2010b)

The Outreach Event Report is a tool which enables the RN to measure the recruitment value of an outreach event. A response code is assigned to each outreach event and is tied to the “expressions of interest” forms, which are distributed at each event. A certain percentage of the interest forms are returned to recruiting to initiate a follow-up contact. The one-page Outreach Event Form provides historical data on the cost of the event, the attendance (including the percentage of attendees who belong to an ethnic minority and who are in the target age group), the level/type of advertising or media exposure of the event, and a subjective evaluation (on a five point scale) of the “recruiting value” of five aspects of the event. A final score for the event is calculated based on the ratings.

6. Royal Navy Acquaintance Centre (RNAC) Feedback Form (Captain Navy Recruiting 2010c)

The pipeline from the initial decision to enlist in the RN and passing the Recruit Test until entering Phase I (recruit) training can be lengthy - often lasting 12–18 months. The delay is due to the need to level out training class sizes over the year and the inability of the

training facility to accommodate unusually large numbers of recruits. The RN attempts to keep recruits in the queue motivated and qualified to serve. One effort involves having recruits attend courses and briefs at the Royal Navy Acquaintance Centers (RNACs). Organized activities include: team building exercises, physical training, marching and drill, small arms training, and ship/submarine visits. A “RNAC Feedback Form” is distributed to recruits to gather their feedback from these events.

7. Royal Navy Students Presentation Team: Teacher’s Feedback Questionnaire (Captain Navy Recruiting 2010e)

As part of its effort to increase awareness, teams of Navy service personnel (not recruiters) make presentations to student audiences. They present the RN as a career choice to students, as well as to school faculty and administrators. A Feedback Questionnaire is completed by the teachers to help the RN learn how the presentation was received by the school and whether the students seemed to benefit from this effort.

8. Applicant Assessment Tools

The RN employs different assessment tools as part of the application process for enlisted personnel and officers. Two applicant assessment tools are used for potential ratings (enlisted personnel)—a Personnel Qualities Assessment Score (PQAS) is generated from personal interviews, in addition to the Recruit Test (RT). Applicants can be awarded ‘discretionary points’ towards qualification for entry.

The evaluations have informed budget decisions with respect to which media works best for each segments. In response, CNR is able to consider re-working the positioning of media for the next campaign as necessary. This flexibility is important when tracking a campaign’s effectiveness (Royal Navy Recruiting 2010). Evaluations have also allowed CNR to identify campaign failures. CNR learned that the 2009 Royal Marine campaign did not perform well. The evaluation indicated that the target audience’s (17–24 year olds) retention of information conveyed in the advertisements was not very good. CNR concluded that the low-budget campaign resulted in the low campaign recognition (Royal Navy Recruiting 2010).

Similar to other AVF countries, the U.K. Ministry of Defence (MOD) is now demanding analysis of ROI to justify spending on advertising and marketing funds. The Select Committee on Defence stated that, “The MoD has programmers to monitor the effectiveness of its marketing campaigns and recruitment spending, but ultimately success is judged on the level of interests generated in Service careers” (Parliament 2008). While data pertaining to the cost of advertising and marketing may be readily available, the challenge is in directly tying these expenditures to the impact—especially the long-term impact—on recruiting.

VI. SUMMARY, CONCLUSIONS, AND IMPLICATIONS

The Royal Navy faces several on-going challenges in meeting its future recruitment goals, as well its current specific job shortages. The primary target market of 16 to 24-year olds has a low awareness of and interest in the Royal Navy. Another negative impact for recruiting is the shrinking pool of 16 to 24-year olds in the U.K. population. While Britain has experienced a growth of ethnic minorities, they are underrepresented in the military. The military is keenly aware that GEN Y youth are hesitant to make long-term career commitments, are more likely to pursue full-time post-secondary education, and increasingly have health issues that may disqualify them from military service.

The Royal Navy has its own recruiting force, budget and strategy. Captain Naval Recruiting (CNR) performs the recruit marketing for the RN, but the recruiting force falls under regional commands. The U.K. recruiting force is unique among AVF nations. It consists of non-commissioned personnel who are retirees from active duty who now belong to the full-time Reserve service and hold a civilian-type rank structure. They are permanently assigned to one location allowing them to establish links with the local community.

The *Armed Forces Overarching Personnel Strategy* (AFOPS) is the top-level guidance driving each service's recruiting strategy. The Recruit Marketing Strategy (RSM) for the Royal Navy, *Life without Limits*, seeks to increase the target market's understanding of the RN, clarify the RN's image and differentiate it from the other services, promote RN career options, and to send compelling messages using the most effective media channels to reach the target market.

Members of the target market are segmented according to their attitude towards risk-taking, self-confidence, career ambition, and career planning. The six segments are: Optimistic Achievers, Enthusiastic Followers, Unfulfilled Potentials, Skilled Settlers, and Low Horizon Grafters. The RN focuses its efforts on the first three segments.

CNR cannot make tradeoffs between recruitment alternatives, such as advertising and recruiters, because the budgets are separate. The Royal Navy's annual marketing budget is fixed for a given year, but CNR has the flexibility to conduct "shortage campaigns" during the year. In light of the need to address emergent requirements, it should be noted that while the actual strategy does not change in the short term, its implementation can change. The staff meets with ad agencies weekly and makes adjustments to occupation-specific ad campaigns, as needed.

The RN employs both an umbrella-style advertising approach to strengthen overall awareness of the Navy, as well as various efforts targeting specific market segments and promoting specific jobs. The RN advertising campaign runs in four primary media—television, cinema, digital, and press. Television, while the most far-reaching medium is also the most

costly; hence, it does not play a large role in the media mix. However, TV advertising is transitioning from the traditional terrestrial five-channel model, to “pub TV” and multi-channel digital TV, both of which offer targeted advertising opportunities.

Digital-based advertising is the most critical media to the marketing strategy. CNR expects its media to be completely digital by 2013 and expects to be running its own digital media and content. The target market is very connected to digital technology--the majority owns a mobile phone and is actively using social media. The RN targets the digitally-minded market with online ads. For instance, RN ads are placed on websites frequented by Optimistic Achievers, and other ads on websites favored by Unfulfilled Potentials.

The RN is increasingly using digital advertising tools including, in-game advertising, mobile phone applications (including those on smartphones), streaming TV ads online, interactive viral videos and other interactive web applications, search engine optimization, and social networking sites. In the future, the CNR seeks to “drip feed” the RN messages to the core audience by overlaying RN ads on the new “social networking” technology. The RN has a channel on YouTube on which it posts recruitment videos. The CNR also expects that youth will be able to design their own websites and use website tools and features provided by the RN.

The RN’s online advertising falls into different categories depending on the focus of their message. Role-specific advertisements highlight the different jobs the RN offers, and portray people performing their jobs. These are also used as tools in shortage campaigns, as they feature specific occupations with manning shortfalls. The role-specific ads are categorized into themes and each group of ads is launched in phases. Website selection for the role-specific ads reflects known online behavior of the target market segments.

More generic RN ads promote the whole range of RN careers. These advertisements, which offer a more general appeal, are designed to attract people who might not be interested in specific occupations. Website selection for the generic ads favors general interest websites frequented by “Optimistic Achievers” and “Unfulfilled Potentials” who might be exploring broad career options.

Similar to other AVF nations, the RN website is key to marketing. It connects potential recruits with recruiters, offers an online application, and extends the life of the ad campaigns. One trend is that the RN website is increasingly interactive and includes user-generated content. The goal is to foster engagement between inquirers and the RN, helping to “bring the reality of the job to life.” User-generated content (including blogs and YouTube videos) give viewers access to RN personnel. RN ‘heroes’, such as a female helicopter pilot, are highlighted, often with video-diaries, which depict job-duties and adventures—all designed to give viewers a

sense of the daily life of RN members. Future plans are to expand this multi-media profile with live chat capability.

As in other AVF nations, the RN is implementing recruiting process improvements. A centralized contact center organization was established with a goal of integrating, standardizing and streamlining the recruiting pipeline and improving customer-relationship management. Also, the on-going IRR (Integrated Recruiting and Retention) program is asking “What will the sailor look like in 2015?” With this information, CNR wants to start recruiting for that sailor now. Based on the IRR study, the focus of RN recruiting might shift from goals based largely on numbers to goals that include applicant quality.

Like other AVF nations, the RN offers various incentives, such as subsidized education and enlistment bonuses. Promoting educational opportunities counters public perceptions that joining the military reduces one’s ability to pursue postsecondary education.

The Royal Navy conducts research to better understand its target markets, the reasons recruits decide to join, and the effectiveness of its marketing efforts. Market research is conducted both internally by CNR, by other government organizations, and by external research organizations. The advertising agency performs research to create the ads and to decide what media channel should be used for the ad. Contracts with agencies are coordinated by the Central Office of Information (Central Office of Information 2010).

The Integrated Retention and Recruitment (IRR) program seeks to ensure RN recruiting gets the best people in the right slots and ultimately to keep people longer in the Navy. The IRR attempts to identify the most successful and committed potential recruits by analyzing retention trends, selection test scores, and other assessment tools. The goal is to use these tools to monitor new recruits’ career progression and to identify the characteristics of those sailors who are more likely to stay in the service.

CNR has developed key performance indicators (KPIs) to evaluate advertising effectiveness, but has contracted out advertising evaluations rather than relying on self-assessments by the advertising agencies. CNR might instruct the ad agency that the objective of an ad campaign is to obtain 20 engineers. The agency then creates a profile of engineers and develops a campaign to attract them. After the website campaign is run, the KPIs would capture the number of responses to the website, the number of subsequent expressions of interest made, the number of telephone calls made to recruiting, the number of applicants, and the number of new accessions. The “conversion rate” is calculated as the ratio of the number of engineers who join to the number of responses to the website-based ad. KPI’s also measure the “spikes” in the number of website “hits” the day after the campaign.

Similar to other AVF countries, the Royal Navy finds it must analyze the ROI on its marketing expenditures. The main difficulty in measuring ROI is tying expenditures to recruiting outcomes. Despite mixed reviews concerning its ability to generate ROI, CNR has learned lessons from its assessments. The evaluations have informed budget decisions with respect to which media works best for the different target segments. CNR is now able to consider re-working the positioning of media for the next campaign if different positioning is suggested by the evaluations. This flexibility is important when tracking a campaign's effectiveness. Advertising assessments also have allowed CNR to identify campaign failures.

V: RECRUITING AND MARKETING STRATEGIES IN ALL-VOLUNTEER FORCE NATIONS: A CASE STUDY OF THE UNITED STATES

I. RECRUIT MARKET TRENDS AND RECRUITING CHALLENGES

A. Awareness and Attitude

A challenge facing the U.S. Navy is its lack of brand identity or image. The Navy is considered to be the least known of the military branches, which may partly be because the other branches outspend the Navy on marketing (U.S. Navy Recruiting Command 2011a). While the Navy enjoys a relatively favorable recruiting environment in the current recession, its competition with the other services is expected to intensify when the economy rebounds.

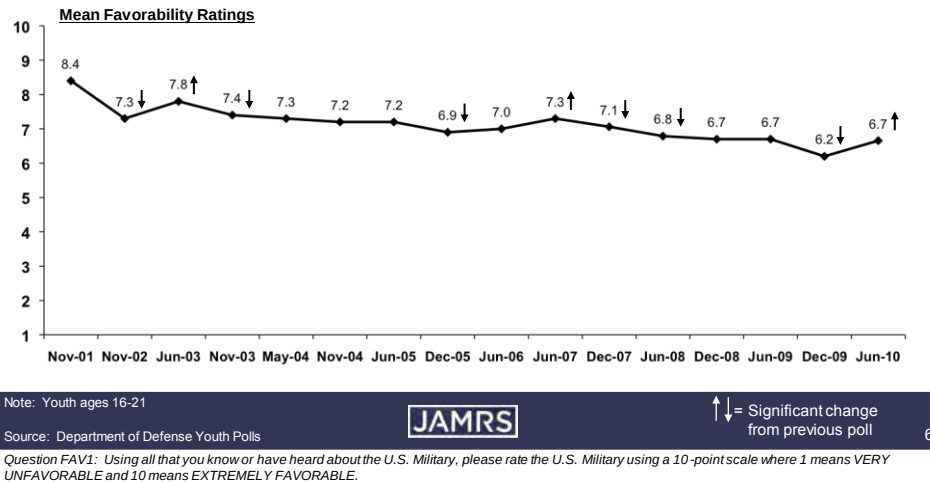
One factor affecting youth military propensity is a declining presence of military role models, such as veterans, and positive influencers of youth, such as family members and teachers (Bicksler and Nolan 2006). Relative to prior decades, today's youth have little personal contact with military veterans. The overall proportion of veterans in the population has dropped. At the end of the Cold War about 40% of youth had a parent who had served in the military, but by 2006 only about 20% had a military parent.

The armed forces struggle with the fact that a significant proportion of today's youth have an unfavorable attitude towards the military. Since the end of the Cold War, there has been a downward trend in the level of propensity to join the military among youth. In the late 1980s, about 25% of young men indicated an interest in joining the military; by 2008 only about 13% were so inclined (Tilghman 2008). There was a brief upward trend in interest after September 11, 2001, but it dropped after the 2003 Iraq invasion. Although interest has recovered somewhat during the current (2010) recession, Figure V-1 shows that just 6.7% of youth indicate they hold a favorable impression of the military.

Figure V-1. Overall Favorability of the Military

Overall Favorability of the Military

- Favorability of the Military significantly increased (6.7) in June 2010 from a historic low of 6.2 in December 2009.
- Both male (6.8) and female (6.5) favorability of the Military significantly increased in June 2010 (from 6.4 and 6.0 in December 2009, respectively).
- Male favorability of the Military remained significantly higher than female favorability in June 2010.

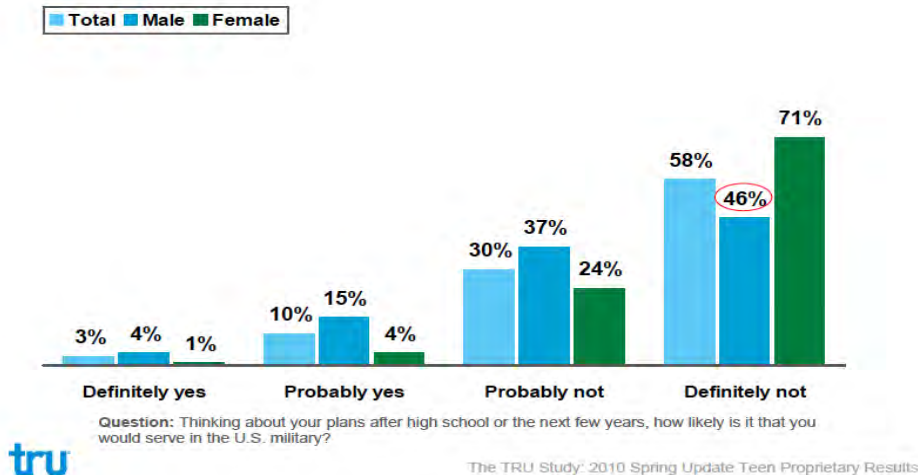


(Joint Advertising Market Research & Studies 2010a)

Figure V-2 presents a snapshot of the likelihood of youth serving in the U.S. military based on youth surveys. Only about 13% indicate they will 'definitely' or 'probably' serve in the military.

Figure V-2. Likelihood of Serving in the U.S. Military

Likelihood of serving in the U.S. Military



(Campbell-Ewald 2010a; Joint Advertising Market Research & Studies 2010a)

B. Economic and Demographic Trends

Significant demographic changes are affecting the primary 17 to 24-year old target market in the U.S. While the overall size of this group is growing, the proportion eligible for the military is declining. This decrease is due to such factors as obesity, drug use, existence of dependents, prior criminal backgrounds, and failure to meet the Navy's minimum aptitude standards. A recent study analyzed 350,000 high school graduates who applied for the Army during 2004–2009 (The Education Trust 2010). These applicants all took the ASVAB test at MEPS and thus were considered highly motivated applicants. While a score of 31 on the AFQT qualifies an applicant for the Army, the preferred minimum score is 50 or above. The study found that 23% of high school graduates failed to achieve a minimum score of 31. The mean AFQT score for African-Americans was 38 and for Hispanics was 44, both below the minimum target score of 50.

High school graduates who do meet aptitude standards are much more likely to attend college than in previous periods. Colleges are absorbing an increasing proportion of youth in the targeted age bracket, and especially of high-quality youth. The growth in college enrollment rates has been driven by a growing gap in earnings between college-educated and other workers (Ehrenberg and Smith 2010). It remains to be seen whether the current global recession will impact the college wage premium or college enrollment rates.

Another demographic factor is the rapid growth of the Hispanic population, which is expected to comprise nearly 25% of the U.S. population by 2025. In comparison, the proportion of Blacks in the youth population is expected to remain fairly stable, and that of whites is expected to decline. The growth of the Hispanic youth population has both positive and negative implications for Navy recruiting. Hispanic youth are considered to be more favorably disposed towards joining the military than are either black or white youth, but they are less likely to have graduated from high school (Bicksler and Nolan 2006).

The effect of the long-term downward trend in youth propensity and the demographic changes in the U.S. population can be observed in trends in recruiting cost and recruiting productivity data. One measure of recruiter output is production per recruiter (PPR), measured as the number of contracts signed per production ('field') recruiter. For the Navy the current PPR is only .73 contracts per month, or 8.9 per year, a substantial drop from earlier decades. Correspondingly, the cost of recruiting each new accession has risen. Table V-1 below shows the cost per recruit (in 2011 dollars) for all four U.S. services. The current cost for the Navy, as for all of the services has risen considerably in recent years.

Table V-1. Cost per New Recruit by Service (constant dollars)

Cost per Recruit (Current Dollars)							
As of President's Budget				Year End Results			
	2009	2010	2011		2,009	2010	2011
Army	20,383	26,403	22,899	Army	27,852	24,128	25,130
Navy ^{*3}	4,554	14,608	15,759	Navy ^{*3}	14,683	14,163	14,793
Marine Corps	13,030	11,209	12,766	Marine Corps	14,083	12,904	12,418
Air Force	8,209	9,225	9,386	Air Force	8,422	8,558	8,835

(Navy Recruiting Command 2011e)

II. RECRUITING ORGANIZATION AND MANNING LEVELS

The Navy Recruiting Command (NRC) recruits both active and reserve enlisted and officers with a recruiting force of about 7,200 total personnel. Of this total, about 6,350 personnel man over 1,500 recruiting stations, of which about 5,000 are uniformed field recruiters. These facilities fall under 26 Navy Recruiting Districts (NRDs), which, in turn, fall under two Navy Recruiting Regions (U.S. Navy Recruiting Command 2011c). Within the Navy, Recruiting is decentralized. While NRC bases its advertising strategy on the Chief of Naval Personnel's strategic initiatives, NRC plans and implements its recruiting and marketing operations independently (U.S. Navy Recruiting Command 2011a). The Navy contracts out various marketing functions. Campbell-Ewald Co. currently has the contract for advertising and marketing services for the Navy Recruiting Command, and has been working on Navy recruiting-related contracts since 2000 (Defence Industry Daily 2009).

As in other AVF nations, the current recruiting environment is, at least in part, a product of changes in force structure since the post-Cold War period. The military downsized significantly after the Cold War; by 2005, total force size was about one-third its size during the Cold War (Bicksler and Nolan 2006). In recent years, Navy active enlisted end-strength and accession goals have decreased steadily. Table V-2 shows that the success of the Navy in meeting enlisted accessions goals during the last decade.

Table V-2. Navy Recruiting Enlisted Active Goals/Accessions

<u>FY</u>	<u>Goal</u>	<u>Accessions</u>	<u>End-Strength</u>
2011	35,100		
2010	34,140	34,140	329,629
2009	35,500	35,527	330,621
2008	38,419	38,485	332,436
2007	37,000	37,361	338,735
2006	36,656	36,679	349,788
2005	37,635	37,704	365,900
2004	39,700	39,868	373,800
2003	41,359	41,376	382,235
2002	46,150	46,155	385,051
2001	53,520	53,690	377,810
2000	55,000	55,147	

(Navy Recruiting Command 2011c)

The overall accession goal for FY10 was 44,797, broken down as in Table V-3.

Table V-3. Accession Goals for FY10 and FY11

	<u>FY10 Goal</u>	<u>FY10 Attained</u>	<u>FY11 Goal</u>
Active Duty Enlisted	34,140	34,180	35,100
Reserve Enlisted	6,654	6,669	9,179
Active Duty Officer	2,403	-	2,200
Reserve Officer	1,600	-	1,809
Total:	44,797	-	48,288

(U.S. Navy Recruiting Command 2011c)

The goal for active enlisted accessions will increase in FY11 to 35,100.

III. RECRUITING MARKETING AND ADVERTISING STRATEGY

A. Objectives and Target Markets

NRC recruits for 71 different ratings, with the highest priority being ratings that are undermanned. The second objective is to ensure the Delayed Entry Program (DEP) is well managed. The DEP feeds applicants into boot camp, from which they move to advanced training or directly to the fleet. NRC considers it critical that DEP members be effectively mentored in order to avoid attrition during this waiting period. The third objective is to meet overall manning requirements. While the Navy is making its recruiting goal overall, it still has shortages in specific skills such as, SEALs, Navy Special Warfare, Navy Special Operations, Special Warfare Combatant-Craft Crewman, Explosive Ordnance Disposal, Diver, Hospital Corpsman, Reserves, and women in non-traditional ratings (e.g., Master-at-Arms and Seabees) (U.S. Navy Recruiting Command 2011c).

While NRC's overall "general target market" (GTM) is 17- to 29-year olds and their influencers, primary emphasis is given to the "specific target market" (STM) of 17- to 24-year olds. The Navy seeks to recruit those who are high school juniors and seniors, those who may be college-bound but financially constrained from attending college, those who have dropped out of college, and those currently in the workforce but who are dissatisfied with their careers (U.S. Navy Recruiting Command 2010a).

Quality is targeted; in addition to age, medical and physical requirements, DoD has standards for entry based on educational attainment and aptitude. Specifically, 90% of enlistees must have a traditional high school diploma and 60% must earn at least an average score on the Armed Forces Qualification Test (AFQT) (Bicksler and Nolan 2006). The Navy's quality targets are higher than those of DOD: 95% high school graduates and 70% with above-average AFQT scores.

As in other AVF nations, the U.S. Navy seeks to increase diversity within its ranks. The Navy made great strides toward achieving diversity among the enlisted force in the 1990s. During 2000–2007, black representation among high-quality Navy recruits has been fairly consistent, while Hispanic representation among high-quality Navy recruits increased from 9.6 to 15.4 percent. A recent study found that the Iraq war had a stronger positive effect on Hispanic enlistments than on black enlistments, but had a negative effect on white enlistments (Asch, Heaton and Savych 2009).

B. Development of Marketing Strategy

Several high level strategic documents lay the foundation for recruiting strategy. The Secretary of the Navy's (SECNAV) *Human Capital Strategy* addresses how the military's ability

to recruit is impacted by changes in the nation's workforce. The SECNAV strategy also addresses the critical need for increased awareness of the Navy (U.S. Department of the Navy 2007). The Chief of Naval Personnel strategy is contained in the *Navy's Total Force Vision for the 21st Century* (U.S. Navy 2010). The Chief of Naval Operation's strategic vision provides guidance for the Chief of Naval Personnel's strategic initiatives, which, in turn, provide the basis for the Navy's recruiting goals. NRC's "*Navy Recruiting Command Strategy and Business Plan 2011*" is aligned with the Navy's *Total Force (NTF)* strategic vision.

NRC goals are provided each year in the "Commander's Guidance," which provides guidance for the recruiting marketing plan, including identifying recruiting mission, high-priority occupations, and the resources available for marketing efforts. The Commander's Guidance is provided to the ad agency, Campbell-Ewald, which combines its knowledge of the target market and its advertising expertise to produce the U.S. Navy *Annual Advertising and Marketing Plan (AAMP)*.

C. Niche Marketing

The current recruiting environment, including the characteristics of the youth generation, have changed, causing the recruiting marketing strategy to change course to meet Navy recruiting requirements. Historically, marketing and advertising were Navy-centric; the assumption being that people wanted to join the Navy, in general. Using a "big umbrella" approach, the Navy message was promoted primarily through the traditional, wide-reaching media, such as TV, radio and print. Under the traditional recruiting environment, recruiters were instructed to "sell the Navy, not jobs."

The Navy's current mission is about "fit." While overall goal is easily being met in the current recession, Navy faces challenges in filling certain hard-to-fill ratings, such as SEALs. Also, the current assumption is that, relative to earlier generations, youth are less inclined to want to simply "join the Navy" and more inclined to seek specific jobs. As a result, the Navy's marketing strategy has adopted a "niche marketing" approach. The Navy now does not just recruit for the Navy, but rather recruits for 37 different jobs. The trend toward niche-marketing pertains to diversity, as well as to jobs. Specific marketing approaches are used to attract more diverse recruits, such as those from the Hispanic, African-American, Native-American, and female populations (U.S. Navy Recruiting Command 2011a).

GEN Y demands to know more specific information than previous generations when considering enlistment in the Navy - including answers to such questions as "What will I do in the Navy?" and "What is shipboard life like?" The navy.com website and the Navy's huge presence in social media represent two ways the Navy is responding to this need (U.S. Navy Recruiting Command 2011a).

Despite the shift to a job-centric approach, the Navy still simultaneously employs the traditional Navy-centric approach. The Navy recognizes that it needs to first instill awareness of the Navy, and then channel interested youth into the job that is the best fit for them and for the Navy. “*We will find a place for you*” is the message NRC wishes to send to potential recruits.

NRC recognizes that this is a transitional time for advertising. The traditional, old-school approach relied on relatively passive advertising techniques whereas the current approach attempts to connect with people in their specific communities. Today’s youth are organizing themselves into digital communities, such as Facebook, and NRC realizes that it must also offer them a community. This trend is fuels the Navy’s increased focus on social media.

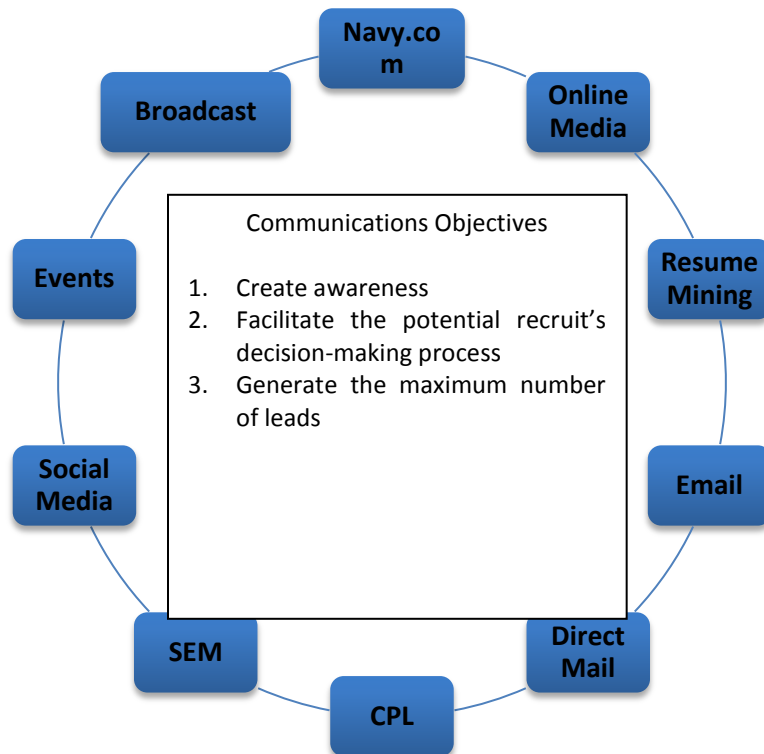
D. Branding and Communications Strategy

In October 2009, the Navy launched a new national advertising campaign, based on the theme, *America’s Navy—A Global Force for Good* (U.S. Navy Recruiting Command 2011c). This represents the Navy’s fifth slogan since 1973. Through this branding, the Navy wishes to communicate that the Navy protects the world around the clock “in an increasingly interconnected and uncertain world” (U.S. Navy Office of Information 2009). The brand educates the public that the protection and “good” provided by the Navy include providing humanitarian assistance and disaster relief, keeping sea lanes open for free trade, and deterring aggression. The *Global Force for Good* message is tied to the Navy’s Maritime Strategy, “*A Cooperative Strategy for 21st Century Seapower*.”

Advertising recruiters and monetary incentives are the three major weapons NRC employs to meet its goals. The Navy uses advertising to generate general awareness of the Navy and to inform youth of the benefits the Navy offers, such as money for education, bonuses, enlistment tours of various lengths, training with civilian transferability, pay, and quality of life benefits (e.g., housing, child care, and health benefits) (Rostker 2006).

Figure V-3 shows the objectives of the communications strategy are to create awareness, facilitate the potential recruit’s decision-making process, and generate the maximum number of leads. The wheel displays the media used to implement the communications strategy.

Figure V-3. Objectives of Communications Strategy



(Note: "SEM" refers to search engine marketing and "CPL" refers to cost-per-lead marketing.)

(Campbell-Ewald 2010a)

The strategy is for the *GFFG* brand message to be communicated across ten different channels in the wheel diagram. The ad agency recommends a "surround sound" approach that integrates a spectrum of new media, as well as traditional mass media, to reach the target market (Campbell-Ewald 2010a). The communications plan recognizes that the target markets have unique 'communication needs.' In their communication with the Navy they want immediate fulfillment of their desire for information (such as the ability to download information), and an immediate follow-up response (U.S. Navy Recruiting Command 2010a). The message the Navy wishes to send to the enlisted market is that the U.S. Navy "offers broad choices of numerous high tech career fields with world class training and unlimited opportunities "and that the Navy "provides opportunities to be involved in "real world" situations" (U.S. Navy Recruiting Command 2010a).

E. Marketing and Advertising Budget

NRC uses resources from three broad tools: 1) Recruiters, 2) Incentives and bonuses, and 3) Advertising and Marketing. The other service branches make similar budget allocation

decisions. Table V-4 show the 2003 allocation of the military's recruiting budget among advertising, recruiters, and monetary incentives.

Table V-4. Allocation of U.S. Military Recruiting Budget

<u>Resources</u>	<u>% of Recruiting Budget</u>
Field recruiters	42%
Recruiting support (Administrative, automation and logistical support)	26
Advertising	10
Enlistment bonuses and Educational incentives	4

(Bicksler and Nolan 2006)

Advertising is considered the most flexible recruiting weapon. Changing the number of recruiters can take as long as two years. Incentives and bonuses typically receive the second priority for funds. Hence, the size of the recruiting force and amount of money devoted to incentives are kept relatively stable over time. Advertising tends to receive the "left-over" funding and displays the greatest variability in funding over time (U.S. Navy Recruiting Command 2011a).

Table V-5 shows the distribution of Navy spending across recruiters, advertising, and bonuses for the Navy for 2009-2011. In 2010, the Navy allocated about 50% of its overall recruiting budget on the recruiting force, 27% on advertising, and 23% on monetary incentives.

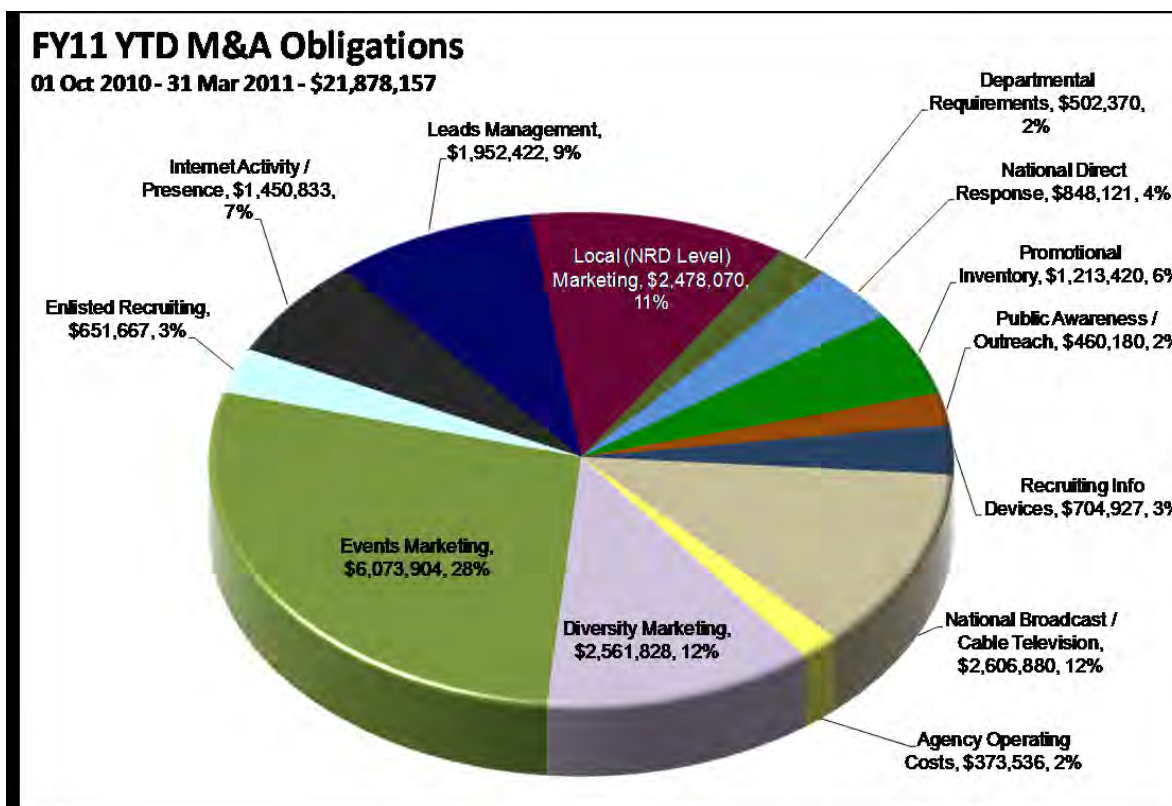
Table V-5. Distribution of Navy Spending across Recruiters, Advertising, and Bonuses

	Navy ^{*3}					
	FY2009		FY2010 ^{*1}		FY2011 ^{*2}	
	PB	Actual	PB	Actual(est)	PB	Actual(est)
Recruiter Support -- w/o civilian personnel costs	112,642	105,857	66,649	105,052	120,402	110,766
Recruiter Support -- with civilian personnel costs	160,092	148,379	114,238	150,734	166,339	159,019
Enlistment Bonuses	203,764	101,306	106,457	100,939	101,429	101,429
College Fund	5,902	6,046	10,460	4,939	5,258	5,258
Other Enlistment Incentives (Loan Repayment)	11,803	10,988	10,000	6,740	8,400	8,400
Television Advertising	19,507	12,954	25,991	16,948	8,467	14,337
Advertising other than Television	64,771	61,379	64,652	39,173	59,135	46,140
Total Advertising	84,278	74,333	90,643	56,121	67,602	60,477

(U.S. Navy Recruiting Command, 2011e)

The advertising agency, Campbell-Ewald, estimates that launching a brand costs about \$70 million in each of the first two years, then about \$50 million a year for roughly the next three years to maintain the brand. Enlistment programs receive the bulk, between 70–80%, of the marketing budget (U.S. Navy Recruiting Command 2011a). Figure V-4 shows the distribution of Navy marketing and advertising (M&A) expenditures for the first nine months of FY11. The accounting mixes media spending (e.g., internet activity) with overhead spending categories (e.g., agency operating costs), as well as spending on local marketing.

Figure V-4. Marketing and Advertising Obligations: Oct–Mar 2011



(U.S. Navy Recruiting Command 2011d)

Figure V-4 also shows that about 11% of all M&A spending is allocated to regional marketing efforts.

While the current recession positively affects recruiting, it negatively impacts the advertising budget (U.S. Navy Recruiting Command 2011a). In 2010, the advertising budget was reduced from \$85 million to \$25 million—a 70% drop (Campbell-Ewald, 2010a). Consequently, the ad agency is shifting to less costly digital media (Campbell-Ewald Company 2010a). Also, NRC fears that reductions in the Navy's budget will reduce awareness, which will have long-term implications for future recruitment (U.S. Navy Recruiting Command 2011a).

IV. IMPLEMENTATION OF THE STRATEGY: ADVERTISING CAMPAIGNS AND MARKETING PLANS

A. Overview of Implementation Plan

NRC categorizes advertising into national advertising (which includes Navy website and TV ads) and local or field advertising (which includes direct mail and newspaper ads). In general, the goal of national advertising is to establish branding and awareness of the Navy, while the goal of local advertising is lead generation (U.S. Navy Recruiting Command 2011a).

The regions are responsible for developing their own marketing and advertising plan (MOP). To assist them, NRC provides advertising guidance in the Field Advertising Manual (U.S. Navy Recruiting Command 2011a). The Navy Advertising and Leads Tracking System (NALTS), to be described below, also plays a critical role in helping the recruiting districts develop and implement their own, customized marketing and advertising plan.

In 2010, CNR instructed its advertising and marketing agency to address the following areas in its *“Annual Advertising & Marketing Plan”* (AAMP): Officer and Enlisted Programs, with emphasis on diversity; national and local advertising; call center operations; NALTS; website and other interactive sites; events marketing; and return on investment metrics. The AAMP addresses implementation of the strategy in each of these areas. For each enlisted or officer community, the AAMP describes the target segment and explains where most leads originate for that target segment (i.e., call center, navy.com, media events, mobile/wireless, resume mining, webcast, poster, etc.). The AAMP then develops tactics to recruit that segment. For example, the marketing plan to attract recruits into Naval Special Warfare/Special Operations includes: social media efforts (i.e., updating Facebook pages); developing a SEAL webcast; sending focused email ‘blasts’; developing print material; resume mining; updating SEM efforts; conducting event marketing (such the X Games), and conducting local direct mail marketing (Campbell-Ewald 2010c).

National advertising also targets specific market segments. For example, in response to NRC’s strategic objective of recruiting more women into nontraditional careers, advertising strives to portray that the Navy offers more than the traditional female nursing and administrative jobs and to dispel common misconceptions of Navy life. Advertising targeted to women presents the Navy from the perspective current service members. This approach is used in the “Women in the Navy” microsite on the Navy’s website, as well as in various “through-the-eyes-of-a-female-Sailor” style videos, Facebook pages, direct mail, online advertising, mobile SMS (short message service), mobile banners advertising, in-game advertising, and cinema advertising (Campbell-Ewald 2010b).

B. Media Mix

When determining the optimal media mix, the Navy's ad agency distinguishes between "awareness media" and "response media." Advertising that generates awareness of the Navy includes TV, radio, print, place-based, and Internet search ads. Advertising that generates responses includes direct mail/email, broadband/mobile, Internet banners, cost per lead (lead purchases such as from military.com), job posting/resume mining, and media event advertising.

The local media mix differs from that of national advertising. National leads are primarily generated from TV, radio, magazines, direct mail (targeted to a specific group, profession, or specialty), the Internet, email 'blasts', and the Joint Recruiting Advertising Program (JRAP) (Navy Recruiting Command 2009b). Local leads are primarily generated from newspapers, direct mail, and outreach events.

Local direct mail allows recruiters to target their market by zip code (U.S. Navy Recruiting Command 2011a). Radio is considered the best local mass media that can be used to supplement national efforts (U.S. Navy Recruiting Command 2009b, 1–10). TV ads are costly and are not considered cost-effective at the local level (U.S. Navy Recruiting Command 2009b).

NRC has found "cost-per-lead buys" to be a very successful program. Under this form of on-line advertising, NRC provides advertising vendors with descriptive parameters of its target market. The vendor places website banners on websites known to be frequented by the target market. Interested persons are prompted to complete an electronic business reply card. The Navy pays the vendor each time a person clicks on a banner that generates a lead.

The trend is toward "channels of entry" or direct marketing (such as direct mail). Technology has allowed advertising to leverage the lower cost media as compared to the more expensive traditional media, such as TV. Secondly, direct marketing is well-suited to targeting market niches, and is considered a useful way to attract youth into hard-to-fill enlisted jobs.

While the shift to direct marketing and other response media accommodates a smaller budget, NRC is concerned that this trend will create unintended consequences. The ad agency fears that the reduction in TV advertising could reduce Navy awareness (Campbell-Ewald Company 2010a). Similarly, NRC is concerned that some low-cost media, such as Facebook, serve as "prospecting," rather than advertising—stressing that advertising is necessary to induce a person to respond to prospecting efforts. Hence, NRC is concerned that the current media mix could reduce future leads (U.S. Navy Recruiting Command 2011a). A recent study (GMAX, 2010) recommended a media mix of 70:30—70% awareness media and 30% response media.

The Navy website, *America's Navy—A Global Force for Good: Navy.com*, is central to the marketing strategy. The website contains links to microsites, which provide information about the Navy, how to join the Navy, 'glimpses' inside the Navy (highlighting the lifestyle, diversity, women, athletes), different career opportunities, as well as enlistment incentives and educational benefits. It also offers a microsite specifically for families and advisors of potential recruits. A Spanish-language version of the Navy website is also offered.

One component of the advertising campaign that uniquely marries up with the Navy website is the "Life Accelerator," which is trademarked by the Navy. This program allows candidates to complete a personal profile that matches their personal interests and skills with Navy careers. Interested persons can convey what career fields they find attractive and are steered to various job opportunities. The website includes on-line lead forms for interested persons to complete and return. These forms are then screened for eligibility and forwarded for recruiter follow-up (Campbell-Ewald 2010a).

C. Social Media

A recent study reveals that 75% of youth report they have a profile on a social networking web site, with use by females (83%) exceeding that of men (67%). As the use of social media has grown, the Navy has increased its use of this medium. Campbell-Ewald reports that the Navy is a leader in social media among the U.S. services. The Navy is currently on approximately 18 different Facebook pages (U.S. Navy Recruiting Command 2011a). The campaign spans social media outlets, including: NavyforMoms.com, Facebook (U.S. Navy Life, Spanish), YouTube channel (Skinned), Flickr (includes Spanish tags), MySpace and mobile media (iPhone app). The Navy Life presence on Facebook currently highlights 13 different Navy communities, but Facebook Fan pages are constantly being created for additional communities and careers. The Navy4moms.com social website has also been recognized as a very effective effort. The agency monitors conversations on the social media websites to measure activity and gather insight (Campbell-Ewald 2010a). Future plans to expand Navy presence on social media include:

- Establishing "microblogging sites," with blog sites for the U.S. Navy, U.S. Navy Jobs (with links to current Navy job postings), and Naval Tweetups (Campbell-Ewald Company 2010a).
- Creating a Navy SlideShare account to provide U.S. Navy career information.
- Placing niche job postings on job search sites and Twitter

While social media is clearly a fast-growing direction in Navy advertising, NRC is cautious about it replacing traditional advertising methods, commenting, "Social media cannot replace paid media." NRC views social media as a way for people to connect with each other. It is

considered particularly powerful as a vehicle for showing Navy testimonials. However, NRC asserts that traditional (paid) advertising is valuable because it is the force that brings people to the social media (U.S. Navy Recruiting Command 2011a).

D. Outreach and Events Marketing

As mentioned above, the goal of outreach events is to inform and inspire the large target market of 17 to 29-year olds and their influencers. The message the Navy projects at local events is that the Navy is “hiring now!” and that it offers educational benefits, professional training, and exciting career options. Most of these efforts are geared toward the regional and local market. The wide variety of outreach events and efforts include: Fleet Week/Navy Week; Navy Simulator Van; Blue Angels Air Show; X Games; Navy Band; Hispanic College Tour; Fitness Challenges Career Days; NASCAR races; Conventions (associations, college fairs); SEAL Accelerator Tour; Navy Suburban Tour; and CIAA Basketball Tourney (FY09).

The number of marketing events impacts Navy awareness. The Navy increased the number of marketing events from 393 in FY06 to 573 in FY07 to 778 in FY08. The level of Navy awareness (measured by the Awareness Index described later in this report) increased over each of these three years (U.S. Navy Recruiting Command 2009a).

E. Bonuses and Incentive Packages

Enlistment bonuses, unlike basic pay increases, are targeted to specific, often high-quality, recruits who agree to fill hard-to-fill jobs. Bonus programs vary widely across the services. In FY2005, 64% of Army recruits and 52% of Navy recruits received enlistment bonuses, while bonuses were given to only 8% of Air Force and 6% of Marine Corps recruits (Bicksler and Nolan 2006).

Roughly half (48%) of GEN Y youth are not college graduates and are not in school. Their biggest reason for this is that they cannot afford it (Taylor and Keeter 2010, 43). This group represents a large component of the military’s target market and offers a significant opportunity for the Navy to market its educational incentives. The Navy offers a variety of enlistment incentives, including: signing bonuses of up to \$25,000, depending on rating; the GI Bill; the Tuition Assistance Program; and guaranteed training. Table V-6 shows that about half of Navy recruits receive some incentive.

Table V-6. Percent of Navy Recruits Receiving an Enlistment Incentive (2009)

<u>Incentive</u>	<u>Navy Recruits who Received an Enlistment Incentive (%)</u>
Enlistment bonus of \$5,000 or less	5%
Enlistment bonus of over \$5,000	36%
Loan Repayment Incentive	4%
Navy College Fund	6%
Combination of Above	2%
Received no Incentive	47%

(U.S. Navy Recruiting Command 2009c)

The New Sailor Survey FY2009 data results revealed that “education benefits” are the second most important factor influencing recruits to join the Navy.

F. Operations and Lead Management

The Navy recruiting business processes, including operations and lead management, impact the Navy’s ability to achieve recruiting goals. Lead management is critical to NRC. While actual contracts are the final product (goal) of NRC, the command asserts that marketing and advertising planning is based on lead generation (U.S. Navy Recruiting Command 2011a). It is useful to look at a few of the steps involved from when a ‘gross’ lead is received until a candidate accesses.

Navy ads provide a 1-800 phone number for a call center, the National Navy Recruiting Information Center (NNRIC). When the call center receives a call, it enters a “source code” into NALTS, which identifies the source (e.g., newspaper ad) that presumably generated the call. “Gross leads” are screened by the advertising agency and entered as “quality eligible leads” in NALTS. Eligible leads are forwarded to another system for further screening.

NRC Marketing operates a cyberspace recruiting cell which mans the Navy “chat rooms” and answers email questions submitted to Navy website. Cyberspace recruiters conduct ‘blueprinting’ in which they deem certain leads to be ‘quality leads.’ The cyberspace recruiters input these quality leads into the appropriate system for follow-up (U.S. Navy Recruiting Command 2009b).

The “response channels” for leads are primarily the telephone, Business Reply Cards (BRCs), the Internet, “White Mail” (written correspondence), and email (U.S. Navy Recruiting Command 2009b, 7–6). Local lead sources are primarily the Naval Recruiting Districts (NRDs). The NRDs-sourced leads are often the result of advertisements in local newspapers, direct mailings, ‘prospecting’ at outreach events, and other efforts.

National leads are typically obtained from inquiries to Navy.com, the Navy call center, mailed or electronic business reply cards, and responses to job postings (U.S. Navy Recruiting Command 2011a; 2009b). NRC considers it difficult to measure the number of “national leads” generated (i.e., versus leads generated by a recruiter at a local outreach event). Responses from all media channels are tracked and reported by NALTS, which enables recruiter follow-up. The nationally produced leads are followed-up by the districts, which qualify them and then forward them to applicable recruiters. Each recruiter's disposition of the leads are fed into NALTS, which then produces evaluations of “the efficiency of national advertising and the contribution of national leads to recruiting goals” (U.S. Navy Recruiting Command 2009b, 7–2).

Both national and local leads are tracked by NALTS (U.S. Navy Recruiting Command 2009b, 2). The NALTS system has the following capabilities:

- Managing recruiting zone and station territories and zip code-to-station relationships
- Copying, creating and maintaining local advertising plans, including managing local vendors
- Creating and managing new campaign descriptions
- Finding prospects for district local direct marketing (LDM) activities, including defining and ordering LDM pieces and importing direct marketing lists
- Managing and maintaining dispositions of leads, including performing initial, baseline eligibility assessment
- Reporting on regional, district and station-level performance
- Analyzing the effectiveness of national and local marketing campaigns (U.S. Navy Recruiting Command 2011a).

NRC and the ad agency recognize that there are internal challenges concerning lead management. Some leads are “lost” before being captured by recruiters, while others are of a poor quality. Related to this is the challenge of lead qualification. Improved lead qualification could produce higher conversion rates by helping to ensure that enlistees are the right fit for the Navy. Another challenge for recruiting concerns lead attribution, which identifies where people initially obtained their idea to investigate the Navy. It is considered very difficult to identify the true source of leads due to the numerous factors that may have produced the lead, such as the effect of advertising, the economy, and other factors.

An additional challenge for NRC is that, while the end product of a recruiter’s efforts is a signed contract, the ad agency is only held responsible for generating leads. The ad agency’s primary job is to generate awareness and interest, such as that reflected in national leads. It is considered the role of the recruiters, who follow-up with the leads, to convert qualified leads into contracts (U.S. Navy Recruiting Command 2011a).

G. Recruiting Force 2020: Navy Recruiting Strategy and Business Plan 2011

NRC is in the process of redesigning its business processes to better align its capabilities with the current and projected marketing needs. The draft *Recruiting Force 2020: Navy Recruiting Command Strategy and Business Plan 2011* (Draft RF2020) delineates how the command envisions its force redesign. The premise of RF2020 is that current business processes are ill-equipped to reach the future target market. NRC should employ technology that offers improved speed and flexibility. Similarly, the recruiter of the future should have systems that allow him/her to be highly mobile, have easy access to information, be relieved of cumbersome administrative burdens and—ultimately, to be able to focus on “informing, inspiring, influencing, and hiring future Sailors” (U.S. Navy Recruiting Command, 2011b). The future “Robo-recruiter” should be semi-autonomous, well trained, and highly efficient. NRC’s goals for FY11 are summarized below:

- Achieve 99% “FIT” (refers to quality, as opposed to quantity, or “FILL”)
- Improve officer and enlisted quality.
- Deploy a tool that measures return on investment of marketing and advertising and helps guide resource decisions.
- Merge officer and enlisted recruiting.
- Implement ability to assign jobs and classify from mobile locations.
- Equip each recruiter with mobile technology.
- Develop an automated, common (office/enlisted, active/reserve) on-line application.
- Employ a performance-based cost model to guide and track resource decisions.

V. EVALUATION OF MARKETING EFFECTIVENESS

NRC relies on a variety of research and analytical tools to help it understand the factors that impact recruiting success. The research helps NRC assess the effectiveness of its marketing and advertising efforts and make informed resource allocation decisions. Current research and analysis efforts involve use of metrics, surveys, and analysis from NALTS.

NRC finds it difficult to measure the direct effects of marketing and advertising as it is difficult to isolate which specific factor causes an observed level of contracts. Rather, NRC looks for patterns to determine, for instance, whether the main driver has been the economy, marketing efforts or some other factor. Research is conducted by the ad agency, by NRC staff, and by independent researchers. Currently, the ad agency tracks performance metrics, generates research reports and conducts concept testing. The agency generates reports from NALTS, especially on national and local leads.

A. Metrics

'Cost-per-lead' is an important metric to Navy recruiting. Each advertising initiative has a tracking program in NALTS, which calculates the cost per eligible lead and other metrics. NRC maintains that cost per lead, rather than cost per contract, is the better metric due to the difficulty in linking a contract to a specific advertising effort (U.S. Navy Recruiting Command, 2011a). However, the cost-per-lead metric also has flaws. It is difficult to link local awareness efforts (such as placards on busses) to leads. Leads are categorized as "gross leads" and "eligible leads," reflecting the fact that interested persons often do not qualify for enlistment. While the gross response rate from local advertising is only about 1%, the 'gross lead-to-eligible lead' conversion rate is typically about 60–70%, suggesting that local advertising is effective (U.S. Navy Recruiting Command, 2011a).

The conversion rate is another important metric. The ad agency "backwards plans" the marketing plan. The Navy informs the ad agency of the number of enlistment contracts it seeks for the upcoming year. Historical conversion rates indicate how many leads are needed to produce one enlistment contract. Conversion rates are not constant; rather, they change as the number of total contacts increases. The agency reports that at low contract levels (35,000), the eligible conversion rate is 4.4%, meaning about 100 eligible leads generates between 4 to 5 contracts. However, at contract levels over 35,000 more leads are required to obtain one contract (Campbell-Ewald Company 2010a). The ad agency calculates conversion rates for each different media, as well as an overall rate.

With respect to local advertising, the Navy recruiting regions are charged with monitoring the effectiveness and efficiency of advertising efforts within their region. Both leads and conversion rates are benchmarked and tracked as performance metrics. The Navy calculates a "combined National and Local Leads Contribution to Goal" for each of its active/reserve and officer/enlisted categories (U.S. Navy Recruiting Command 2009b, 2–4). Each NRD is supposed to meet minimum acceptable metrics for leads.

B. JAMRS Studies

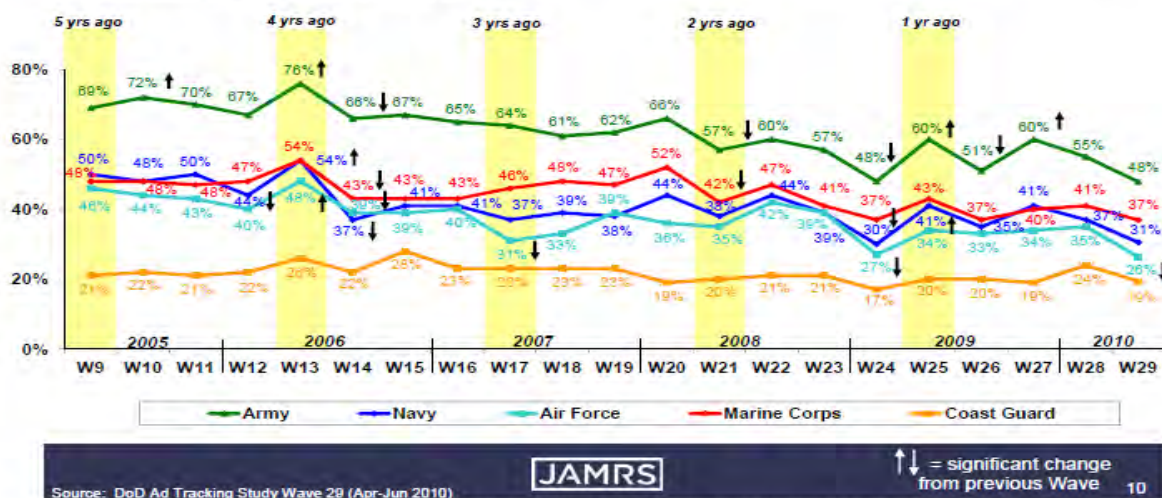
The Joint Advertising Market Research & Studies (JAMRS) program conducts recruiting-related surveys. Two surveys in particular are useful to NRC. The *Youth Poll* explores the youth trends impacting recruitment, such as the level of favorability towards and knowledge of the military held by youth. This poll also provides data on the youth propensity to enlist in the military. The *Advertising Tracking Studies*, which present pre- and post-wave survey results, explore awareness of and attitude towards military advertising, as well as perceptions of the military. Two surveys are administered for these studies—one to potential recruits and the other to influencers of youth.

Figure V-5 below (from a recent JAMRS advertising tracking study) compares how well potential recruits recall advertisements of the four services. About 31% of respondents had unaided recall of a Navy advertisement—which is a lower recall level than that for Army and Marine Corps, yet higher than that for the Air Force and the Coast Guard. The findings would imply that youth seem to be recalling military advertisements a bit less than in previous years.

Figure V-5. Unaided Ad Recall: Service Comparisons

Unaided Ad Recall: Service Comparisons

- In Wave 29, unaided recall for the Air Force (26%) decreased significantly from Wave 28 (31%).
- Unaided recall for the Army, Navy, and Air Force was significantly lower in Wave 29 than one year ago in Wave 25.



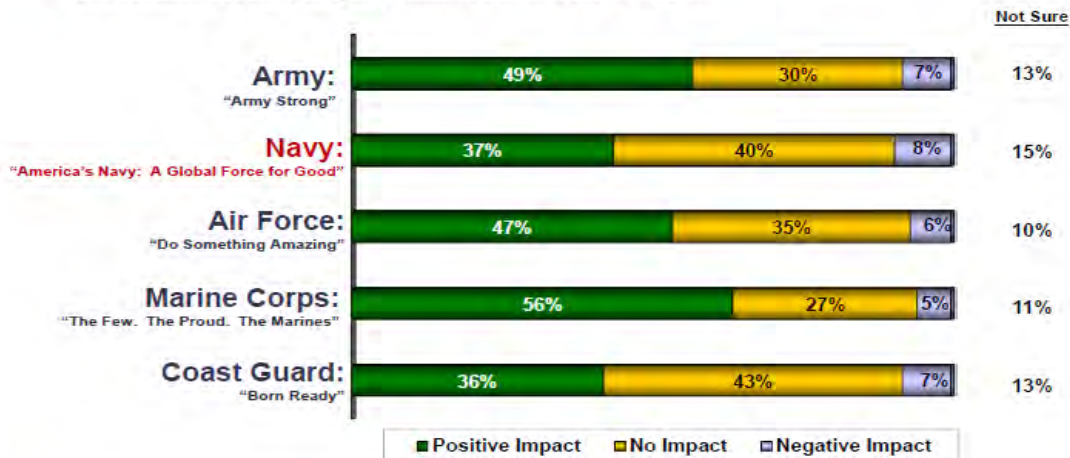
(Joint Advertising Market Research & Studies 2010b, 10)

The JAMRS study explored respondent recall of the Navy's *A Global Force for Good* slogan. There can be a lag effect when a new slogan is introduced. A 2010 ad tracking survey (JAMRS, 2010b) indicates that recall was higher for slogans from previous campaigns than for the *A Global Force for Good* campaign. For example, the *It's Not Just a Job, It's An Adventure* campaign ended in 1986, 25 years before for the current campaign, but the recall rate was 13% compared to only 10% for the current campaign. Similarly, recall for *Let the Journey Begin*, which ended in 2000, was 12%. Recall was 29% for *Accelerate Your Life*, even though it ended in 2009 (U.S. Navy Recruiting Command, 2011a). Figure V-6 shows how the Navy compares to other services with respect to the service-specific ad slogan's influence on potential recruits.

Figure V-6. Ad Slogan Reactions: Service Comparisons

Ad Slogan Reactions: Service Comparisons

- In Wave 29, respondents were significantly less likely to agree that the Navy slogan has a positive impact (37%) than the Army (49%), Air Force (47%) and Marine Corps slogans (56%).
- Reactions to the Navy slogan remained stable from Wave 28.



Source: DoD Ad Tracking Study Wave 29 (Apr-Jun 2010)

JAMRS

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Questions 27 (Army), 29 (Navy), 31 (Air Force), 33 (Marine Corps), and 35 (Coast Guard): "The ad slogan of the (Service) is (slogan). Does thinking about the (branch) this way - (slogan) - give you a strong positive feeling, a somewhat positive feeling, have no impact either way, a somewhat negative feeling, or a strong negative feeling?"

(Joint Advertising Market Research & Studies 2010b, 38)

As Figure V-8 illustrates, the Navy's new slogan, *A Global Force for Good* appears to positively influence 37% of respondents. The JAMRS data has found that tagline awareness is low, which is not uncommon in the early period of a new campaign (U.S. Navy Recruiting Command 2011a).

C. Navy Surveys

Some youth are considered pre-disposed to join, such as those who have had a parent in the military. However, for the general youth population who are not pre-disposed to join the military, advertising and marketing can play a particularly important role. Surveys are one way that NRC tries to understand what factors "drive" youth to decide to enlist (U.S. Navy Recruiting Command 2011a). The Navy conducts several surveys that offer valuable feedback to NRC.

The "New Sailor Survey" provides important information on marketing efforts. This 27-item survey is administered on-line to new recruits at the Navy's Recruit Training Command (RTC). The feedback helps the Navy assess its recruitment and classification processes, in addition to its Delayed Entry Program (DEP) (U.S. Navy Recruiting Command 2009c). Applicants who enlist for active duty join the Delayed Entry Program (DEP) until they report to Recruit Training Command (RTC) (COMNAVCRUITCOMINST 1130.8H). It is possible for a new sailor to

spend 9 to 12 months in DEP before being sent to boot camp. Hence, some sailors who take the New Sailor Survey might not have a fresh recollection of the influence of advertising as others. Also, the survey responses of more delayed sailors might be somewhat of a lagged response to earlier advertising efforts (U.S. Navy Recruiting Command 2011a).

A survey is also conducted at the Military Entrance Processing Station (MEPS) where recruits undergo medical and other screening examinations. There are two parts to the MEPS survey—one to gain feedback on the recruiting process and one to understand the impact of marketing efforts.

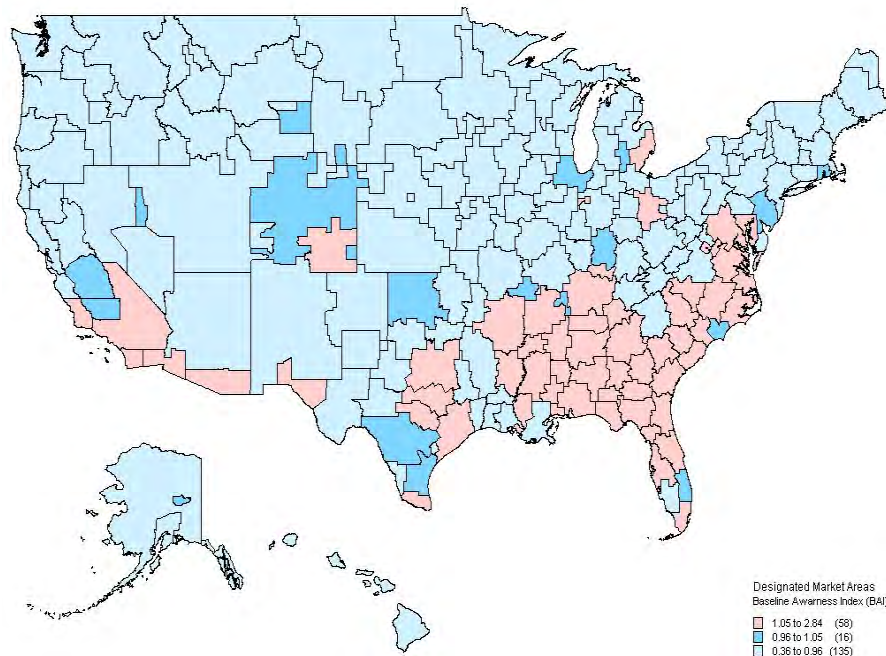
D. The Navy Awareness Index

The Navy has developed an awareness measure called the Navy “Awareness Index” (AI). The AI is a leads-based metric and primarily measures the impact of regional or local marketing efforts (such as outreach events). The AI has three components:

- Designated Market Area (DMA) - A geographical area in which the population receives roughly the same media (newspapers, Internet content, and television and radio station offerings.
- Eligible Population (EP) or General Target Market (GMT) - The estimated number of 17–29 year olds, based on census estimate data.
- Gross Leads Responses (GR)—Navy leads from all advertising sources.

The AI measures Navy awareness by DMA. The index is defined as the ratio of Leads to GMT population times 100. A national baseline of Navy awareness (based on a three year average) is used to compare the area-specific AI’s. In addition, the national AI average is used to determine trends in future year’s national AI. A value of 1.0 indicates that Navy awareness in a region equals the national average. If the AI exceeds 1.06 the regional awareness level area is considered relatively high; an AI below 0.95 indicates that awareness is relatively low. Figure V-7 shows the traditionally strong and weak recruiting areas (Designated Market Areas) in the country during 2006-2008, as compared to the three-year average baseline AI over this period.

Figure V-7. Baseline Navy Awareness by Area



- **AI > 1.06: High Navy Awareness Areas**
- **AI 0.96—1.05: Navy Awareness Areas at the National Average**
- **AI < 0.95: Low Navy Awareness Areas**

(U.S. Navy Recruiting Command 2009a)

The AI helps the Navy to decide where best to conduct outreach events. The AI allows the Navy to evaluate the return on awareness from district event marketing and also informs the Navy on which specific locations are most productive (have highest baseline AI) for hosting such events.

E. NALTS-generated “ROI” Analysis

The NALTS system generates “return on investment” indicators. Each marketing effort is assigned a unique source code in NALTS, allowing the system to report the number of leads resulting from that effort. Since advertising and event cost data also resides in NALTS, the system can calculate an approximate “return” on the marketing effort, based on the associated cost and number of leads.

It is important to note, however, that cost data are only available for local efforts, whereas budget data associated with national advertising, national mailings, and other national efforts do not reside in NALTS. Hence, NALTS can produce a sort of return-on-investment,

based on local cost and leads data. However, with respect to national advertising, NALTS can only report the number of leads from each event (U.S. Navy Recruiting Command 2011a).

F. PRO Model

As mentioned earlier, NRC has three major recruiting tools: the recruiting force, incentives, and advertising. NRC has developed an optimization tool that incorporates costs, as well as external factors, into its calculation of the optimal amount to allocate to each of the three resources. The model recognizes two types of costs. The Overhead / Core Infrastructure costs reflect the initial start-up and on-going operational business costs incurred by the ad agency. These costs are those that the agency and others incur prior to operating in the marketplace. The second cost category includes costs of outreach events, mailings, TV and other ads. The PRO model also takes three external factors into account: the mission (i.e. recruiting goals), the unemployment rate, and “Qualified Military Population.” Given these factors, the PRO model calculates the optimal allocation of resources (budget) to each recruiting tool.

G. GMAX and GALLUP Studies

Two recent studies analyzed the cost and effectiveness of Navy marketing efforts, one conducted by the Optimization Group (Optimization Group 2010) and one by Gallup (Gallup, Inc. 2010). Both studies analyzed issues associated with the economic return on marketing programs. They addressed the availability of metrics to measure ROI and applied regression analysis to the relationship between M&A spending and these metrics. The studies argued that leads are the main metric for measuring ROI, as contracts are affected by too many other factors.

Both studies employed monthly data on media expenditures, leads, and contracts from 2007 to 2010 (N=42 months). Each used regression-based modeling approaches on the time series data to explain the impact of M&A expenditures on leads and contracts. The Gallup study differed by including the monthly unemployment rate and the percent of new contracts that received an enlistment bonus as explanatory variables to isolate the independent effect of M&A expenditures. Based on leads data, the GMAX study found that the effective range in total annual spending for all media was \$65-\$100 million. Gallup found the annual minimum was about \$48 million. They also found that each additional \$100,000 in spending generated a larger effect in the range of \$1.4-\$1.9 million per month, depending on the specific media. Figure V-8 demonstrates this relationship (U.S. Navy Recruiting Command 2011a). Figure V-9 breaks out the marginal effects on leads of additional spending by media type.

Figure V-8. Effect of Total M&A Spending on Enlisted Leads

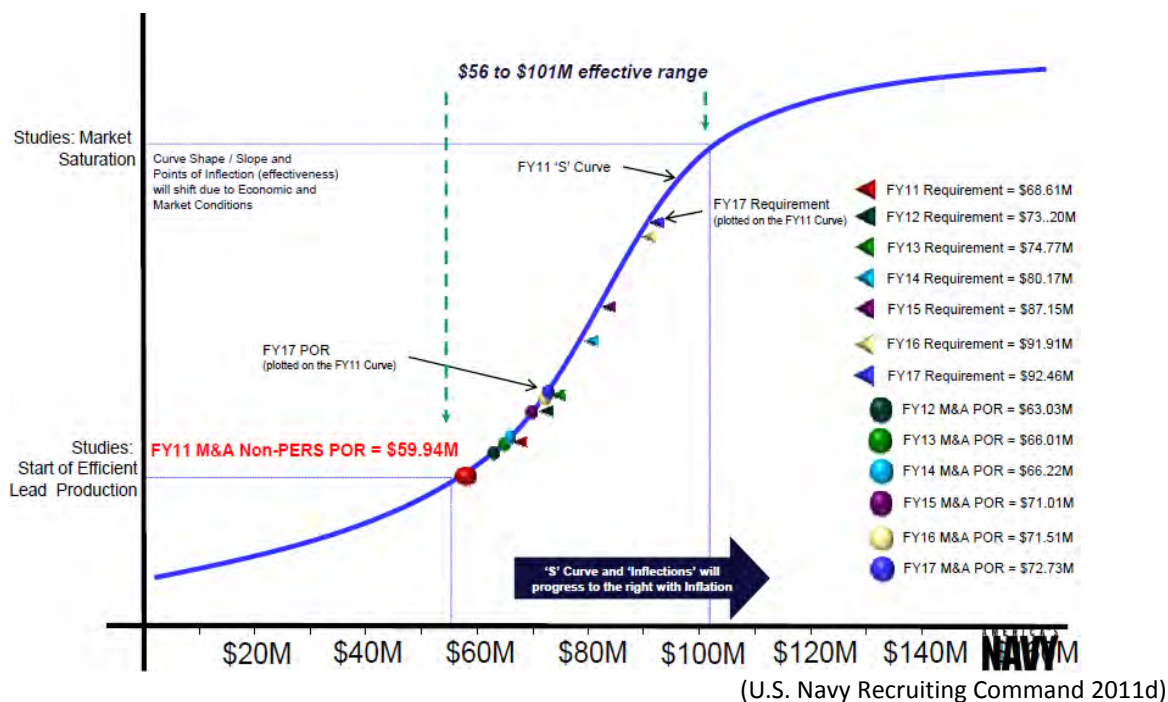


Figure V-9. Enlisted Leads per \$100,000 Spending by Media Channel

- ☐ **Television** Advertising: Minimum of \$1.4 million monthly necessary. Next \$500,000 generates 19,000 leads; each incremental \$100,000 generates 391 leads.
- ☐ **Radio Advertising**: \$147,000 generates 24,000 leads, steady decline in leads beyond that point.
- ☐ **Print**: Every \$100,000 yields 7,418 leads, up to \$900,000 when diminishing returns occur
- ☐ **Internet**: Every \$100,000 generates 2,739 leads. Diminishing returns occur at \$1.4 million
- ☐ **Magazine BRC/Bingo**: Above a min. threshold of \$261,000 every \$100,000 generates 6,367 leads.
- ☐ **Media Event**: Each incremental \$100,000 yields 4,642 leads.
- ☐ **OOH**: Up to a maximum at \$386,000, every \$100,000 generates 13,370 leads
- ☐ **Local Newspaper (Enlisted)**: Every \$100,000 produces 1,691 leads.
- ☐ **Other Local (Officers)**: A minimum threshold of \$726,000; above this, each incremental \$100,000 means 5,499 additional leads per \$100,000.

(Navy Recruiting Command 2011d)

The study also found that some media channels affect mainly leads (e.g., the internet), whereas others affect the conversion of leads to contracts (e.g., TV and radio advertising). A

third finding was that media channels interact in generating leads and contracts. These spillover effects make it difficult to identify an optimal media mix since the impact of spending on one channel is affected by spending on related channels.

The studies also estimated cost per contract. Table V-7 shows estimated cost per contract associated with various media types. The marginal cost per enlisted contract, in column two, is based on 22 different individual linear regressions of contracts on spending by each media type. Cost per contract varied from a low of \$23 for internet resume search, to \$9,038 for TV advertising. The Optimization Group study also estimated that the overall marketing cost per contract was \$6,722.

Table V-7. Estimated Cost per Contract by Media Type

WEIGHTED BY # CONTRACTS GENERATED BY EACH MEDIA (Sig @ 80% CL) MEDIA	General Enlisted	
	Base Level Cost per Contract	Marginal Cost per Contract
Emerging Mobile Wireless	\$ 84	\$ 985
Emerging Broadcast	\$ 110	\$ 830
Internet CPL	\$ 512	\$ 619
Internet Job Post	\$ 466	\$ 629
Internet Display	\$ 602	\$ 962
Internet Resume	\$ 2	\$ 23
Internet Search	\$ 171	\$ 220
Print	\$ 902	\$ 2,169
Radio		
National DM/EM		
Local DM/EM		
Media Event		
Out of Home	\$ 532	\$ 3,075
TV	\$ 2,813	\$ 9,038
NAVY OPERATIONS		
Fulfillment	\$ 75	\$ 81
National Call Center	\$ 6	na
Postage	\$ 97	\$ 71
EVENTS		
Accelerate Your Life		
NASCAR	\$ 164	na
Conventions	\$ 141	\$ 802
Suburban	\$ 45	\$ 205
Simulator		

(Optimization Group 2010)

H. Other Models

The street-to-fleet supply chain model attempted to calculate the cost of processing a new recruit from initial contact until arriving at the first duty station. NRC built a model that differentiates the costs of the supply chain by rate, gender and minority status. The cost of moving one enlistee through the chain varies depending on the target segment. For instance,

recruitment of a minority of female officer costs about \$47,000–48,000, which is double that of recruiting a male, non-minority officer (U.S. Navy Recruiting Command 2011a). This information enabled NRC to analyze investigate why some of the 26 NRDs spend more or less than the average cost per recruit.

Analysis of effectiveness is on-going at NRC. One challenge involves the difficulty in knowing how to ‘grade’ the results of ad campaigns. The ad agency has conducted Navy awareness and attitude testing both prior to and after campaigns and has reported positive results (Campbell-Ewald 2010a). However, the agency does not provide benchmarks with which NRC can determine whether the results achieved compared to expectations (U.S. Navy Recruiting Command 2011a).

Three models described above (PRO, GMAX, and Gallup) give NRC decision-making guidance. In the first step, the PRO model analyzes the allocation of resources among the three major recruiting weapons (recruiting force, incentives, and M&A). The GMAX model provides budget estimates for optimal marketing and advertising effort, based on cost-per-lead data (given certain goal levels) (U.S. Navy Recruiting Command 2011a).

While research concludes that advertising spending positively impacts high-quality enlistments, the precise effect of military advertising is difficult to estimate. NRC Marketing considers determining marketing ROI to be its biggest challenge (U.S. Navy Recruiting Command 2011a). One aspect of this difficulty is measuring military advertising’s delayed effect on youth propensity to join (Bicksler and Nolan 2006). It can take a year before NRC can gauge the impact of advertising on contracts. This lag effect makes it difficult to make current advertising decisions (U.S. Navy Recruiting Command 2011a).

NRC is extremely interested in improving its ability to identify the optimal type and level of advertising and marketing efforts. One of the initiatives described in the *draft RF2020* was development of a marketing and advertising ROI tool. The draft RF2020’s specific goal for this initiative is the “establishment of organizational metrics, performance targets, and resource allocation forecasting tools to ensure effective and efficient use of Navy resources. The initial focus areas are Navy Marketing and Awareness spending and enhanced resource modeling capabilities” (U.S. Navy Recruiting Command 2011b).

VI. SUMMARY, CONCLUSIONS AND IMPLICATIONS

While the Navy has met its enlisted accessions goals every year for the last decade, due in part to the steadily decreasing recruiting requirements, it still faces shortages in specific skills. To ensure the Navy meets future recruiting missions, the NRC faces dual challenges. American youth have a low propensity to join the military. In addition, the Navy is the least

known of all of the military branches. Hence marketing is tasked with strengthening the Navy's brand identity and image among the public.

Of all the AVF forces surveyed in this study, the U.S. military is the most decentralized with respect to recruiting; NRC plans and implements its recruiting and marketing operations independently of the other services. NRC's recruiting marketing goals are presented in the annual "Commander's Guidance," which delineates recruiting priorities and the resources available for marketing efforts. The Navy's advertising agency, Campbell-Ewald, uses this guidance to develop the U.S. Navy *Annual Advertising and Marketing Plan* (AAMP).

The Navy's marketing strategy has transitioned from a largely Navy-centric approach that attempted to 'sell the Navy' toward a greater 'niche' or targeted approach. Marketing and advertising also attempts to respond to Gen Y's need for specific information and their desire to find a suitable personal job fit and a sense of community.

The Navy's communication strategy aims to create awareness, facilitate the potential recruit's decision-making process and generate the maximum number of leads. Advertising is the means to generate awareness and brand identity. The current ad campaign, *America's Navy – A Global Force for Good* is designed to communicate the protection and global "good" provided by the Navy. The brand message is communicated across ten different channels to create a "surround sound" effect. "Awareness media" includes television, radio, print and Internet search advertisements. In contrast, "response media" is that which more directly generates leads, including direct mail/email, mobile media, Internet banners, cost-per-lead, job postings and event advertising.

There is an increased emphasis on social and mobile media and Internet-based approaches to connect with and create a community for potential recruits. Hence, the current ad campaign spans a variety of social media and web-based outlets. Another trend is towards direct marketing which is relatively low in cost and is well-suited for targeting niche markets – an important feature in the ongoing effort to attract targeted market segments into priority jobs. While direct marketing and other response media-based marketing accommodates a smaller budget, NRC is concerned that a reduction in more expensive TV advertising could result in lower awareness and could worsen future recruiting success. The recommended media mix, as prescribed by a contracted agency that conducted a media optimization study, is still heavily awareness weighted, with 70% awareness media (\$33.5 million) and 30% response media (\$14.7) for a total media budget of \$48 million.

The Navy conducts outreach and events marketing to inform and inspire the target market and influencers and to send the message that the Navy, with its spectrum of

educational and training benefits, is “hiring now!” The recruiting districts develop and implement their own marketing and advertising plans.

NRC marketing and advertising planning is leads-focused. The ad agency is only held responsible for generating leads, rather than actual contracts. NRC distinguishes between national leads, such as those generated from TV, radio, magazines and email ‘blasts’, and local leads, which are primarily generated from newspapers, direct mail, and outreach events. The Navy Advertising and Leads Tracking System (NALTS) manages and channels leads and also helps the recruiting districts develop and implement their own local marketing plans. Identifying the source of leads is critical to the formulation of the AAMP, which lays out the implementation of the recruiting marketing strategy. The AAMP explains where most leads originate for each segment, and then identifies tactics to recruit that segment. While responses from all media channels are tracked by NALTS, it is difficult to measure the number of national leads, as compared to locally-generated leads. Another factor that confounds advertising planning is the lag time between placement of an ad and the signing of a contract.

NRC is actively pursuing methods to measure the effectiveness of its advertising and marketing efforts. The *“Recruiting Force 2020: Navy Recruiting Command Strategy and Business Plan 2011”* includes plans to deploy a marketing ROI tool to help guide resource decisions. NRC currently looks to various marketing performance metrics (largely provided by the ad agency) including cost-per-lead and the conversion rate. Advertising tracking studies, which track pre- and post- campaign indicators, youth polls and navy surveys, are also resources for measuring awareness, understanding, and propensity.

NRC has three tools with which to work to meet its recruiting goals: the recruiting force, advertising and incentives. Each of these tools comprises a component of the overall NRC budget. Of the three, advertising is the most variable, as the manpower and incentive budgets are fairly fixed. NRC finds it increasingly necessary to have quantifiable evidence supporting the Navy’s investment in advertising. NALTS generates a form of ROI for local marketing efforts, although NALTS is not a very comprehensive ROI tool, as it uses cost data for local efforts only and cannot measure the direct impact of national advertising. NRC now also looks to several externally developed optimization models that use historical data to simulate the dynamics of advertising and marketing in the market place and can help ascertain ROI as well as help guide future resource decisions. The PRO model incorporates costs, as well as external factors, into its calculation of the optimal mix of recruiters, incentives and advertising. Two other studies, GMAX and Gallup, use regression-based modeling on time series data to explain the impact of marketing and advertising on leads and contracts. These studies describe an effective range (or S-curve) for advertising, implying there is a minimum level of necessary advertising and there also is a level above which additional advertising does not bring additional benefits. For

example, the Gallup study found that the annual minimum advertising spend is about \$48 million, and GMAX found that the effective range for total advertising spend is \$65-100 million. These models provide NRC with decision-making guidance and also can help bolster justification for advertising budget requests.

VI. SUMMARY

I. BACKGROUND

The goal of this study is to assess the recruiting, marketing and advertising strategies that have been adopted in nations with all-volunteer forces (AVF). To meet the goals of the research within the resources available, we restricted the scope of the study along several dimensions. First, we confined our attention to four AVF nations—Canada, Australia, the United Kingdom and the U.S. Second, even though many of the policies discussed apply to all of the military branches in each nation, we focus primarily on the Navy. Third, although analysts historically have been concerned about the level of compensation necessary for the military to be competitive in the youth labor market, modern militaries also spend heavily on marketing and advertising. The focus of this study is on marketing and advertising strategies and policies rather than on pay policies. While recruiters perform the difficult tasks of tracking down leads, processing applicants, and completing the ‘sale,’ marketing and advertising programs are equally important recruiting weapons in AVF nations. Marketing and advertising programs affect the attitudes and behavior not only of youth in the target market but also of the key adult influencers of youth. While it is difficult to disentangle the recruitment effects of advertising from those of recruiters, and other recruitment tools, the importance of marketing in generating awareness and visibility cannot be understated.

This report seeks to compare and contrast the marketing strategies in selected nations, as well as to identify their best marketing practices. We find significant differences in the policies adopted across nations. However, perhaps somewhat surprisingly, we often find significant differences in recruitment initiatives within each nation between the Navy and the other branches. The study seeks to address the following questions:

- What recruit market trends the greatest challenges to recruiting in AVF nations?
- How should Navy be branded to promote recruiting?
- What is best mix of advertising and marketing media?
- What are the best practices of these AVF militaries?
- How can awareness of Navy been increased?
- What is the effectiveness of joint-service marketing for Navy recruiting?
- What marketing policies and initiatives are most cost-effective?
- How is effectiveness of marketing programs measured?
- What is the role of advertising in long-term recruiting strategies?

II. TRENDS

Demographic trends in the four nations that we survey generally are similar in direction, but not necessarily in magnitude. Each has experienced an aging of the population as the birth

rates of natives have dropped. Fertility rates vary from a low of 1.66 in Canada to 2.01 in the U.S. (Organization for Economic Cooperation and Development 2011) Slower population growth of natives has been offset to a varying extent by immigration and high birth rates among immigrant groups. These demographic shifts have created multiple concerns for military recruiting. First, military propensity among many immigrants is often lower than among natives as their primary motivation for immigrating most often is based on economics. Second, national identity is often weaker among immigrants so that certain marketing approaches are less appealing to these groups. Third, military eligibility rates are often lower among some immigrant groups, in part due to inability to acquire security clearances, and in part due to fitness, aptitude (due to language), and health issues. Even though diversity is a long-standing goal of AVF nations, these trends have created difficulties for their militaries to be representative of their national populations and challenges in devising marketing strategies for these groups.

A persistent trend in health problems has affected military eligibility rates in all Anglophone nations. The proportion of adults who are overweight varies from 48% in Australia to a high of 62% in the U.S. Obesity rates range from 25% in Canada to 35% in the U.S. (Organization for Economic Cooperation and Development 2010). Moreover, the overweight population is projected to grow by 15% by 2020.

Another demographic trend has been the entry of the 'Millennial' generation (or GEN Y) into the prime recruiting market. GEN Y members are generally perceived to be impatient, demanding and marketing savvy. They expect to know what they will be doing in their military jobs, what training they will receive, and what they can expect throughout their careers. Also, friendships are very important to this generation. These characteristics of GEN Y have forced the adoption of new marketing strategies and shifted the emphasis across media types, particularly from mainstream media to digital channels.

The recent (2008–2011) global recession has impacted recruitment in all of the surveyed nations, with perhaps the exception of Australia. The average unemployment rate in the OECD nations was 9.5% in Europe and 9.8% in the U.S., but only 5.2% in Australia (Organization for Economic Cooperation and Development 2010). High unemployment has increased the number of applicants to the military as civilian employment opportunities and pay levels shrink. Nonetheless, while cyclical factors favor short-term recruitment, all AVF nations are experiencing longer-term trends that are affecting recruiting negatively.

All of the AVF nations have contributed troops to the wars in Iraq or Afghanistan, or both. However, the length of the Afghanistan war and the associated human and economic costs appear to have altered attitudes toward the military. The increasingly negative effect of the war has contributed to a long-term downward trend in youth military propensity. In the

U.S., military propensity has dropped among all demographic groups, but especially among blacks, a group that traditionally held more positive views towards military service.

The single most important long-term factor contributing to declining youth interest in military careers has been a strong and persistent upward trend in post-secondary enrollment among school leavers. In the U.S., among those aged 25–34, the share of high school graduates who had enrolled in college increased from under 50% in 1975 to over 68% in 2009 (Bound and Turner 2010). This trend has been mirrored in all of AVF nations, and has been fueled by a growing civilian earnings gap favoring college-educated workers as technology makes such skills more valuable in the labor market. This trend also has forced AVF nations to stress marketing and recruiting policies that focus on the technical jobs and educational programs they offer, and on the transferability of military training to the civilian sector.

Another factor influencing the downward trend in propensity is the declining presence of veterans in the civilian population. Marketing and advertising strategies have been forced to adapt to the lack of visibility of military role models in many communities. For example, outreach activities, which improve visibility among specific target groups, have become a more important component of marketing strategies in AVF nations.

Most AVF Navies are encountering recruiting and manning shortfalls in certain, mostly technical, specialties. Intense competition with the civilian sector is the primary reason for these shortfalls. Recruiting and marketing initiatives have been adopted that target those who can qualify for these skilled occupations. For example, all nations (except the U.S.) have adopted direct entry program for recruits with technical training, skills, and qualifications. The nations have also developed specialist recruiting cells which concentrate on recruiting individuals with specific skills that are in short supply.

Perhaps one of the most surprising findings is that all AVF nations have experienced a decrease in public awareness of the Navy. Furthermore, the Navy has an unclear identity and weak brand. Marketing and recruiting strategies have been developed by Navy policy makers specifically to address these problems. For example, all of the nations continue to utilize TV ads even though the use of lower-cost digital media has expanded rapidly. Such ads improve awareness by reaching both youth and adult influencers and by promoting the Navy brand.

III. RECRUITING STRUCTURE AND PROCESSES

The differences in the recruiting organizations of each of the AVF nations are striking. Canada and Australia have joint military structures with one organization performing recruiting functions for all branches. At the opposite end of the spectrum, both the U.S. and the U.K. maintain separate recruiting organizations for each branch. Thus, even though the four nations have experienced common external changes, the recruiting and marketing initiatives adopted

in response to these changes are filtered through vastly different recruiting structures. Table VI-1 summarizes the differences in the recruiting structures and the recruiting force for active duty, enlisted recruits.

Table VI-1. Structure of Recruiting Organizations

Country	Recruiting Command Structure	Recruiter Control	Recruiting Force
Australia	Joint (ADF)	ADF/MOD	Hybrid: Civilian Contractors and Active Duty
Canada	Joint (CF)	CF/MOD	Active Duty
United Kingdom	By branch	By branch— Policy at HQ; recruiters at local level	Retired Active Duty (on Reserve Duty)
United States	By branch	By branch	Active Duty

Although a centralized recruiting structure appears to offer a more cost-effective organizational model, it has not been without issues. While the Canadian Forces (CF) generally meets its overall recruiting goals, Navy recruitment has been a serious concern. In part, this is because of low public awareness of the Canadian Navy. To combat low awareness, the Navy has been forced to create its own “Navy Attractions and Recruiting Support” cell. Similarly, in Australia, which also has a joint recruiting organization, Navy awareness and brand identity also has become an issue. In response, the Australian Defence Force (ADF) has begun to develop and promote brands for each of the individual services.

The recruiting process itself has become an element of the marketing strategy in Canada, the U.K., and Australia. Recent efforts have been made to reduce the length of the process. These improvements include developing an online or “e-recruiting” program which allows candidates to submit and track status of their applications over the Internet. Canada has established a central contact center which responds to e-mail inquiries and sends information packages and streamlined procedures for processing applications. Also, Canada is probably the only nation that permits recruiting centers to conduct on-site selection for many military occupations in an effort to reduce processing time. To speed up its process, the ADF has reduced the administrative requirements for potential recruits at initial testing stages.

The U.K. recruiting structure recently was reorganized from a centralized to a decentralized, regional focus. The goal of the decentralization was to improve the ability of field recruiters to tailor their efforts to the local population and its needs. Early assessments of this

structure indicate that communication and planning between CNR and the regions is not as efficient as it could be.

As Table VI-1 indicates, AVF nations have striking differences in the utilization and assignment of recruiters. In the Royal Navy recruiters are retired active duty personnel who are serving in a reserve status and who are permanently assigned to recruiting duty. Moreover, they are assigned permanently to a given local area. Canada uses a mix of CF active duty and reserve personnel as recruiters. Australia has a hybrid model that combines civilian contractors and active duty personnel as recruiters.

IV. DEVELOPMENT OF RECRUITING AND MARKETING STRATEGY

This study examines the process of developing recruiting and marketing strategies in the four AVF nations and how the strategies are implemented in both the short-run and the long-run. In particular, we focus on the relationship between recruiting strategies and marketing initiatives and advertising spending. Table VI-2 summarizes the strategy development process in each nation.

Table VI-2. Strategy Development Process

Country	Defense Strategy--MOD Level	Personnel/HR Strategy	Recruiting Strategy	Navy Recruiting Plan
Australia	Defence White Paper; Defence Strategic Reform Program	Defence Strategic Workforce Plan	ADF Recruiting Strategic Plan	In-service Recruiting Plan
Canada	Canada First Defence Strategy	Military HR Strategy; Defence Strategic Workforce Plan	CF Recruiting Strategy; Chief of Maritime Staff Strategic HR Plan	Efforts by Navy Attraction and Recruiting Support
United Kingdom	Armed Forces Overarching Personnel Plan		RN Recruit Marketing Strategy	As prescribed by RN Recruit Marketing Strategy
United States	CNO Strategic Initiatives		Commander's Guidance	AAMP

The strategy process differs widely across the AVF nations. Australia develops and maintains a long-run strategy based on a forecast and scan of the future recruiting environment. ADF recruiting strategy is defined by MOD strategy in *Defence White Paper 2009*, and the Defence Strategic Reform Program. The *Defence Strategic Workforce Plan (DSWP) 2010–2020* is a 20-year plan that describes the workforce requirements for the capabilities of Force 2030. The plan foresees a joint and integrated Australian Defense workforce, combining uniformed personnel, civil servants, and contractors. *The ADF Recruiting Strategic Plan 2007–2017* describes how ADF will meet the demand for people specified by the MOD-level strategy over the next decade.

Each nation's process includes elements of these strategy building blocks, but often not all of the components. The CF recruit marketing strategy, Canadian Forces Recruiting Strategic Level Guidance on Winning the War for Talent (2007), flows primarily from MOD guidance provided by the *Canada First Defence Strategy* (2008) and the *Military HR Strategy 2020* (2002). In the U.K., the strategy development process encompasses several levels of the MOD. These include the Armed Forces Overarching Personnel Strategy, the Defence Recruiting Committee, which formulates corporate recruitment policy for the Armed Forces, and the Naval Strategic Plan.

V. MARKETING AND ADVERTISING PLANS: IMPLEMENTING THE STRATEGY

The countries distinguish between awareness efforts and job-specific or response-focused efforts. The awareness efforts tend to be national and employ the more expensive media, such as TV, while job-specific or response-focused efforts tend to use less expensive media (such as recruiting website and direct mail) and tend to be more the focus of regional marketing.

The Recruit Marketing Strategy develops marketing principles for the Royal Navy. The current strategy is entitled “Life without Limits” and has been in effect since January 2008. Market research studies guided the RN to adopt a new approach to recruit marketing. The original model assumed that the target audience would be inspired to contact a recruiter after being exposed to an advertisement on TV or in a cinema. However, research found that potential recruits desired communication with greater interaction—allowing them to better understand what the Navy is about or to identify a possible role model in the Navy.

The current *Fight with the Canadian Forces* campaign (*Fight Fear, Fight Chaos, Fight Distress*) is a rebranding of the CF. The current message focuses less on the military's combat mission and more on humanitarian and global assistance missions. This theme echoes that in the U.S. Navy's recent *A Global Force for Good* campaign. CF advertising also aims to communicate career opportunities in the CF, as well as opportunities for professional and

personal growth. The CF campaign also promotes Navy teamwork to address Gen Y misconceptions about an isolated maritime service. While the *Fight* campaign is intended to raise awareness, a complementary job-specific *Priority Occupations* campaign is designed to attract and steer “job-seekers” into certain (undermanned) occupations. While Navy does not have its own advertising campaign, it leveraged the 2010 Navy Centennial anniversary with a variety of advertising efforts. The Navy also is highlighted in Navy priority occupations advertising as well as in the Great Lakes Deployment.

Unlike other nations, Canada still relies on TV advertising, even though the CF website is important to the overall marketing plan. Due to its large geographical area, Canada increasingly relies on a “Virtual Recruiting Center.” It is possible for a prospect to have no personal contact with a recruiter until the final screening interview. Canada feels that increased use of the internet and social media has reduced the number of field recruiters.

All nations (except the U.S.) offer direct entry programs that allow qualified enlisted recruits to bypass traditional, lengthy initial rate training. Canada offers a wide range of direct entry programs, including opportunities for inter-component transfer, occupational transfer (within the same component) based on civilian skills and training. Direct entry programs are also available for technicians and applicants who are skilled/semi-skilled tradesmen.

Also, Specialist /Technical Trades Recruiting Cells have been established in Canada and Australia for health, engineering and technical trades. Personnel in these trades staff the specialist recruiting cells, which aim to increase career promotion, liaison and mentoring for candidates interested in these employment categories. Also, the “Defence Technical Scholarship” program awards scholarships to youth who have demonstrated interest/desire to go into the trades.

The rapid growth in post-secondary enrollments among youth has affected all nations. A challenge for recruitment is the perception that joining the military will block or delay the ability to pursue post-secondary education. In response, most nations have promoted the educational opportunities offered in the military and offered subsidized in-service education to attract both officers and non-commissioned members.

The use of financial incentives varies widely across AVF countries. The U.K. appears to make limited use of financial incentives—they use ‘Golden Hellos’ but only for hard-to-recruit skill areas. The U.S., by contrast, makes extensive use of enlistment bonuses. In the CF recruiting bonuses are available for shortage ratings and officer specialties. For officer prospects allowances are designed to offset the average college debt of recent college graduates. This is similar to the U.S. Navy’s college loan repayment program.

Joint advertising has raised some important issues in Canada and Australia. Joint ADF advertising had adopted two different approaches: advertising specific jobs and advertising to generally attract people to join the military. For example, branding efforts convey the military as the employer of choice, while job-specific efforts convey the jobs available. However, joint ADF advertising had allowed misperceptions to emerge about the individual service brands. Consequently, the individual services were compelled to offer new advertising and marketing campaigns to address the indistinct images of the Navy, Army and Air Force brands. An example of Navy-specific branding is seen in a recent advertisement which shows footage of busy Navy sailors on ships and of sailors in a foreign city. After the footage, the voice-over states: "That was seven days in the Navy. Imagine what it would be like in a career."

Although it is not due to a joint recruiting structure, the U.K. Royal Navy also suffers from low awareness. The current *Life without Limits* campaign attempts to address the low awareness of youth. The RN directs recruiting messages to the primary target based on the central proposition "One Career Many Opportunities." This overriding message, which conveys the range of Navy careers, is the cornerstone of the *Life without Limits* campaign. The campaign translates and customizes this foundational message to appeal to specific target market segments.

The Royal Australian Navy Community Engagement Program seeks to improve awareness of the Navy and its career options. Regional Coordinators arrange events and activities throughout Australia, including displays at public events, presentations to schools, business and community groups, ship visits, and at careers fairs and sporting events. The ADF distinguishes its market by age and by propensity to join. Promotional campaigns are launched on the internet and mobile phones to reach Generation Y.

The ADF Youth Connection Program attempts to increase ADF awareness among youth. It includes a multimedia teaching program geared toward 15–18 year olds. The Gap Year Program is an ADF program designed to give recent school leavers a taste of military life for 12 months while paying them a salary. The program seeks to 'win over' recruits who might resist making a military commitment without first experiencing the military life.

In the ADF, incentives are managed by each service. While ADF recruiting does not design the service-specific incentives, it is considering changing the initial service obligation for new recruits. Currently, the initial minimum service obligation is 4-6 years for enlisted personnel. However, studies indicate that GEN Y values flexibility and might not want to commit to an up-to-a-six year commitment.

The U.K. and Australia communications strategies address moving people to action along a path from learners to inquiry to decision.

The Royal Navy Marketing and Advertising Plan is based on ‘market segmentation’ research. RN recruiting focuses on three or four (of seven) market segments and selects the media most used by each market segment (e.g., TV, cinema, online, social media, Pub TV) and uses that specific media to reach the targeted audience. The Royal Navy considers digital channels to be a key part of its communication strategy and intends to have totally digital marketing strategy by 2015. As part of its digital strategy, RN creates a platform for potential recruits to create their own website, add photos, videos, etc. Reliance on digital strategy reduces the cost per lead since the costs of digital advertising are lower than for other media at least in the U.K.

Both the U.K. and Australia use target market segmentation research to customize communication plans to reach and motivate different segments (such as those segments deemed most likely to apply for certain priority jobs). While the U.S. Navy employs niche marketing, its marketing plan does not appear to integrate target market segmentation research to as great an extent as do the U.K. and Australia.

The U.S. recruiting mission currently is dictated by ‘fit.’ Traditionally, recruiters sold the Navy, not jobs. Today, the market demands to know the specifics about Navy life and jobs—what will I do in the Navy? What is shipboard life like? The navy.com website and a huge presence in social media attempts to provide answers to these questions. The Navy is currently on 18 different Facebook pages.

Advertising presents the product, and invites people to consider it; advertising builds awareness, interest and involves long-term dynamics. Direct marketing is leads-oriented, not awareness-oriented. Reducing advertising reduces awareness and harms future prospects. The U.S. Navy has largely dropped TV advertising due to a huge drop in the ad budget and is focusing more on digital media, including social media. One perceived advantage to the more fragmented digital landscape is that it facilitates targeted, niche marketing via the media channels frequented by each target segment. For example, medical students are always on the internet, so the Navy advertises the Financial Assistance Program to them on email, rather than via direct mail.

VI. MEASURING EFFECTIVENESS AND RETURN ON INVESTMENT

All countries attempt to develop some metrics to measure the relationship between advertising and leads or contracts. While research concludes that military advertising positively impacts contracts, the direct, causal effect of military advertising and marketing is difficult to estimate. One aspect of this difficulty is the delayed effect of advertising on youth propensity to join (Bicksler and Nolan 2006). However, the other problem is disentangling the relative contribution of monetary incentives and field recruiters from that of advertising.

The organization responsible for assessment of advertising effectiveness varies across nations. In the U.K., assessment of marketing and advertising campaigns is not conducted by the ad or marketing agency responsible for a campaign or program, but rather by the RN or by a private research group. The U.K. government's Central Office of Information (COI) contracts independent research companies to conduct target audience research. In addition, CNR has produced KPIs for marketing agencies and COI to measure the performance and effectiveness of ad campaigns.

In the U.S., pre- and post-campaign assessments are conducted by DoD surveys. However, much of the on-going assessment of advertising is conducted by the ad agency. In the past, the agency was offered monetary incentives to meet certain metrics, but the monetary award was so small that it did not affect behavior. Currently, the role of the ad agency is viewed as generating interest, as measured by national leads. Once prospects have met with recruiters, it is the responsibility of the recruiters to produce contracts. Currently, NRC provides guidance to the ad agency on the various missions, problem areas, and the resources available. The ad agency uses the guidance to develop the annual marketing plan. While NRC largely relies on the ad agency for on-going metrics and assessments, it supplements this feedback with analytical studies performed by contracted firms.

Perhaps the most advanced efforts to track the effectiveness of marketing and advertising initiatives are conducted in the U.S. and the U.K. The Royal Navy conducts extensive analysis of the effectiveness of marketing initiatives U.K. gives the advertising or marketing agency the metrics (KPI's) they need to meet in the campaign (TV, web, cinema, etc.). If the ad agency fails to meet the KPI's, they risk renewal of their contract. For example, CNR might instruct the ad agency that the goal of an ad campaign is to obtain 20 engineers. After the website campaign, KPIs are collected on the number of responses to the website, the number of expressions of interest, the number of telephone calls received, and the number of applicants, which leads ultimately to the number of engineers who enlist. The "conversion rate" is the ratio of the number of engineers who join to the number of responses to the website-based ad. The evaluation assesses the cost-effectiveness of each media for each different market segment. Based on the results Navy recruiting can re-position the media for the next campaign. This is done when tracking a campaign and is especially easy to do when working in the online environment where campaigns can be easily moved different sites.

The Royal Navy stresses the importance of ensuring that advertising is integrated across all media channels. In fact, CNR considers the level of overall public RN awareness to be based on three components: Outreach (e.g., events, career fairs), cinema advertising, and education efforts. While advertising is important, the "tipping point" (the point at which youth actually make the decision to join) is when they meet and talk to someone face-to-face. The CNR

stresses that no one element of marketing, media or advertising package can cover all of the target markets, without the others.

All AVF nations conduct surveys of potential and new recruits. The RN surveys every recruit to determine how they learned about the RN and what motivated them to join. There are also efforts to measure the results of investments in outreach efforts. In the U.K., advertising pre-wave and post-wave tracking is done via surveys. Also, RN administers a Potential Applicant Survey, as well as a new recruit survey. In Canada, surveys are used to evaluate post-campaign audience recall and to understand behavior and propensity of target market. Also, CF conducts focus groups and surveys of new recruits to learn what factors (including what type of advertising) attracted them to the Navy. In the U.S., surveys are used to understand motivations for enlistment. The New Sailor Survey provides important information to marketing efforts.

In the U.S., some research is conducted in-house by NRC or within the DoD, while other research is conducted by Campbell-Ewald (C-E), the advertising agency. C-E also sub-contracts to agencies who conduct research on certain demographic groups. The Department of Defense has a program responsible for joint market research and communications, Joint Advertising Market Research & Studies (JAMRS). JAMRS conducts national surveys, supplemented with mall intercept interviews and focus groups, to gauge Navy awareness; for example, the JAMRS Youth Poll, describes the youth trends impacting recruitment and propensity to enlist in the military. The Navy launched the GFFG brand in 2009, but surveys indicate that Navy brand awareness is very low. Awareness appears to be around 1% for the GFFG campaign as compared to about 8-9% under the *Accelerate Your Life* campaign.

In the U.K., the Royal Navy administers separate instruments to assess outreach events. The U.K. does not merely rely on leads from the events to assess their effectiveness. Return on investment (ROI) is also measured in terms of recruitment results. The impact of an event on recruiting is based on the return of completed “Expression of Interest” (EOI) forms by event attendees. The RN also evaluates the overall effectiveness of the initiatives via an annual Omnibus survey, which tracks the public’s opinion of the RN.

In the U.S., the effectiveness of events marketing is analyzed by measuring the number of leads generated. Leads are generated from a variety of media. For example, NRDs advertise in local newspapers and via direct mail, recruiters contact prospects at outreach events, and national advertising provides the Navy’s recruiting website and phone number. Responses from all media are tracked, reported and evaluated via Cyberspace via various databases, such as NALTS. Together, these tools form a comprehensive system of advertising planning, leads tracking, media evaluation, web-enabled leads management, and recruiter follow-up.

The U.S. conducts marketing at the national and the regional level. Local advertising is used to generate leads, which are complemented by leads from national advertising. All leads are tracked through the [Leads Production Team] using the web-based Navy Advertising and Leads Tracking System (NALTS). The Navy calculates a “combined National and Local Leads Contribution to Goal” for each of its active/reserve and officer/enlisted categories. Each NRD is supposed to meet minimum acceptable metrics for leads. For example, with respect to active enlisted leads, each NRD should achieve the following three metrics: (1) Combined National and Total Leads Contribution to Goal equal or greater than 34%; (2) National Enlisted Leads Conversion Rate percentage equal to or greater than 5%; and (3) Local Enlisted Leads Conversion Rate equal to or greater than 5%.

Historical conversion rates indicate the number of leads that result in an enlistment contract. The number of leads is further broken down from “gross leads” into “eligible leads,” reflecting the fact that many interested persons do not qualify for enlistment. Conversion rates change as the number of contacts increases. The agency reports that when seeking to generate less than 35,000 contracts, the eligible conversion rate is 4.4%, meaning about each 100 eligible leads results in about 4 enlistments. However the higher goal of over 35,000 contracts, the rate is 6%, meaning many more leads must be generated to achieve one conversion. For example, the advertising agency developed its plan based on the need to generate 35,000 enlistment contracts. The advertising agency stated that it needed a \$30-48 million media budget to generate about 35,000 contracts.

NRC and Campbell-Ewald evaluate the success of marketing strategy via several methods, including a monthly and year-to-date look at: (1) How well accessions are meeting goals; (2) How well ‘quality eligible leads’ are meeting goals; and (3) Conversion rates of leads to contracts, and ultimately, actual contracts delivered. One of the most cost-effective efforts is the ‘cost-per-lead’ program, in which the Navy pays the advertising vendor for the media that generates a lead. NRC gives vendors parameters for the target market, and the vendor, for example, puts banners on applicable websites frequented by the target market. The Navy pays each time someone clicks on the banner.

While all countries track metrics to generate a sense of marketing effectiveness, the U.S. is further along than the others with respect to determining ROI; the U.S. Navy is now seeking resource decision-making guidance from optimization models that use historical data to estimate the ROI of advertising and marketing.

VII. CONCLUSIONS AND RECOMMENDATIONS

A number of best practices used by other militaries have important implications for the U.S. Navy. The study found that advertising budget cuts seem to be the biggest impediment to

a long-term recruiting advertising/marketing strategy. That is, implementation of the planned advertising strategy appears to be severely affected by budget changes. To avoid this type of reactive, rather than constant, advertising strategy, the Australian Defence Force developed a high-level personnel strategy, which includes a recruiting strategy, that is long-term and is designed to stay constant regardless of personnel turnover and budget cuts. That is, the long-term strategy and its objectives are adhered to, while in the short-term, how the strategy is implemented tactically, may change in response to budget cuts. This type of approach could help the U.S. Navy avoid the frustration of strategy changes as a result of budget fluctuations.

Navy-specific advertising is essential to address Navy awareness overall, to distinguish the Navy brand as one distinct from the other services, and to position the Navy as an employer-of-choice. While U.S. Navy advertising is already service-specific, it is worth reinforcing the conclusion that joint advertising, while possibly providing cost savings from economies of scale, is not likely to meet Navy's strategic recruiting objectives.

Brands need continual reinforcement. All the AVF countries in this study suffered weakened Navy images as a consequence of reduced advertising in the post-cold war period and have had to 'reinvent' their brands during the past decade. A long-term strategy that addresses the need for sustaining a strong Navy brand (and the negative consequences of a weakened Navy brand) could provide justification for greater advertising resources.

Targeted, niche marketing appears to represent a growth area in military recruiting. Niche marketing leverages the ability to target select skills and diversity, as well as to reach Gen Y 'where they live.' The Royal Navy's application of target market segmentation research directly into its marketing practices is a useful model. Although USN does conduct market segmentation research, it would be worthwhile for it to explore ways to more directly integrate this research into its marketing plan.

Advertising via digital media is growing rapidly. Nonetheless, while digital media is cost-effective and fosters targeted niche marketing, mass media is still needed to cultivate general awareness of the Navy. Recruiting policy must, in essence, perform a balancing act—reducing awareness-style mass media advertising too much can jeopardize the effectiveness of the more targeted digital-based media, such as social media.

The study also reveals that the traditional 'join the Navy' focus is no longer enough to attract recruits in today's environment. Increasingly, other nations' advertising, websites and outreach efforts are promoting specific jobs and occupations. This focus addresses both the Navies' needs for certain skills, as well as the competition for these skills from other employers. In addition, there appears to be high value in promoting educational benefits through advertising; the trend for the target market to increasingly pursue post-secondary education

does not appear to be going away in the near future. The Navy should continue to promote educational programs and education financing as a means to compete with colleges in the youth market.

Different recruiting models—in terms of both organizational structure and processes—are being used by AVF nations. While no single model fits all nations, the USN could benefit from exploring the potential advantages of utilizing civilian and/or military retiree as field recruiters. In addition, USN should continue with efforts to improve or shorten the ‘customer’s’ recruiting process and experience. All AVF countries share this goal, both to reduce costs and to help ensure that quality recruits stay in the recruiting process until accession. Interestingly, other AVF countries appear to be farther along than the U.S. in terms of e-recruiting—which may or may not be good for the USN. However, efforts to improve and streamline the process should be explored, even while current recruiting conditions appear to be flush with candidates. Lastly, it would be prudent for USN to continue to pursue analysis of its advertising and marketing effectiveness that is independent of the ad agency’s own analysis.

Some of the important questions that have been posed in studies of military advertising and marketing are as follows:

- Is a minimum level of advertising necessary for a cost-effective long-run recruiting program?
- What is the most efficient mix of joint and Navy-specific advertising?
- What is the optimal mix of marketing media?

A recent review of the literature on the effectiveness of military advertising concludes that little is known about this relationship (Adams 2009). Part of the problem is that the incidence of advertising, as well as its direct effects, is difficult to measure. Experimental evidence is practically non-existent, thus comparative analysis of the experience of similar nations can provide some evidence on the effects of advertising.

The Canada and Australia case studies suggest that a minimum spending level is important in maintaining the long-term viability of a recruitment program. One reason for this is the lag effects in advertising wherein current expenditures affect interest in the military well into the future, and earlier spending has some effect on interest and awareness today. The evidence is based on a cyclical variation in advertising expenditures, and recruitment, between the drawdown of the 1990s, and the manpower buildup after 9/11. The evidence shows that the growth of advertising expenditures after 9/11 generated a significant growth in recruitment, although this ramp-up was also accompanied by increases in other recruiting resources. The Canadian experience suggests that it may be more cost-effective to maintain advertising expenditures at a minimum level rather than to allow them to decline and then to

compensate for their absence by increasing recruiters and other resources. The costs associated with the boom-and-bust cycle in all recruiting resources (especially recruiters) might be reduced by maintaining advertising and marketing efforts.

In addition, a minimum level of spending is necessary to maintain an awareness of the Navy, even when the recruiting market is robust and goals are easy to achieve. Advertising affects awareness not just of youth, but also of ‘influencers’, such as family members, teachers, and counselors who help youth make career decisions. Again, maintaining awareness among this group requires a sustained minimum level of spending.

Adams (2009) also notes that there is little evidence on the effects of joint advertising. However, Canada and Australia provide some light on this subject. The low awareness of the Navy in both nations suggests that joint service advertising is inherently limited in promoting specific services. In both nations, problems emerged in the form of low general Navy awareness and recruiting shortfalls in many specialist skill areas. Both nations have been forced to adopt new marketing strategies specifically aimed at improving Navy awareness.

All AVF countries surveyed have faced significant advertising budget cuts (somewhat induced by the fact that overall recruiting mission is now more easily being met) and have had to make difficult trade-offs in allocating advertising and marketing resources. The Navy recruiting leadership in these countries share concerns that high-level budget decision-makers may be cutting the advertising budget too deeply and threatening the need for the Navy to maintain baseline brand awareness.

Assessing the proper mix of advertising media has become more complex with the advent of the internet, mobile phones, and social networking sites. Currently, it is easier to target specific markets because of the expanding number of media available. Conversely, choosing the media mix depends on the specific target market that needs to be reached, the media habits in that market, and the specific message that needs to be delivered.

Note that in non-U.S. nations, appeals to patriotism or service to country do not appear to be important factors in motivating youth to enlist. Rather, it is travel, adventure, jobs available, and learning marketable skills that appear to be strong motivators. Advertising in these nations seldom addresses patriotism or service to country. This is especially important in nations with growing immigrant populations. As immigrant populations grow in the U.S., appeal to patriotism again may have less impact on these groups.

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