



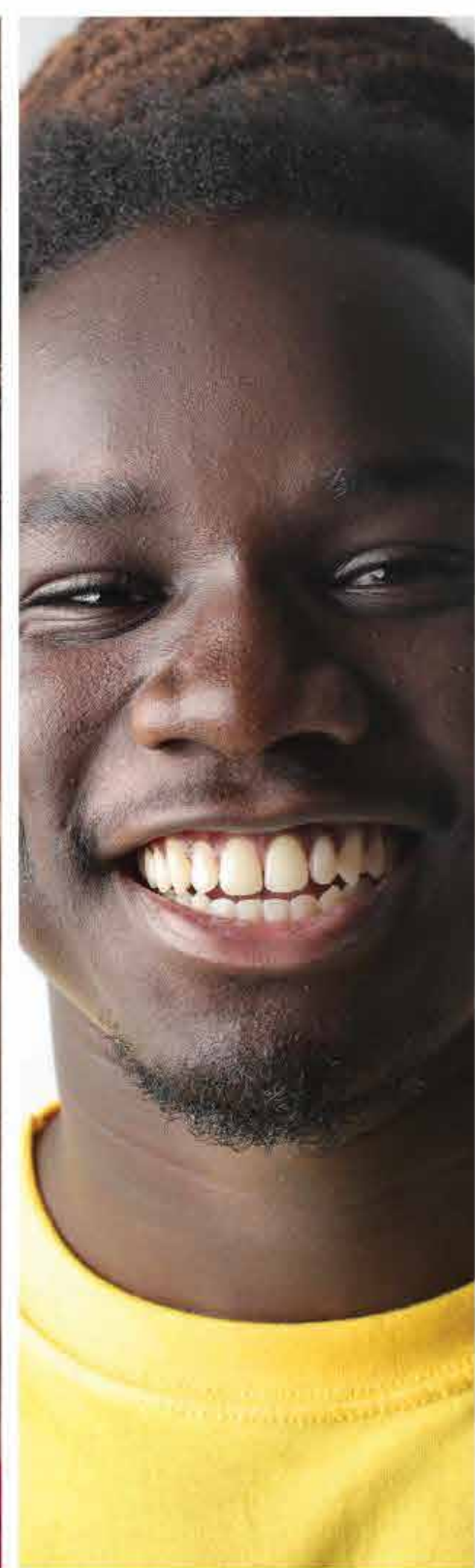
**LABOUR  
MARKET  
INFORMATION**

POWERED BY FOOD PROCESSING SKILLS CANADA

# Your Next Worker: Everything You Need to Know

**PERCEPTIONS OF THE PEOPLE  
YOU'RE TRYING TO REACH**

FOOD PROCESSING SKILLS CANADA



**Available online at [www.fpsc-ctac.com](http://www.fpsc-ctac.com)**

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# Introduction



**For some time now,** the food and beverage processing sector has been highlighted as a major source of economic growth for Canada.<sup>1</sup> Growth comes with its own challenges, however. Many processors cannot find enough people to fill positions; and almost all experience chronic recruitment and retention difficulties. Among meat processors, for example, it is estimated that 7,300 positions went unfilled in 2016, affecting one in five (22%) companies.<sup>2</sup> When looking at the entire industry 65,000 new workers are needed to meet the Agri-Food Economic Strategy Roundtable export targets for 2025.<sup>3</sup> (Press Release)<sup>3</sup>

To fill positions some larger processing companies (e.g., meat processors) have used the Temporary Foreign Worker Program (TFWP). Food Processing Skills Canada (FPSC) recent labour market research has revealed, however, that the program's complexity, high application fees, and stringent rules make it unviable for most companies in the sector. The program is also controversial.<sup>4</sup> The lion's share of future food and beverage processing sector employees, therefore, will have to come from within Canada.

FPSC conducted the initial research in 2018 and revisited the data in 2019 to pull out new information about the people you're trying to hire. This report contains everything that you need to know about people looking for work today.

## **Part of the Solution: Attracting Workers to the Food and Beverage Processing Sector**

As part of two large labour market information studies conducted by FPSC in 2017-19, one pertaining to meat processing and the other fish and seafood, 3,337 people were surveyed about working in the food and beverage processing sector generally and in meat and seafood processing specifically. The major themes covered in this 2018 survey included:

- Level of motivation to obtain employment or change jobs.
- Importance of various factors in the decision to take a job (e.g., pay, training opportunities, proximity to home).
- Knowledge and awareness of jobs in the food and beverage processing sector and in the meat and seafood processing sector.
- Perceptions of working in the sector, including advantages and drawbacks.
- Interest in working in the sector, including in four specific occupations (e.g., meat cutter, operations manager).
- Resonance of potential messaging and inducements to work in the sector.
- Sources of labour market information (i.e., where people look for information on job openings).

<sup>1</sup> Advisory Council on Economic Growth. Unleashing the Potential for Growth of Key Sectors. February 2017. <https://www.budget.gc.ca/aceg-ccce/pdf/key-sectors-secteurs-cles-eng.pdf>

<sup>2</sup> Food Processing Skills Canada. Securing Canada's Meat Workforce: Real Challenges, Practical Solutions, Fresh Perspectives, Final Report. 2019.

<sup>3</sup> Food Processing Skills Canada Press Release. June 2019. LMI Study Reveals Serious Workforce Gap for Industry. <https://www.fp-sc-ctac.com/lmi-study-reveals-serious-workforce-gap-for-industry/>

<sup>4</sup> Douglas Todd, Dramatic Jump in Guest Workers Hurts Canadians on Low Wages. Vancouver Sun, July 28, 2019. <https://vancouversun.com/opinion/columnists/douglas-todd-dramatic-jump-in-guest-workers-hurts-canadians-low-wage-earners>.

The survey had two unique features. First, it delved into the issues in-depth by providing respondents with a significant amount of fact-based information as a way of generating more thoughtful feedback. Second, it targeted four segments that have traditionally faced labour market challenges: youth (n=972), Indigenous People (n=506), Recent Immigrants (n=500) and individuals with a tenuous attachment to the labour market (n=1,205). The total number of respondents from these four segments was 2,089, with some respondents belonging to more than one segment (e.g., an unemployed youth). As a point of comparison, another 1,248 members of the general population were surveyed based on a national random sample.

The point of the survey was to generate insight to help sector stakeholders, including employers and HR professionals, better understand the motivations, perceptions, interests, challenges and preferences of prospective employees. The research was also meant to help sector members develop tailored recruitment and retention strategies.

## Segment Definitions

**“Indigenous”**: includes people who identify as: “Indigenous”, including Metis, First Nation, Inuit, etc. (n=506)

**“Recent Immigrants”**: defined as born outside of Canada and having been lived in Canada less than five years. (n=500)<sup>1</sup>

**“Tenuously Attached”**<sup>2</sup>: defined as either currently unemployed and looking for work at the time of the survey or having been unemployed at least twice in the last 5 years. (n=1,205)

**“Youth”**: defined as between 18 to 29 years of age, inclusively. (n=972)

<sup>1</sup> This segment was labelled “New Canadians” in our initial analysis.

<sup>2</sup> This segment was labelled “Unemployed” in our initial analysis.

The point of the survey was to generate insight to help better understand the motivations, perceptions, interests, challenges and preferences of prospective employees.



## Why Choose These Four Segments of the Labour market?

Some have suggested that the four segments targeted in the survey should be a focus of food and beverage processing employer recruitment efforts because of their relatively high unemployment rates. The table below shows the 2018 unemployment rates for Youth, Recent Immigrants and Indigenous People. The “Tenuously Attached” segment was defined specifically for this study. At the time of the survey, 32% of respondents in this segment were unemployed and 20% were employed part-time. Across the four target segments, 24% were unemployed and 21% worked part-time.

### Unemployment Rates<sup>1</sup>

	Total Canadians	Canadians 15-24 years	Canadians 25 + years	Recent Immigrants 0-5 years	Immigrants 5-10 years	Indigenous Population
Year	2018	2018	2018	2018	2018	2018
%	5.8%	11.1%	5.0%	9.4%	6.4%	10.1%

According to the labour market research cited above, the labour shortages experienced by food and beverage processors are particularly acute in semi and unskilled occupations. There is some obvious logic, therefore, for employer recruitment efforts to target segments of the labour market that have historically experienced higher levels of unemployment and under-employment. But employment statistics paint only part of the picture; after all, one can only lead a horse to water. It’s important to explore questions such as: How do members of the four segments feel about working in the food and beverage processing sector? Would they move to take a job? What are they looking for in a job and how do their expectations jibe with their perceptions of jobs in the sector? And, perhaps most significantly, do their views differs from those of other Canadians? In short, are they in fact, promising recruitment targets?



<sup>1</sup>

Statistics Canada. Labour Statistics Research Paper: Annual review of the labour market, 2018. <https://www150.statcan.gc.ca/n1/pub/75-004-m/75-004-m2019002-eng.htm>

## Findings Produced from the Initial Analysis (Fall 2018)

Initially, the survey data was analysed to detect differences and similarities between the four targeted segments and the general population. An analysis of similarities and differences among the four targeted segments was also conducted.

Overall, this analysis showed that all four segments show promise as sources of workers. Segment members, both collectively and across the individual segments, were found to be significantly:

- More highly motivated to look for employment opportunities.
- More likely to have definitive views of the sector (including both positive and negative perceptions).
- More interested in taking a job in food and beverage processing compared to the average Canadian resident, both overall, and with respect to the four specific job types profiled in the survey.

We also found that interest in working in meat and seafood processing increased by the end of the survey, suggesting that exposure to fact-based information about careers / jobs increased openness to working in the sector.

The analysis also revealed that recent immigrants appeared to be the most promising of the four segments, based on their level of motivation, perceptions of working in the sector and interest in exploring a career in it.

These and other results were based on an initial analysis of the entirety of both samples (i.e., n=1,248 in the general population sample and n=2,089 in the target segments sample). The target segments sample, has, by design, a disproportionately high number of respondents who were unemployed, particularly in the Tenuously Attached segment (i.e., almost half the sample). Both the target segments sample and the general population sample also include a small, but not insignificant, proportion of people who are either retired or have never worked (i.e., cannot be considered part of the labour market).

The composition of the target audience sample with its relatively high proportion of unemployed and fewer full-time workers, begs a fundamental question about the results produced by the initial analysis: To what extent, if any, were the positive differences observed in it caused by the sample composition? The answer to this question has obvious academic, as well as real-world implications (e.g., targeting employee recruitment efforts).

To answer this question, we re-analysed the data for 10 key variables after filtering both samples to include only respondents who met one or more of the following criteria:

- Self-identified as unemployed at the time of the survey;
- Responded “yes” to: “Are you currently looking for work?”; or
- Provided an agreement rating of 4 or 5 on a 5-point scale to: “I am actively looking for a new job.”

While this basic sample filtering does not control for characteristics such as income and education, it does dramatically increase the homogeneity, and thus the comparability, of the General Population and Target Segments samples.

### Number of Survey Completions in Filtered Samples *(includes overlap in target segments)*

General Population (n=333)  
Youth (n=629)  
Indigenous People (n=251)  
Tenuously Attached (n=993)  
Recent Immigrants (n=335)



## Findings Produced from the Additional Analysis (Fall 2019)

### Overall

The additional analysis reveals that, even when controlling for labour market status, the target segments (i.e., exclude those who are neither unemployed nor looking for work) continue to show promise as sources of potential employees for the food and beverage processing sector. The differences between the two samples, as well as among the four groups in the target segment sample, tend not to be as pronounced, however. And, while the initial analysis suggested that Recent Immigrants might be the most promising of the four segments, the additional analysis shows that Indigenous People also have potential.

In the new analysis we continue to see that openness to working in meat and seafood processing significantly increases by the end of the survey (i.e., after exposure to fact-based information about careers / jobs).

### Motivation

Motivation and openness can be measured by one's willingness to relocate for a better job opportunity.

First, we note that compared to the initial 2018 analysis, the difference in results between the General Population sample and Target Segments samples is much smaller.

Consistent with the initial 2018 analysis, we see that willingness to move is highest among Youth and Recent Immigrants. Willingness among the Tenuously Attached and Indigenous People is the same as it is in the General Population.

### Detailed Findings

The following tables show two types of analysis:

**Column 1:** Results based on an analysis of the entire General Population sample (i.e., the control group) and the entire Target Segments sample (i.e., the treatment group). This is the same analysis we initially conducted in 2018, and which was included in LMI final reports.

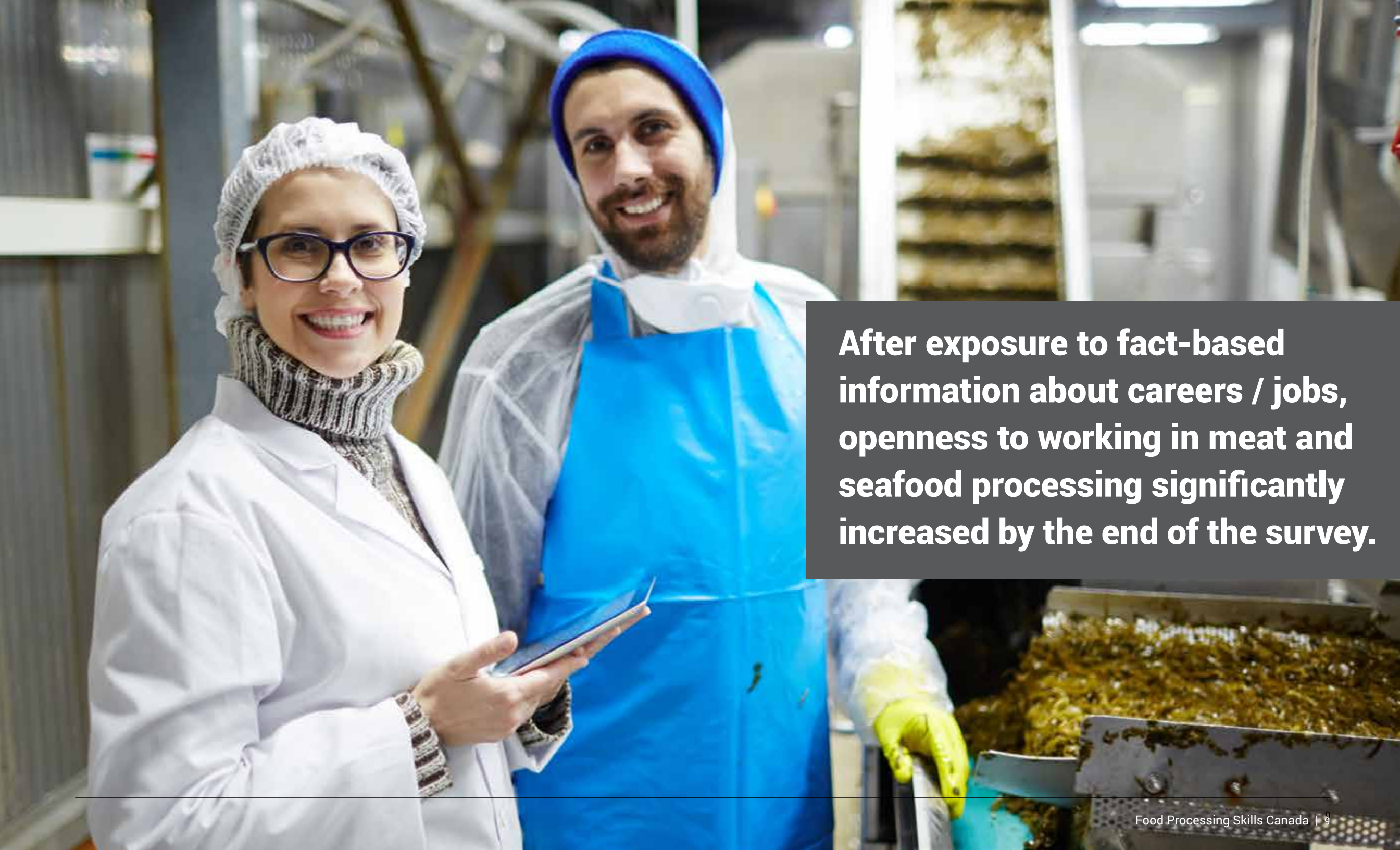
**Column 2:** Results produced from the analysis of the filtered samples (i.e., only unemployed and/or looking for work/new job). This analysis is new.

Also note that statistically significant differences in the new analysis are in red.

WILLINGNESS TO MOVE FOR A BETTER JOB		
Segments	Samples include all respondents (2018 analysis)	Samples include only those who are either unemployed or actively looking for work (new analysis)
General Population	26%	50%
Youth	50%	58%
Indigenous People	36%	51%
Tenuously Attached	43%	49%
Recent Immigrants	52%	58%

% saying Yes (rated 4 or 5 out of 5) to: "Generally speaking, are you willing to move somewhere for better job opportunities."



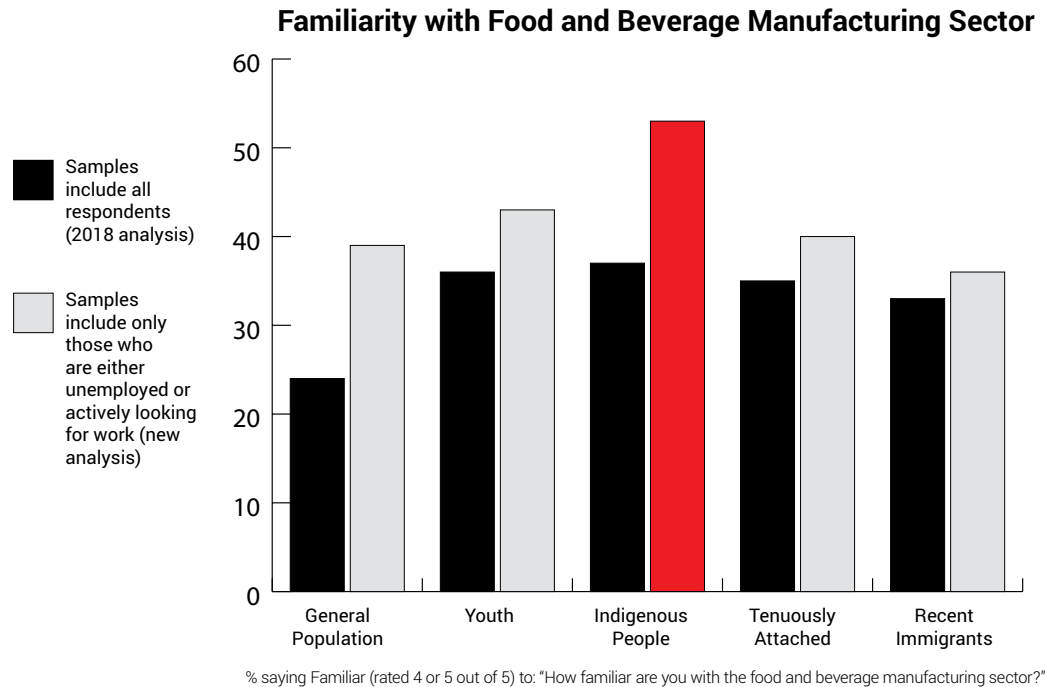


**After exposure to fact-based information about careers / jobs, openness to working in meat and seafood processing significantly increased by the end of the survey.**

## Familiarity with and Impressions of the Sector

It is interesting to see that when the samples are filtered to include only people who are unemployed or looking for work, the proportion of those who say they are familiar with the food and beverage manufacturing sector rises significantly, particularly in the General Population sample (i.e., 24% to 39%).

Among our four Target Segments, Indigenous People stand-out as most likely to say they are familiar; a result that was not apparent in the original analysis.



Based on a comparison of the total samples (2018) versus the filtered samples (2019), we see that people who are unemployed or looking for work are more likely to have positive impressions of jobs in the sector than the population as a whole.

Looking only at the 2019 analysis, there is little difference in the perceptions of members of the Target Segments and the General Population, except for Indigenous People, who have significantly more positive views.

OVERALL IMPRESSION OF JOBS IN THE SECTOR		
Segments	Samples include all respondents (2018 analysis)	Samples include only those who are either unemployed or actively looking for work (new analysis 2019)
General Population	31%	42%
Youth	34%	40%
Indigenous People	38%	49%
Tenuously Attached	39%	41%
Recent Immigrants	37%	41%

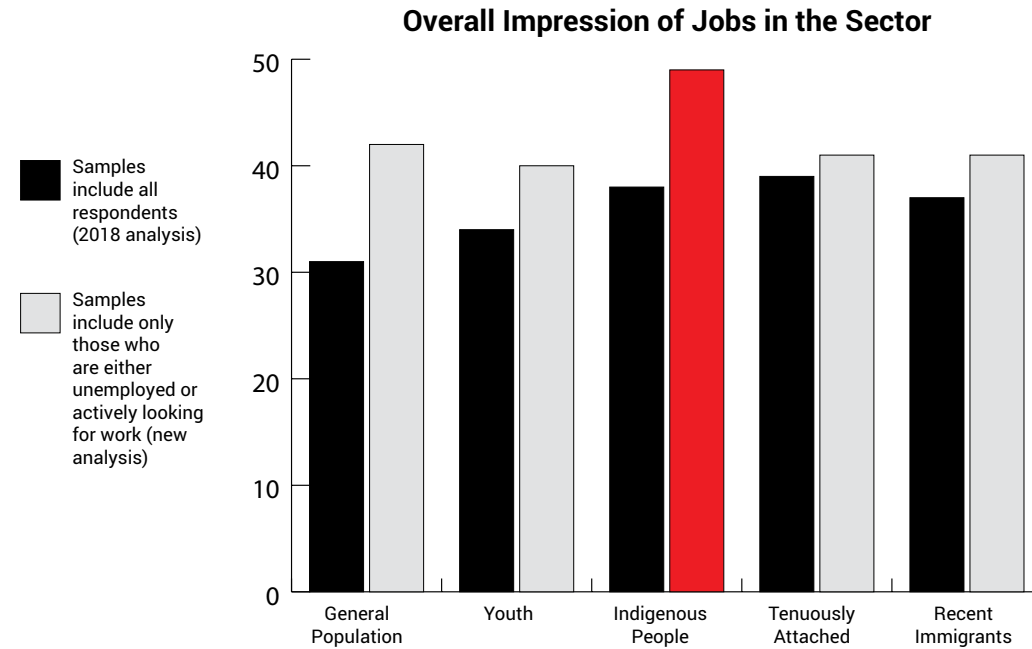
% saying Positive (rated 4 or 5 out of 5) to: "In general, do you have a positive or negative impression of jobs in the food and beverage manufacturing sector?"

## Openness to Working in the Sector

One of the key questions in the survey was aimed at assessing people's openness to working in the food and beverage manufacturing sector.

The proportion of people who convey an openness to working in the sector is higher among the unemployed and/or job seekers (i.e., based on a comparison of the entire samples to the filtered ones). Within the filtered samples, interest is higher among Target Segment members than it is among the General Population, though these differences are smaller compared to those produced by the initial 2018 analysis.

The Recent Immigrants segment, and, to a lesser extent, the Indigenous People segments, appear to be the most open to working in the sector. A second, similar question was asked pertaining to respondents' openness to working specifically in meat and seafood manufacturing. Consistent with the 2018 full-sample analysis, the new analysis finds that interest wanes significantly when the question specifies "meat and seafood".



% saying Positive (rated 4 or 5 out of 5) to: "In general, do you have a positive or negative impression of jobs in the food and beverage manufacturing sector?"

**Recent Immigrants and Indigenous People appear to be the most open to working in food and beverage manufacturing sector.**



The new analysis also produces a flattening of differences between the General Population and Target Segments samples, though interest is consistently higher among members of the segments, particularly Indigenous People.

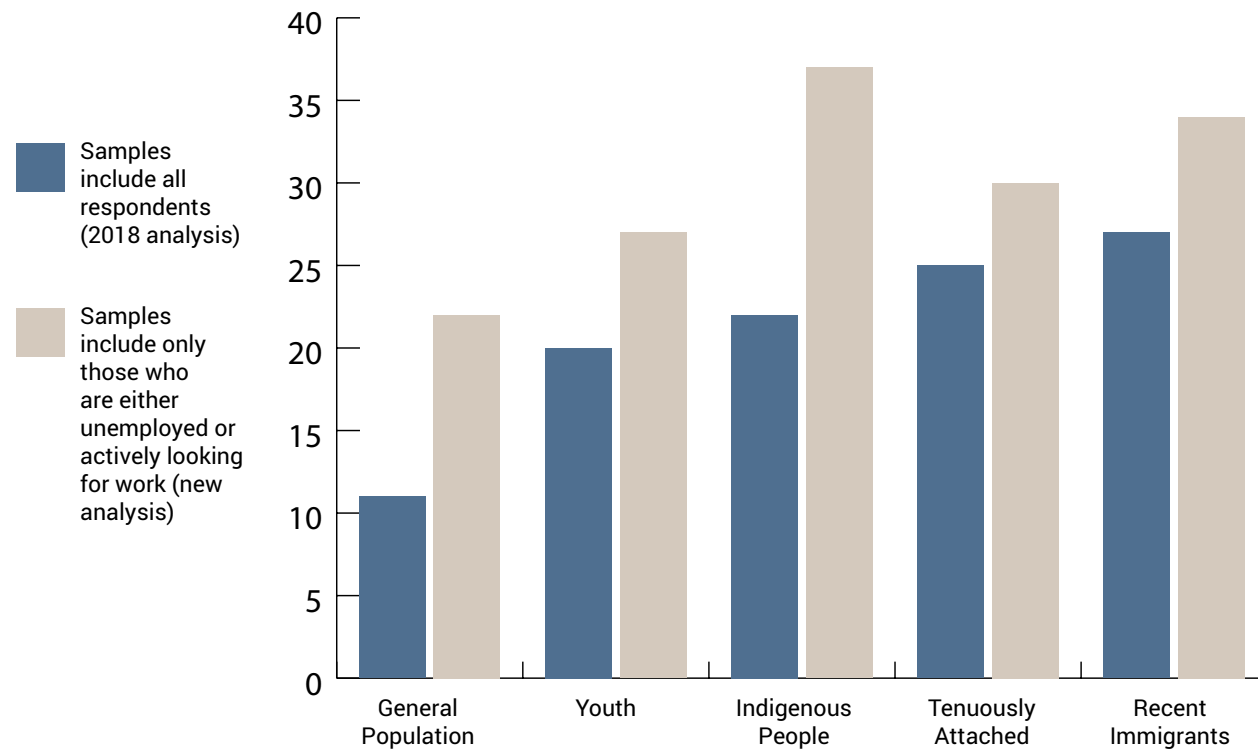
The survey asked respondents to rate their interest in applying for four different jobs in the food and beverage processing sector: fish filleter, lobster processor, industrial butcher and operations manager. The results of our analysis are presented in the following four tables.

Overall, we find that interest in all four jobs is much higher among the proportion of the population that is either unemployed and/or looking for work (i.e., the 2019 filtered samples) compared to the 2018 analysis of entire samples. The operations manager's job garnering the most interest, followed by the fish filleter position.

Interest in each of the four jobs is consistently higher among members of the Target Segments than it is in the General Population sample. This is true for both the 2018 and new 2019 analysis.

Looking at the 2019 analysis (i.e., includes only respondents who are either unemployed or looking for work), we see that Indigenous People are the most likely to apply for three of the four job, with the exception being the operations manager position.

### Openness to Working in Meat and Seafood Manufacturing (T1 Initial Measure)



% saying Yes (rated 4 or 5 out of 5) to: "Generally speaking, if a meat and seafood manufacturing job was located near you, would you apply?"



**According to the 2019 analysis, Indigenous People are the most likely to apply for three of the four jobs\*, with the exception of the operations manager position.**

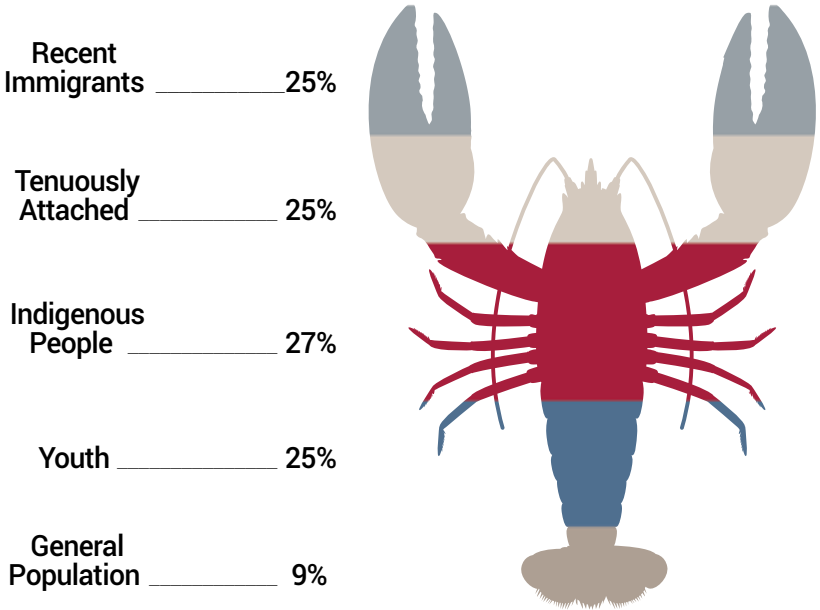
\* Fish filleter, lobster processor, industrial butcher and operations manager

INTEREST IN APPLYING FOR FISH FILLETER'S JOB		
Segments	Samples include all respondents (2018 analysis)	Samples include only those who are either unemployed or actively looking for work (new analysis)
General Population	12%	23%
Youth	27%	33%
Indigenous People	32%	49%
Tenuously Attached	27%	31%
Recent Immigrants	27%	31%

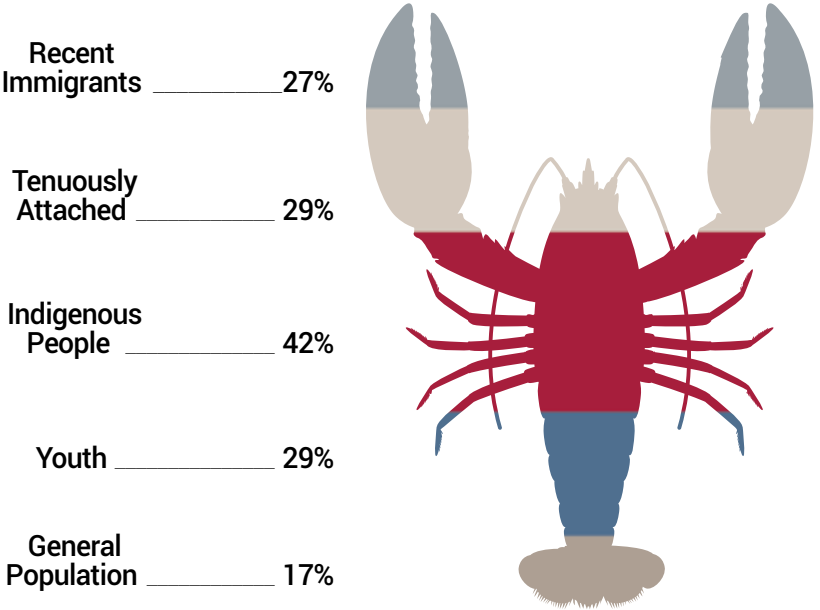
% saying Would Apply (rated 4 or 5 out of 5) to: "Looking at this job, which perspective is closest to your own?"

### Interest in Applying for Lobster Processor's Job

Samples include all respondents (2018 analysis)



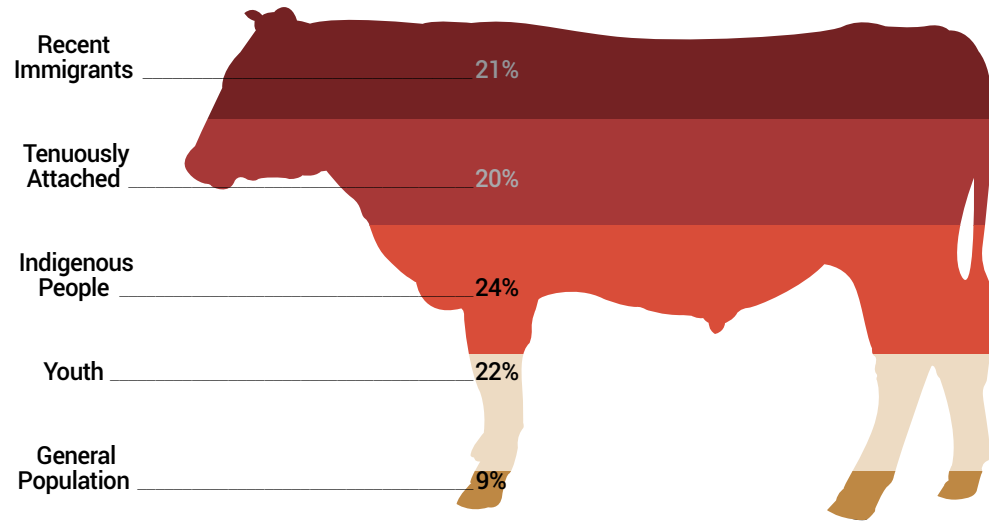
Samples include only those who are either unemployed or actively looking for work (new analysis)



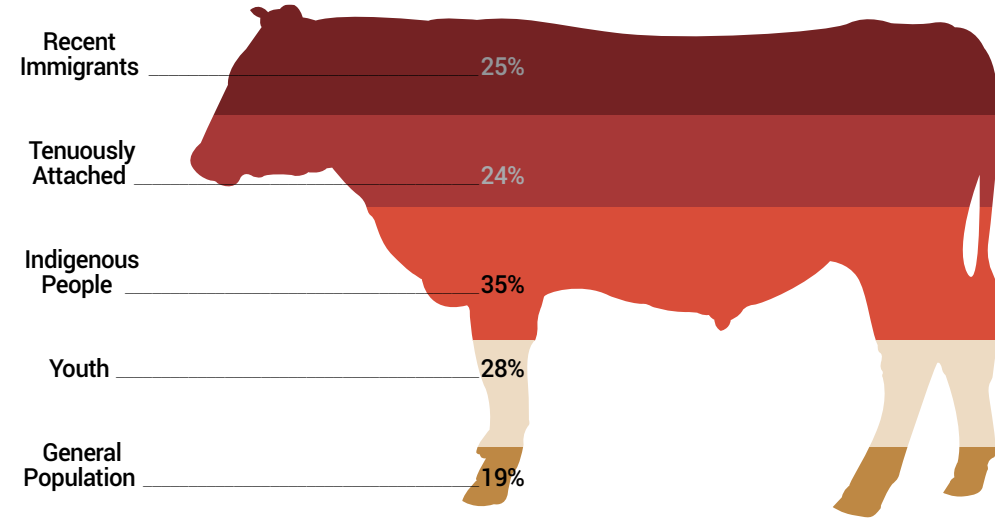
% saying Would Apply (rated 4 or 5 out of 5) to: "Looking at this job, which perspective is closest to your own?"

# Interest in Applying for Industrial Butcher's Job

Samples include all respondents (2018 analysis)



Samples include only those who are either unemployed or actively looking for work (new analysis)



% saying Would Apply (rated 4 or 5 out of 5) to: "Looking at this job, which perspective is closest to your own?"

INTEREST IN APPLYING FOR OPERATIONS MANAGER'S JOB		
Segments	Samples include all respondents (2018 analysis)	Samples include only those who are either unemployed or actively looking for work (new analysis)
General Population	18%	35%
Youth	32%	37%
Indigenous People	28%	39%
Tenuously Attached	28%	33%
Recent Immigrants	37%	37%

% saying Would Apply (rated 4 or 5 out of 5) to: "Looking at this job, which perspective is closest to your own?"



One of the objectives of the survey was to assess the impact exposure to fact-based information can have on respondent attitudes, specifically to their openness to working in meat and seafood processing. The assessment was based on comparing the responses obtained to the same question asked at two different times in the survey: once at the beginning and second time at the end.

The table below presents the results for the second time the question was asked (T2) for both the entire samples (2018 initial analysis) and the filtered samples (additional 2019 analysis). In brackets are the percentage point increases in respondent interest from T1 (the first time the question was asked) to T2 (the second time it was asked).

Comparing the 2018 with 2019 analysis, we see that the impact of fact-based information on the interest of the Target segments is the same for both the entire sample and the filtered sample (i.e., unemployed and/or looking for work). Looking at the general population, the positive impact of fact-based information appears to have been greater among those who are either unemployed and/or looking for work.

The most noteworthy finding may lie in the 2019 analysis (which looks only at the views of those who are unemployed and/or looking for work): virtually half of the Indigenous People and Recent Immigrants segments say that they are open to working in meat and seafood manufacturing by survey's end.

<b>IMPACT OF FACT-BASED INFORMATION ON OPENNESS TO WORKING IN MEAT AND SEAFOOD MANUFACTURING</b> <i>(Second measure and percentage point change between T1 and T2 measures)</i>		
Segments	Samples include all respondents (2018 analysis)	Samples include only those who are either unemployed or actively looking for work (new analysis)
General Population	16% (+5% pts)	32% (+10% pts)
Youth	29% (+9% pts)	37% (+10% pts)
Indigenous People	29% (+7% pts)	46% (+9% pts)
Tenuously Attached	32% (+7% pts)	38% (+8% pts)
Recent Immigrants	41% (+14% pts)	45% (+11% pts)

% saying Would Apply (rated 4 or 5 out of 5) to: "Now that you have learned more about it, if a meat and seafood manufacturing job was located near you, would you apply?"





## Conclusions

Data analysis of samples filtered to include only those who were either unemployed or looking for work, leads us to reach the following conclusions and observations:

First, we can confirm the hypothesis that certain labour market segments (i.e., Youth, Tenuously Attached, Recent Immigrants and Indigenous People) are more predisposed and open to working in the food and beverage processing industry than other Canadians.

Consistent with the results of our initial analysis, Recent Immigrants emerge as a particularly promising segment. The new analysis, however, also highlights Indigenous People as equally receptive to working in food and beverage processing industry, if not more so.

Analysis of Statistics Canada labour force data suggests that the window of opportunity for hiring recent immigrants narrows over time: In 2018, the unemployment rate among immigrants who had lived in Canada between five and 10 years was about one-third lower than it was for those who had live here for no more than five years.

The Your Next Worker: What You Need to Know - Overview and Data from our Perceptions Research Report and the two Labour Market Information Final Reports provide insights and information on engaging with target audiences (e.g., inducements, outreach messaging). While our additional analysis did not focus on engagement per se, results confirm the positive impact that fact-based information about jobs in the sector has on target audience, especially Recent Immigrants. Indeed, of the four target segments, Recent Immigrants were least familiar with the sector going into the survey, and they also experienced the largest increase in their willingness to take a job in meat and seafood processing by survey's end.

**Youth, Tenuously Attached, Recent Immigrants  
and Indigenous People are more predisposed  
and open to working in the food and beverage  
processing industry than other Canadians.**



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