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Formative Research for Recruitment Marketing and Advertising 2019 Final Report

Prepared for the Department of National Defence

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March 2019

This public opinion research report presents the results of the online survey conducted by Earnscliffe Strategy Group on behalf of Department of National Defence. The research was conducted in March 2019.

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EXECUTIVE SUMMARY

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to the Department of National Defence (DND) summarizing the results of quantitative research to inform the recruitment marketing and advertising strategies of the Canadian Armed Forces.

The Department of National Defence is focused on ensuring the diversity of Canadian society is reflected in the Canadian Armed Forces (CAF). The CAF wanted to better understand how to reach potential recruits with messages that resonate. Past research efforts have not been specific to this target demographic: potential recruits, aged 17-23. One of the primary objectives of the research was to create psychographic profiles of potential recruits. This analysis could be used to inform recruitment efforts by exploring lifestyle values, preferences, attitudes, motivations, behaviours, and barriers to joining. Further, the research set out to determine information sources, influencers, and how to best resonate with visible minorities, Indigenous groups, and women. The total cost to conduct this research was \$74,263.60 including HST.

Earnscliffe used a quantitative approach to meet these objectives. We conducted an online survey of 2,031 Canadians. The survey was conducted with respondents aged 17 to 23, half self-identified as visible minority or Indigenous and the other half self-identified as neither visible minority nor Indigenous. The research was conducted using our data collection partner, Léger's, proprietary online panel. The surveys were conducted online from March 5 to 24, 2019 and averaged 14 minutes. The data was weighted to reflect the demographic composition of the Canadian population aged 17 to 23.

The key findings from the research are presented below.

- The elements that the most respondents seek in a career are good pay (51%), work-life balance (28%), a positive work environment (24%), job security (22%) and benefits (22%).
- Many of the things respondents look for in a career are reflected in the importance they place on certain life goals. For example, well over two-thirds (69%) rate having good work-life balance as very important to them. Over half of respondents also prioritize goals related to job security and pay, including having a full-time job (63%) and being financially successful (61%).
 - Over 40% are very confident they will have a career that offers them intellectual and physical challenges, training, competition, respect, and opportunities for advancement and to get jobs in their field.
 - About a third are very confident that they will find a career that provides many of the elements they seek in a career, including a positive work environment (36%), benefits (34%), job security (31%) and good pay (31%). Fewer (25%) are very confident they will find work-life balance.
 - The aspects of a career that matter least are physical challenge (40%), prestige (34%) and a competitive environment (25%).
- A fulfilling career (42%), having a family (33%) and being happy (25%) are the top three things respondents want to achieve in life, followed by financial stability (19%) and travel (18%).
- Under half (40%) are familiar with the CAF, but their opinion of the CAF is mostly favourable (68%).
 - Overall, respondents who are visible minorities, Indigenous, male or from Atlantic Canada are more familiar with the CAF.

- Those who have a very favourable view of the CAF hold this view out of respect for the sacrifices its members make (26%), the protection the CAF offers our country (25%), the CAF's reputation (11%) and its members' service to our country (11%).
- Those with a very negative impression tend to associate the CAF with war or violence (28%).
- Fewer respondents (53%) have a favourable opinion of the CAF as an employer than do in general, but the lower rating could stem from unfamiliarity with the CAF in this context, as 26% do not offer an opinion on the subject.
- Under a third (28%) are knowledgeable of career opportunities within the CAF, and fewer (23%) are knowledgeable with opportunities within the Reserve Force.
- One-in-five are either very likely (4%) or somewhat likely (16%) to consider a career in the CAF.
 - Interest in joining the Reserves is higher (45%).
 - Few (17%) of those who are unlikely to consider a career in the CAF have thought about it before.
- Likelihood of considering joining the CAF rises to 52% when respondents are told they could have a career in one of their preferred fields. The possibility of a career in a field that interests them appears compelling even to those who were less interested in joining the CAF to begin with. Among those who initially said they would not be very likely to consider a career in the CAF, over half would be very or somewhat likely to consider it if it meant working in a field that interests them.
- Significantly fewer agree (28%) than disagree (65%) that they could see themselves joining the CAF. This pattern extends to the Royal Canadian Navy (20% agree, 72% disagree), the Royal Canadian Air Force (RCAF) (22% agree, 70% disagree) and the Canadian Army (25% agree, 67% disagree).
 - Though they are not enthusiastic about joining, more would be proud to serve (59%) than would not (27%).
- More agree than disagree with a number of positive aspects of a career in the CAF including that it offers a wide variety of professions (66% agree, 17% disagree), opens doors to work outside the CAF (56% agree, 23% disagree), and that the work environment is respectful of all cultures (54% agree, 28% disagree) and women (47% agree, 32% disagree).
 - Opinion is more evenly split over whether one's family (43% agree, 47% disagree) or friends (45% agree, 43% disagree) would encourage them to join.
- Respondents feel the most compelling reasons to consider a career in the CAF are paid education (37% place it in the top three), salary/benefits (35%) and helping others (30%).
 - Exposure to danger (38%), being away from home and family (34%), and the possibility of combat (33%) are the greatest deterrents to joining the CAF.
 - Those who are likely to join the CAF believe serving the country is a more compelling argument (26%), along with training (18%) than those who are less interested in serving.
- Half (52%) agree that "physically challenging" describes a career in the CAF very well. The plurality of respondents believe "offers training" (42%) is an apt description. Respect (35%) and the offer of adventure (31%) follow as the most accurate terms to describe a military career.
 - Fewer believe a positive work environment (9%), freedom/flexibility (8%), not having to move (8%) and work/life balance (6%) describe a career in the CAF very well.

- Both the Navy and Army videos elicit similar reactions. Over half say the videos are appealing to watch and are compelling. Over half also agree that they made them at least a little more interested in a career in the CAF and that the videos seemed in some way meant for them.
 - The videos had an impact on those who said they are not very likely to consider a career in the CAF. In both cases, large majorities said that they made them at least a little more likely to consider a career in the CAF.

Research Firm:

Earnscliffe Strategy Group Inc. (Earnscliffe)
Contract Number: W8484-181041/001/CY
Contract award date: January 23, 2019

I hereby certify as a Representative of Earnscliffe Strategy Group that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed: 

Date: March 31, 2019

Doug Anderson
Principal, Earnscliffe

INTRODUCTION

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to the Department of National Defence (DND) summarizing the results of quantitative research to inform the recruitment, marketing and advertising strategies of the Canadian Armed Forces.

The Department of National Defence is focused on ensuring the diversity of Canadian society is reflected in the Canadian Armed Forces (CAF). The CAF wanted to better understand how to reach potential recruits with messages that resonate. Past research efforts have not focussed specifically on potential recruits; those aged 17-23. One of the primary objectives of the research was to create psychographic profiles of potential recruits. This analysis could be used to inform recruitment efforts by exploring lifestyle values, preferences, attitudes, motivations, behaviours, and barriers to joining. Further, the research set out to determine information sources, influencers, and how to best resonate with visible minorities, Indigenous groups, and women.

The specific objectives of the research included:

- Create a demographic and psychographic profile of potential recruits within the target age range;
- Determine the lifestyle values, preferences, and attitudes they have, based on factors, such as: happiness, success, career paths and goals, leisure activities and hobbies, self-confidence, health, and family;
- Determine how these lifestyle values affect attitudes towards joining the CAF and perceptions of the CAF;
- Determine reasons and motivations to join;
- Determine barriers to overcome to join;
- Determine the sources of information they use to make informed life decisions and the impact they have;
- Determine influencers that they use to make informed life decisions and the impact they have; and
- Target recruit profiles must consider how the CAF can resonate with visible minorities, Indigenous groups, and women.

To meet these objectives, Earnscliffe used a quantitative approach. We conducted an online survey of 2,031 Canadians. The survey was conducted with respondents aged 17 to 23; half self-identified as visible minority or Indigenous and the other half self-identified as neither visible minority nor Indigenous. The research was conducted for the most part using our data collection partner, Léger's, proprietary online panel. In order to achieve the desired number of visible minority respondents, Léger partnered with Decision Point Research to make use of the latter's proprietary multicultural research panel. For more comprehensive details on the nature of the opt-in panels used, the Government of Canada is already in possession of each company's responses to the ESOMAR28 questions. In total, 406 completes were from Decision Point's panel. The surveys were conducted online from March 5 to 24, 2019 and averaged 14 minutes. The data was weighted to reflect the demographic composition of the Canadian population aged 17 to 23.

To ensure sufficient representation of Canadians at all age levels and across all provinces, quotas were set as outlined in the table below.

The original sampling frame was as follows:

Region/Province	%	Visible Minority/Indigenous (17-23)	Rest of Canadians (17-23)
Atlantic Canada	6.8%	68	68
Quebec	23.4%	234	234
Ontario	38.3%	383	383
Prairies	6.5%	66	66
Alberta	11.2%	113	113
British Columbia	13.5%	136	136
TOTAL	100%	1,000	1,000

Bolded results in the tables presented in this report indicate that the difference between the demographic groups analysed are significantly higher than results found in other columns in the table. In the text of the report, unless otherwise noted, demographic differences highlighted are statistically significant at the 95% confidence level. The statistical test used to determine the significance of the results was the Z-test.

The detailed findings from this research are presented in subsequent sections of this report. Appended to this report are the methodology report, survey instrument, and data tables (presented under a separate cover).

DETAILED FINDINGS

The following research results are presented in seven sections: career outlook and aspirations; values and goals; thoughts on a career in the Canadian Armed Forces; communications testing; civics; employment profile; and, the segmentation analysis.

These findings focus primarily on the differences across the three target samples: the general population as a whole; those who self-identify as a visible minority (including Indigenous persons); and, those who self-identify as non-visible minority (including non-Indigenous persons). Appended data tables provide results of findings across a much broader range of demographics, characteristics, and attitudes.

Career Outlook and Aspirations

When asked to choose from a list which three elements they expect from a career, half (51%) prioritize good pay. Around one in four seek either work-life balance (28%), a positive work environment (24%), job security (22%) and benefits (22%). Respondents from visible minority groups are less concerned about having a positive work environment (16%) than non-visible minorities (26%), and more likely than those who are not members of a visible minority group to prioritize job security (28% vs 20%) and respect (17% vs 12%). Other notable differences between demographic groups include:

- Female respondents are more likely than male respondents to seek work-life balance (33% vs 24% of men), a positive work environment (28% vs 19%), benefits (27% vs 16%) and adventure (15% vs 11%).
- Respondents aged 17-18 rank job opportunities in the field (18%) higher than those in the older age categories (13% among those ages 19-20 and 11% among those ages 21-23).
 - Along with those ages 19-20 (11%), 17-18 year-olds also find free job training more appealing (9%) than those aged 21-23 (5%).
 - The oldest age group is more likely to prioritize work-life balance (31%) and benefits (24%) than the youngest age groups (23% and 17%, respectively).
- Good pay (62%) and lots of job and career opportunities in the field (26%) are more important to Atlantic Canadians than those in other regions, particularly when compared to BC (41% prioritize good pay and 13% job opportunities), as well as Quebec (11% prioritize job opportunities) and Ontario (12% prioritize job opportunities).

Exhibit A1: Q12: *From the list below, which three do you most want out of a career?*

Career Expectations			
	Gen Pop (n=2031)	Visible Minority (n=1,008)	Non-Visible Minority (n=1,023)
Good pay	51%	48%	52%
Work-life balance	28%	28%	29%
Positive work environment	24%	16%	26%
Job security	22%	28%	20%
Benefits	22%	18%	23%
Freedom/Flexibility	17%	16%	18%
Intellectual challenge	15%	13%	16%
Job opportunities in the field	14%	14%	13%
Adventure (opportunity to travel)	13%	13%	14%

Respect	13%	17%	12%
Opportunity for advancement	11%	12%	11%
No requirement to move far away	9%	8%	9%
A pension	8%	7%	9%
Free job training	8%	7%	8%
Competition	6%	7%	5%
Prestige	5%	7%	4%
Equal opportunity employer	5%	7%	4%
Flexibility to change careers	5%	6%	4%
Paid university education	5%	7%	5%
Training	5%	7%	4%
Physical challenge	4%	4%	4%
Mentorship	4%	4%	4%
Don't know/Prefer not to answer	1%	2%	1%

Respondents were asked if they were confident that they will find a career that meets the three expectations they selected. Over 40% of those who selected one of the following career expectations are very confident they will have a career that meets their expectations: intellectual and physical challenges, training, competition, respect, and opportunities for advancement and to find jobs in their field. Slightly fewer respondents are very confident that they will have a career that offers them the financial and economic benefits they are looking for, including 31% of those who selected good pay and 35% of those who expect a pension. Visible minorities are less confident than non-visible minority respondents that they will find a career with plenty of job opportunities (38% vs 49%), opportunities for advancement (33% vs 44%), prestige (31% vs 40%) and a positive work environment (28% vs 37%). Non-visible minorities are less certain they will find a job with benefits (32% vs 42%), good pay (29% vs 37%), free job training (24% vs 31%) and mentorship (21% vs 39%). It should be noted that the differences between visible and non-visible minority respondents are not statistically significant for this series of questions, with the exception their expectations around good pay.

There are several other notable demographic differences, including:

- Respondents aged 19-20 are the least confident they will have a job with a pension (42% not confident) compared to 17-18 year-olds (18%) and 21-23 year-olds (21%).
- Women are also less confident than men that they will have a pension (31% not confident compared to 18%, but the difference is not statistically significant).
- Those with a household income of between \$40K to \$80K are less confident (35%) than those with a household income of less than \$40K (18%) and over \$80K (20%) that they will have a pension (the differences are not statistically significant).
- Respondents aged 21-23 are more likely than younger respondents to be very confident they will find an intellectually challenging career (69%), compared to those aged 19-20 (51%) and 17-18 (50%).

Exhibit A2: Q13: *And how confident are you that you will have a career that offers...?*

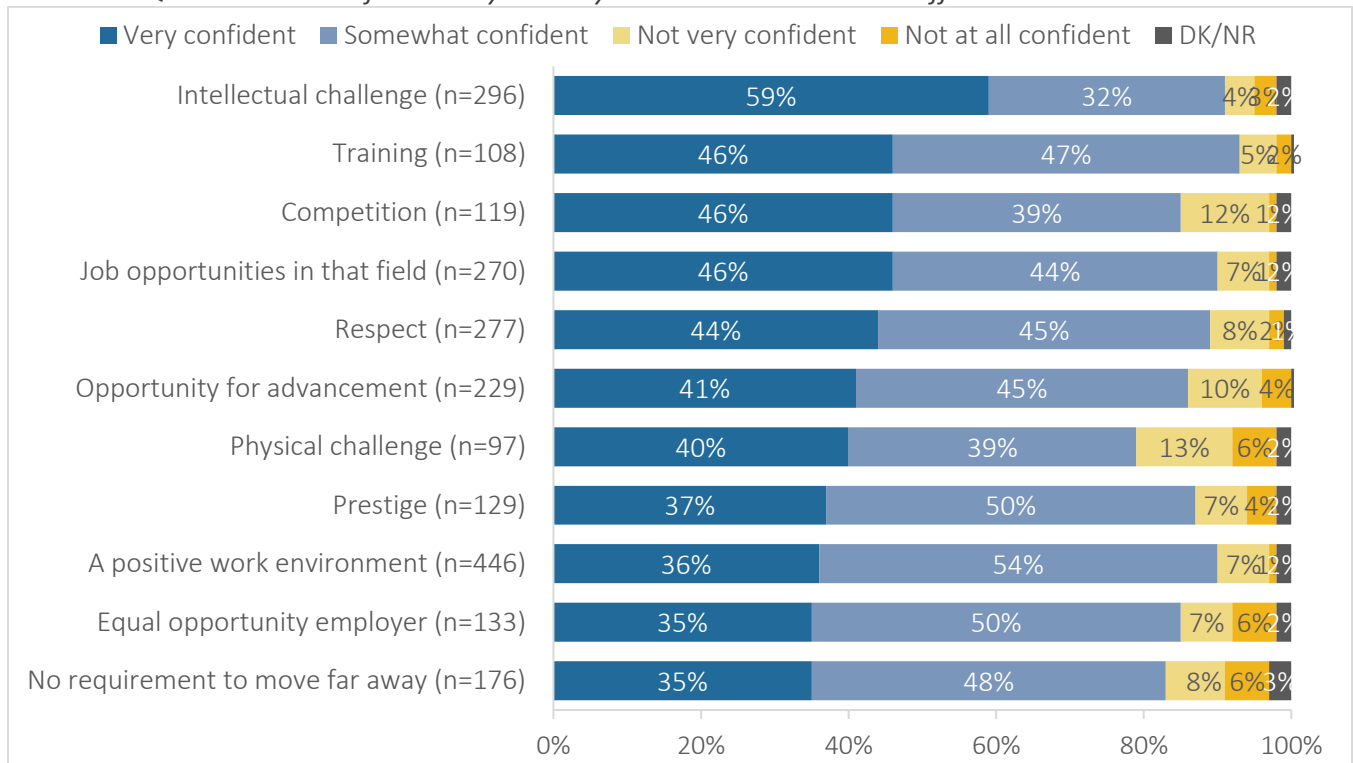


Exhibit A3: Q13: *And how confident are you that you will have a career that offers...?*

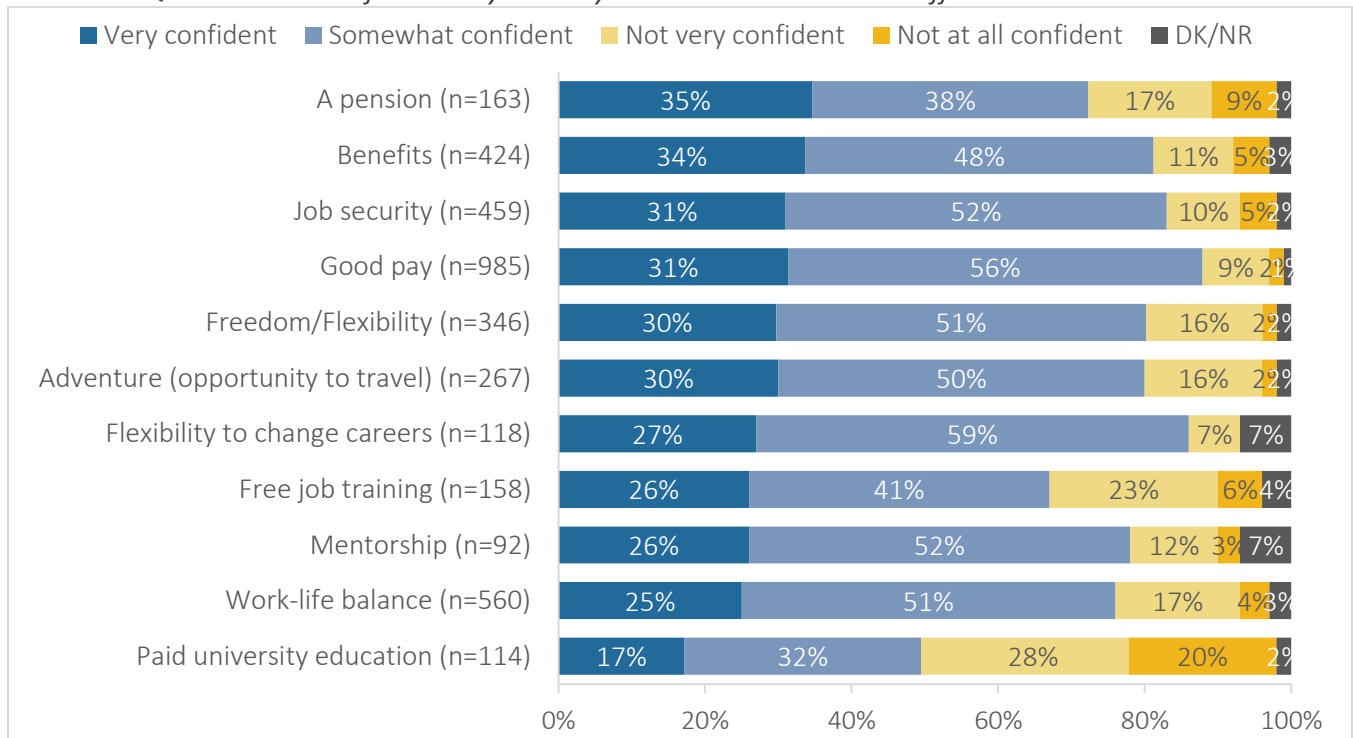


Exhibit A4: Q13: *And how confident are you that you will have a career that offers...?*

Confidence in Fulfilling Expectations - % Very Confident			
	Gen Pop	Visible Minority	Non-Visible Minority
Intellectual challenge (n=296/125/171)	59%	58%	59%
Training (n=108/71/37)	46%	46%	46%
Competition (n=119/63/56)	46%	43%	48%
Job opportunities in that field (n=270/125/145)	46%	38%	49%
Respect (n=277/156/121)	44%	44%	44%
Opportunity for advancement (n=229/122/107)	41%	33%	44%
Physical challenge (n=97/53/44)	40%	40%	40%
Prestige (n=129/84/45)	37%	31%	40%
A positive work environment (n=446/186/260)	36%	28%	37%
Equal opportunity employer (n=133/85/48)	35%	34%	36%
No requirement to move far away (n=176/89/87)	35%	35%	36%
A pension (n=163/74/89)	35%	35%	35%
Benefits (n=424/186/238)	34%	42%	32%
Job security (n=459/254/205)	31%	30%	32%
Good pay (n=985/457/528)	31%	37%	29%
Freedom/Flexibility (n=346/166/180)	30%	33%	29%
Adventure (opportunity to travel) (n=267/130/137)	30%	31%	29%
Flexibility to change careers (n=118/70/48)	27%	32%	25%
Free job training (n=158/76/82)	26%	31%	24%
Mentorship (n=92/51/41)	26%	39%	21%
Work-life balance (n=560/265/295)	25%	25%	25%
Paid university education (n=114/68/46)	17%	22%	14%

When asked which three attributes matter the least when choosing a career, physical challenge (40% say it matters least) and prestige (34%) matter the least when respondents are making career decisions, followed by competition (25%) and avoiding moving (24%). More non-visible minorities feel prestige matters least (36%) compared to visible minority respondents (27%). Other notable differences are:

- More women do not prioritize physical challenge (47% say it is one of the least important attributes) compared to men (33%), along with prestige (39% vs 28%). Men are less concerned with finding an equal opportunity employer (17% vs 7% of women) or an intellectually challenging job (15% vs 12% of women).
- Older respondents aged 19-20 and 21-23 are less interested in prestige (35% and 37% respectively) than the youngest group (27%).
- More respondents from BC are less concerned about good pay (13%) and job security (10%) than those from other regions, particularly when compared to Atlantic Canada (2% say good pay is among the least important), Quebec (4% say good pay and job security are among the least important), and Alberta (3% say job security is among the least important).

Exhibit A5: Q14: *And, can you identify which three matter the least to you in making career decisions?*

Least Important Career Motivations			
	Gen Pop (n=1995)	Visible Minority (n=987)	Non-Visible Minority (n=1008)
Physical challenge	40%	37%	41%
Prestige	34%	27%	36%
Competition	25%	23%	26%
No requirement to move away	24%	22%	24%
Mentorship	19%	18%	19%
Adventure (opportunity to travel)	19%	20%	18%
Paid university education	18%	17%	19%
Intellectual challenge	13%	14%	13%
Equal opportunity employer	12%	11%	12%
Flexibility to change careers	11%	10%	11%
Respect	11%	10%	11%
A pension	9%	11%	8%
Free job training	9%	8%	9%
Training	7%	7%	7%
Freedom/Flexibility	6%	8%	5%
Good pay	5%	9%	4%
Work-life balance	5%	7%	4%
Job security	5%	6%	5%
Opportunity for advancement	5%	4%	5%
Job opportunities in that field	5%	6%	4%
Positive work environment	5%	6%	4%
Benefits	4%	5%	4%
None of the above	2%	2%	2%
Don't know/Prefer not to answer	2%	2%	2%

Over half (59%) are satisfied with their life right now, while 21% are dissatisfied and 20% are neither satisfied nor dissatisfied. There are only small differences between demographic groups, if at all.

Exhibit A6: Q15: *How satisfied would you say you are with your life right now?*

Current Life Satisfaction			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Very satisfied	15%	14%	16%
Somewhat satisfied	44%	42%	44%
Neither	20%	24%	18%
Somewhat dissatisfied	16%	15%	16%
Very dissatisfied	5%	5%	5%
Don't know/Prefer not to answer	1%	1%	0%

Values and Goals

When asked to choose from a list the top five most important values or character traits to them, respondents most often selected being of good character (43%), successful (39%), learning continuously (38%), loyalty (37%) and compassion (37%). Heroism (7%), respecting tradition (11%) and community service (14%) are the least important. Of note, respecting tradition is more important to visible minorities (17%) than non-visible minorities (9%). Being successful (44%) is also slightly more important to visible minorities (44%) than non-visible minorities (37%). There are other notable differences based on gender, age and region:

- Women place greater importance on good character (47% vs 39%), continuous learning (42% vs 33%), compassion (42% vs 30%) and loyalty (41% vs 33%). Men, in comparison, more often prioritize success (44% vs 34%), tackling important challenges (23% vs 15%), being proud to be Canadian (22% vs 12%), respecting tradition (13% vs 9%) and being heroic (10% vs 4%).
- The 21-23 age group is more likely to prioritize continuous learning (40%) and being fun-loving (32%) than the younger age groups: 38% of those 19-20 and 33% of those 17-18 prioritize continuous learning, and 27% of both age categories prioritize being fun-loving.
- Quebecers have a different set of important values than respondents from the rest of the regions: determination (49%), freedom (42%) and being fun-loving (40%) make up their top three.

Exhibit B1: Q16: *Below is a list of values or character traits that may be important to some people and unimportant to others. Please rank the five that are most important to you personally?*

Importance of Values / Character Traits – Among Top Five			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Being of good character	43%	44%	42%
Being successful	39%	44%	37%
Continuous learning	38%	38%	37%
Being loyal	37%	35%	37%
Being compassionate	37%	33%	38%
Thinking independently	36%	35%	36%
Freedom to choose one's path	34%	31%	35%
Being determined/perseverant	33%	31%	34%
Making a difference	34%	30%	35%
Being creative	30%	30%	30%
Being fun-loving	29%	29%	29%
Being tolerant of others	24%	22%	24%
Curiosity	20%	20%	20%
Tackling important challenges	19%	19%	19%
Being proud to be Canadian	17%	16%	17%
Being of service to one's community	14%	16%	14%
Respecting tradition	11%	17%	9%
Being heroic	7%	9%	6%

When asked to provide unprompted answers describing the three things they most want to achieve in life, a fulfilling career (42%), a family (33%) and being happy (25%) are the top three responses, followed by financial stability (19%) and travel (18%). Having a family (35%) and travel (20%) are more important to non-minority respondents than visible minorities (29% and 14%, respectively). Women are more likely than men to want a family (37% vs 29%), a good job (46% vs 33%), happiness (30% vs 20%) and to travel (24% vs 13%). Men are more likely

to name wealth (22% vs 10%) as an important life achievement. Those aged 19-20 (49%) are most focused on finding a good, fulfilling career, compared to those 17-18 (41%) and 21-23 (39%).

Exhibit B2: Q17: *What are the three things you most want to achieve in life?* [OPEN END] *excludes DK/NR/None/Nothing

Most Important Life Achievements			
	Gen Pop (n=1635)	Visible Minority (n=781)	Non-Visible Minority (n=854)
A good, fulfilling career	42%	41%	43%
Have a family	33%	29%	35%
To be happy	25%	23%	26%
Financial stability	19%	22%	18%
To travel	18%	14%	20%
To have money	15%	18%	14%
To be successful	14%	19%	12%
To have a home	12%	11%	12%
To be healthy	8%	10%	8%
Finish school	8%	9%	7%
Make a difference	7%	6%	8%
To get married	7%	7%	7%
Have a good, comfortable life	6%	7%	6%
Help others	6%	5%	6%
Being a good, kind person	6%	6%	6%
To be loved	5%	6%	5%
Have children	4%	3%	5%
To open a business	4%	5%	4%
To have friends	3%	3%	4%
To have a car	3%	2%	3%
Ability to take care of/provide/support family	3%	3%	2%
Adventure / Fun	2%	2%	2%
Good work/life balance	2%	3%	2%
To be famous	2%	2%	2%
Be independent	2%	1%	2%
Freedom	2%	2%	2%
To fulfil/achieve my dreams	2%	2%	2%
Overall well-being	2%	2%	2%
To be creative	2%	1%	2%
Self-development/growth	2%	2%	2%
To have good, meaningful relationships	2%	1%	2%
Stability (unspecified)	1%	1%	1%
Retire comfortably	1%	1%	1%
Safety/Security	1%	1%	1%
To have a good/serving relationship with God	1%	1%	1%
To be mentally healthy	1%	1%	1%
To have animals/help animals	1%	1%	1%
Help the environment	1%	0%	1%
To be debt free	1%	1%	1%

To own property	1%	1%	1%
More time (for family, friends, hobbies, etc.)	1%	1%	0%
To be proud/make parents proud	1%	1%	1%
None/Nothing	0%	0%	0%
Other	7%	9%	6%

When asked to rate the importance of several goals, well over half place great importance on work-life balance (69% very important), full-time employment (63%), and being financially successful (61%) and proud of one's career (61%). Fame (8%), peer recognition (20%) and community engagement (22%) are the least important. Being financially successful is even more important to visible minorities than non-visible minorities (67% vs 59%), along with having a clear career path (50% vs 36%), being recognized by peers (27% vs 17%) and being famous (14% vs 6%). Other notable differences include:

- Men would like to be recognized by their peers (25% very important) more than women do (15%). Women are more likely to aspire to getting married (53%) and having children (45%), compared to men (46% and 38%, respectively).
- While most feel it is important, home ownership (58% very important) is a higher priority for respondents aged 21-23 than the younger age groups (49% of 17-18 year-olds and 50% of 19-20 year-olds). Work-life balance is also more important to the older group (72%), compared to the 17-18 (67%) and 19-20 year-olds (66%).

Exhibit B3: Q18: *There are many different types of goals people might have for their life. For each of the following, please indicate how important, if at all, each goal is to you personally.*

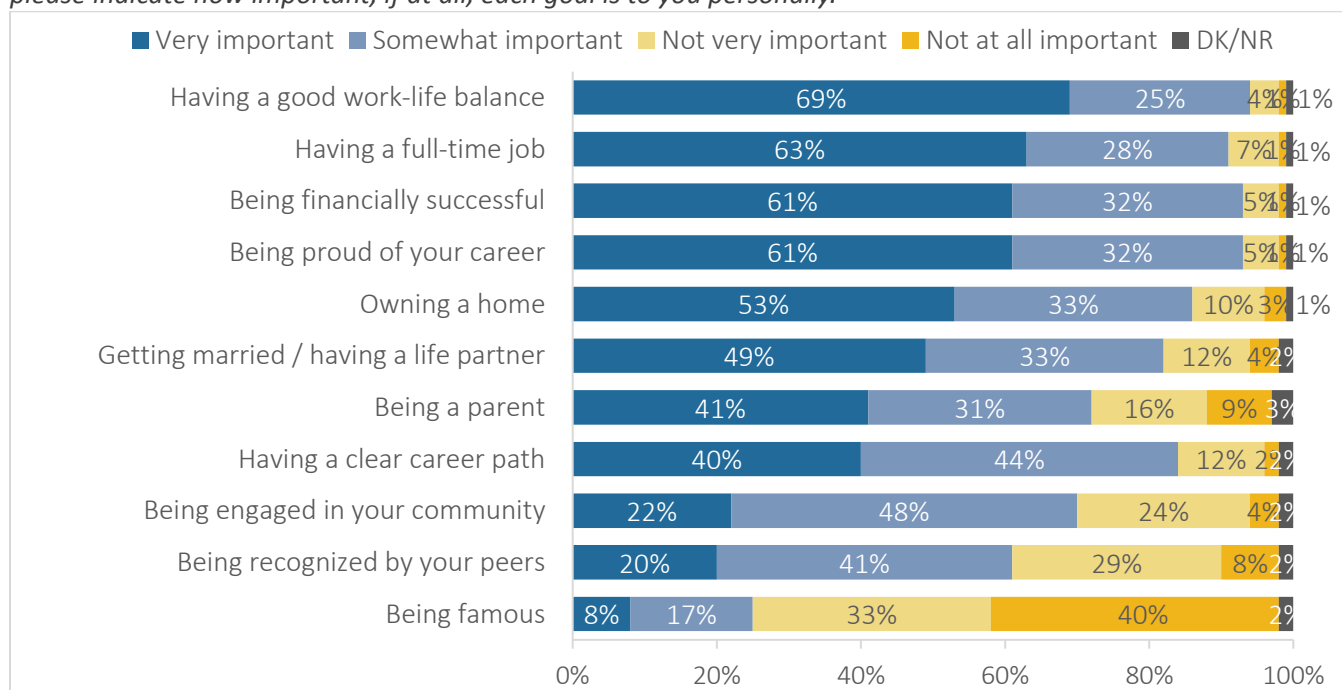


Exhibit B4: Q18: *There are many different types of goals people might have for their life. For each of the following, please indicate how important, if at all, each goal is to you personally.*

Life Goals - % Very Important			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Having a good work-life balance	69%	69%	68%
Having a full-time job	63%	65%	62%
Being financially successful	61%	67%	59%
Being proud of your career	61%	62%	61%
Owning a home	53%	56%	52%
Getting married/having a life partner	49%	49%	49%
Being a parent	41%	41%	41%
Having a clear career path	40%	50%	36%
Being engaged in your community	22%	30%	18%
Being recognized by your peers	20%	27%	17%
Being famous	8%	14%	6%

Career in the Canadian Armed Forces

Few (7%) are very familiar with the CAF, while a third are somewhat familiar. Over half (59%) are not familiar including 44% who are not very familiar and 15% who are not at all familiar with the CAF. Visible minorities are more familiar with the CAF (45% very or somewhat familiar) than non-visible minorities (37%). Familiarity is also higher among:

- Men (46%) than women (32%);
- Indigenous respondents (58%) than non-Indigenous respondents (39%);
- Atlantic Canadians (56%) than Quebecers (28%), Ontarians (40%), Albertans (43%) and those in Manitoba and Saskatchewan (37%); and,
- Those who have completed high school (40%), college (44%) or university (46%) than those who have not completed high school (26%).

Exhibit C1: Q22: *How familiar are you with the Canadian Armed Forces?*

Familiarity with the CAF			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Very familiar	7%	8%	6%
Somewhat familiar	33%	37%	31%
Not very familiar	44%	37%	47%
Not at all familiar	15%	16%	15%
Don't know/Prefer not to answer	1%	2%	0%

Two-thirds (68%) have a favourable opinion of the CAF in general and, though one quarter do not offer an opinion, half (53%) have a positive impression of the CAF as an employer. When it comes to the CAF in general, impressions do not vary much between various segments of the population. One notable exception is that Atlantic Canadians have a much more positive view of the CAF (80% very or somewhat favourable) than respondents from other regions.

When asked to rate the CAF as an employer, certain groups are more likely not to offer a response, including:

- Women (32% compared to 21% of men);
- Ontarians (30%, compared to British Columbians at 20%); and
- Those who have not completed high school (32%) or have only completed high school (30%) compared to those who have a college diploma (23%) or have a bachelor’s degree/postgraduate degree (17%).

Exhibit C2: Q23: *Generally speaking, would you say that you have a very favourable, somewhat favourable, not very favourable, or not at all favourable opinion of the Canadian Armed Forces?*

Q25. *Would you say you have a very favourable, somewhat favourable, not very favourable, or not at all favourable opinion of the Canadian Armed Forces as an employer?*

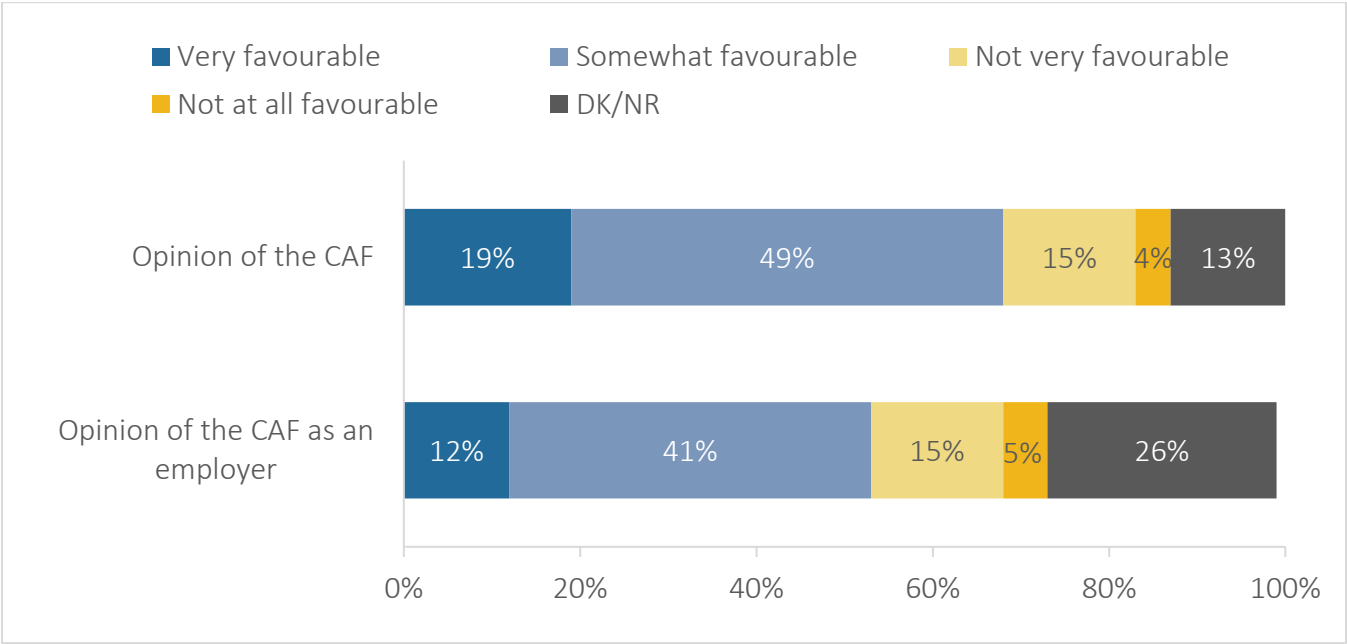


Exhibit C3: Q23: *Generally speaking, would you say that you have a very favourable, somewhat favourable, not very favourable, or not at all favourable opinion of the Canadian Armed Forces?*

Opinion of the CAF			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Very favourable	19%	16%	20%
Somewhat favourable	49%	49%	48%
Not very favourable	15%	14%	15%
Not at all favourable	4%	4%	5%
Don't know/Prefer not to answer	14%	17%	12%

Exhibit C4: Q25: *Would you say that you have a very favourable, somewhat favourable, not very favourable, or not at all favourable opinion of the Canadian Armed Forces as an employer?*

Opinion of the CAF As an Employer			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Very favourable	12%	11%	13%
Somewhat favourable	41%	40%	41%
Not very favourable	15%	16%	15%
Not at all favourable	5%	6%	5%
Don't know/Prefer not to answer	26%	27%	26%

A quarter of those with a highly favourable impression of the CAF say they feel this way out of respect for the sacrifices its members make (26%) and the protection they provide (25%). Other reasons include the CAF's reputation (11%), its members service (11%) and the sense that they do important work (10%). Non-visible minorities are more likely to have a very favourable view of the military because they know someone in the CAF (10% vs 3%), though the difference is not statistically significant. Across the country, the source of favourable impressions varies slightly:

- Over a third (38%) in Alberta say they have a very favourable impression of the CAF because they respect the sacrifices its members make, a significantly higher percentage than in BC (8%).
- More in Ontario (14%) have a very favourable impression of the CAF because of its reputation, in contrast to Quebec (4%).
- Ontarians are more likely to have a very favourable impression because they know someone in the CAF (13%), particularly compared to Atlantic Canadians (2%).

Exhibit C5: Q24: *[IF VERY FAVOURABLE OPINION OF CAF] Why do you say that?*

Favourable Impressions of the CAF			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Respect/Respect them for sacrifices they make	26%	23%	27%
They protect us/our country	25%	22%	26%
Great reputation	11%	9%	12%
They serve our country	11%	10%	11%
They do important/good work	10%	12%	9%
I know someone in the military	8%	3%	10%
Respected job/Good career choice	8%	10%	7%
Ensure that peace is kept	6%	7%	5%
They serve for our freedom	4%	2%	5%
I am part of/have been part of Cadets	4%	2%	5%
Known to be well trained	3%	1%	3%
Offers good opportunities	3%	3%	3%
I want to become a member of the CAF	2%	4%	1%
No reason	1%	0%	2%
They are heroic/Heroes	1%	0%	1%
Other	5%	7%	4%
Don't know/Prefer not to answer	6%	6%	6%

Those with a completely unfavourable impression associate the CAF with war and violence (28%), do not respect the CAF (14%) or are not very interested in the army (10%). Non-visible minorities are more likely than visible minorities to have a not at all favourable impression because they associate the CAF with violence (31% vs 17%) and do not respect the CAF (17% vs 7%) though the differences are not statistically significant.

Exhibit C6: Q24: *[IF NOT AT ALL FAVOURABLE OPINION OF CAF] Why do you say that?*

Unfavourable Impressions of the CAF			
	Gen Pop (n=86)	Visible Minority (n=40*)	Non-Visible Minority (n=46*)
Associate with war/violence/global unrest	28%	17%	31%
I don't respect anything about the CAF	14%	7%	17%
Not interested in the army	10%	14%	9%
No reason	9%	10%	9%
Respected job/Good career choice	1%	0%	2%
I am part of/have been part of Cadets	1%	0%	2%
Great reputation	1%	3%	0%
Other	12%	14%	11%
Don't know/Prefer not to answer	24%	36%	20%

**Small sample size, results should be considered qualitative in nature and interpreted with caution.*

Under a third (28%) are knowledgeable of opportunities within the CAF, and fewer (23%) are familiar with opportunities within the Reserve Force. Visible minorities tend to be slightly more familiar with opportunities in both the CAF (32%) and the Reserve Force (27%) than non-visible minorities (27% and 22%, respectively), but the differences are not statistically significant. More striking contrasts are found between the following groups:

Opportunities within the CAF:

- Just 20% of women, compared to 37% of men consider themselves knowledgeable;
- Indigenous respondents are more knowledgeable (46%) than non-Indigenous respondents (28%);
- Respondents in BC (41%) and Atlantic Canada (40%) are more knowledgeable than those in other regions, specifically Quebec (26%), Ontario (25%) and Manitoba/Saskatchewan (26%); and,
- Those who have completed either college (35%) or university (35%) are more knowledgeable than those who have not (19% of those with some high school or less and 26% of those who have graduated high school).

Similar patterns exist when it comes to knowledge of opportunities within the Reserve Force:

- Men (29%) claim to be more knowledgeable than women (16%);
- Indigenous respondents are more knowledgeable (48%) than non-Indigenous respondents (21%);
- Respondents in Atlantic Canada (38%) and BC (30%) are more knowledgeable than those in other regions, Ontario in particular (18%); and,
- Those who have completed either college (28%) or university (29%) are more knowledgeable than those who have not (18% of those with some high school or less and 19% of those who have graduated high school).

Exhibit C7: Q28: *How knowledgeable do you feel you are about career opportunities within the Canadian Armed Forces?*

Q30. *How knowledgeable do you feel you are about opportunities within the Reserve Force in the Canadian Armed Forces?*

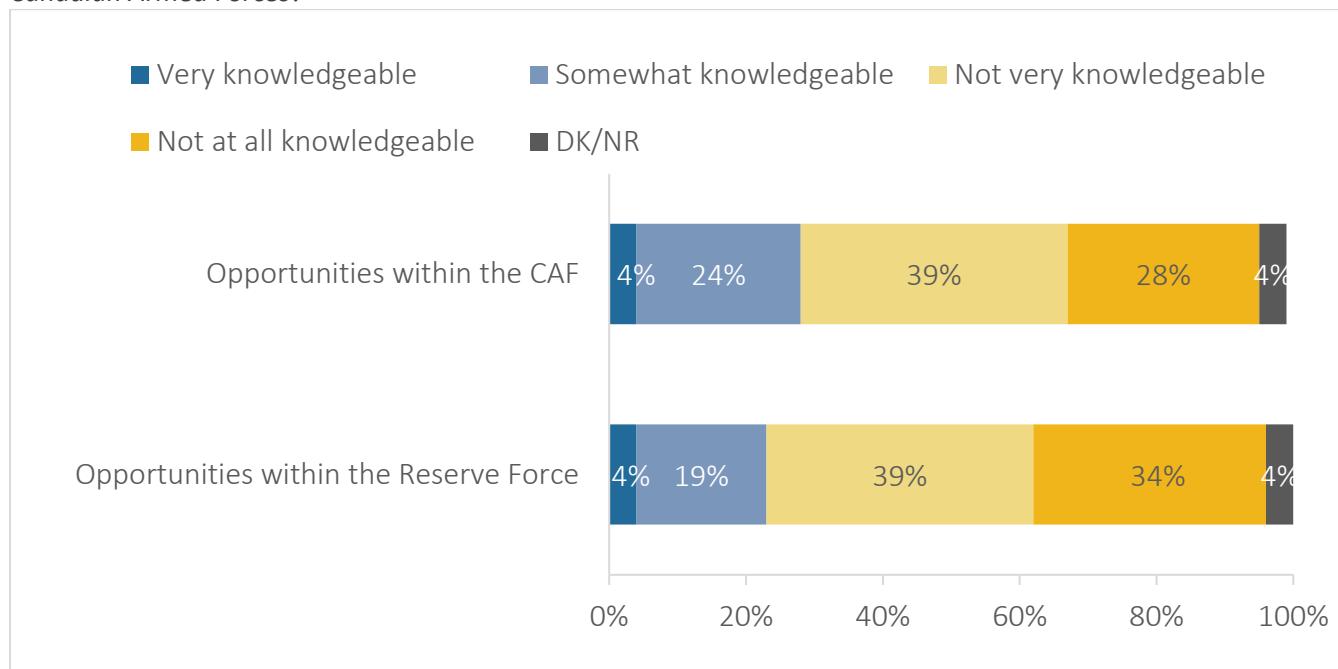


Exhibit C8: Q28: *How knowledgeable do you feel you are about career opportunities within the Canadian Armed Forces?*

Knowledgeable about Opportunities within the CAF			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Very knowledgeable	4%	5%	4%
Somewhat knowledgeable	24%	27%	23%
Not very knowledgeable	39%	36%	40%
Not at all knowledgeable	28%	28%	28%
Don't know/Prefer not to answer	4%	4%	4%

Exhibit C9: Q30: *How knowledgeable do you feel you are about opportunities within the Reserve Force in the Canadian Armed Forces?*

Knowledgeable about Opportunities within the Reserve Force			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Very knowledgeable	4%	4%	4%
Somewhat knowledgeable	19%	21%	18%
Not very knowledgeable	39%	35%	40%
Not at all knowledgeable	34%	34%	35%
Don't know/Prefer not to answer	4%	5%	3%

One-in-five are likely to consider a career in the CAF. Few (17%) of those who are not likely to pursue a career with the CAF have thought about it before. Visible minorities are more likely (29%) than non-visible minorities (16%) to be very or somewhat likely to consider a career in the CAF. Other groups more likely to consider a career in the CAF include:

- Men (26%) compared to women (14%);
- Indigenous respondents (52%) compared to non-Indigenous respondents (18%); and,
- Respondents from BC (29%), particularly compared to respondents from Atlantic Canada (16%), Quebec (15%) and Ontario (18%).

Exhibit C10: Q26: *Today, how likely are you to consider a career in the Canadian Armed Forces?*

Likelihood to Consider a Career in the CAF			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Very likely	4%	6%	3%
Somewhat likely	16%	23%	13%
Not very likely	36%	31%	38%
Not at all likely	41%	35%	43%
Don't know/Prefer not to answer	4%	6%	3%

Exhibit C11: Q27: *[IF NOT VERY LIKELY OR NOT AT ALL LIKELY] Have you ever considered a career in the Canadian Armed Forces?*

Likelihood to Consider a Career in the CAF			
	Gen Pop (n=1478)	Visible Minority (n=654)	Non-Visible Minority (n=824)
Yes	17%	14%	18%
No	80%	83%	80%
Don't know/Prefer not to answer	2%	3%	2%

Half (52%) would be likely to pursue a career in the CAF if they knew it was possible to do so in the fields they find most interesting. Among those who initially said they would be likely to pursue a career in the CAF, 36% would be very likely to consider it if they could pursue a career in one of the fields of greatest interest to them. Among those who initially said they would not be very likely to consider a career in the CAF, over half (60%) would be very or somewhat likely to consider it if it meant working in a field that interests them. Among those who said they would not be likely at all to consider a career in the CAF, just under a third (30%) would be willing to do so, contingent upon being able to work in the field of their choice.

Turning to demographic differences, if offered the chance to work in the field that is of greatest interest to them, 60% of visible minorities and 50% of non-visible minorities would be likely to consider applying to the CAF. Slightly more men (56%) than women (50%) would consider applying, but the increase in the proportion who would be interested in joining the CAF is larger among women (+36%) than among men (+30%).

Exhibit C12: Q29: *If you found it was possible to pursue a career [INSERT RESPONSE AT Q10 OR “OF INTEREST TO YOU”] as a member of the Canadian Armed Forces, how likely would you be to consider applying to the Canadian Armed Forces?*

Likelihood to Pursue Preferred Career Field in the CAF			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Very likely	11%	15%	10%
Somewhat likely	41%	45%	40%
Not very likely	28%	25%	29%
Not at all likely	14%	10%	16%
Don't know/Prefer not to answer	6%	6%	6%

Just under half (45%) would be interested in joining the CAF Reserves. A larger percentage of visible minorities (51%) than non-visible minorities (43%) would be interested in joining the CAF Reserves. The CAF Reserves are particularly appealing to the following:

- Indigenous respondents (68% interested in joining compared to 44% of non-Indigenous respondents);
- Male respondents (50% compared to 41% of women);
- Respondents in BC (57%, compared to a low of 37% in Manitoba/Saskatchewan); and,
- Those who have completed college (51%, compared to those with a high school diploma at 41% and those with a university degree at 43%).

Exhibit C13: Q31: *Reservists usually have a full-time job or attend school during the daytime and work on a part-time basis with the Canadian Armed Forces. Reservists play an important role in supporting Canadian operations both at home and abroad (e.g., Helping with flood relief efforts in Quebec and Manitoba). Reservists are also active in their communities and help with cultural events, parades, festivals and other public events in communities across Canada (e.g., the 2010 Winter Olympics in Vancouver). Part-time members may also choose to serve overseas, when there are opportunities available. How interested would you be in joining the Canadian Armed Forces Reserves?*

Interest in Joining the CAF Reserves			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Very interested	9%	12%	8%
Somewhat interested	36%	39%	34%
Not very interested	28%	27%	28%
Not at all interested	22%	15%	24%
Don't know/Prefer not to answer	5%	7%	4%

Significantly fewer agree than disagree that they could see themselves joining any environment of the CAF. This includes the CAF broadly (net score of -37%, calculated by subtracting the % disagree from the % agree), the Royal Canadian Navy (-52%), the Royal Canadian Air Force (-47%) and the Canadian Army (-42%). Opinion is more evenly split over whether one's family (-4%) or friends (+2%) would encourage them to join. Significantly more agree than disagree that the CAF offers a wide variety of professions (+49%), opens doors to careers outside the CAF (+33%) and that they would be proud to be in the CAF (+32%). Over half agree (60%) that a career in the CAF makes it difficult to raise a family.

The most pronounced differences between visible minorities and non-visible minorities are for the statements dealing with joining the CAF. For example, 28% of visible minorities could see themselves joining the Navy,

compared to 17% of non-visible minorities. Other differences include that non-minorities are more likely to agree that the CAF offers a wide variety of professions (27% vs 20% strongly agree) and that they know people who could have a great career in the CAF (20% vs 15% strongly agree).

Men (35%) are more likely than women (21%) to agree that they could see themselves joining the CAF. They are also more likely to believe the workplace environment in the CAF is respectful of women (51% of men agree, compared to 44% of women).

Regionally, respondents in BC are most likely to agree they could see themselves joining the CAF (37%), the Royal Canadian Air Force (31%) or the Royal Canadian Navy (30%). Respondents in Atlantic Canada are more likely to agree that their family (58%) and friends (63%) would encourage them to join the CAF. The perception that a career in the CAF makes it hard to raise a family is strongest in Quebec (67% agree).

Exhibit C14: Q32: *To what extent do you agree or disagree with each of the following statements.*

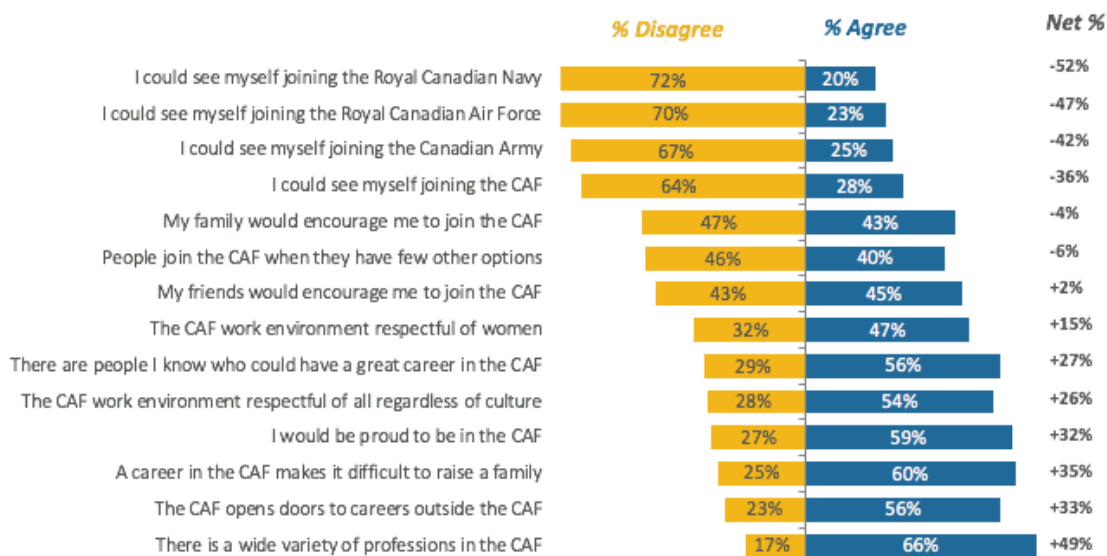


Exhibit C15: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: I could see myself joining the Royal Canadian Navy			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	4%	6%	3%
Somewhat agree	16%	22%	14%
Somewhat disagree	27%	27%	28%
Strongly disagree	45%	34%	49%
Don't know/Prefer not to answer	8%	11%	7%

Exhibit C16: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: I could see myself joining the Royal Canadian Air Force			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	6%	8%	5%
Somewhat agree	17%	23%	14%
Somewhat disagree	27%	28%	26%
Strongly disagree	43%	30%	48%
Don't know/Prefer not to answer	8%	11%	7%

Exhibit C17: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: I could see myself joining the Canadian Army			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	6%	9%	5%
Somewhat agree	19%	21%	18%
Somewhat disagree	28%	29%	27%
Strongly disagree	39%	30%	42%
Don't know/Prefer not to answer	8%	11%	7%

Exhibit C18: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: I could see myself joining the Canadian Armed Forces			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	7%	9%	6%
Somewhat agree	21%	27%	19%
Somewhat disagree	30%	28%	30%
Strongly disagree	35%	27%	38%
Don't know/Prefer not to answer	8%	10%	7%

Exhibit C19: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: My family would encourage me to join the Canadian Armed Forces if it were of interest to me			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	12%	12%	12%
Somewhat agree	31%	29%	32%
Somewhat disagree	23%	24%	22%
Strongly disagree	24%	23%	24%
Don't know/Prefer not to answer	11%	12%	10%

Exhibit C20: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: People join the Canadian Armed Forces when they have few other options available			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	8%	9%	8%
Somewhat agree	32%	33%	31%
Somewhat disagree	31%	32%	31%
Strongly disagree	15%	11%	17%
Don't know/Prefer not to answer	14%	15%	13%

Exhibit C21: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: My friends would encourage me to join the Canadian Armed Forces if it were of interest to me			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	11%	11%	11%
Somewhat agree	34%	36%	33%
Somewhat disagree	24%	25%	23%
Strongly disagree	19%	16%	20%
Don't know/Prefer not to answer	12%	12%	12%

Exhibit C22: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: The Canadian Armed Forces workplace environment is respectful of women			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	13%	12%	13%
Somewhat agree	34%	34%	34%
Somewhat disagree	22%	21%	22%
Strongly disagree	10%	9%	11%
Don't know/Prefer not to answer	21%	23%	20%

Exhibit C23: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: There are people I know who could have a great career in the Canadian Armed Forces			
	Gen Pop (n=2013)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	19%	15%	20%
Somewhat agree	37%	36%	37%
Somewhat disagree	16%	19%	15%
Strongly disagree	13%	11%	13%
Don't know/Prefer not to answer	16%	18%	15%

Exhibit C24: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: I think that the Canadian Armed Forces workplace environment is respectful of all people regardless of cultural heritage			
	Gen Pop (n=2013)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	17%	17%	17%
Somewhat agree	37%	39%	37%
Somewhat disagree	20%	19%	20%
Strongly disagree	9%	8%	9%
Don't know/Prefer not to answer	18%	18%	18%

Exhibit C25: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: I would be proud to be in the Canadian Armed Forces			
	Gen Pop (n=2013)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	20%	19%	20%
Somewhat agree	39%	39%	39%
Somewhat disagree	15%	17%	14%
Strongly disagree	12%	9%	14%
Don't know/Prefer not to answer	14%	16%	13%

Exhibit C26: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: A career in the Canadian Armed Forces makes it difficult to raise a family			
	Gen Pop (n=2013)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	17%	15%	17%
Somewhat agree	43%	42%	43%
Somewhat disagree	18%	19%	18%
Strongly disagree	7%	8%	6%
Don't know/Prefer not to answer	15%	16%	15%

Exhibit C27: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: The Canadian Armed Forces also open doors to success in careers outside of the Canadian Armed Forces			
	Gen Pop (n=2013)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	15%	15%	15%
Somewhat agree	41%	38%	42%
Somewhat disagree	16%	19%	15%
Strongly disagree	7%	9%	6%
Don't know/Prefer not to answer	21%	20%	21%

Exhibit C28: Q32: *To what extent do you agree or disagree with each of the following statements.*

Attitudinal Statement: There is a wide variety of professions within the Canadian Armed Forces			
	Gen Pop (n=2013)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Strongly agree	25%	20%	27%
Somewhat agree	41%	40%	42%
Somewhat disagree	12%	17%	11%
Strongly disagree	5%	4%	5%
Don't know/Prefer not to answer	16%	19%	15%

When asked to choose the top three most compelling reasons to join the CAF from a list, respondents feel paid education (37%), salary/benefits (35%) and helping others (29%) are the most important. Travel appeals more to non-visible minorities (29%) than visible minorities (24%), as does the opportunity to help others (32% vs 25%). Other demographic differences include:

- Women, more than men, find helping others (37% vs 23%), travel (31% vs 24%), salary/benefits (41% vs 28%) and paid education (40% vs 34%) more compelling reasons. Men find service to the country (25% vs 17%), interesting challenges (21% vs 15%) and transferable skills (15% vs 11%) more persuasive.
- The youngest age group (17-18 year-olds) are more persuaded by the possibility of helping others (36%) compared to those aged 19-20 (29%) and 21-23 (27%). The salary and benefits are most compelling to 21-23 year-olds (39%), particularly compared to those 17-18 (30%).
- The salary and benefits are distinctly important to Quebecers (46%). Helping others is a bigger driver in Ontario (34%) and Alberta (34%).
- Those who are likely to join the CAF believe serving the country is a more compelling argument (26%), along with training (18%) than those who are not at all likely (16% and 8%, respectively).

Exhibit C29: Q33a: *Below is a list of factors that may make someone consider pursuing a career in the Canadian Armed Forces. Regardless of your current interest in a career in the Canadian Armed Forces, please rank the three most compelling to you, personally.*

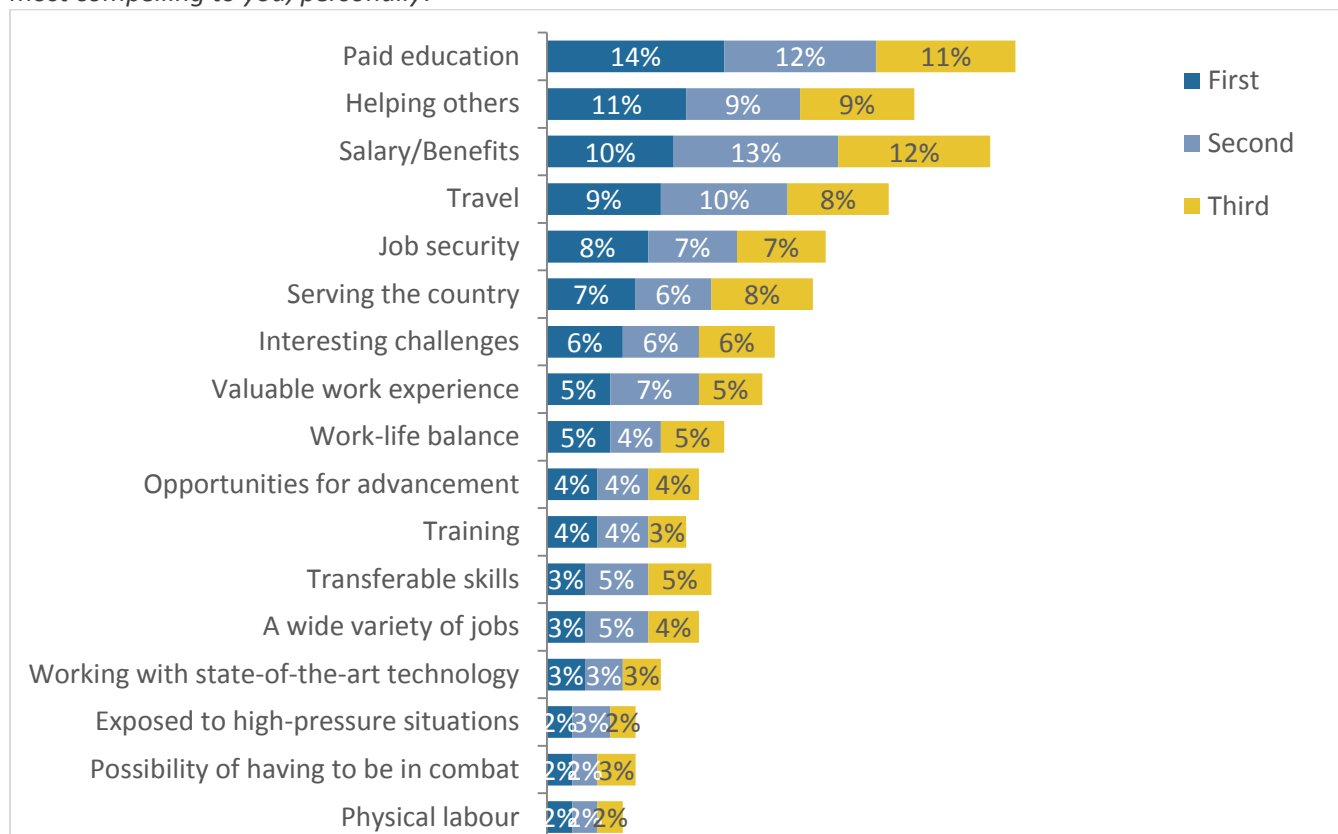


Exhibit C30: Q33a: *Below is a list of factors that may make someone consider pursuing a career in the Canadian Armed Forces. Regardless of your current interest in a career in the Canadian Armed Forces, please rank the three most compelling to you, personally.*

Most Compelling Reasons to Consider a Career in the CAF - % Combined First, Second and Third Ranking			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Paid education	37%	34%	38%
Salary/Benefits	35%	34%	36%
Helping others	30%	25%	32%
Travel	27%	24%	29%
Job security	22%	24%	21%
Serving the country	21%	22%	20%
Interesting challenges	18%	18%	18%
Valuable work experience	17%	17%	16%
Work-life balance	14%	15%	13%
Opportunities for advancement	12%	13%	12%
Training	11%	13%	11%
Transferable skills	13%	14%	13%
A wide variety of jobs	12%	11%	12%
Working with state-of-the-art technology	9%	10%	9%
Exposed to high pressure situations	7%	10%	6%

Possibility of having to be in combat	7%	9%	7%
Physical labour	6%	8%	5%

Respondents were asked which three reasons are the strongest arguments against a career in the CAF. Exposure to danger (38%), being away from home and family (34%), and the possibility of combat (33%) are the greatest deterrents. Non-visible minorities are more concerned about being away from home and family (36%) compared to visible minorities (29%), as well as the possibility of combat (36%, compared to 25%). Other notable differences include:

- Women are more deterred than men by the possibility of combat (38%, compared to 29%), exposure to danger (45%, compared to 33%) and being away from home (40% vs 29%).
- Youth 17-18 years old are more concerned about giving up their freedom than the older cohorts. A quarter view it is a reason not to join the CAF, compared to 18% of those 19-20 and 17% of those 21-23.
- Those interested in the CAF are more deterred by the impact it would have on their work-life balance (23%), inability to utilize all their talents in the CAF (14%) and job instability (11%) than those who are less likely to join.
 - Among those not very interested, 16% are concerned about work-life balance, 9% are concerned about their inability to utilize all their talents and 5% are concerned about job instability; among those not at all interested, 14% are concerned about work-life balance, 6% are concerned about their inability to utilize all their talents and 6% are concerned about job instability).

Exhibit C31: Q33b: *Below is a list of factors that may make someone decide NOT to pursue a career in the Canadian Armed Forces. Which three of the following best describe why you would avoid a career in the Canadian Armed Forces?*

Most Compelling Reasons NOT to Consider a Career in the CAF			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Being exposed to danger	38%	40%	38%
Being away from home/family	34%	29%	36%
Possibility of combat	33%	25%	36%
Giving up your freedom	19%	18%	20%
Not something I identify with	19%	15%	21%
Physical labour	18%	18%	18%
Requires a minimum commitment	16%	16%	16%
Work-life balance	16%	17%	16%
Having to follow orders	13%	11%	14%
Being micro-managed	11%	11%	11%
Unable to fully utilize one's talent	9%	10%	8%
Boring	7%	10%	6%
Not offer a positive work environment	7%	7%	7%
Lack of representation of my gender or culture	7%	9%	7%
Salary/Benefits	7%	6%	7%
Limited variety of jobs	6%	8%	5%
Job instability	6%	9%	6%
Work experience not helpful outside the CAF	6%	9%	5%
Limited opportunities for advancement	5%	8%	4%
Not offer flexibility to change careers	5%	8%	4%
Limited job opportunities in skilled trades	4%	5%	4%

Not respected	4%	4%	4%
Not adventurous	3%	4%	3%
Not prestigious	3%	5%	2%
Other	1%	0%	1%

When asked how well a series of attributes describe a career in the CAF, physically challenging (52% describes very well), training (42%), respect (35%) and adventure (31%) are the most appropriate. Work-life balance (6%), no requirement to move away (8%) and freedom/flexibility (8%) are the attributes that worst describe a career in the CAF. These assessments are fairly consistent across a wide range of demographic groups, with a few exceptions:

- Men (19%) are more likely than women (15%) to believe “equal opportunity employer” describes the CAF very well. They are also more likely to believe that “no requirement to move away” describes the CAF very well (10%), compared to women (5%).
- Women (56%) are more likely than men (48%) to think that “physically challenging” describes a career in the CAF very well.
- The oldest cohort (aged 21-23) believe economic-based attributes such as “job security”, “good pay” and “offers a pension” are very good descriptors of a career in the CAF:
 - Job security: 24% of those ages 21-23 say this term describes a CAF career very well compared to 18% of 17-18 year-olds and 19% of 19-20 year-olds;
 - Good pay: 21% of 21-23 year-olds compared to 12% of 17-18 year-olds and 15% of 19-20 year-olds;
 - Offers a pension: 32% of 21-23 year-olds compared to 25% of 17-18 year-olds and 26% of 19-20 year-olds.
- Those who are likely to consider a career in the CAF are more inclined to agree that “no requirement to move away” is a good description (16% compared to 4% of those not at all interested), along with “offers a positive work environment” (17% compared to 5% of those not interested) and “offers a pension” (39% compared to 25% of those not interested). They also believe it offers more freedom and flexibility (15% compared to 5% of those not interested) and opportunity for promotion (29% compared to 19% of those not interested).

Exhibit C32: Q34: *To what extent would you say each of the following describes a career in the Canadian Armed Forces?*

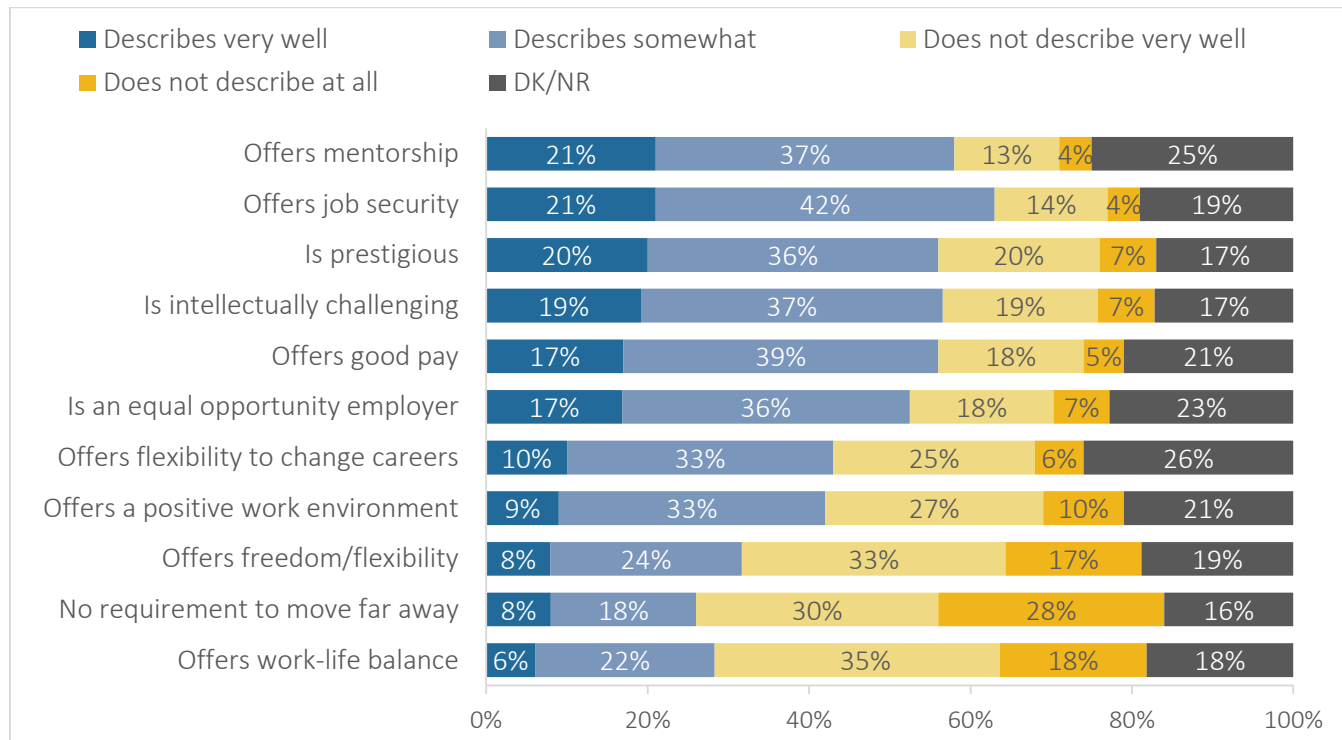
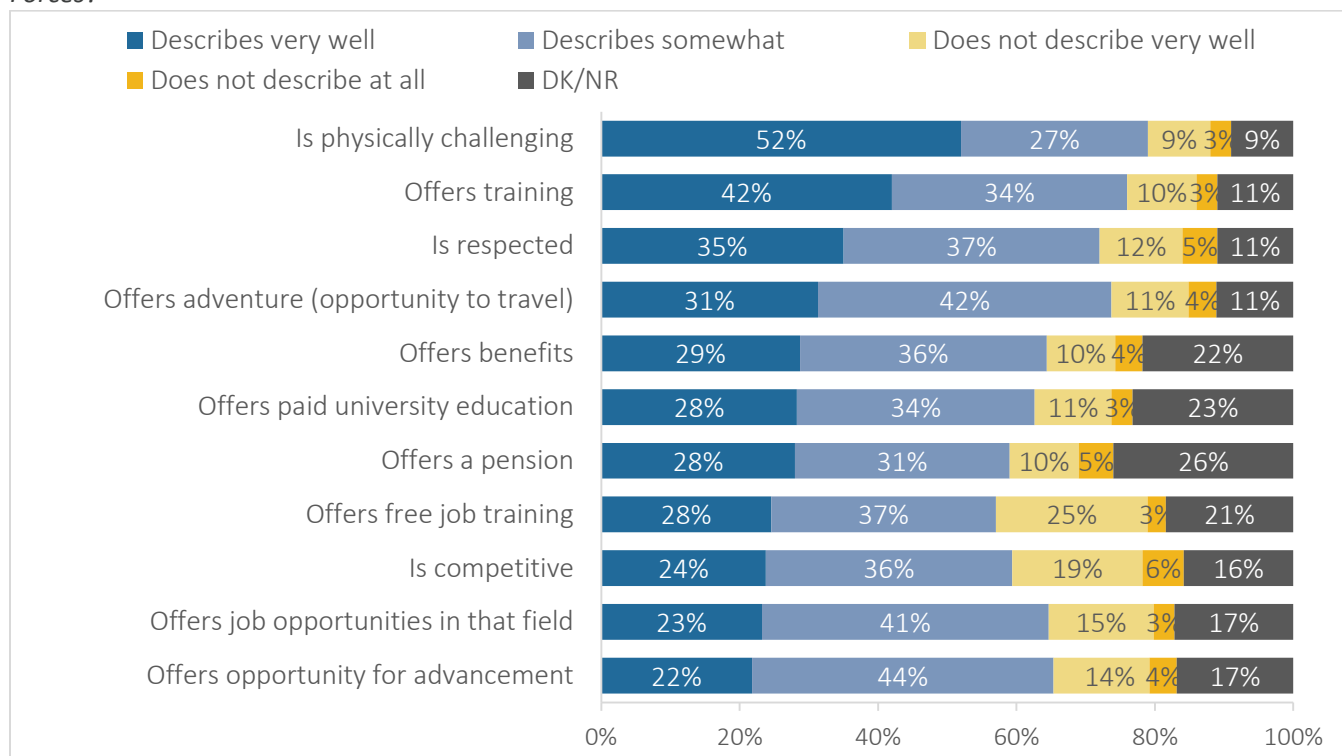


Exhibit C33: Q34: *To what extent would you say each of the following describes a career in the Canadian Armed Forces?*

Description of a Career in the CAF - % Describes Very Well			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Is physically challenging	52%	47%	54%
Offers training	42%	40%	43%
Is respected	35%	36%	34%
Offers adventure (opportunity to travel)	31%	28%	32%
Offers benefits	29%	27%	30%
Offers paid university education	28%	26%	29%
Offers a pension	28%	28%	29%
Offers free job training	28%	26%	28%
Is competitive	24%	24%	25%
Offers job opportunities in that field	23%	24%	23%
Offers opportunity for advancement	22%	23%	21%
Offers mentorship	21%	24%	20%
Offers job security	21%	22%	21%
Is prestigious	20%	22%	19%
Is intellectually challenging	19%	19%	20%
Offers good pay	17%	19%	16%
Is an equal opportunity employer	17%	17%	17%
Offers flexibility to change careers	10%	10%	10%
Offers a positive work environment	10%	12%	8%
Offers freedom/flexibility	8%	11%	6%
No requirement to move far away	8%	10%	7%
Offers work-life balance	6%	10%	5%

Communications Testing

Respondents who completed the survey in English were shown one of two recruitment videos: “Attention (Navy)” or Attention (Army)” and asked a series of questions to capture their reaction.

Over half said the video “Attention (Navy)” was appealing to watch (65%) and was compelling (59%). Over two-thirds (69%) said it made them at least a little more interested in a career with the CAF. Fewer, though still a majority, felt it was meant for them (59%). Over three-quarters (76%) of visible minority respondents said the video made them at least a little more likely to consider a career in the CAF, compared to 67% of non-visible minorities.

Among those who initially said they are likely to consider a career in the CAF, almost all (94%) said the video made them a little more interested in the CAF. Among those who said they are not very likely to join, 81% are a little more interested after seeing the video.

Exhibit D1: Q35: *Please indicate how well this applies to what you just watched? Attention (Navy)*

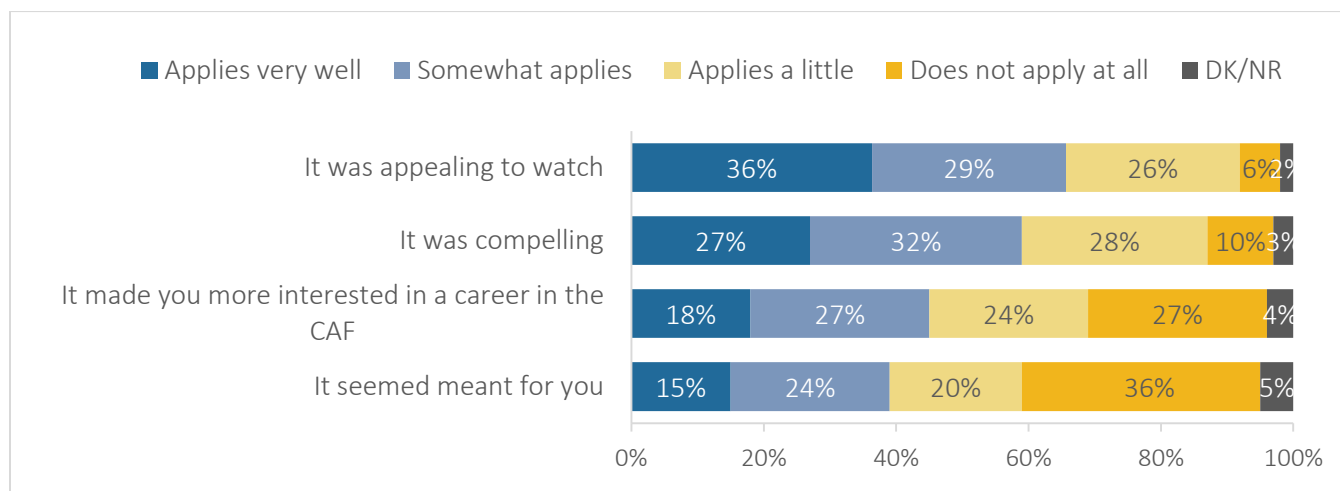
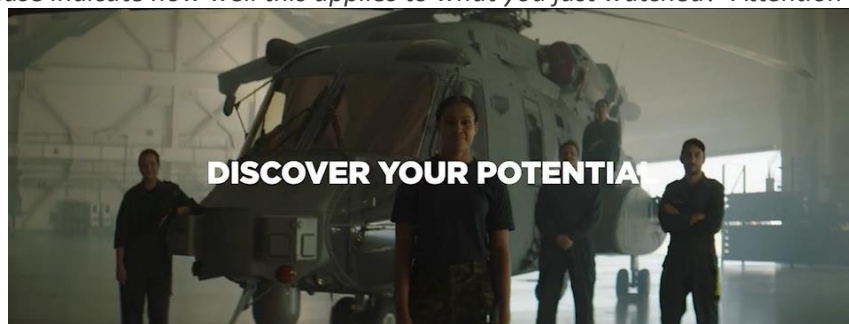


Exhibit D2: Q35: *Please indicate how well this applies to what you just watched.*

Attention (Navy): It was appealing to watch				
	Gen Pop (n=780)	Visible Minority (n=411)	Non-Visible Minority (n=369)	
Applies very well	36%	34%	37%	
Somewhat applies	29%	33%	27%	
Applies a little	26%	24%	27%	
Does not apply at all	6%	6%	6%	
Don't know/Prefer not to answer	2%	2%	2%	

Exhibit D3: Q35: *Please indicate how well this applies to what you just watched.*

Attention (Navy): It was compelling				
	Gen Pop (n=780)	Visible Minority (n=411)	Non-Visible Minority (n=369)	
Applies very well	27%	29%	26%	
Somewhat applies	32%	33%	31%	
Applies a little	28%	25%	30%	
Does not apply at all	10%	10%	10%	
Don't know/Prefer not to answer	3%	2%	3%	

Exhibit D4: Q35: *Please indicate how well this applies to what you just watched.*

Attention (Navy): It made you more interested in a career in the CAF			
	Gen Pop (n=780)	Visible Minority (n=411)	Non-Visible Minority (n=369)
Applies very well	18%	22%	17%
Somewhat applies	27%	30%	26%
Applies a little	24%	24%	24%
Does not apply at all	27%	21%	30%
Don't know/Prefer not to answer	4%	3%	4%

Exhibit D5: Q35: *Please indicate how well this applies to what you just watched.*

Attention (Navy): It seemed meant for you			
	Gen Pop (n=780)	Visible Minority (n=411)	Non-Visible Minority (n=369)
Applies very well	15%	15%	15%
Somewhat applies	24%	28%	22%
Applies a little	20%	21%	19%
Does not apply at all	36%	32%	39%
Don't know/Prefer not to answer	5%	4%	6%

As with the first video, the majority found the “Attention (Army)” video appealing (62%) to watch and compelling (57%). Slightly fewer, though still the majority, said it made them at least a little more interested in a career in the CAF (61%). Non-visible minorities found it less appealing (38% does not apply/only applies a little) and compelling (45%). As with the first video, visible minorities were more swayed by the messages. A quarter (73%) said the video made them at least a little more interested in the CAF, compared to 54% of non-visible minorities.

Among those who were initially likely to consider the CAF, almost all (93%) said the video made them more interested. Among those who were not very likely, fewer, though still over two-thirds (69%), are at least a little more interested in joining the CAF.

Exhibit D6: Q35: *Please indicate how well this applies to what you just watched? Attention (Army)*



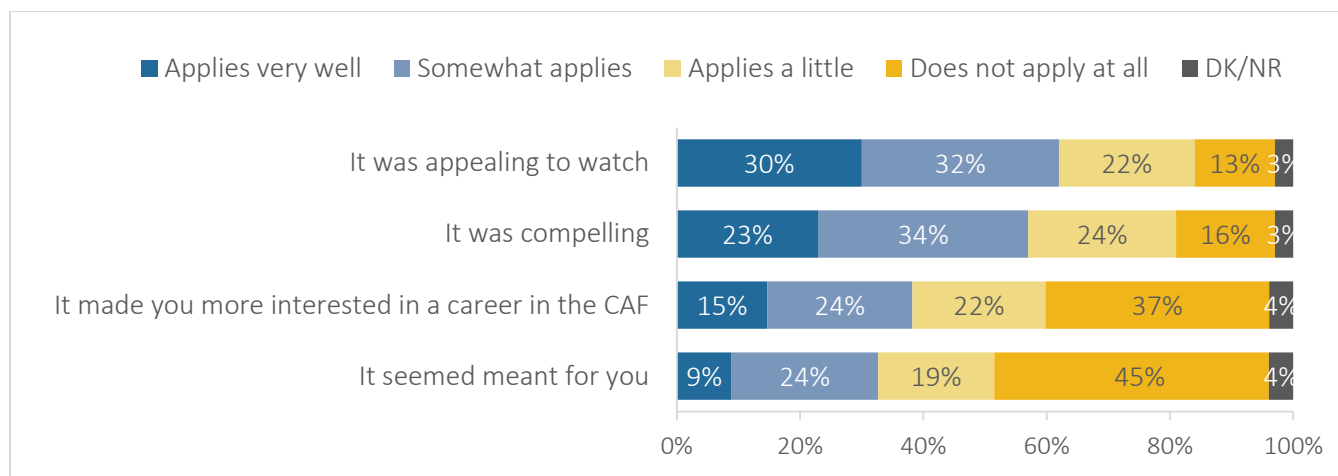


Exhibit D7: Q35: *Please indicate how well this applies to what you just watched.*

Attention (Army): It was appealing to watch				
	Gen Pop (n=833)	Visible Minority (n=437)	Non-Visible Minority (n=396)	
Applies very well	30%	33%	29%	
Somewhat applies	32%	34%	32%	
Applies a little	22%	22%	22%	
Does not apply at all	13%	7%	16%	
Don't know/Prefer not to answer	3%	5%	2%	

Exhibit D8: Q35: *Please indicate how well this applies to what you just watched.*

Attention (Army): It was compelling				
	Gen Pop (n=833)	Visible Minority (n=437)	Non-Visible Minority (n=396)	
Applies very well	23%	27%	21%	
Somewhat applies	34%	38%	32%	
Applies a little	24%	19%	27%	
Does not apply at all	16%	10%	18%	
Don't know/Prefer not to answer	3%	5%	2%	

Exhibit D9: Q35: *Please indicate how well this applies to what you just watched.*

Attention (Army): It made you more interested in a career in the CAF				
	Gen Pop (n=833)	Visible Minority (n=437)	Non-Visible Minority (n=396)	
Applies very well	15%	22%	12%	
Somewhat applies	24%	28%	21%	
Applies a little	22%	23%	21%	
Does not apply at all	37%	23%	43%	
Don't know/Prefer not to answer	4%	4%	3%	

Exhibit D10: Q35: *Please indicate how well this applies to what you just watched.*

Attention (Army): It seemed meant for you			
	Gen Pop (n=833)	Visible Minority (n=437)	Non-Visible Minority (n=396)
Applies very well	9%	12%	8%
Somewhat applies	24%	31%	20%
Applies a little	19%	24%	16%
Does not apply at all	45%	28%	52%
Don't know/Prefer not to answer	4%	4%	4%

Civics

Just over half follow the news closely (56%) or are interested in politics or political issues of the day (53%). One notable difference in civic interest is that those likely to consider joining are more likely to follow the news (67%) and pay attention to politics (70%). Men are more likely than women to follow the news very closely (15% vs 8%) but the combined percentages of men and women who follow the news at least somewhat closely are similar (57% vs 55%) and the difference is not statistically significant.

Exhibit E1: Q19: *How closely do you follow news about current events?*

Follow News about Current Events			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Very closely	12%	12%	12%
Somewhat closely	44%	48%	43%
Not very closely	36%	33%	37%
Not at all closely	8%	6%	8%
Don't know/Prefer not to answer	1%	2%	0%

Exhibit E2: Q20: *How interested are you in politics or political issues of the day?*

Interest in Politics			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Very interested	13%	11%	14%
Somewhat interested	40%	44%	39%
Not very interested	30%	29%	30%
Not at all interested	16%	14%	17%
Don't know/Prefer not to answer	1%	1%	1%

Respondents were asked to select from a list which leisure activities they engage in on a regular basis. The most common leisure activities include TV/movies (50%), music (44%), fitness (43%) and video games (43%). Visual (18%) and culinary arts (17%), team sports (17%) and cycling (15%) make up the second tier of most common pastimes.

Women are more likely than men to participate in the following:

- TV and movies (56% vs 44%);
- Music (49% vs 39%);

- Visual arts (22% vs 12%); and
- Culinary arts (22% vs 13%).

Men are more likely than women to participate in the following:

- Video games (56% vs 29%);
- Team sports (21% vs 14%);
- Cycling (19% vs 12%);
- Hunting and/or fishing (13% vs 9%);
- Individual sports (14% vs 7%);
- Vehicle restoration (6% vs 1%); and
- Marksmanship (6% vs 1%).

Exhibit E3: Q21: *In which of the following leisure activities do you participate?*

Preferred Leisure Activities			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Television/Movies	50%	50%	51%
Music	44%	44%	44%
Fitness	43%	42%	43%
Video games	43%	39%	45%
Visual arts	18%	18%	18%
Culinary arts	17%	13%	19%
Competing in team sports	17%	13%	19%
Cycling	15%	17%	15%
Watersports	11%	9%	12%
Hunting/Fishing	11%	6%	13%
Performing arts	10%	10%	10%
Competing in individual sports	10%	9%	11%
Canoeing	9%	6%	10%
Vehicle restoration	4%	4%	4%
Marksmanship	4%	3%	4%
Cadets	3%	3%	2%
Sailing	2%	1%	2%
Aviation	2%	2%	1%
Amateur radio	2%	2%	2%
Scouts/Girl Guides	2%	2%	2%
None of the above	5%	6%	5%
Other	4%	2%	5%
Don't know/Prefer not to answer	2%	5%	1%

Employment Profile

When asked which three career fields they find most interesting, respondents name healthcare (27%) and the creative or arts field (27%) first, followed by education (22%), travel and tourism (20%), and business or entrepreneurial pursuits (20%).

Exhibit F1: Q10: *Which three career fields do you find the most interesting?*

Preferred Career Field			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Healthcare	27%	28%	26%
Creative/Arts	27%	24%	28%
Education	22%	18%	24%
Travel/Tourism	20%	18%	21%
Business/Entrepreneur	20%	25%	18%
Sports/Entertainment	16%	15%	16%
Public service/Government	14%	16%	13%
Research & Development	14%	14%	13%
Marketing/Advertising/Media	13%	12%	13%
Engineering	13%	15%	12%
Banking/Finance	12%	17%	11%
Information technology	12%	16%	11%
Legal profession	12%	11%	12%
Skilled trade	12%	10%	13%
Police/Law enforcement	12%	8%	13%
Journalism	10%	8%	10%
Retail/Service	9%	10%	8%
Architecture	9%	8%	10%
Military	8%	7%	8%
Manufacturing	6%	6%	7%
Mining	2%	2%	2%
Distribution	2%	2%	2%
Other	2%	1%	2%
Don't know/Prefer not to answer	2%	2%	2%

The least interesting career field is mining (36%), followed by the military (28%), banking and finance (20%) and journalism (19%).

Exhibit F2: Q11: *Which three of the following types of career fields do you find the least interesting? That is, which three are the career/profession you would least prefer?*

Least Interesting Career Field			
	Gen Pop (n=2031)	Visible Minority (n=1008)	Non-Visible Minority (n=1023)
Mining	36%	39%	35%
Military	28%	25%	29%
Banking/Finance	20%	17%	21%
Journalism	19%	20%	18%
Manufacturing	14%	16%	14%
Retail/Service	15%	16%	15%
Police/Law enforcement	15%	16%	14%
Engineering	13%	11%	14%
Sports/Entertainment	13%	12%	13%
Legal profession	13%	12%	14%
Healthcare	12%	11%	12%
Distribution	11%	14%	10%
Public service/Government	10%	7%	11%
Marketing/Advertising/Media	10%	8%	10%
Education	10%	8%	10%
Architecture	10%	11%	9%
Skilled trade	9%	10%	8%
Creative/Arts	9%	10%	8%
Information technology	8%	7%	9%
Travel/Tourism	7%	7%	7%
Research & Development	6%	7%	6%
Business/Entrepreneur	6%	5%	6%
Don't know/Prefer not to answer	3%	3%	2%

Segmentation Analysis

To support DND and the CAF in their efforts to develop recruitment marketing and advertising strategies, we conducted a segmentation analysis of the data. Two additional data analyses were undertaken:

1. For each respondent, a score on a scale from zero (0) to five (5) was calculated indicating their level of potential for recruitment. This score has been labelled their “CAFSCORE”; and,
2. A segmentation was created that sorted groups of respondents with similar scores for potential recruitment.

The score was developed using responses from three specific variables that are most indicative of recruitment potential: overall impression of the CAF; impression of the CAF as an employer; and, likelihood to consider joining the CAF.

After investigating various approaches, we determined that a logic-based sorting of respondents produced the most valuable results. Of the three questions above, likelihood to consider joining CAF is the most immediate indication of a person with high potential to be recruited.

- It is reasoned that someone who is already likely to consider joining (those who are currently very or somewhat likely to consider a career in the CAF) and hold consistently favourable impressions of the CAF both in general and as an employer specifically (with responses of very or somewhat favourable in both cases), can rationally be considered a person who is most immediately receptive to any CAF recruiting initiatives. These people were assigned a score of five (5) out of five on the CAFSCORE scale indicating their potential to be recruited.
- An individual who is at least somewhat likely to consider joining the CAF, but does not have such consistently favourable impressions of the CAF (overall and as an employer) may reasonably be considered to have great potential to join, but slightly less than one who holds favourable impressions. These respondents were assigned a CAFSCORE of four (4).
- A CAFSCORE of three (3) was assigned to respondents who are unable to answer whether or not they would consider a career in the CAF but hold favourable impressions of both the CAF overall and as an employer.
- A CAFSCORE of two (2) was assigned to respondents who are unsure whether or not they would consider a career in the CAF and do not hold consistently favourable impressions of both the CAF overall and as an employer.
- Respondents who indicate being not very or not at all likely to consider a career in the CAF despite holding favourable impressions of the CAF overall and as an employer were assigned a CAFSCORE of one (1).
- Finally, respondents who are not very or not at all likely to consider joining and do not hold consistently favourable impressions of the CAF overall and as an employer were assigned a CAFSCORE of zero (0).

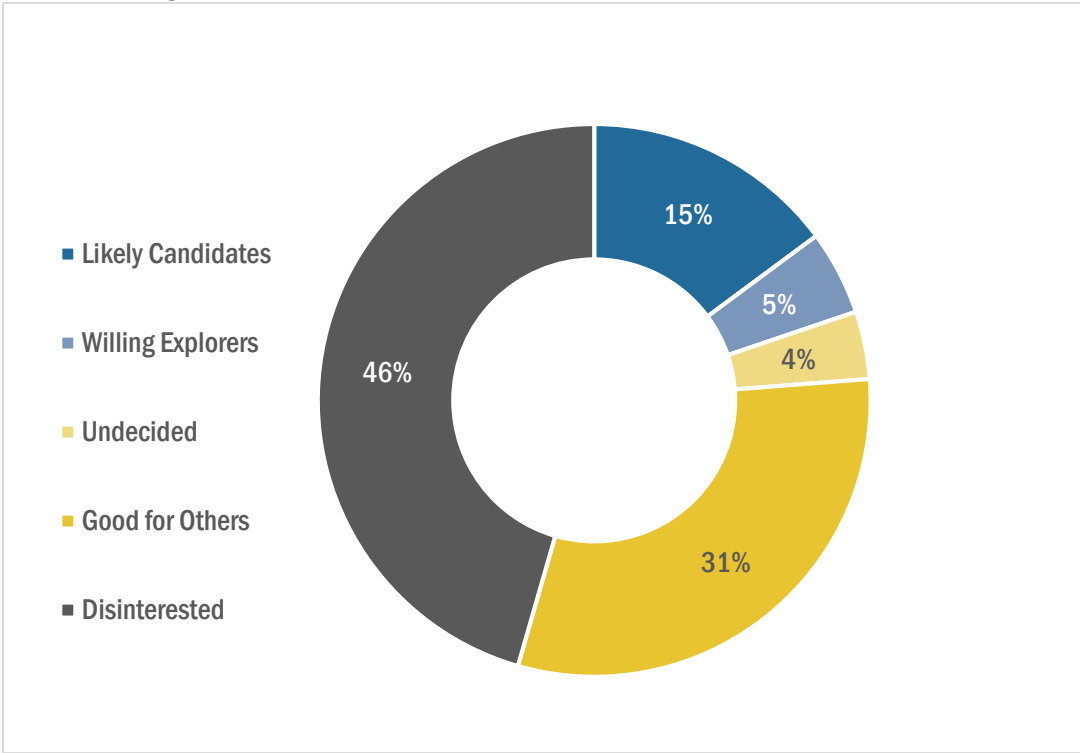
The distribution of CAFSCORES is as follows:

- 15% have a CAFSCORE of 5/5
- 5% have a CAFSCORE of 4/5
- 1% have a CAFSCORE of 3/5
- 3% have a CAFSCORE of 2/5
- 31% have a CAFSCORE of 1/5
- 46% have a CAFSCORE of 0/5

This CAFSCORE index variable formed the basis for a segmentation identifying target audiences based upon their level of potential to be immediately receptive to marketing and advertising. We decided that a five-segment solution would be the most helpful:

- **Likely Candidates** (15%) have a CAFSCORE of 5, are top-2-box (T2B) on likely to consider a CAF career and T2B on both overall impression of the CAF and impression of the CAF as an employer;
- **Willing Explorers** (5%) have a CAFSCORE of 4, are top-2-box (T2B) on likely to consider a CAF career but not consistently favourable on impressions of the CAF (they may hold favourable impressions on one criterion or the other or on neither criterion, but they do not hold favourable impressions on both criteria);
- **Undecided** (4%) have a CAFSCORE of 2 or 3, are those who do not offer a response on whether they are willing to consider a career in the CAF, regardless of their impressions of the CAF overall or as an employer;
- **Good for Others** (31%) have a CAFSCORE of 1, are those who are not T2B on likely to consider a career in the CAF, despite holding consistently favourable impressions of the CAF overall and as an employer; and,
- **Disinterested** (46%) have a CAFSCORE of 0, are those who are neither T2B on likely to consider a career in the CAF nor hold consistently favourable impressions of the CAF overall and as an employer.

Exhibit G1: CAFSCORE Segmentation



The survey results were then analyzed using these two new variables (CAFSCORE and the segmentation). This chapter reviews the key insights gleaned from this analysis in terms of the value to recruitment marketing and advertising strategies. This includes both profiling of the segments to understand the nature of each group, as well as a comprehensive review of CAFSCOREs highlighting how habits, interests, attitudes and goals relate to having a greater or lesser potential to be recruited by the CAF.

Segment Profile

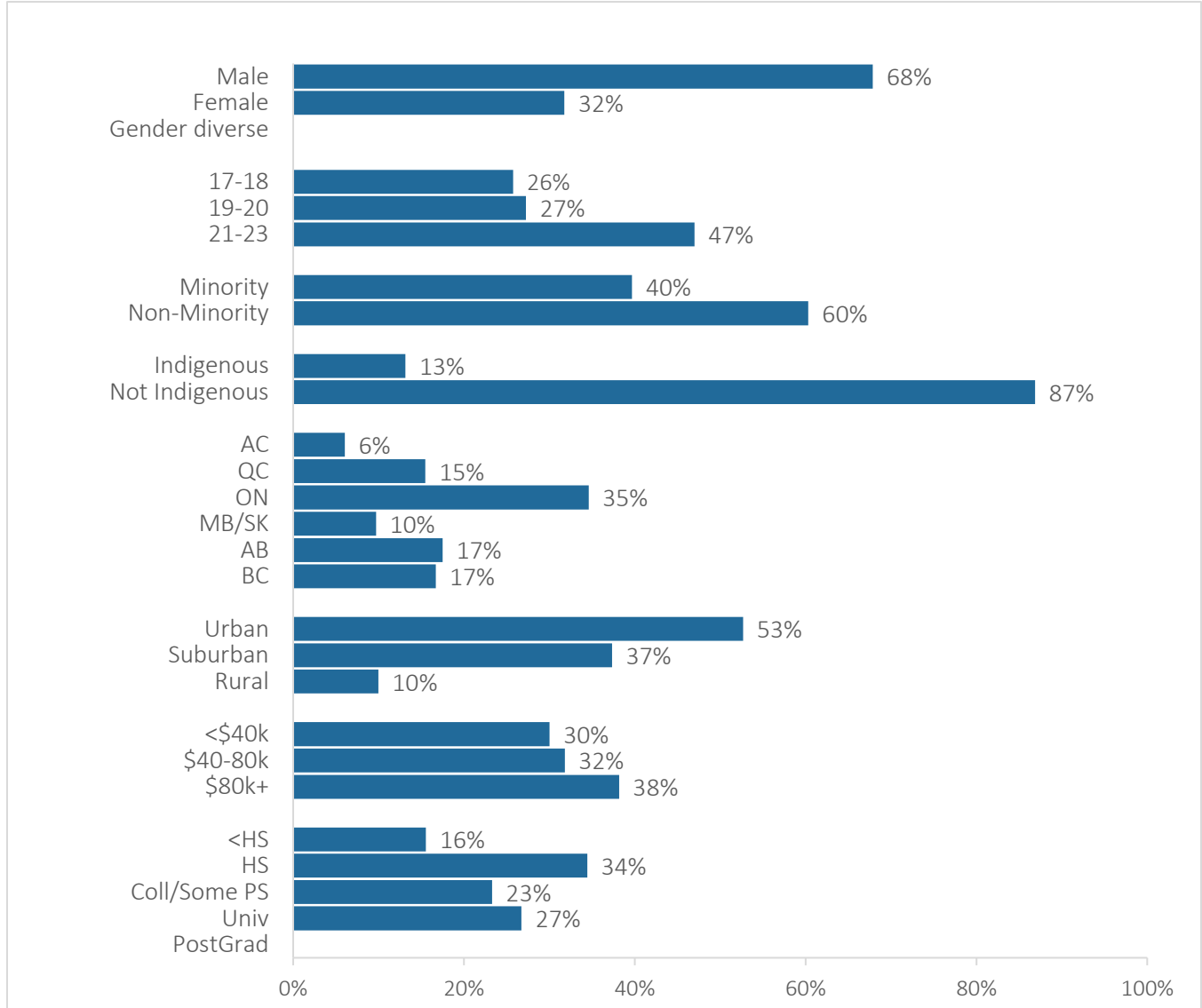
The following analysis highlights the demographic characteristics of each of the five segments created.

Likely Candidates (15%) are notable for the following characteristics:

- More **male** (68%) than any others segment;
- Slightly **older** skew (47% are aged 21-23);
- More likely than average to be **visible minority** (40% vs 27% on average);
- More likely than average to be **Indigenous** (13% vs 5% on average);
- Less likely to live in either Ontario (35% vs 40% on average) or Quebec (15% vs 22% on average);
- More likely to live **west of Ontario** (44% vs 32% on average);
- Slightly less likely to live in a rural area (10% vs 13% on average);
- Slightly more likely than average to have **household income of \$40k or more** (70% vs 65% on average);
- Most likely to have some **university education** (27% vs 21% on average);
- Most **familiar with the CAF** (76% vs 40% on average);
- Most **knowledgeable about CAF careers** (64% vs 29% on average);
- Nearly all (92%) say they would be at least somewhat **likely to join the CAF if they could pursue their preferred career(s)**;
- More **knowledgeable about the CAF Reserves** (58%) than any other segment;
- More **interested in the CAF Reserves** (89%) than any other segment;

- Slightly more likely to feel dissatisfied with their life (24% vs 21% on average);
- Most likely to **follow news** (74% vs 56% on average); and
- Most **interested in politics** (77% vs 53% on average).

Exhibit G2: Likely Candidates - Demographics

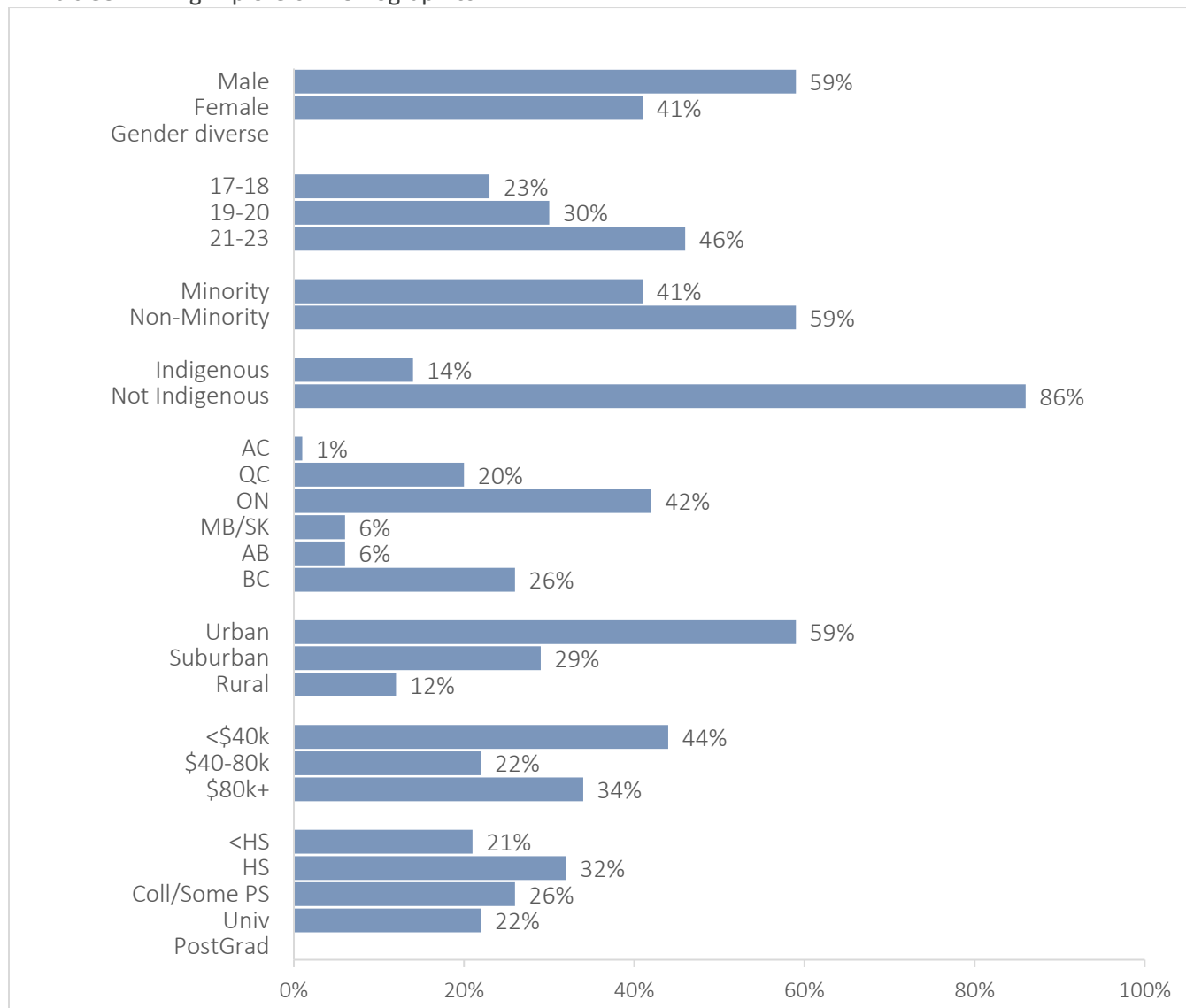


The relatively small **Willing Explorers** segment (5%) are notable for the following characteristics:

- Skew **male** (59%);
- Slightly skew **older than 18** years of age (76% vs 73% on average);
- More likely than average to be a member of a **visible minority group** (41% vs 27% on average);
- More likely than average to be **Indigenous** (14% vs 5% on average);
- Twice as likely as average to **live in B.C.** (26% vs 13% on average);
- Most likely to be **urban** (59% vs 52% on average);
- Most likely to have a **household income of less than \$40k** (44% vs 35% on average);
- Least likely to have completed high school (21% vs 15% on average) and most likely to have attended **college or received vocational or technical training** (26% vs 21% on average);

- More **familiar with the CAF** (52% vs 40% on average);
- More **knowledgeable about CAF careers** (45% vs 29% on average);
- Most (78%) say they would be at least somewhat **likely to join the CAF if they could pursue their preferred career(s)**;
- More **knowledgeable about the CAF Reserves** (34% vs 23% on average);
- More **interested in the CAF Reserves** (75% vs 45% on average);
- Most likely to be **neutral in terms of their level of satisfaction** with their life (38% vs 20% on average); and
- **Less likely to follow the news** (46% vs 56% on average).

Exhibit G3: Willing Explorers - Demographics

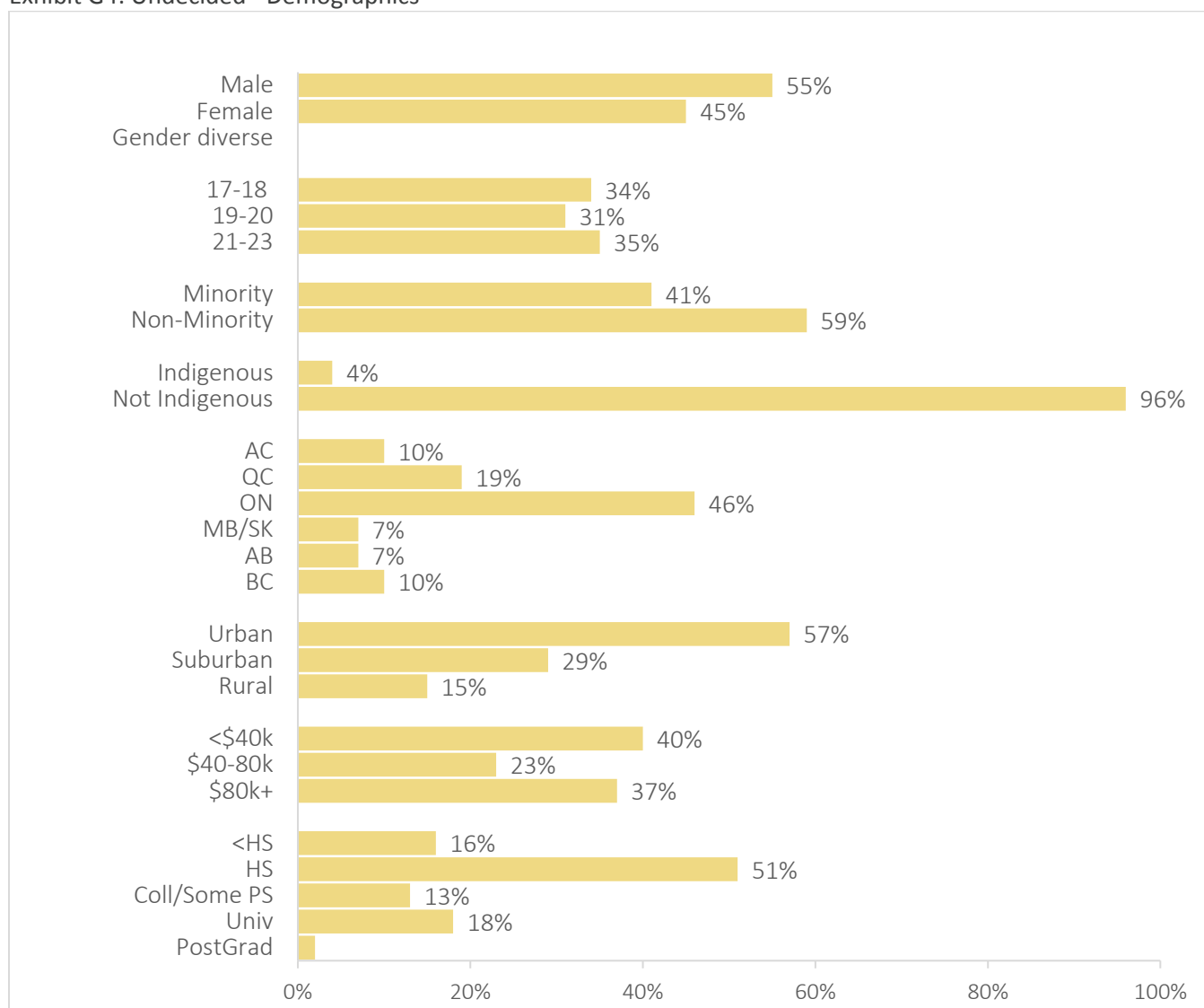


The equally small **Undecided** segment (5%) are notable for the following characteristics:

- Skew **male** (55%);
- Skew slightly to the youngest age bracket, **17-18** years of age (34% vs 27% on average);
- More likely than average to be a member of a **visible minority group** (41% vs 27% on average);
- Slightly more likely to **live in Ontario** (46% vs 40% on average) or **Atlantic Canada** (10% vs 6% on average);

- More likely to live in an **urban area** (57% vs 52% on average), but also slightly more likely to live in a rural area (15% vs 13% on average);
- Most likely to have **household income of less than \$40k** (40% vs 35% on average);
- Most likely to have only a **high school education or less** so far (67% vs 56% on average);
- **Less familiar with the CAF** (32% vs 40% on average);
- Least certain as to whether they would be likely to join the CAF if they could pursue their preferred career(s) (38% non-responsive vs 6% on average);
- **Least knowledgeable about CAF careers** (15% vs 29% on average);
- **Less knowledgeable about the CAF Reserves** (14% vs 23% on average);
- **Less interested in the CAF Reserves** (31% vs 45% on average);
- Fairly **satisfied with their life** (62% vs 59% on average); and
- Least **interested in politics** (31% vs 53% on average).

Exhibit G4: Undecided - Demographics

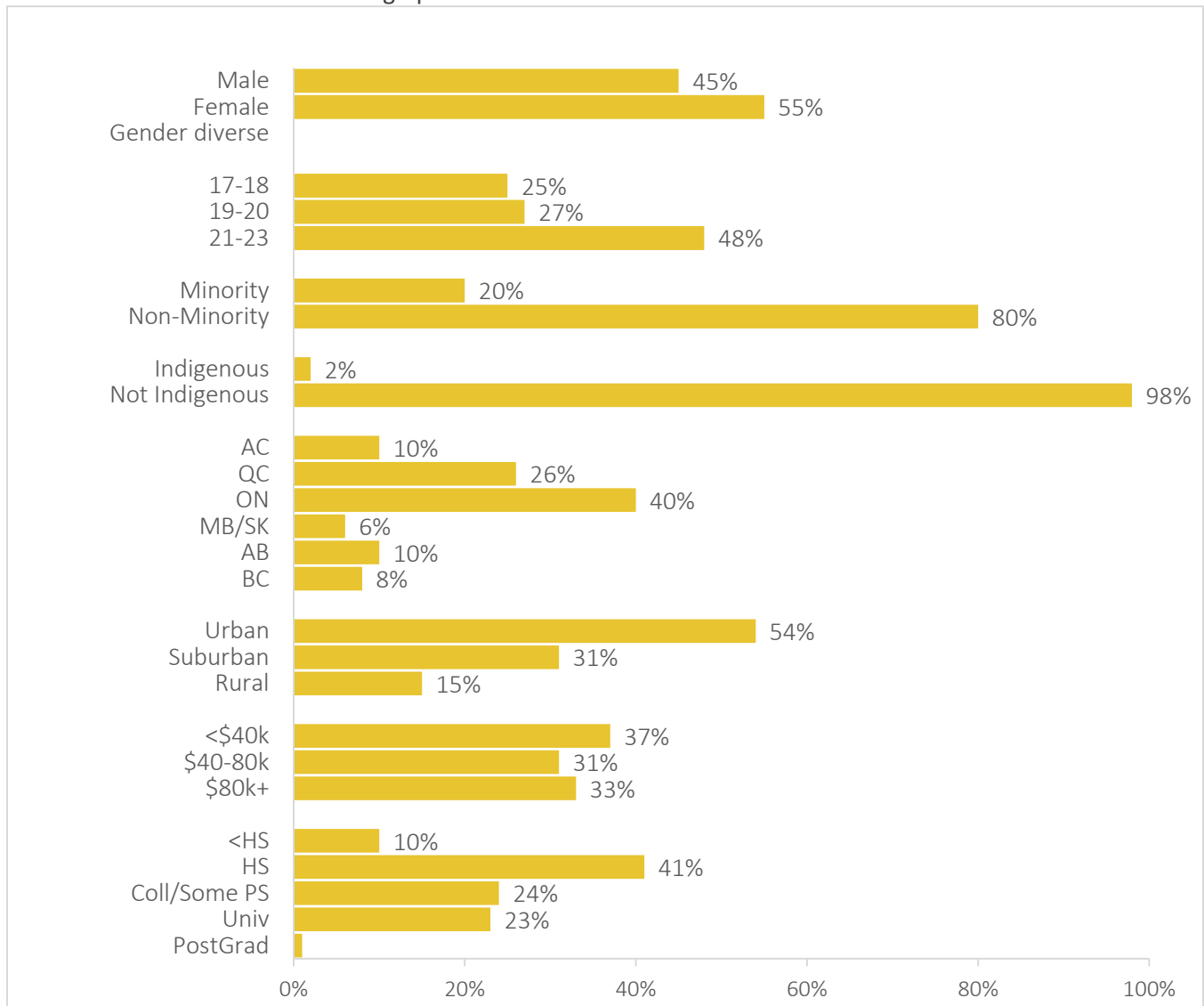


The third (31%) of respondents who fall into the **Good for Others** segment are notable for the following characteristics:

- More **female** (55%) than any other segment;

- Slightly **older** skew (48% are aged 21-23);
- Most likely to be **non-visible minority** (80% vs 73% on average);
- Most likely to be **non-Indigenous** (98% vs 95% on average);
- More likely to live in **Quebec** (26% vs 22% on average) or Atlantic Canada (10% vs 6% on average);
- More likely to have some **post-secondary education** (48% vs 43% on average);
- More likely to feel **not very or not at all knowledgeable about CAF careers** (70% vs 67% on average);
- Slightly more likely to say they would be likely to join the CAF if they could pursue their preferred career(s) (56% vs 52% on average);
- **Less knowledgeable about the CAF Reserves** (78% not very or not at all knowledgeable vs 73% on average);
- Slightly more **interested in the CAF Reserves** (49% vs 45% on average);
- Most **satisfied with their life** (67% vs 59% on average);
- More likely to **follow the news** (61% vs 56% on average); and
- More **interested in politics** (57% vs 53% on average).

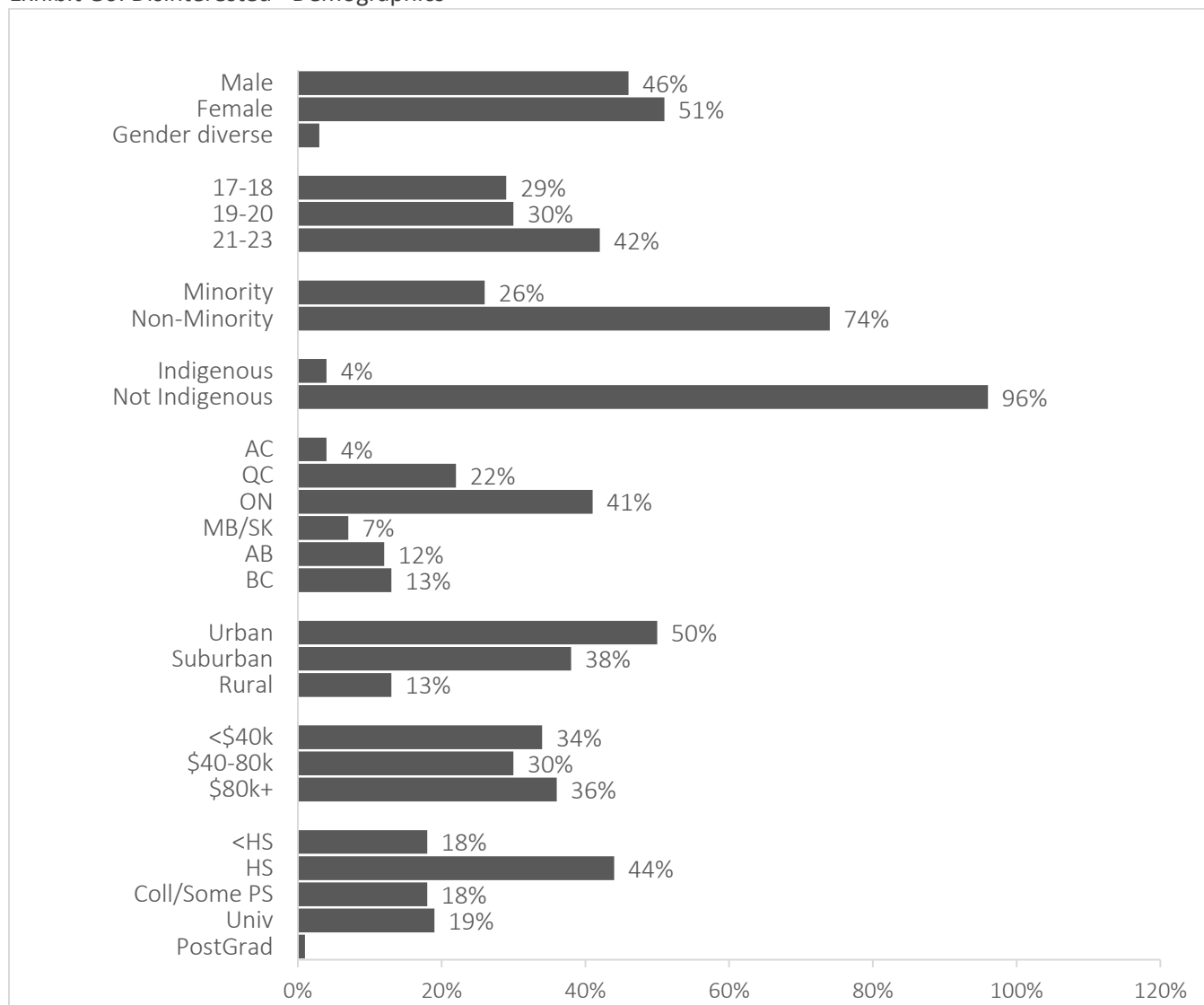
Exhibit G5: Good for Others - Demographics



Because of their size, the plurality (46%) who comprise the **Disinterested** segment tend to have characteristics similar to the population as a whole. However, they are notable for the following characteristics:

- More **female** (51%) than the segments most inclined to join the CAF and, although the survey found very few (3%) identifying as **gender diverse**, all of those respondents fall into this Disinterested segment;
- Slightly **younger** skew (59% are less than 21);
- More likely to live in **suburbs** (38% vs 35% on average);
- More likely to have only a **high school education or less** so far (62% vs 56% on average);
- Most likely to feel **not very or not at all familiar with the CAF** (73% vs 67% on average);
- Most likely to feel **not very or not at all knowledgeable about CAF careers** (78% vs 67% on average);
- Least likely to say they would be likely to join the CAF if they could pursue their preferred career(s) (35% vs 52% on average);
- Less knowledgeable about the CAF Reserves (84% not very or not at all knowledgeable vs 73% on average);
- Least interested in the CAF Reserves (27% vs 45% on average);
- Less likely to follow the news (48% vs 56% on average); and
- Less interested in politics (45% vs 53% on average).

Exhibit G6: Disinterested - Demographics



There is clearly a correlation between where one sits on this spectrum of potential recruitment and one's level familiarity with the CAF in general, one's knowledge about career options within CAF and one's knowledge about the CAF Reserves. However, it is not clear whether being interested stimulates gathering knowledge or that being more informed about CAF drives a higher willingness to consider joining CAF. Nevertheless, given the correlation, for the purposes of recruitment marketing and advertising strategies, it may be reasonable to assume that building up awareness and knowledge of the CAF has the potential to increase an individual's probability of joining CAF.

Exhibit G7: CAFSCORE Segments – Demographic Profiles

CAFSCORE Segments – Demographic Profile with Statistical Significance Testing						
	Total (n=2031) (A)	Likely Candidates (n=340) (B)	Willing Explorers (n=126) (C)	Undecided (n=87) (D)	Good for Others (n=584) (E)	Disinterested (n=894) (F)
Male	50%	68% EF	59% EF	55%	45%	46%
Female	49%	32%	41%	45%	55% BC	51% B
17-18	27%	26%	23%	34%	25%	29%
19-20	29%	27%	30%	31%	27%	30%
21-23	44%	47%	46%	35%	48% DF	42%
Minority	27%	40% EF	41% EF	41% EF	20%	26%
Non-minority	73%	60%	59%	59%	80% BCD	74% BCD
Indigenous	5%	13% EF	14% EF	4%	2%	4%
Non-Indigenous	95%	87%	86%	96%	98% BC	96% BC
AC	6%	6%	1%	10%	10% CF	4%
QC	22%	15%	20%	19%	26% B	22%
ON	40%	35%	42%	46%	40%	41%
MB/SK	7%	10%	6%	7%	6%	7%
AB	12%	17% CDE	6%	7%	10%	12% C
BC	13%	17% E	26% DEF	10%	8%	13% E
Rural	13%	10%	12%	15%	15%	13%
Suburban	35%	37%	29%	29%	31%	38% E
Urban	52%	53%	59%	57%	54%	50%
<\$40K	35%	30%	44% B	40%	37%	34%
\$40-80K	30%	32%	22%	23%	31%	30%
\$80k+	35%	38%	34%	37%	33%	36%
<HS	15%	16%	21% E	16%	10%	18% E
HS	41%	34%	32%	51% BC	41%	44% BC
Coll/Some PS	21%	23%	26%	13%	24% DF	18%
Univ	21%	27% F	22%	18%	23%	19%
Post-grad	1%	0%	0%	2%	1%	1%

Targeting Based Upon Goals, Attitudes and Activities

The segmentation and segment profiling information above is helpful for identifying, prioritizing and targeting broad groups as well as knowing their respective predispositions and determining the steps that need to be taken to move people further up the spectrum. However, there is a great deal of value in reviewing the CAFSCORE results by respondents' characteristics, interests, goals, attitudes and activities.

The analysis below examines the mean CAFSCOREs for the many variables identifying these characteristic, attitudinal and behavioural traits. On an aggregate basis, the average CAFSCORE generated by all respondents together was 1.33 out of 5. To make it easier to quickly analyze the results, the CAFSCOREs have been indexed against the national average. Since the national average CAFSCORE was 1.33, any group with an average CAFSCORE of 1.33 will have an indexed CAFSCORE of 100. Thus, respondent groups with CAFSCOREs above 1.33 hold greater-than-average potential for recruitment into CAF and will have indexed scores above 100.

As an example, respondents who identified as Indigenous have an average CAFSCORE of 2.66. Since this is twice the national average of 1.33, the indexed CAFSCORE for Indigenous respondents is 200 – or, twice the national base index of 100. The higher the CAFSCORE, the greater the current degree of potential for recruitment among that subset of respondents.

The table below presents a list of the subsets of respondents with relatively high CAFSCOREs and therefore the subsets with the greatest potential for recruitment. In addition to the indexed CAFSCORE, the unweighted sample size is provided for each subset. An asterisk indicates subsets where the sample size is too small for statistical analysis, but the findings in these cases are included since they may provide useful qualitative analysis.

Exhibit G7: CAFSCORE Top Prospects for Recruitment – CAFSCORE Index

Top Prospects for Recruitment Based Upon CAFSCORE	n	CAFSCORE Indexed
National Average	2031	100
By Cultural Heritage...		
Indigenous	268	200
South Asian (e.g., East Indian, Pakistani, Sri Lankan, etc.)	151	148
Arab/Filipino/Japanese	139	141
By Employment Status...		
Employed full-time	324	126
By Current Field of Employment...		
Working in skilled trades/ mining/ distribution	63*	208
Working in journalism/IT/business/entrepreneur/banking/finance/ marketing/advertising/engineering	130	153
Those Most Interested in These Careers:		
The military	149	255
Manufacturing	117	147
Law enforcement/Police	217	137
Mining	48*	135
Distribution	47*	126
Engineering	270	121
Skilled trades	224	117

Banking/Finance	262	114
Architecture	181	114
Information technology	265	114
Those Least Interested in These Careers:		
Architecture	206	133
Education	188	132
Journalism	366	125
Research & Development	131	122
Distribution	245	119
Information technology	193	115
A healthcare profession	208	115
A creative career (e.g., designer, musician, film maker)	184	113
Skilled trades	191	113
Those Most Seeking a Career That...		
Is physically challenging	97	177
Offers the flexibility to change careers	118	139
Is competitive (not something that anyone can do)	119	137
Offers training	108	132
Offers the opportunity for promotion and advancement	229	123
Is prestigious	129	121
Offers a pension	163	121
Is respected	277	120
Those Least Motivated by...		
There are job/career opportunities in that field	107	158
Offers a positive work environment	98	154
Job security	108	135
Offers a pension	205	132
Offers the opportunity for promotion and advancement	107	119
Good pay	122	119
Work-life balance	121	117
Those Who Rank These Values as Important:		
Being heroic	181	154
Being proud to be Canadian	328	123
Respecting tradition	269	120
Those Who Describe These as Life Goals:		
Good lifestyle (fulfilling/fun/adventure/quality time/freedom/self-development)	203	126
Serving (doing good/being good/helping, serving God)	203	121
Basic material goals (land/car/home/debt-free/money)	469	116
Rate These Life Goals as Very Important:		
Being famous	233	141
Being engaged in your community	480	126
Being recognized (by your community or your peers)	443	125
Rate These Life Goals as Unimportant:		
Having a good work/life balance	101	132
Those Who Strongly Agree That...		

The Canadian Armed Forces also open doors to success in careers outside of the Canadian Armed Forces	287	177
Those Who Participate in...		
Aviation	38*	273
A member of the Cadets program	57*	236
Marksmanship	64*	195
Sailing	41*	184
Vehicle restoration	67*	177
Amateur radio	39*	156
A member of Scouts or Girl Guides	47*	141
Hunting and/or fishing	182	132
Canoeing	149	120
Cycling	282	115
Among Those Who Think the Best Reason to Join is...		
Training	236	136
The possibility of having to be in combat	162	134
Typically involves a lot of physical labour	146	127
Serving the country	397	119
Being exposed to high-pressure or risky situations	151	119
Opportunities for career advancement	268	118
Interesting challenges	358	116
Valuable work experience	339	113
Among Those Who Say the Biggest Drawbacks Are...		
Is not prestigious	76	158
Limited job opportunities in technical occupations and skilled trades	99	157
Job instability (risk of unemployment)	161	146
Unable to fully utilize one's talent	179	143
Limited opportunities for career advancement	112	141
Does not offer the flexibility to change careers	126	133
Limited variety of jobs	138	132
Is not adventurous, for example, offers little opportunity to travel	73	132
Is not respected	93	128
Work-life balance	314	124
Being micro-managed	197	120
Having to follow orders	250	114
Lack of representation of members of my gender or cultural community	162	113

In addition to uncovering the national insights above, an indexed CAFSCORE can also be used to help inform strategies aimed at recruiting specific subsets of the population. Below is a table of the results among only the female respondents to the survey. As has been demonstrated, women are, as a whole, consistently less inclined to consider a career in the CAF than are men, but by examining the results on an indexed CAFSCORE, it is possible to identify which groups of women are more open to considering a career in the CAF. To ease analysis, the index for this table was based upon the average CAFSCORE of all women (1.07), as opposed to the average CAFSCORE of all respondents (1.33). Thus, in the table below, an index of 200 would mean that group of women score twice as high as the aggregate of all women – not the aggregate of all respondents. In many instances, the attitudes, characteristics and behaviours that relate to higher inclination to consider a career in the CAF are identical to those found in the population as a whole, but there are a few where women have unique results.

Exhibit G8: CAFSCORE Top Prospects for Recruitment Among Women – CAFSCORE Index

Top Prospects for Recruitment Based Upon CAFSCORE	n	CAFSCORE Indexed
Average Among Women	1123	100
By Cultural Heritage...		
Visible minority	494	116
Arab/Filipino/Korean	75	159
Indigenous	61*	147
South Asian (e.g., East Indian, Pakistani, Sri Lankan, etc.)	86	119
By Employment Status...		
Employed full-time	166	115
Employed part-time	161	117
Those Most Interested in These Careers:		
The military	51*	284
Manufacturing	27*	169
Law enforcement/Police	120	154
Information technology	98	128
Skilled trades	94	126
Architecture	87	124
Engineering	89	119
Those Least Interested in These Careers:		
Education	79	149
Research & Development	85	142
Distribution	142	135
Banking/Finance	242	124
Architecture	107	123
Business/Entrepreneur	75	118
Retail or service industry	148	117
Marketing/Advertising/Media	87	114
Journalism	175	114
Skilled trades	94	114
Those Most Seeking a Career That...		
Is physically challenging	28*	223
Offers the flexibility to change careers	50*	139
Is competitive (not something that anyone can do)	51*	143
Offers paid university education, while on a full-time salary	48*	123
Offers free job training, while on full-time salary	81	119
Offers training	39*	114
Those Least Motivated by...		
Work-life balance	47*	136
Offers the opportunity for promotion and advancement	46*	125
Offers training	79	118
Job security	39*	116
Offers freedom and flexibility	51*	115
Offers a pension	93	115

Those Who Rank These Values as Important:		
Being heroic	50*	198
Being proud to be Canadian	139	141
Being of service to one's community	170	131
Those Who Describe These as Life Goals:		
Serving (doing good/being good/helping, serving God)	104	119
Basic material goals (land/car/home/debt-free/money)	241	118
Rate These Life Goals as Very Important:		
Being famous	64*	122
Being engaged in your community	226	119
Rate These Life Goals as Unimportant:		
Having a good work-life balance	47*	177
Those Who Agree That...		
The Canadian Armed Forces also open doors to success in careers outside of the Canadian Armed Forces	590	135
I think that the Canadian Armed Forces workplace environment is respectful of women	500	134
There is a wide variety of professions within the Canadian Armed Forces	719	128
Those Who Participate in...		
Aviation	6*	340
A member of the Cadets program	24*	239
Marksmanship	15*	223
Sailing	19*	202
Vehicle restoration	16*	182
Hunting and/or fishing	89	163
Competing in individual sports	68*	144
Amateur radio	16*	136
Among Those Who Think the Best Reason to Join is...		
Training	99	168
Typically involves a lot of physical labour	56*	131
Opportunities for career advancement	151	124
The possibility of having to be in combat	49*	122
Valuable work experience	192	119
Serving the country	193	118
Among Those Who Say the Biggest Drawbacks Are...		
Limited opportunities for career advancement	42*	187
Limited job opportunities in technical occupations and skilled trades	35*	178
Is not adventurous, for example, offers little opportunity to travel	27*	175
Unable to fully utilize one's talent	75	166
Is not prestigious	27*	149
Does not offer the flexibility to change careers	53*	146
Lack of representation of members of my gender or cultural community	95	134
Job instability (risk of unemployment)	85	123
Is not respected	40*	120
The salary and benefits	54*	116

The same exercise was conducted among respondents who identify as visible minorities. The index for the table below is based on the average CAFSCORE among visible minorities (1.72). Among this relatively more enthusiastic segment of the sample, the attitudes, characteristics and behaviours that relate to higher inclination to consider a career in the CAF are similar to those found in the population as a whole, with a few exceptions. For example, seeking an equal opportunity employer is a stronger determinant of visible minorities' inclination to join, along with valuing the ability to tackle important challenges.

Exhibit G9: CAFSCORE Top Prospects for Recruitment Among Visible Minorities – CAFSCORE Index

Top Prospects for Recruitment Based Upon CAFSCORE	n	CAFSCORE Indexed
Average Among Visible Minorities	1008	100
By Cultural Heritage...		
South Asian (e.g., East Indian, Pakistani, Sri Lankan, etc.)	151	114
Those Most Interested in These Careers:		
The military	71*	225
Distribution	27*	159
Information technology	153	128
Architecture	89*	128
Banking/Finance	155	116
Those Least Interested in These Careers:		
Travel & Tourism	78*	136
Research & Development	67*	130
Architecture	105	127
Journalism	188	126
Skilled trades	108	121
Education	91*	120
A legal profession	113	115
Those Most Seeking a Career That...		
Is physically challenging	53*	166
Is competitive (not something that anyone can do)	63*	153
Offers the flexibility to change careers	70*	139
Offers a pension	74*	138
Is prestigious	84*	125
Offers training	71*	116
Is an equal opportunity employer	85*	115
Those Least Motivated by...		
Offers a positive work environment	62*	152
Offers training	84*	129
Is respected	93*	126
Job security	59*	126
Offers a pension	122	124
There are job/career opportunities in that field	60*	124
Work-life balance	77*	119
Good pay	78*	114

Those Who Rank These Values as Important:		
Being heroic	115	142
Curiosity	194	126
Being creative	298	121
Tackling important challenges	182	120
Respecting tradition	180	118
Rate These Life Goals as Very Important:		
Being engaged in your community	294	131
Being famous	169	129
Being recognized (by your community or your peers)	269	119
Those Who Agree That...		
I could see myself joining the Royal Canadian Air Force	292	190
I could see myself joining the Canadian Army	297	190
I could see myself joining the Royal Canadian Navy	280	187
I could see myself joining the Canadian Armed Forces	339	181
My family would encourage me to join the Canadian Armed Forces if it were of interest to me	408	152
My friends would encourage me to join the Canadian Armed Forces if it were of interest to me	439	147
I think that the Canadian Armed Forces workplace environment is respectful of women	478	133
The Canadian Armed Forces also open doors to success in careers outside of the Canadian Armed Forces	502	130
I would be proud to be in the Canadian Armed Forces	575	128
I think that the Canadian Armed Forces workplace environment is respectful of all people regardless of cultural heritage	539	128
There are people I know who could have a great career in the Canadian Armed Forces	499	125
There is a wide variety of professions within the Canadian Armed Forces	586	122
People join the Canadian Armed Forces when they have few other options available	428	120
Those Who Participate in...		
Sailing	18*	235
Aviation	26*	232
Amateur radio	24*	192
A member of the Cadets program	32*	191
Marksmanship	26*	162
A member of Scouts or Girl Guides	25*	158
Hunting and/or Fishing	56*	147
Canoeing	53*	144
Cycling	150	136
Vehicle Restoration	33*	120

Among Those Who Think the Best Reason to Join is...		
The possibility of having to be in combat	95*	125
Training	135	124
Opportunities for career advancement	138	121
Serving the country	200	117
Job security	223	115
Among Those Who Say the Biggest Drawbacks Are...		
Unable to fully utilize one's talent	95*	171
Limited job opportunities in technical occupations and skilled trades	62*	156
Is not adventurous, for example, offers little opportunity to travel	43*	154
Is not respected	49*	152
Limited variety of jobs	85*	137
Limited opportunities for career advancement	72*	131
Lack of representation of members of my gender or cultural community	93*	130
Having to follow orders	117	120
Giving up your freedom	176	116
Work-life balance	149	116

CONCLUSIONS AND RECOMMENDATIONS

Although young Canadians do not tend to feel they are particularly familiar with the CAF, there is nevertheless a broadly favourable attitude towards the CAF in general. This favourable predisposition holds true regardless of region, gender, cultural heritage or many other demographic characteristics. When it comes to perceptions of the CAF as an employer, while knowledge is noticeably lower, those offering an opinion have more favourable than unfavourable impressions of CAF as an employer.

For any organization hoping to attract new applicants from among this age cohort, this positivity provides a helpful foundation.

Going further into the specifics of how one evaluates career choices, the self-assessed level of knowledge about the career options within the CAF reduces still further, resulting in just over one in four youth feeling they are knowledgeable.

Since the default towards positivity is combined with a lack of familiarity with the CAF – both in general and specifically as an employer – and a fairly widespread lack of knowledge about the career options available within the CAF, the data demonstrates there is an ability to raise the awareness and understanding of the CAF career options and open the eyes of more young Canadians to the notion of how a career in the CAF may be something that fits with their personal goals, interests, values and ambitions.

Fewer feel they have much knowledge about career options within the CAF, but again, for those who offer an opinion, there is more default towards favourable than unfavourable impressions of careers in the CAF.

At the moment, roughly one in seven hold favourable impressions of the CAF in general as well as of the CAF as an employer and are already likely to consider a career in the CAF. This segment of “Likely Candidates” forms the most promising pool of potential recruits to target in the short term. There are other segments of the population who have some potential to be recruited, but there is certainly a plurality of “Disinterested” individuals who would require a significant amount of convincing in order to ever consider applying for a career in the CAF. Strategically, it may be valuable over the long-term to see this segment of the population reduced and the study identifies some of the key attitudes to address should this be an objective for the CAF, but in the meantime, devoting resources to communicate with those more pre-disposed may be more efficient.

As one of the main objectives of this study was to investigate opinions among youth who identify as visible minority or Indigenous, it is particularly useful to note the relatively high interest in pursuing a career in the CAF already exists among those respondents who identify as Indigenous, South Asian, Arab, Filipino or Japanese.

There are many more traits that correlate more strongly with interest in pursuing a career in the CAF and several of them are perhaps stereotypical. These include people who: want a career that is physically challenging; are (also) interested in a career in law enforcement; place importance on values such as being heroic; feel the possibility of being in combat is appealing; and, already enjoy activities such as aviation, marksmanship, or being in the Cadets.

However, the results of this study shed light on a far more diverse range of possibilities for attracting youth to the CAF. The data suggests there are at least three specific approaches that may improve the effectiveness of marketing and advertising aimed at stimulating recruitment into the CAF and for the most-part, these hold true whether targeting men or women:

- **Enabling certain life goals.** Highlighting how a career in the CAF helps individuals achieve goals of personal financial stability (e.g., home- or land-ownership, being debt-free), fulfillment, friendship, the pursuit of interests while cultivating the sense of freedom that comes with a sense of independence all appear to be aspects that have the potential to broaden the appeal of, or strengthen the interest in, a career in the CAF. For women, in particular, the potential for the CAF to be an environment that contributes to their professional development and success may be a uniquely valuable motivator, if more widely known.
- **Opening eyes to a range of possibilities.** Two aspects that are not as widely understood but which tend to correlate with a higher inclination to join the CAF are:
 - the notion that within the CAF, one can actually pursue the careers that interest them, rather than being limited to options that do not align with current interests; and,
 - the notion that training received during one's time in the CAF can be leveraged to open doors to interesting career opportunities after having spent time in the CAF.

The data suggest that educating young Canadians in general, and women in particular, on these possibilities may increase the willingness to consider a career in the CAF for some.

- **Removing perceived barriers where possible.** Certain drawbacks to a career in the CAF may be impossible to remove. There are many roles that may involve exposure to danger and the requirement to be away from home are aspects that can never be entirely removed for all career options within the CAF. However, there may be some aspects where it may be possible to demonstrate that the drawback is not as significant as assumed and changing that assumption may stimulate some youth to increase their willingness to consider a career in the CAF. There are a few that appear to have both the data evidence of being impactful and possibly be aspects where there is an ability to alter impressions:
 - Demonstrating that the CAF offers greater individual freedom and flexibility than may be assumed, particularly as it pertains to the ability for those in the CAF to choose, shape or perhaps even switch their career to suit one's evolving interests and needs;
 - Placing physical challenge in context so that some of those who are interested in careers that do not generally involve physical challenge and specifically identify physical challenge as a drawback to a career in the CAF, can more easily see themselves pursuing their preferred (non-physical) careers in such fields as information technology, engineering and even finance;
 - For women in particular, proving that a career within the CAF need not be narrowly defined and can allow one to explore numerous avenues in order to ensure one is ultimately satisfied their talent has been fully developed and utilized; and,
 - There is also clearly a relationship between one's sense that the work environment is respectful of women and one's openness to a career in the CAF. The more the CAF can increase the proportion of women who see this is the case, the greater the pool of potential recruits among women.

The insights above are by no means the limits to how the results of this survey can successfully guide the development of effective marketing and communications strategies. Indeed, the survey results contain a wealth of information that the CAF can possibly use in very narrowly focused ways to stimulate recruitment among young

Canadians. Fundamentally, the results prove the public opinion environment includes a significant number of youth who welcome additional information from the CAF on how a career may suit them and perhaps more importantly, may suit them in ways they value but which they do not currently expect.

APPENDIX A: METHODOLOGY REPORT

Survey Methodology

Earnscliffe Strategy Group's overall approach for this study was to conduct an online survey of Canadians aged 17 to 23, using Léger's online survey panel. A detailed discussion of the approach used to complete this research is presented below.

Questionnaire Design

The questionnaire for this study was designed by Earnscliffe in consultation with DND, drawing on previous studies, and provided for fielding to Léger. The survey was offered to respondents in both English and French and completed based on their preferences.

Sample Design and Selection

The sampling plan for the study was designed by Earnscliffe to ensure the appropriate quotas were achieved. The sample was drawn by Leger based on Earnscliffe's instructions from their proprietary online panel. To achieve the desired sample size of visible minority and Indigenous respondents, Leger partnered with Decision Point Research and drew from the latter's proprietary multicultural research panel. For more comprehensive details on the nature of the opt-in panels used, the Government of Canada is already in possession of each company's responses to the ESOMAR28 questions. In total, 406 completes were from Decision Point's panel. In total, 406 completes were from Decision Point's panel.

Data Collection

The survey was conducted in English and French from March 5, 2019 to March 24, 2019. The survey was undertaken by Leger's online opt-in panel headquartered in Montréal, Québec.

Targets/Weighting

The sample was targeted to region, age and gender quotas, along with setting a target to ensure half of the respondents self-identified as members of a visible minority. The data was weighted by age, region, gender and membership to a visible minority group.

REGION/PROVINCE	Actual %	Sample %	Expected: Visible Minority/ Indigenous (17-23)	Sample: Visible Minority/Indigenous (17-23)	Expected: Rest of Canadians (17-23)	Sample: Rest of Canadians (17-23)
Atlantic Canada	6.8%	10%	68	101	68	100
Quebec	23.4%	25%	234	251	234	263
Ontario	38.3%	33%	383	334	383	332
Prairies	6.5%	10%	66	100	66	101
Alberta	11.2%	10%	113	101	113	101
British Columbia	13.5%	12%	136	121	136	126
TOTAL	100%	100%	1,000	1,008	1,000	1,023

Reporting

Bolded results in the tables presented in this report indicate that the difference between the demographic groups analysed are significantly higher than results found in other columns in the table. In the text of the report, unless otherwise noted, demographic differences highlighted are statistically significant at the 95% confidence level. The statistical test used to determine the significance of the results was the Z-test.

Quality Controls

Leger conducted a soft-launch pre-test of the survey, and Earncliffe reviewed the data to ensure that all skip patterns were working and that all respondents were completing the survey in an appropriate amount of time.

Results

FINAL DISPOSITIONS

A total of 7,931 individuals entered the online survey, of which 2,031 qualified as eligible and completed the survey. The response rate for this survey was 11.91%.

Total Entered Survey	7931
Completed	2031
Not Qualified/Screen out	3438
Over quota	1830
Suspend/Drop-off	632

Unresolved (U)	53442
Email invitation bounce-backs	375
Email invitations unanswered	53067
In-scope - Non-responding (IS)	632
Non-response from eligible respondents	N/A
Respondent refusals	N/A
Language problem	N/A
Selected respondent not available	N/A
Qualified respondent break-off	632
In-scope - Responding units (R)	7313
Completed surveys disqualified – quota filled	1830
Completed surveys disqualified – other reasons	3438
Completed surveys	2031
Response Rate = $R/(U+IS+R)$	11.91%

NONRESPONSE

Respondents for the online survey were selected from among those who have volunteered to participate in online surveys by joining an online opt-in panel. The notion of non-response is more complex than for random probability

studies that begin with a sample universe that can, at least theoretically, include the entire population being studied. In such cases, non-response can occur at a number of points before being invited to participate in this particular survey, let alone in deciding to answer any particular question within the survey.

That being said, in order to provide some indication of whether the final sample is unduly influenced by a detectable non response bias, we provide the tables below comparing the unweighted and weighted distributions of each sample's demographic characteristics.

All weighting was determined based upon the most recent Census data available from Statistics Canada. The variables used for the weighting of each sample were age and gender within each region, and whether or not the respondent was a member of a visible minority community.

SAMPLE PROFILE: UNWEIGHTED VS. WEIGHTED DISTRIBUTIONS

Region	Unweighted Sample	Weighted Sample
Atlantic	201	125
Quebec	514	445
Ontario	666	817
Manitoba/Saskatchewan	201	145
Alberta	202	238
British Columbia/Territories	247	261

Gender	Unweighted Sample	Weighted Sample
Female	1123	1010
Male	891	992
Gender Diverse	17	30

Employment	Unweighted Sample	Weighted Sample
Working full-time	324	366
Working part-time	266	276
Self-employed	32	39
Unemployed, but looking for work	71	85
Full-time student	1189	1135
Part-time student	102	82
Not in the workforce	37	40
Retired	2	2
Prefer not to answer	8	6

Education	Unweighted Sample	Weighted Sample
Grade 8 or less	23	13
Some high school	291	298
High school diploma or equivalent	828	832
Registered apprenticeship or other trades certificate or diploma	92	100

College, CEGEP or other non-university certificate or diploma	328	323
University certificate or diploma below bachelor's level	144	143
Bachelor's degree	287	286
Post graduate degree above bachelor's level	21	22

Household Income	Unweighted Sample	Weighted Sample
Under \$20,000	317	327
\$20,000 to just under \$40,000	287	293
\$40,000 to just under \$60,000	271	251
\$60,000 to just under \$80,000	281	277
\$80,000 to just under \$100,000	283	267
\$100,000 to just under \$150,000	220	217
\$150,000 and above	106	135
Prefer not to answer	266	265

Indigenous Heritage	Unweighted Sample	Weighted Sample
Indigenous person, that is, First Nations (North American Indian), Métis or Inuk (Inuit)	268	102

Ethnicity	Unweighted Sample	Weighted Sample
White	1090	1516
South Asian	151	115
Chinese	202	136
Black	156	85
Filipino	60	37
Latin American	61	31
Arab	64	30
Southeast Asian	52	32
West Asian	21	11
Korean	14	10
Japanese	15	12
Other	11	8

MARGIN OF ERROR

Respondents for the online survey were selected from among those who have volunteered to participate/registered to participate in online surveys. The data have been weighted to reflect the demographic composition of the Canadian population aged 17 to 23. Because the sample is based on those who initially self-selected for participation in the panel, no estimates of sampling error can be calculated. The treatment here of the non-probability sample is aligned with the Standards for the Conduct of Government of Canada Public Opinion Research for online surveys.

SURVEY DURATION

The median survey duration was 14 minutes.

APPENDIX B: SURVEY INSTRUMENT

Research Approach

An online survey of 2,000 Canadians between the ages of 17 and 23. The survey will be conducted with Canadians who would be potentially eligible to join the Canadian Armed Forces (CAF) and the sample will be evenly divided between Canadians who self-identify as visible or cultural minorities and those who do not. The survey will be completed in English and French, representative of the first official language distribution across the country. To ensure sufficient representation of Canadians, we will set quotas as outlined in the table below.

	Minority Canadians	Non-Minority Canadians
Region		
Atlantic Canada	100	100
Quebec	250	250
Ontario	330	330
Prairies (MB/SK)	100	100
Alberta	100	100
British Columbia	120	120
Total	1,000	1,000

Email Invitation

LA VERSION FRANÇAISE SUIT

Welcome and thank you for your interest in this study. Earnscliffe Strategy Group, in collaboration with Leger Marketing, has been hired to administer an online survey on behalf of the Government of Canada. The purpose of the study is to explore Canadians’ education, career planning and choices.

This online survey will take about 15 to 17 minutes to complete. Your participation in the study is voluntary and completely confidential. All your answers will remain anonymous and will be combined with responses from all other respondents. As a token of our appreciation for your participation, you will receive [insert reward].

If you have any questions about the survey or if you encounter any difficulties, please email [INSERT EMAIL CONTACT].

To begin, click on the link below.

[URL]

Landing Page

Welcome and thank you for your interest in this study. Earnscliffe Strategy Group, in collaboration with Leger, has been hired to administer an online survey on behalf of the Government of Canada. The purpose of the study is to explore Canadians’ education, career planning and choices.

Your responses to this survey will be kept entirely confidential and any information you provide will be administered in accordance with the Privacy Act and other applicable privacy laws. Do you wish to continue?

Yes

No [TERMINATE]

Section 1: Screening

1.	Are you a Canadian citizen?	
	Yes	1
	No [THANK & TERMINATE]	2
	Prefer not to answer [THANK & TERMINATE]	9
2.	Please indicate your gender.	
	Male	1
	Female	2
	Gender diverse	3
	Prefer not to answer [THANK & TERMINATE]	9
3.	In what year were you born?	
	[INSERT YEAR. IF YOUNGER/OLDER THAN 17-23 YEARS, THANK & TERMINATE]	
4.	Which of the following provinces or territories do you live in?	
	Newfoundland and Labrador	1
	Nova Scotia	2
	Prince Edward Island	3
	New Brunswick	4
	Quebec	5
	Ontario	6
	Manitoba	7
	Saskatchewan	8
	Alberta	9
	British Columbia	10
	Yukon	11
	Nunavut	12
	Northwest Territories	13
	Prefer not to say [THANK & TERMINATE]	99
5.	Do you work for the Canadian Armed Forces?	
	Yes [THANK & TERMINATE]	1
	No	2
	Prefer not to answer [THANK & TERMINATE]	9
6.	Are you an Indigenous person, that is, First Nations, Métis or Inuk (Inuit)?	
	Yes	1
	No	2
	Prefer not to answer	9

7. [IF NOT INDIGENOUS] Are you...? [SELECT ALL THAT APPLY]

White	1
South Asian (e.g., East Indian, Pakistani, Sri Lankan, etc.)	2
Chinese	3
Black	4
Filipino	5
Latin American	6
Arab	7
Southeast Asian (e.g., Vietnamese, Cambodian, Malaysian, Laotian, etc.)	8
West Asian (e.g., Iranian, Afghan, etc.)	9
Korean	10
Japanese	11
Other [SPECIFY]	12
Prefer not to answer [THANK & TERMINATE]	99

FOR CAUCASION SAMPLE: Q6>1 AND Q7=1 ONLY.

FOR NON-CAUCASION SAMPLE: Q6=1 OR Q7 HAS AT LEAST ONE RESPONSE BETWEEN 2 AND 11.

Section 2: Personal Situation, Outlook & Aspirations

8. Which of the following best describes your current employment status?

Working full-time, that is, 30 or more hours per week	1
Working part-time, that is, less than 30 hours per week	2
Self-employed	3
Unemployed, but looking for work [SKIP TO Q10]	4
A student attending school full-time [SKIP TO Q10]	5
A student attending school part-time [SKIP TO Q10]	6
Retired [SKIP TO Q10]	7
Not in the workforce (full-time homemaker, unemployed, not looking for work) [SKIP TO Q10]	8
Prefer not to answer [SKIP TO Q10]	9

9. You indicated that you are (INSERT Q8 RESPONSE: working full-time/ working part-time/ self-employed). In which field are you currently working? [RANDOMIZE]

Information technology	1
Entrepreneur/Business	2
Public service/Government	3
Banking/Finance	4
Engineering	5
Architecture	6
Sports/Entertainment	7
Education	8
Healthcare profession	9
Legal profession	10
Skilled trades	11

Police/Law enforcement	12
Military	13
Retail or service industry	14
Manufacturing	15
Distribution	16
Marketing/Advertising/Media	17
Mining	18
Travel & Tourism	19
Research & Development	20
Journalism	21
Creative career (e.g., designer, musician, film maker)	22
Other (specify)	77
Don't know/Prefer not to answer	99

10. Which three other career fields do you find the most interesting? [EXCLUDE ANSWER TO PREVIOUS QUESTION. USE SAME ORDER AS Q9.]

Information technology	1
Entrepreneur/Business	2
Public service/Government	3
Banking/Finance	4
Engineering	5
Architecture	6
Sports/Entertainment	7
Education	8
Healthcare profession	9
Legal profession	10
Skilled trades	11
Police/Law enforcement	12
Military	13
Retail or service industry	14
Manufacturing	15
Distribution	16
Marketing/Advertising/Media	17
Mining	18
Travel & Tourism	19
Research & Development	20
Journalism	21
Creative career (e.g., designer, musician, film maker)	22
Other (specify)	77
Don't know/Prefer not to answer	99

11. Which three of the following types of career fields do you find least interesting? That is, which three are the career/profession you would least prefer? [EXCLUDE ANSWERS TO PREVIOUS QUESTIONS. KEEP ORDER IDENTICAL TO Q9.]

Information technology	1
Entrepreneur/Business	2
Public service/Government	3
Banking/Finance	4
Engineering	5
Architecture	6
Sports/Entertainment	7
Education	8
Healthcare profession	9
Legal profession	10
Skilled trades	11
Police/Law enforcement	12
Military	13
Retail or service industry	14
Manufacturing	15
Distribution	16
Marketing/Advertising/Media	17
Mining	18
Travel & Tourism	19
Research & Development	20
Other (specify)	77
Don't know/Prefer not to answer	99

12. From the list below, which three do you most want out of a career? [RANDOMIZE. ANCHOR OTHER, NONE OF THE ABOVE AND DK AT THE BOTTOM. ALLOW UP TO 3 ANSWERS]

Job security	1
Good pay	2
Adventure, for example, offers opportunity to travel	3
Would not require moving far away for the job	4
Offers a positive work environment	5
Offers benefits such as health insurance/drug plan	6
Offers a pension	7
Offers the flexibility to change careers	8
Offers paid university education, while on a full-time salary	9
Is respected	10
Is prestigious	11
Is intellectually challenging	12
Is physically challenging	13
Is competitive (not something that anyone can do)	14
Offers freedom and flexibility	15
Offers the opportunity for promotion and advancement	16
Offers free job training, while on full-time salary	17
Is an equal opportunity employer	18

There are job/career opportunities in that field	19
Work-life balance	20
Offers training	21
Offers mentorship	22
Other (specify)	77
None of the above	98
Don't know/Prefer not to answer	99

13. And how confident are you will have a career that [INSERT ANY SELECTED ANSWERS <98 FROM Q13. FOR ANSWERS 1, 2, 4, 5 AND 21 INSERT “delivers” BEFORE RESPONSE]?

Not at all confident	1
Not very confident	2
Somewhat confident	3
Very confident	4
Don't know/Prefer not to answer	9

14. And can you identify which three matter the least to you in making career decisions? [EXCLUDE RESPONSES FROM Q12. USE SAME ORDER AS Q12. ALLOW UP TO 3 ANSWERS]

Job security	1
Good pay	2
Adventure, for example, offers opportunity to travel	3
Would not require moving far away for the job	4
Offers a positive work environment	5
Offers benefits such as health insurance/drug plan	6
Offers a pension	7
Offers the flexibility to change careers	8
Offers paid university education, while on a full-time salary	9
Is respected	10
Is prestigious	11
Is intellectually challenging	12
Is physically challenging	13
Is competitive (not something that anyone can do)	14
Offers freedom and flexibility	15
Offers the opportunity for promotion and advancement	16
Offers free job training, while on full-time salary	17
Is an equal opportunity employer	18
There are job/career opportunities in that field	19
Work-life balance	20
Offers training	21
Offers mentorship	22
Other (specify)	77
None of the above	98
Don't know/Prefer not to answer	99

15. How satisfied would you say you are with your life right now?

Very dissatisfied	1
Somewhat dissatisfied	2
Neither satisfied nor dissatisfied	3
Somewhat satisfied	4
Very satisfied	5
Don't know/Prefer not to answer	9

Section 3: Values & Goals

16. Below is a list of values or character traits that may be important to some people and unimportant to others. Please rank the five that are most important to you personally. [RANDOMIZE. SELECT FIVE.]

Being proud to be Canadian	1
Being of service to one's community	2
Making a difference	3
Being of good character	4
Tackling important challenges	5
Being heroic	6
Being compassionate	7
Being tolerant of others	8
Respecting tradition	9
Being determined or perseverant	10
Thinking independently, for oneself	11
Being creative	12
Being fun-loving	13
Curiosity	14
Continuous learning and self-development	15
Being successful	16
Freedom to choose one's path	17
Being loyal	18

17. What are the three things you most want to achieve in life? [OPEN-END]

- a) Answer 1: [OPEN-END]
- b) Answer 2: [OPEN-END]
- c) Answer 3: [OPEN-END]

18. There are many different types of goals people might have for their life. For each of the following, please indicate how important, if at all, each goal is to you personally. [RANDOMIZE]

- a. Getting married or having a life partner
- b. Being a parent
- c. Owning a home
- d. Having a full-time, steady job
- e. Being engaged in your community
- f. Being proud of your job or career
- g. Being famous
- h. Being financially successful
- i. Being recognized (by your community or your peers)
- j. Having a good work/life balance
- k. Having a clear career path

Not at all important	1
Not very important	2
Somewhat important	3
Very important	4
Don't know/Prefer not to answer	9

Section 4: Civics

19. How closely do you follow news about current events?

Very closely	4
Somewhat closely	3
Not very closely	2
Not at all	1
Don't know/Prefer not to answer	9

20. How interested are you in politics or political issues of the day?

Very interested	4
Somewhat interested	3
Not very interested	2
Not at all interested	1
Don't know/Prefer not to answer	9

21. In which of the following leisure activities do you participate? [SELECT ALL THAT APPLY.]

Sailing	1
Canoeing	2
Fitness	3
Water Sports	4
Vehicle Restoration	5
Competing in Team Sports	6
Music	7

Visual Arts	8
Aviation	9
Amateur radio	10
Marksmanship	11
Hunting and/or Fishing	12
Video Games	13
Culinary Arts	14
Competing in Individual Sports	15
Cycling	16
Performing Arts	17
Television and Movies	18
A member of Scouts or Girl Guides	19
A member of the Cadets program	20
Other [SPECIFY]	97
None of the above	98
Don't know/Prefer not to say	99

Section 5: Career in the Canadian Armed Forces

22. How familiar are you with the Canadian Armed Forces?

Very familiar	4
Somewhat familiar	3
Not very familiar	2
Not at all familiar	1
Don't know/Prefer not to answer	9

23. Generally speaking, would you say that you have a very favourable, somewhat favourable, not very favourable, or not at all favourable opinion of the Canadian Armed Forces?

Very favourable	4
Somewhat favourable	3
Not very favourable	2
Not at all favourable	1
Don't know/Prefer not to answer	9

24. [IF Q23=4 OR IF Q23=1] Why do you say that? [OPEN-END]

25. Would you say you have a very favourable, somewhat favourable, not very favourable, or not at all favourable opinion of the Canadian Armed Forces as an employer?

Very favourable	4
Somewhat favourable	3
Not very favourable	2
Not at all favourable	1
Don't know/Prefer not to answer	9

26. Today, how likely are you to consider a career in the Canadian Armed Forces?

Very likely	4
Somewhat likely	3
Not very likely	2
Not at all likely	1
Don't know/Prefer not to answer	9

27. [IF NOT VERY LIKELY OR NOT AT ALL LIKELY] Have you ever considered a career in the Canadian Armed Forces?

Yes	2
No	1
Don't know/Prefer not to answer	9

28. How knowledgeable do you feel you are about career opportunities within the Canadian Armed Forces?

Very knowledgeable	4
Somewhat knowledgeable	3
Not very knowledgeable	2
Not at all knowledgeable	1
Don't know/Prefer not to answer	9

29. If you found out that it was possible to pursue a career [IF ANSWERED Q10: "in [INSERT Q10 RESPONSES]"; EVERYONE ELSE: "of interest to you"] as a member of the Canadian Armed Forces, how likely would you be to consider applying to the Canadian Armed Forces?

Very likely	4
Somewhat likely	3
Not very likely	2
Not at all likely	1
Don't know/Prefer not to answer	9

30. How knowledgeable do you feel you are about opportunities within the Reserve Force in the Canadian Armed Forces?

Very knowledgeable	4
Somewhat knowledgeable	3
Not very knowledgeable	2
Not at all knowledgeable	1
Don't know/Prefer not to answer	9

31. Reservists usually have a full-time job or attend school during the daytime and work on a part-time basis with the Canadian Armed Forces. Reservists play an important role in supporting Canadian operations both at home and abroad (e.g., Helping with flood relief efforts in Quebec and Manitoba). Reservists are also active in their communities and help with cultural events, parades, festivals and other public events in communities across Canada (e.g., the 2010 Winter Olympics in Vancouver). Part-time members may also choose to serve overseas, when there are opportunities available. How interested would you be in joining the Canadian Armed Forces Reserves?

Very interested	4
Somewhat interested	3
Not very interested	2
Not at all interested	1
Don't know/Prefer not to answer	9

32. To what extent do you agree or disagree with each of the following statements? [RANDOMIZE. DISPLAY SCALE AT THE TOP, MIDDLE AND BOTTOM OF GRID.]

- a. I could see myself joining the Canadian Armed Forces
- b. I could see myself joining the Royal Canadian Navy
- c. I could see myself joining the Canadian Army
- d. I could see myself joining the Royal Canadian Air Force
- e. My friends would encourage me to join the Canadian Armed Forces if it were of interest to me
- f. My family would encourage me to join the Canadian Armed Forces if it were of interest to me
- g. People join the Canadian Armed Forces when they have few other options available
- h. There is a wide variety of professions within the Canadian Armed Forces
- i. The Canadian Armed Forces also open doors to success in careers outside of the Canadian Armed Forces
- j. I think that the Canadian Armed Forces workplace environment is respectful of women
- k. I think that the Canadian Armed Forces workplace environment is respectful of all people regardless of cultural heritage
- l. A career in the Canadian Armed Forces makes it difficult to raise a family
- m. I would be proud to be in the Canadian Armed Forces
- n. There are people I know who could have a great career in the Canadian Armed Forces

Strongly agree	4
Somewhat agree	3
Somewhat disagree	2
Strongly disagree	1
Don't know/Prefer not to answer	9

33. There are a number of factors people might consider for why they would or would not join the Canadian Armed Forces. [ROTATE ORDER OF A AND B AND RANDOMIZE VARIABLES WITHIN EACH LIST]

- a. Below is a list of factors that may make someone consider pursuing a career in the Canadian Armed Forces. Regardless of your current interest in a career in the Canadian Armed Forces, please rank the three most compelling to you, personally. [RANDOMIZE]

Paid education	1
Job security	2
Valuable work experience	3
Opportunities for career advancement	4
A wide variety of jobs	5
Serving the country	6
Helping others	7
Working with state-of-the-art technology	8
Interesting challenges	9
Traveling to other parts of the country and world	10
Being exposed to high-pressure or risky situations	11
The possibility of having to be in combat	12
Typically involves a lot of physical labour	13
The salary and benefits	14
Having transferable skills	15
Work-life balance	16
Training	17
Other [SPECIFY]	98

- b. Below is a list of factors that may make someone decide NOT to pursue a career in the Canadian Armed Forces. Which three of the following reasons best describe why you would avoid a career in the Canadian Armed Forces? [RANDOMIZE]

Work experience that does not help outside of the Canadian Armed Forces	1
Limited opportunities for career advancement	2
Limited variety of jobs	3
Boring/Not interesting	4
Being exposed to danger	5
Giving up your freedom	6
Having to follow orders	7
Being away from home and family	8
Limited job opportunities in technical occupations and skilled trades	9
Unable to fully utilize one's talent	11
The possibility of having to be in combat	12
Typically involves a lot of physical labour	13
Typically requires a minimum commitment of 3 years	14
Being micro-managed	15
The salary and benefits	16
Work-life balance	17
Job instability (risk of unemployment)	18
Is not adventurous, for example, offers little opportunity to travel	19

Does not offer a positive work environment	20
Does not offer the flexibility to change careers	21
Is not respected	22
Is not prestigious	23
Lack of representation of members of my gender or cultural community	24
It is not something or people I see myself identifying with	25
Other [SPECIFY]	98

34. To what extent would you say each of the following describes a career in the Canadian Armed Forces?
[DISPLAY IN SAME ORDER AS Q12]

Job security	1
Good pay	2
Adventure, for example, offers opportunity to travel	3
Would not require moving far away for the job	4
Offers a positive work environment	5
Offers benefits such as health insurance/drug plan	6
Offers a pension	7
Offers the flexibility to change careers	8
Offers paid university education, while on a full-time salary	9
Is respected	10
Is prestigious	11
Is intellectually challenging	12
Is physically challenging	13
Is competitive (not something that anyone can do)	14
Offers freedom and flexibility	15
Offers the opportunity for promotion and advancement	16
Offers free job training, while on full-time salary	17
Is an equal opportunity employer	18
There are job/career opportunities in that field	19
Work-life balance	20
Offers training	21
Offers mentorship	22
Describes very well	4
Describes somewhat	3
Does not describe very well	2
Does not describe at all	1
Don't know/Prefer not to answer	9

Section 6: Video Testing

Next, you will be shown a brief video and then asked for your impressions of it. [RANDOMLY SELECT ONE VIDEO TO TEST PER RESPONDENT.]

35. For each of the following, please indicate how well this applies to what you just watched? [RANDOMIZE]

- a. It was appealing to watch
- b. It was compelling
- c. It seemed meant for you
- d. It made you more interested in a career in the Canadian Armed Forces

Does not apply at all	1
Applies a little	2
Somewhat applies	3
Applies very well	4
Don't know/Prefer not to answer	9

Section 7: Demographics

The last few questions are strictly for statistical purposes. All of your answers are completely confidential.

36. What is the highest level of schooling that you have completed?

Grade 8 or less	1
Some high school	2
High school diploma or equivalent	3
Registered apprenticeship or other trades certificate or diploma	4
College, CEGEP or other non-university certificate or diploma	5
University certificate or diploma below bachelor's level	6
Bachelor's degree	7
Post graduate degree above bachelor's level	8
Prefer not to answer	9

37. Which of the following categories best describes your total household income for 2018? That is, the total income of all persons in your household combined, before taxes?

Under \$20,000	1
\$20,000 to just under \$40,000	2
\$40,000 to just under \$60,000	3
\$60,000 to just under \$80,000	4
\$80,000 to just under \$100,000	5
\$100,000 to just under \$150,000	6
\$150,000 and above	7
Prefer not to answer	9

38. How would you describe the area in which you live?

Urban	1
Suburban	2
Rural	3
Prefer not to answer	9

39. What is your marital status?

Single	1
Married/living with someone/common law	2
Separated/divorced	3
Widowed	4
Other	5
Prefer not to answer	9

40. What are the first three digits of your postal code?

[INSERT FIRST THREE DIGITS OF POSTAL CODE. FORMAT A1A]	
Prefer not to answer	9

This concludes the survey. Thank you for your participation!