



# COOK LABOUR MARKET ANALYSIS

## Final Report

*June 30, 2016*



## ACKNOWLEDGMENTS

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The contributions of the Cook Labour Market Analysis Steering Committee, Restaurants Canada, the British Columbia Restaurant and Foodservices Association, the Industry Training Authority's Tourism and Hospitality Sector Advisory Group, and the BC Labour Market Information Office helped to guide the project and provide recommendations based on the study. The views and opinions expressed in this report are those of its author(s) and not the official policy or position of the Government of British Columbia.

We also would like to thank the many individuals who participated in the primary research and provided critical information, insights, and honest feedback about working in the kitchens of British Columbia.

Special thanks goes to the exceptional research team from The Deetken Group and Sentis Research, who helped us make sense of some very complex data.



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**The Deetken Group**

## EXECUTIVE SUMMARY

### Project Overview

From November 2015 to May 2016, go2HR conducted a robust labour market study of the landscape of cooking occupations in British Columbia across all sectors that employ Cooks and Chefs through a Sector Labour Market Partnerships (LMP) Project with the support of the Ministry of Jobs, Tourism and Skills Training.

The goal of the project was to provide clarity in the information available to industry, students, consumers, and government, and identify possible crisis points as well as point to solutions to address reported labour challenges.

A steering committee of stakeholders representing all sectors of industry was recruited and provided oversight to the project, input to the scope, and analyzed the findings in order to make recommendations.

### Research

Primary and secondary research was conducted by The Deetken Group and Sentis Research with the support of an industry steering committee, and participation of over 500 individuals who were working or had previously worked in the foodservice industry.

Research was approached in three different areas: Labour Market Analysis, Economic Analysis, and Consumer Research and included:

- The development of a framework to analyze the composition of the workforce for Cooks and Chefs in BC across all industry sectors
- A review of data from a wide range of government and industry sources
- Structured interviews with 15 employers representing different foodservice segments to understand the composition of the workforce in different environments
- An online survey of over 450 cooks, chefs, former cooks and chefs, and culinary instructors and students from BC to gather current information about employment, compensation, and work environments
- Online focus groups and phone interviews to gather the perspectives of women in the industry and small, independent and ethnic foodservice operators
- An online consumer panel of over 800 BC residents who frequent foodservice establishments

## Findings

A model was built to determine the composition of the industry across all foodservice segments and evaluate the impact of various forces on labour supply and demand. Data gathered during the study was evaluated and provided the following observations:

*Observation 1: The foodservice industry is a very diverse landscape with many small independent operators and a wide range of work environments.*

- The ratio of Cooks (those in front line cooking positions) to Chefs (supervisory and managerial positions within the kitchen) varies greatly by type of operation, from nearly 1 to 1 in some very small employers to over 20 to 1 in very large multi-unit employers. On average the workforce is split approximately 80% Cooks and 20% Chefs
- 75% of the kitchen workforce works in restaurants, and 2/3 work for independent, single unit operators
- 23% of foodservice units feature some ethnic specialty, accounting for 16% of the workforce
- Large employers account for only 18% of locations but employ over 50% of the workforce

*Observation 2: Compensation varies widely by employer type, with independent restaurants offering lower overall compensation than larger organizations / chains.*

- BC's large chains provide the highest compensation for both Chefs and Cooks
- Compensation at independents tends to be lower, and unionized positions in catering and institutional foodservice often pay more than comparable non-unionized positions
- The compensation range for Cooks and Chefs is much wider than previously indicated, with somewhat higher median compensation. Cook base wages range from \$10.25 to \$28.66 per hour, with an average wage of \$16.55 and Chef base wages range from \$10.38 to \$66.83 per hour with an average wage of \$25.63

*Observation 3: Compensation does not appear to be increasing faster than other occupations, but there is other evidence of some current sector-wide shortages.*

- Compensation growth for Cooks and Chefs has kept relative pace with other occupations, growing at an annual rate of 2.1% since 2000
- 39% of employers reported a vacancy in the last year, and kitchen positions were consistently ranked as "hard to fill"
- 73% of employers with a vacant kitchen staff position identified themselves as facing a labour shortage
- Reported shortages were not exclusive to certain regions or employer types, but certainly more pronounced for smaller employers and outside of the Lower Mainland

*Observation 4: There are signs of increasing labour market tightness, particularly at the entry level, and pockets of more acute issues for certain sub-sectors.*

- Ethnic restaurants report shortages at all kitchen positions, limiting expansion in some cases
- Ethnic restaurants reported challenges due to no domestic supply of cooks trained in specialized cuisines and changes to the immigration process and Temporary Foreign Worker program
- Small independent restaurants reported challenges in finding suitable skilled candidates, particularly in smaller regions and those with seasonal operations
- Seasonal employers noted chronic and worsening shortages and a lack of affordable housing as issues in resort communities
- Employers across all sectors indicated greater difficulty in hiring entry level positions, due to declining numbers of applicants
- Demographics heavily impact the Cook and Chef occupations, as both rely heavily on segments of the population that are in decline. The majority of Cooks (52%) are under 35 and most Chefs (63%) are under 45. There are very few Cooks (14%) or Chefs (12%) over the age of 55
- Cooks and Chefs tend to exit their occupations at an early age – of those who had left the industry, the largest grouping (40%) did so between the ages of 35 and 44

*Observation 5: Independent of the labour market supply situation, growth in demand for Cooks and Chefs is expected to be positive as a result of general economic growth, changing consumer preferences (less cooking at home) and other factors. In addition, when labour force demand is measured as “headcount”, the part-time /full-time structure of the industry becomes an important driver of demand.*

- Demand for Cooks and Chefs is projected to increase at an average annual rate of approximately 1.5% over the next 10 years
- A variety of other factors, such as a low Canadian dollar, increased consumer preference to dine out or pick up ready-made meals, retirements, and disposable income, have direct implications for the number of Cooks and Chefs required in BC
- Very few Chefs (10%) but a significant proportion of Cooks (33%) work part-time, which increases the number of total people needed to meet Full Time Equivalent (FTE) demands

*Observation 6: There was a significant contrast between the experiences of Chefs and Cooks working for hotel and restaurant chains versus smaller independent establishments.*

- Other than apprenticeship, Cooks and Chefs working in chains are more likely to receive training and development opportunities than those working for independents
- Apprenticeship rates for Cooks are similar in most industry segments, but Chefs working in independent restaurants are more likely to have completed an apprenticeship than Chefs working in chain restaurants
- Cooks and Chefs working in independent restaurants work longer hours and receive fewer benefits than their counterparts in chains and unionized institutional environments
- When asked what their goals are over the next 1 to 3 years, the most common response among Chefs in chain restaurants is that they want to be working at a higher level job within the same company. Chefs working in independent restaurants either intended to be working in the same position or aspire to own their own business
- Independent Cooks and Chefs are far more likely to switch jobs than those working in chains or for institutional employers
- Both independent and chain employees and employers highly value attention to detail, the ability to multitask and thrive in a fast paced, high pressure environment, while the importance of creativity varied within both groups

*Observation 7: Cooks and Chefs tend to be passionate about their careers but feel undervalued and overworked.*

- The majority of Cooks and Chefs were attracted to the career for a love of food, creativity, and a fast paced environment
- Former Cooks and Chefs who have left the industry entirely and those who are now working in a related field were similar with respect to how long they worked in the industry (between 10 and 20 years) and when they left. 40% exited the industry between the ages of 35 and 44
- The majority of Cooks and Chefs who had left the industry had done so primarily for work/life balance reasons
- Women tend to exit the industry at a higher rate than men (while nearly 40% of Cooks are female, less than 25% of Chefs are)
- The majority of Cooks and Chefs would not recommend a career in the industry to friends or family

*Observation 8: Consumers are generally unaware of the cost structure in the foodservice industry, and are sensitive to dramatic price increases or a move away from the current tipping model. However, they are more tolerant of price change when they know they are going to increase wages and benefits.*

- The majority of consumers overestimate the amount of profit generated in the foodservice industry
- Consumers are sensitive to price increases larger than 5%, and prefer the current model of tipping for a quality dining experience over all inclusive pricing or fixed service charges
- Consumers are more tolerant of price increases with a better understating of the reason, such as higher wages and benefits for staff, similar to their choices based on food sourcing and environmental policies

## Recommendations

Based on the findings, the project steering committee and other industry stakeholders reviewed all of the opportunities that might impact supply and demand and came up with five recommendations.

### *Recommendation 1: Support for small independent operators.*

Given the large number of small independent operators, strategies should be developed such as business coaching and training that can help them:

- Be more competitive with large chains by improving business performance in other areas (e.g. managing food and operating costs)
- Better manage human resources and turnover
- Improve productivity and efficiency
- Provide more training and development opportunities for staff
- Access affordable group benefit plans

### *Recommendation 2: Identify solutions for specific challenges faced by ethnic restaurants.*

Given the significant number of ethnic restaurants and relative proportion of the workforce, further evaluation of their unique issues could provide some solutions to address specific needs:

- Conduct a training needs assessment for specific, high demand cuisine types
- Evaluate barriers in current immigration policy that are additional constraints for foodservice operators

*Recommendation 3: Develop strategies to improve the Employee Value Proposition.*

Strategies that support improved retention are needed across all industry sectors. In addition, other levers that can adjust supply and demand may be available.

- Promote emerging practices that support greater work/life balance like alternative scheduling
- Identify specific strategies to support the greater retention of women, such as job sharing, child care, and access to female mentors and role models
- Adjust prices and cost ratios as much as possible, with a focus at increasing the compensation for critical kitchen positions
- Evaluate the part time and full time balance – utilize as much full time labour as possible, and look at fixed schedules for part time staff

*Recommendation 4: Look for more opportunity to recruit unmatched or untapped labour supply.*

There will always be some job vacancies and unemployment, but better identification of the gaps between those looking for work and available positions would benefit the industry.

- Identify the need for upskilling or upgrade training to move Cooks and Chefs from one segment to another
- Identify alternative demographics that could be targeted instead of such a heavy reliance on the 15-24 year-old age group for Cooks
- Provide opportunities for older workers leaving other industries that have a passion for food to work in the industry
- Provide seasonal job matching or employee sharing between employers with similar needs

*Recommendation 5: Develop strategies to better inform consumers about their dining dollar*

Consumers will always be price sensitive to dramatic increases in prices, but better communication regarding the narrow margins and how the dining dollar is divided could benefit the industry.

- Develop marketing strategies that outline the cost and profit margins in the foodservice industry
- If price increases are going to improve wages and benefits, proactively communicate that message to the consumer audience



## Conclusion

The purpose of this study was to gain a better understanding of the breadth and depth of the Cook and Chef workforce across British Columbia, and in turn identify the labour market forces at play, and strategies to help industry cope with growth and demographic shift.

There are certain aspects of the industry which are immovable. Cooks and Chefs will always be needed on evenings and weekends, when the bulk of the population is on personal time. It will always be fast-paced, high pressure, and require a certain amount of stamina from its workforce as the kitchen is a place that requires people to be on their feet all day. The commercial foodservice segments like restaurants and hotels are also subject to consumer preferences and trends, and very price sensitive. It is a competitive environment with tight margins, and that is not likely to change any time soon.

However, projects such as this, which bring the foodservice industry together to share best practices and information, can help to formulate strategies that are critical to support the industry. There are also things that industry can do to collaborate and improve the employee value proposition. People working in the industry love certain aspects of it. Those aspects and lessons learned from segments of the broader foodservice industry can help to strengthen the industry as a whole.

Working on this project has been a fascinating journey for the project team, that we hope will lead to solutions for the industry everywhere.

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## INTRODUCTION

### Background

Tourism and hospitality is a growing industry in British Columbia and a major economic generator of economic growth. As of 2014, visitor spending generated \$14.6 billion in revenue, a 5.1% increase over 2013 and a 37.7% increase from 2004, and contributed \$7.1 billion in direct GDP. Additional direct and indirect revenue, such as that spent by local residents on restaurant meals and other forms of entertainment, brings the total economic value of the broader tourism and hospitality sector to over \$29 billion.

go2HR's labour market forecast for British Columbia to 2020 indicated over 108,000 job openings in the tourism and hospitality sector and a labour shortage of over 14,000 full time equivalent jobs over the same period. This included openings for over 9,200 Cooks (NOC 6322) and Chefs (NOC 6321). Added to the demand from tourism and hospitality, there is also demand for Cooks and Chefs from other sectors, such as camps in the resource sector, health care, and institutional environments. With these additions, current employment for Cooks and Chefs is approximately 44,000 jobs, and job openings for Cooks and Chefs for all industries in BC for the next 10 years is 16,000, according to the 2015-2025 BC Labour Market Outlook. The most recent Job Vacancy and Wage Survey (Q4 2015) indicated nearly 2,400 vacant positions for Cooks and Chefs combined.

With Cooks and Chefs being the occupations with the highest demand for skilled workers in the tourism and hospitality sector, go2HR identified a need for greater analysis of the current labour market that focused specifically on Cooks and Chefs.

Traditionally, the data for these two National Occupational Classifications (NOCs) has been difficult to understand due to the wide range of job titles, positions, and sectors in the foodservice and hospitality industry. Wage rate, demand, and labour shortage data tends to group all Cooks and Chefs together, regardless of skill level or industry sector. In reality, the requirements for training, productivity, skill, and experience level vary immensely between Quick Service Restaurants (QSRs), Full Service Restaurants (FSRs), hotels, institutional catering outlets, and restaurants specializing in a variety of ethnic cuisines.

A robust labour market study of the landscape of cooking occupations, including current wages, productivity, labour as a proportion of operational costs, gratuities and other non-wage benefits, cross referenced with skills and training required was conducted by go2HR through a Sector Labour Market Partnerships (LMP) Program project with the support of the Ministry of Jobs, Tourism and Skills Training.

The goal of the project was to provide clarity in the information available to industry, government, students, and consumers and identify possible crisis points as well as point to solutions to address the labour challenges.

## Project Timeline and Scope

A Request for Proposals (RFP) for research consultants was issued in October, 2015 focusing on three areas – Labour Market Analysis, Economic Analysis, and Consumer Research. Contracts were awarded in November 2015 to The Deetken Group and Sentis Research to collaborate on conducting the research necessary for the project.

A project steering committee<sup>1</sup> was assembled with representation from various industry sectors employing Cooks, including health care, institutional catering, camps servicing the oil and gas sector, and the military. The steering committee met for the first time in December, 2015, with additional consultations in January and March 2016.

Secondary research was conducted between November, 2015 and March, 2016 and primary research conducted between January and May 2016. Methodology and findings of the research are detailed in subsequent sections of this report.

Industry stakeholders, the steering committee, and government representatives met in May, 2016, to review preliminary findings of the research and provide input into the completion of the project and recommendations from industry. Subsequent feedback with the ITA Sector Advisory Group (SAG) and steering committee occurred in June, 2016 during the final project phase.

The project scope was refined over the various phases of the project, based on industry and government input and available data sources. The stakeholders determined the most critical pieces to focus on were:

- Quantifying the breakdown of Cooks and Chefs by industry sub-sector and work environment
- Identifying the typical attributes and characteristics of the various types of Cooks and Chefs working in the industry
- Identifying the labour force dynamics that are impacting supply and demand of Cooks and Chefs such as demographics, exit from industry, and career progression
- Quantifying the economic factors such as wage rates and benefits for Cooks and Chefs in different industry segments and work environments, and typical cost and profit structures by industry segment
- Evaluating consumer demand and behaviour as related to workforce dynamics

A re-calibration of the workforce numbers for Cooks, Chefs, and Kitchen Helpers, based on industry input was identified as a high priority within the scope of the project. One of the challenges with the occupational group is the overlap that exists between other occupational classifications and terminology. Industry's definition of "Chef" is someone who is in a supervisory or managerial capacity, which differs from its common colloquial use to describe someone who cooks fancy food or works in a fine dining restaurant as a Cook.

A key example of this definitional issue is seen in the remote lodge and institutional care sectors, where anyone without a journeyperson's certification is called a cook's helper even

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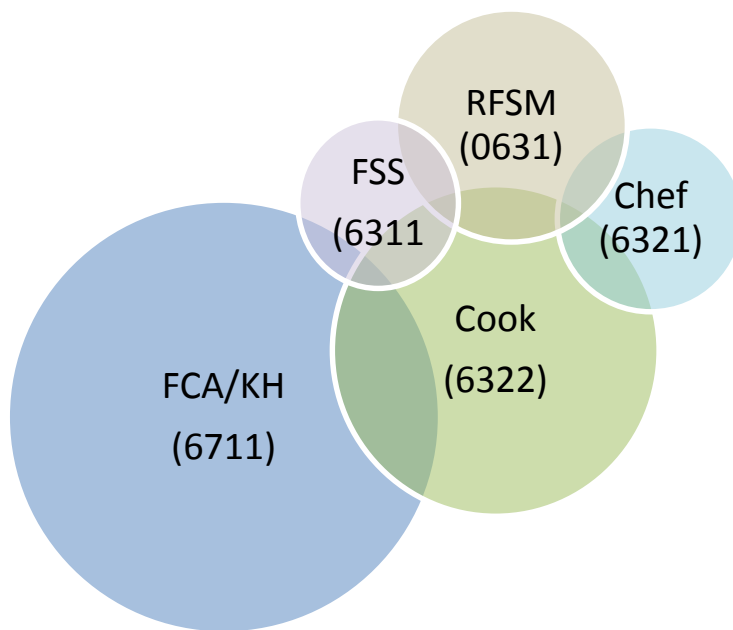
<sup>1</sup> See Appendix IV for a list of members

though their scope of work would be classified as an entry level cook in the restaurant or hotel industry. Similarly, those running the kitchens in chain restaurants are more often titled kitchen manager than chef.

Because the majority of occupational data comes from self-reported data via the Labour Force Survey, industry was confident that there are individuals who have miscategorized themselves due to terminology. To that extent, the Cook (NOC 6322) occupation has some overlap with Food Counter Attendants and Kitchen Helpers (FCA/KH - NOC 6711), and Chef (NOC 6321) has some overlap with both Cook and Restaurant and Food Service Managers (RFSM - NOC 0631). Food Service Supervisors (FSS - NOC 6311) also has some overlap with both the Cook and the RFSM category based on the job duties and titles that are used.

**Figure 1** illustrates the extent of overlap that potentially exists between occupational categories by NOC, as captured by the Labour Force Survey.

*Figure 1. Overlap of NOC occupations<sup>2</sup> by comparison of job titles, duties, and key terminology in use by industry.*




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<sup>2</sup> Each NOC “bubble” is relative in size to the number of workers employed in BC based on the 2014-2024 Labour Market Outlook (Table 1)

Table 1. BC Employment by National Occupational Classification (NOC)<sup>3</sup>

NOC	BC Employment (2014)
Cook (NOC 6322)	29,500
Chef (NOC 6321)	10,500
Food Counter Attendants and Kitchen Helpers (FCA/KH - NOC 6711)	45,200
Food Service Supervisors (FSS - NOC 6311)	5,100
Restaurant and Food Service Managers (RFSM - NOC 0631).	17,500

## METHODOLOGY

The research methodology included separate approaches for the Labour Market and Economic Analysis portions and for the Consumer Research. Further details on methodology and data sources is expanded upon in in the Research and Findings Sections.

### Labour Market and Economic Analysis Methodology Overview

The Labour Market and Economic Analysis research was divided into in three phases or streams:

#### *Stream I*

The first stream of research focused on development of the analysis framework. This framework disaggregated the broad Cook and Chef categories into industry segments and typical personas<sup>4</sup>. These segments and personas were designed to be sufficiently granular to capture key labour market dynamics that may not be apparent at the Cooks and Chefs NOC category levels. They served as the units for data collection and analysis for Streams II and III.

#### *Stream II*

The second stream of research established a fact base at the segment and persona level. The proposed content for each of these fact bases were developed with input from the steering committee and the ITA SAG, and the BC Labour Market Information Office. These materials informed the final research methodology and included the following:

- A draft “grid” with three position types, five sector types and a total of eight categories
- Draft “personas” to highlight specific labour market themes from each grid category
- A framework for modelling of fundamental labour market dynamics at the category or persona level

<sup>3</sup> Source: BC Labour Market Outlook 2014-2024. During the research phase, the 2015 Labour Market Outlook was in development but has since been released.

<sup>4</sup> Refer to Appendix I for Definitions

An additional focus of this stream was to identify where shortages exist and the nature, relative severity and persistence of these shortages. Where possible, regional differences were highlighted.

### *Stream III*

The third stream of research focused on analysis of the data to provide a set of key findings and recommendations.

A core focus of this stream was to quantify, from an economic perspective, the impact of the shortages identified in Stream II. Where possible, the Project Team sought to provide preliminary insight on potential next steps to address such shortages. Further investigation and implementation of these approaches may be relevant topics for future Sector LMP Program project phases.

## **Consumer Research Methodology Overview**

The most effective way to collect information from consumers is to conduct a province-wide survey, and support that primary research with existing secondary research on consumer behaviour and spending in the foodservice industry. This provided the ability to quantify consumer behaviour and conduct an analysis to measure how demand may shift under different conditions.

The survey included BC residents aged 18 and older who frequent restaurants regularly and who are responsible for making decisions regarding where to eat and what to spend. In order to remove undue bias, the following groups were excluded: those who work in the foodservices industry; and those who only frequent QSRs.

Data was collected using an online consumer panel, a group of individuals who have agreed to periodically participate in online survey research. A consumer panel was selected to produce a representative sample of the target population based on geography, gender and age. The total sample size was 813, drawn proportionately based on region (**Table 2**)

*Table 2. Consumer survey distribution.<sup>5</sup>*

<b>BC Region</b>	<b>Sample Size</b>
Lower Mainland/ Southwest	475
Vancouver Island and Coast	152
Thompson – Okanagan/ Kootenay	125
Northern BC (north of 100 mile house)	61
<b>Total</b>	<b>813</b>

<sup>5</sup> The margin of error associated with a sample size of 813 is +/- 3.4% at the 95% confidence level



## RESEARCH AND ANALYSIS

### Secondary Research

The research for this project began with secondary research and the compiling of existing data from a variety of sources. By collecting comparable but independent data sources, a robust model of labour force dynamics was able to be built, as many of the data sources collect different aspects of information about industry and employment which can be cross-referenced to build a complete picture.

These included both government and industry sources, and a brief description of each is found below:

#### Government Data Sources

##### *Labour Market Outlook 2014-2024 (LMO 2014)*

The BC Government provides an annual rolling 10-year forecast of employment supply and demand for all industries and key occupations (the 500 most in demand occupations). The Labour Market Outlook 2014-2024 (LMO 2014) uses data from various government sources, including those listed below, industry consultation, and forecasts of economic and other trends that impact labour market supply and demand in British Columbia. Note that during the final phase of the project, the 2015-2025 Labour Market Outlook was finalized, so current employment numbers have been aligned with that data set.

##### *Labour Force Survey (LFS)*

The Labour Force Survey (LFS) is a monthly survey which measures the current state of the Canadian labour market and is used, among other things, to calculate the national, provincial, territorial and regional employment and unemployment rates. Data is collected by phone or in-person interviews and online questionnaires and is taken from a representative sample of the general population.

##### *Survey of Employment, Payrolls and Hours (SEPH)*

The Survey of Employment, Payrolls and Hours (SEPH) provides detailed information on the total number of paid employees, payrolls, hours and job vacancies at detailed industrial, provincial and territorial levels. It is collected via interviews and online questionnaires monthly, from a representative sample of employers through the Business Payroll Survey results combined with payroll data received from Canada Revenue Agency.

### *Job Vacancy and Wage Survey (JVWS)*

Implemented in 2015, the Job Vacancy and Wage Survey (JVWS) collects information on job vacancies, and wages offered for vacant positions through a representative sample of employers, and is compiled quarterly at the provincial, territorial, and regional level. The JVWS tracks vacancies by occupation and collects information on job requirements, education, and the methods employers are using to fill vacant jobs.

### *Employment Insurance Statistics (EIS)*

The Employment Insurance Statistics (EIS) provides information on the number of beneficiaries collecting employment insurance by region and occupation.

### *WorkSafeBC Employer Data*

WorkSafeBC collects information on employer size such as full time equivalents, operating locations, and total assessable payroll according to a system of classification units (CUs) which are comprised of an employer's primary business activity at each location. Employers are able to register into multiple classification units at the same location, which can give an accurate departmental breakdown of more complex business operations.

### *National Household Survey (NHS)*

The National Household Survey (NHS) Collects data on various social, economic and demographic factors from approximately 4.5 million households across Canada, and is conducted as part of the Census program every five years.

### *BC Stats*

BC Stats is an organization within the Service BC division of the Ministry of Technology, Innovation and Citizens' Services, and is the central statistical agency of the Province of British Columbia.

## Industry Data Sources

### *go2HR Tourism Labour Market Strategy (2012)*

go2HR's Tourism Labour Market Strategy was developed in 2012 to forecast supply, demand and shortages in the broader tourism and hospitality sector, which includes the Accommodation, Food and Beverage, Attractions and Recreation, Transportation, and Travel Services industries, for both local and tourism-driven demand. Forecasts were developed and compiled by tourism region and occupation, using primarily 2011 data sets.

### *Restaurants Canada 2015 Operations Report*

The Restaurants Canada 2015 Operations Report outlines operating ratios by industry segment and province, for commercial foodservice only (which excludes institutional and other foodservice operations).

### *Restaurants Canada Restaurant Industry Forecast 2015-2019*

Restaurants Canada's Restaurant Industry Forecast 2015 – 2019 outlines economic drivers and growth projections for commercial foodservice sales, menu prices, and units by province over a 5-year period.

### *Restaurants Canada The 2015 Bottom Line*

Restaurants Canada *The 2015 Bottom Line* provides a detailed overview of operating performance in the commercial foodservice industry. Included are typical operating costs and profit margins segregated by industry sub-sector, size, region, and sales volume.

### *go2HR Tourism Labour Shortage Economic Impact Survey (EIS)*

go2HR's Tourism Labour Shortage Economic Impact Survey (EIS) was running slightly in advance of this project and gathered data on labour shortages, vacancies, and economic impacts of those shortages by location, industry sub-sector, and occupation.

## **Establishing Primary Research Parameters and Approach**

The steering committee provided input into the primary research required for this project. The development of an analysis framework focused on the following approach:

- To leverage secondary data sources and establish cross-linkages in various data sets, such as using Restaurants Canada's Industry Segments as the basis for sub-sectoral analysis, and establishing how other available data such as WorkSafeBC's classification units and the North American Industry Classification System (NAICS) are related
- To disaggregate the broad Chef and Cook NOCs into industry validated sub-groups or "personas" based on role, responsibilities, and work environment. It was recommended to limit the number of personas to definable and distinct groups, such as small restaurant cooks and chefs specializing in ethnic cuisines, without getting so granular as to limit the effective collection of data
- To use two separate methods of gathering new industry data – structured interviews with typical employers across all industry segments and an online survey of cooks and chefs in British Columbia. These methods were supplemented with focus groups and additional interviews to expand on targeted labour force issues as they emerged

- To evaluate consumer preferences and awareness of the relationship between wages, benefits, and other costs related to menu prices, and how their spending behaviour would change with a greater awareness of the restaurant industry's cost structure

The research framework was developed and validated with the steering committee and other industry stakeholders, consisting of a draft set of personas, industry sectors aligned with Restaurant Canada's segmentation model, and sample questionnaires for the structured interviews and employee research.

## Primary Research

### Structured Interviews

A total of 15 structured interviews<sup>6</sup> were conducted, from the following industry segments:

- Hotels (2) – one smaller independent and one large (recently transitioned into an independent but with previous chain affiliation)
- Institutional multi- unit operator working in health care, industrial camp, and business services sectors
- Small independent winery restaurant in a seasonal and small region environment
- Large ethnic restaurant, with multiple locations specializing in Chinese cuisine
- Extended care sector chef with additional experience in business and remote services
- Chain restaurants (2) – both large, one in the upscale casual segment and one in the steakhouse segment
- An industry recruiter specializing in hospitality executive search across all sectors
- Caterers (2) - a large caterer with a variety of business lines and one mobile caterer servicing the film industry
- A casual pub chain, based outside of the lower mainland
- A large multi- season resort with multiple food outlets and restaurants
- A remote fishing lodge operator
- A retail (grocery store) and food manufacturing specialist

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<sup>6</sup> Interview questions are found in Appendix IX

Interviews were approximately 90 minutes in length and gathered data on the structure of the workforce in each typical environment and for each persona including:

- Headcount (peak and off peak)
- Average weekly hours and job conditions (# of shifts, etc.)
- Demographic profile (age, sex)
- Compensation (salary, gratuities, bonus, benefits)
- Required training
- Turnover
- Sources for new hires
- Barriers to retention
- Organizational shortages (if any)
  - Nature of shortages (persistence, reason that shortage is being experienced for certain organizations but not others for a persona)
- Labour market shortages (if any)
  - Nature of shortages (persistence, reason for shortage)
  - Approach to management of shortages (strategies that have worked or not)

### Employee Survey

go2HR conducted an online survey<sup>7</sup>, which gathered responses from 448 individuals. The target audience was cooks and chefs, both those currently working in BC, and those who had worked in the industry previously and had since left completely or moved on to a related career, such as culinary instructors, sales, or owning a restaurant. In addition, current apprentices and culinary students were surveyed.

Survey participants were recruited from a range of sources including industry associations, culinary schools, training and certification organizations, and other industry networks. Respondents fell into four main categories as outlined in **Table 3**.

*Table 3 Employee survey distribution*

Type of Participant	Responses	%
Cook or Chef currently working in the profession or actively looking for work	298	66
Previously employed as a Cook or Chef but working in a related field (e.g. instructor, sales)	70	16
Previously employed as a Cook or Chef and have left the industry	40	9
Other (e.g. student, on leave)	40	9

<sup>7</sup> Employee survey questions are found in Appendix VII

Each group had different question sets as follows:

#### Current Cooks and Chefs (employed)

- Demographics
- Work environment, such as industry segment and region
- Employer type, such as chain, franchise, or independent
- Job role and responsibilities tied to defined personas
- Current earnings, including, bonuses and gratuities
- Benefits
- Working conditions such as overtime and holidays
- Training and certification
- Skills and personal attributes
- Career plans over the next 5 years
- Reasons for entering the industry or changing jobs

#### Current Cooks and Chefs (unemployed)

- Demographics
- Last position, employer type, and salary
- Type of role they are looking for
- Number of applications and interviews
- Length of time out of the workforce
- Training and certification
- Barriers to finding suitable employment

#### Former Cooks and Chefs

- Demographics
- Current position and occupation
- Last work environment and job role in industry
- When they left the industry (at what age and how long they worked in total)
- Training and certification
- Skills and personal attributes
- Reasons for entering and leaving the industry

#### Current students and apprentices

- Demographics
- Career aspirations
- Reasons for entering industry
- Current training level and environment'
- If working, the full set of employment questions

All participants were asked a summary question, which was evaluated for Net Promoter Score (NPS):

- *“How likely are you to recommend a career as a cook or chef to friends or family?  
Please use a scale of 0 to 10 where 10 means “very likely” and 0 means “very unlikely”*

## Focus Groups and Follow-up Interviews

Following the structured interviews and employee survey, an online focus group of female Cooks and Chefs was conducted to further evaluate specific conditions impacting the recruitment and retention of women in the industry.

Follow up interviews with an additional six small independent and ethnic restaurant employers were conducted to further examine specific recruitment and retention issues in small independent and ethnic restaurants.

## Consumer Research

An online consumer panel was recruited, with responses gathered from 813 participants. The questionnaire focussed on key behaviours and perceptions of consumers who frequent restaurants, in particular:

- Type and frequency of restaurant visits
- Current spending habits
- Understanding of the cost structure of restaurant meals (relative cost of food, wages, operating expenses, profits)
- Perceptions around gratuities – intention when tipping (i.e. is it intended for the wait staff only or for all staff to share); thoughts on fixed service charges or all inclusive “no tipping” pricing
- Perceptions on wages and benefits in the restaurant industry
- Reaction and behaviour when prices go up (without additional context)
- Changes in behaviour if menu prices were increasing to increase retention of staff in the industry (i.e. increased wages and benefits)

## Building a Dynamic Labour Force Model

Building a model that reflects the complexity of the industries employing Cooks and Chefs as well as the available data sets and some of their limitations required an approach that would consolidate the secondary and primary research into a working model of current state of employment across multiple sub-sectors. From this baseline, the model would have the ability to calculate and calibrate various forces or “levers” that could potentially impact both supply and demand.

In this study and project in particular, the focus was on integrating available data from several different sources, and then modeling how certain changes to policy or employer practices in the labour market for Cooks and Chefs could impact supply and demand. This approach provided insight into how best to shape and prioritize strategies for addressing current and potential labour shortages.

In integrating available data, careful attention was paid to limitations of the individual existing data sets. In particular:

- All national job data is represented in full year jobs, or headcount – which includes both full time and part time work. Many other data sets or studies use Full Time Equivalents (FTEs) to represent labour demand
- LFS data is self reported by the general population and not employers – so if someone calls themselves a chef but is really a cook, it isn't captured accurately, which can result in misalignment of the resulting wage data with NOCs
- SEPH captures data at the sector level, but not at the occupation level
- JWWS captures occupation-specific data, but only on vacant positions
- WSBC data doesn't separate data into distinct industry sub-sectors or occupations, but instead uses its own set of classification units (CUs)
- Foodservice industry data doesn't distinctly separate out ethnic specialty establishments from others
- Foodservice industry data on operational costs doesn't separate out front of house and back of house labour or occupation specific data
- go2HR labour forecasts only include tourism related industries and employment, and not all other industry sectors which employ Cooks and Chefs

### Establishing the Baseline Labour Force

By integrating various existing data sources with the additional new information gathered from primary research by the project team, a robust model to capture the existing workforce was built using the following approach:

- Primary data from structured interviews and surveys was used to re-calibrate and segregate total job data provided by the LFS. This was premised on the assumption that the LFS estimate for the aggregate number of people working in the “back of house” was accurate, but that the proportion of Cooks, Chefs, and FCA/KH within that estimate could be adjusted to better reflect the actual staffing structure of employers
- Staffing structure (number of Chefs, Cooks and FCA/KH employed in a representative foodservice unit) were compiled across various industry segments and employer size
- Restaurants Canada data was used to determine the proportion of wages to overall operating costs and location size bands across industry segments
- Primary data from structured interviews was used to calculate the total payroll required for a typical staffing structure in each industry segment, as well as the proportion of payroll allocated to “back of house” labour (Cooks, Chefs, and FCA/KH)
- WSBC data was used to separate employers into unit count based on number of locations and payroll size. Additional analysis dis-aggregated the nearly 12,000 unique entries into Restaurants Canada Industry Segments and flagged ethnic specialty locations by keyword linkages
- FTE numbers were converted to headcount using reported part-time and full-time allocations by NOC, based on the LFS and Tourism HR Canada data
- FTE and total jobs (headcount) were applied across industry segment and employer size data to distribute total workforce among the industry segments



## Projecting Labour Force Supply and Demand

Labour demand growth was estimated by compiling industry growth projections from different sources and, in conjunction with consultation with the Labour Market Information Office, using these to establish a demand growth estimate consistent with the upcoming 2015-2025 Labour Market Outlook.

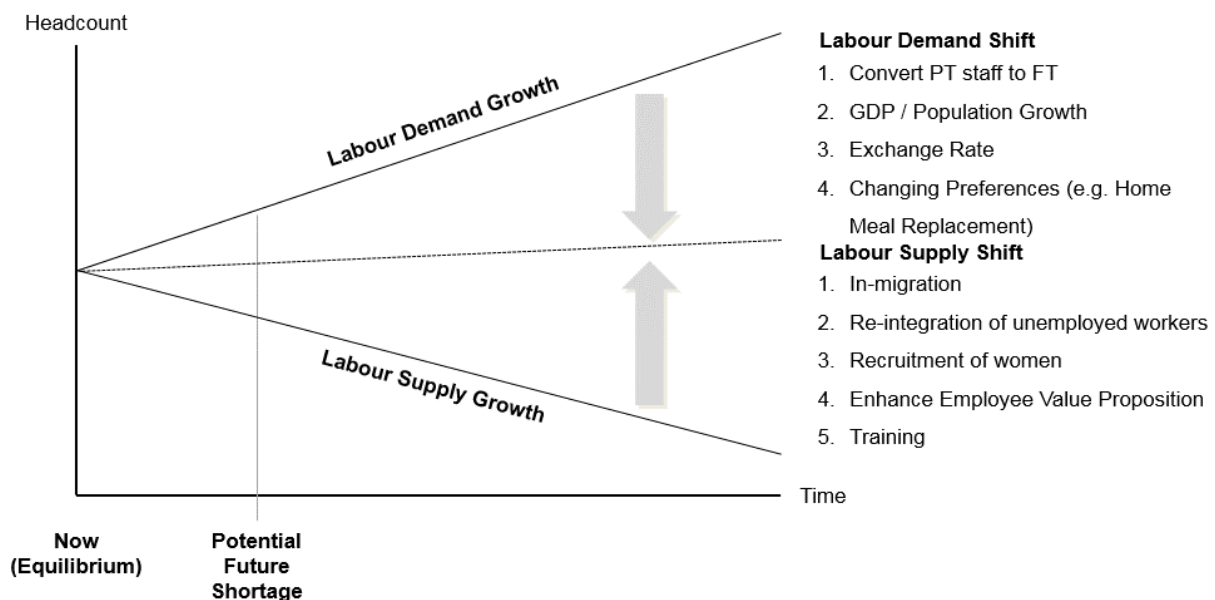
Labour supply growth was estimated based on BC population projections, including net intra-provincial and international migration rates, and adjusting these to reflect the unique demographics for the Cook and Chef occupations (e.g., Cooks are disproportionately drawn from younger age cohorts, which are expected to grow more slowly than older age cohorts).

## Framework for Adjustment

The framework for adjustment was premised on the assumption that when labour demand begins to exceed labour supply (a potential future shortage), various forces will act to bring the market back into equilibrium. Mechanisms include both demand-side levers (e.g., conversion of part-time staff to full-time) and supply-side levers (e.g., in-migration, re-integration of unemployed workers, recruitment of women etc.)

Each of these levers was quantified and incorporated into the dynamic labour force model to project the impact of adjustments to the supply and demand for Cooks and Chefs (**Figure 2**).

Figure 2. Labour supply and demand adjustment model



## Limitations

With the complexity of the data as well as the project timeline, approach and methodology, there are some limitations to the data and analysis that should be stated:

- Although the employee survey was distributed to a reasonably large sample size, the majority of respondents were those with substantive experience in industry and in older age cohorts, which limited the amount of data gathered from young cooks with less experience, and those who earn on the lower end of the wage scale
- Full and part time distribution by occupation was used to convert FTEs to headcount in the industry segmentation but some assumptions as to the number of hours that part time employees worked were necessary given a lack of real data on this topic
- Sub-sectoral differences and key issues were also primarily based on qualitative information gathered from structured interviews and focus groups, rather than a broad industry-wide quantitative survey. These findings were validated by the steering committees but should be considered as indicative of areas of concern
- Qualitative employer interviews were only conducted with those who are currently in business, and therefore the perspectives of employers that have gone out of business are not taken into account

## Findings

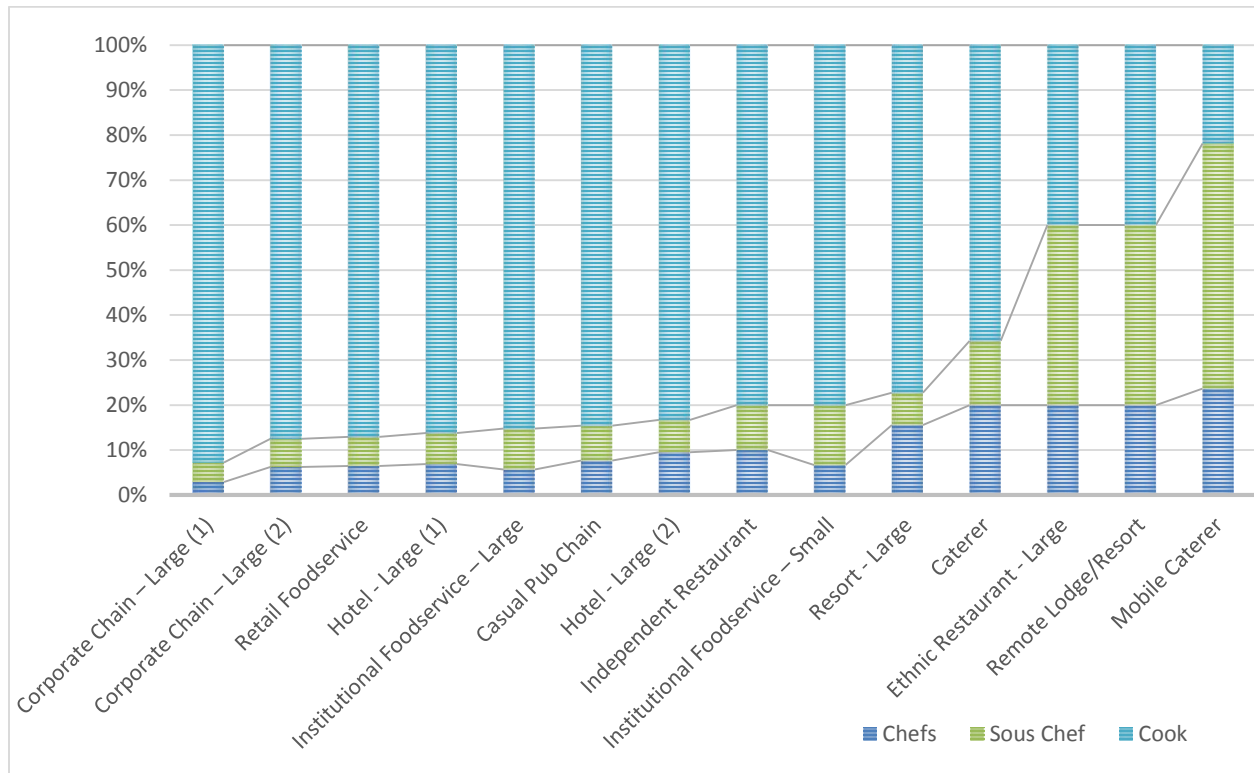
### Industry Composition and Workforce Distribution

*Observation 1: The foodservice industry is a very diverse landscape with many small independent operators and a wide range of work environments.*

Structured interview feedback provided a snapshot of typical workplace structures. Not surprisingly there was a large variety among the 15 interviews, but many similarities. Overall, it was noted that the overall ratio of Cooks to Chefs from the LFS data seemed inaccurate, as the 2014 Labour Market Outlook showed 29,500 Cooks (NOC 6322) and 10,500 Chefs (NOC 6321) in BC, or a ratio of slightly less than three Cooks for every Chef (2.81).

Data gathered in structured interviews showed a wide range, but an industry wide average of approximately 80% are Cooks with Chefs and sous chefs making up the remaining 20% implying a ratio closer to four Cooks for every Chef. This varies significantly by segment type, with caterers and institutional foodservice tending to have higher proportions of Cooks and sous chefs, as indicated in **Figure 3**. Notable exceptions were remote lodges, remote/mobile catering, and ethnic specialty restaurants which relied more proportionately on Chefs and sous chefs than Cooks due to their unique operating environments and small workforce numbers.

Figure 3. Composition of typical workplaces from structured interviews.



Size varied heavily as well, with hotels, resorts, institutions and the largest corporate chains employing large numbers of Cooks and Chefs (30 to 100+ per unit), with other categories employing between 5 and 15 per unit, as indicated in **Table 4**.

Table 4. Count of Cooks and Chefs per operating location from structured interviews.

	<b>Chefs</b>	<b>Sous Chef</b>	<b>Cook</b>	<b>Total Staff</b>
Ethnic Restaurant - Large	1	2	2	<b>5</b>
Remote Lodge/Resort	1	2	2	<b>5</b>
Independent Restaurant	1	1	8	<b>10</b>
Casual Pub Chain	1	1	11	<b>13</b>
Retail Foodservice	1	1	12-15	<b>14-17</b>
Institutional Foodservice – Small	1	2	12	<b>15</b>
Corporate Chain – Large (2)	1	1	14	<b>16</b>
Mobile Caterer	6-7	15	6	<b>27-28</b>
Hotel – Large (1)	2	2	25	<b>29</b>
Caterer	7	5	23	<b>35</b>
Corporate Chain – Large (1)	1	1-2	31-33	<b>33-36</b>
Hotel –Large (2)	4	3	35	<b>42</b>
Institutional Foodservice – Large	5	8	75	<b>88</b>
Resort - Large	43	20	214	<b>277</b>

Further interviews explored the terminology and overlap between the Cook, Chef, and Kitchen Helper NOCs. Based on this feedback, it was determined that inclusion of Kitchen Helpers (NOC 6711) into the overall workforce distribution model was going to be critical.

QSR operators indicated that rarely, if ever, are those preparing food in the kitchen referred to as cooks internally, and apart from perhaps one or two corporate Chefs working on product development, they employ no Chefs at the unit level. Cook is not used commonly in job titles or job descriptions, and in jurisdictions like BC and Alberta, where the Temporary Foreign Worker (TFW) program was used, employers were clear that those working in a typical QSR kitchen are not Cooks in the government’s language for immigration purposes, but are Food Counter Attendants and Kitchen Helpers. Similarly, all of their more senior roles are classified as Food Service Supervisors or Food Service Managers according to the NOC codes.

To add complexity to this, employers working in the casual chain sector indicated that often job applicants with experience in QSR who had larger culinary aspirations will put “cook” as their former job title on resumes, further validating potential inaccuracies in the LFS data set. Where this can have significant impact is in quantifying unmatched supply and demand. For example, if a significant number of individuals self-declare as Cooks, but are actually more correctly Food Counter Attendants and Kitchen Helpers, they will not be linked with job openings to the correct occupations in systems that rely on NOC classifications, such as Labour Market Impact Assessments and comparisons of job vacancies to unemployment rates.

Based on the structured interview feedback and further validation by the steering committee, WorkSafeBC data was used to derive a better understanding of where Cooks and Chefs in BC are employed. This data included the Classification Units (CUs) representing the bulk of Cooks and Chefs including accommodation, institutional food service, FSR, QSR, drinking places, caterers, etc. It is assumed that the majority of employers register their operations in the correct CU, but some “noise” in the data is likely to exist as a result of employers incorrectly classifying their payroll.

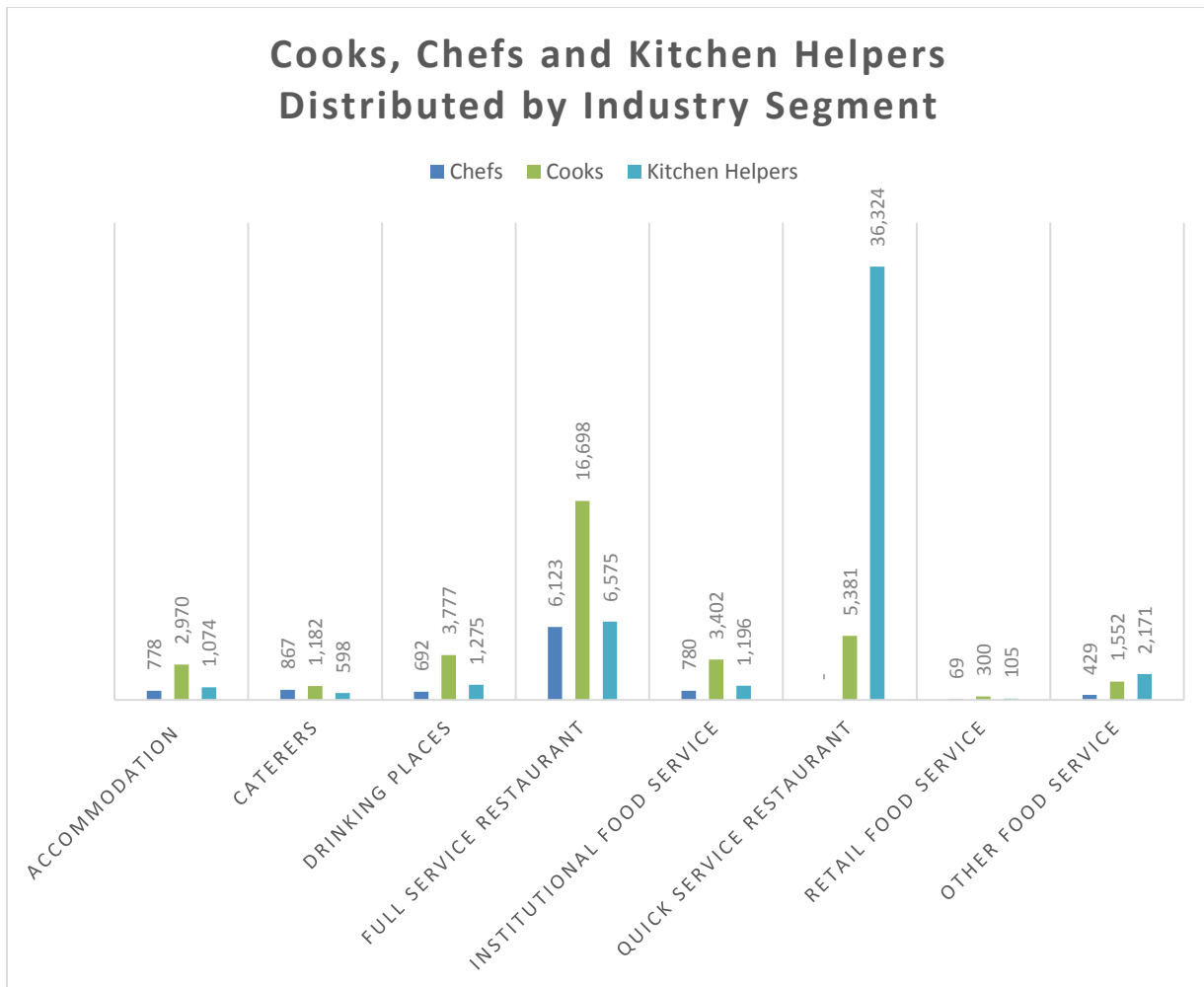
Because payroll for these employers includes “front of house” in addition to “back of house” staff, estimates for staffing ratios, wages, and full-time / part-time splits for small, medium and large employers in each sector were applied in order to determine the proportion of payroll attributable to Cooks, Chefs and Kitchen Helpers and derive an estimate for FTEs and headcount.

From this modeling, various analyses of the data were applied to identify the number of Cooks, Chefs and Kitchen Helpers working in different environments, by industry subsector, those working in independent restaurants and multi-unit or chain environments, and those working in establishments specializing in particular cuisines. The following workforce breakdowns reflect the current composition of the industry, and supply and demand forecasts were applied to the occupational groups as a whole, not by industry segment or by persona.

*Breakdown by Industry Segment*

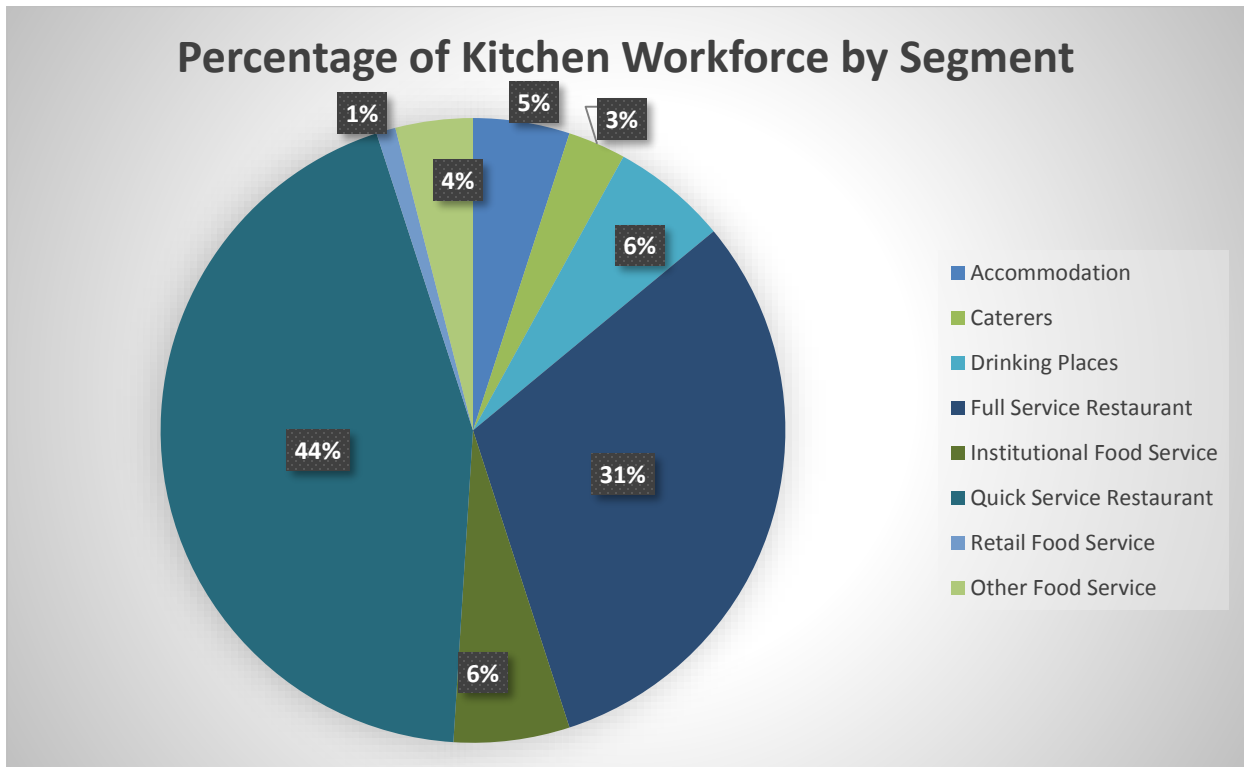
The largest number of Cooks (47%) and Chefs (63%) work in FSR, while most Kitchen Helpers (74%) work in QSR (**Figure 4**).

*Figure 4. Kitchen workforce distribution by industry segment.*



In terms of the overall kitchen workforce, QSR (44%) and FSR (31%) account for ¾ of all of the positions (**Figure 5**)

Figure 5. Percentage of overall kitchen workforce by industry segment.

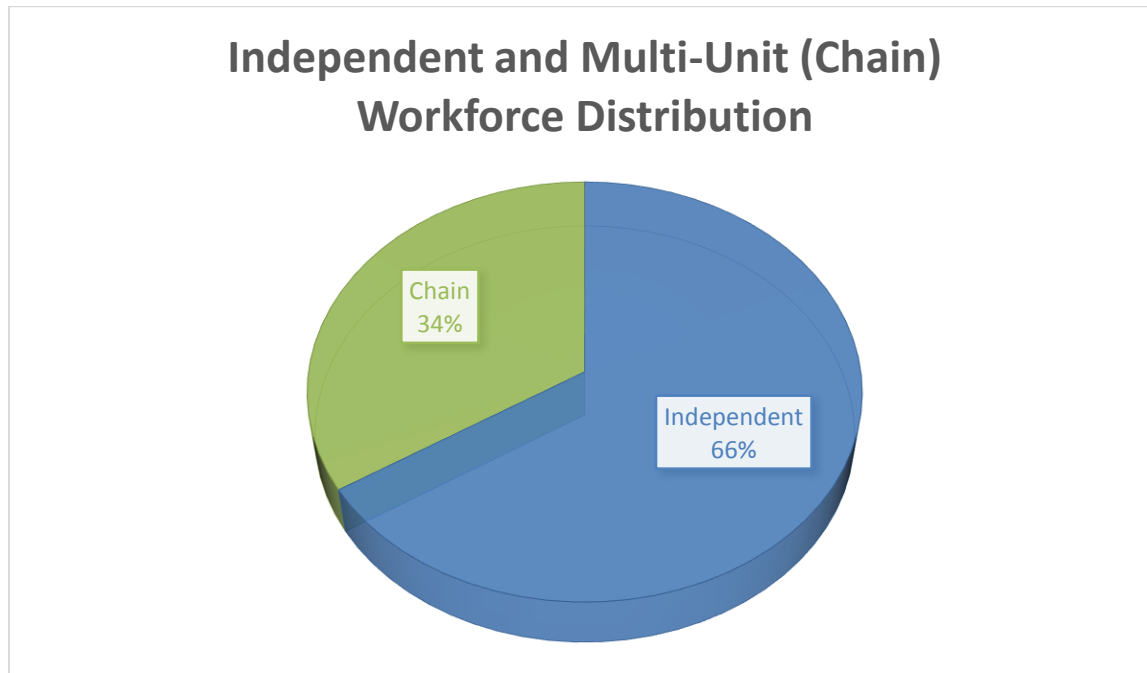


#### Breakdown by Number of Operating Locations

The project team identified some differences in labour market pressures experienced by independent restaurants versus larger corporate chains. Segmenting the payroll data by number of locations offers one approach to quantifying the approximate proportion of Cooks, Chefs and Kitchen Helpers working for independent employers. Although this approach may capture the franchise locations of larger chains as “independent”, in practice this is probably the right categorization, as often these businesses tend to act more like independent restaurants in terms of HR approach, corporate culture and the overall employee value proposition.

As shown in **Figure 6**, two-thirds of Cooks, Chefs and Kitchen Helpers (by headcount) are employed by organizations having a single operating location across all industry segments.

*Figure 6. Distribution of kitchen workforce by single location (independent) vs multi unit (chain) employers.*





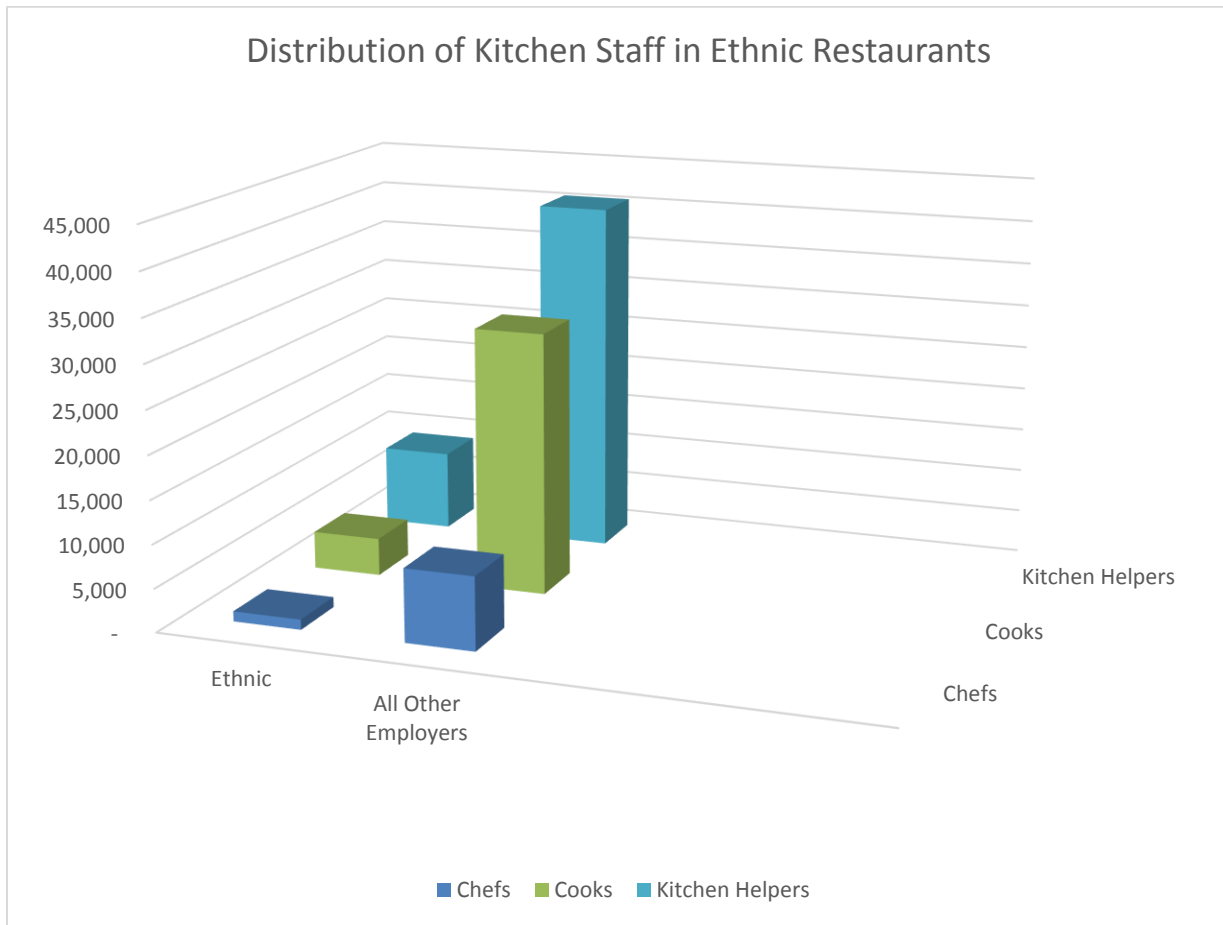
*Breakdown by Cuisine Types*

Ethnic restaurants are a sub-sector that displays unique labour market characteristics and more acute shortages for kitchen staff, particularly due to a lack of domestic training or supply of people trained in ethnic specialty cuisines. Payroll data does not specify whether a restaurant falls into an ethnic food category, but in order to arrive at a directional estimate the project team has flagged employers within the data set based on a search for key words (e.g., “sushi”). As shown in **Figure 7**, based on this approach, ethnic restaurants represent 23% of unit count or restaurant locations (2,499 out of 11,077 locations) and nearly 15,000 jobs (approximately 16% of total kitchen staff provincially, **Figure 8**). This indicates that the majority of ethnic specialty restaurants fall into the small independent category as well.

*Figure 7. Location count of restaurants featuring an ethnic specialty.*



Figure 8. Kitchen Staff distribution in ethnic restaurants.



*Breakdown by Business Size*

Restaurants Canada uses different measures for restaurant size or volume, base on either number of seats or sales revenue. Based on the typical breakdowns of approximately 1/3 of revenue attributed to payroll, the project team determined that a similar approach would represent an effective model using payroll data. Foodservice operations across all segments were banded according to representative bands that align with Restaurants Canada sales bands: Under 100k in payroll translates into an operation with approximately 300k in sales, and similar range bands were applied for 100-250k (300-750k in sales), 250-500k (750k-1.5m in sales), 500k-1m (1.5-3m in sales), and over 1m (over 3m in sales)

Very small businesses with payrolls of less than \$100,000 per year represent close to 40% of total employer locations (**Figure 9**) but only 6% of payroll. Only 18% of locations have a total payroll of over 500k, but those account for over 50% of total kitchen jobs in BC (**Figure 10**).

Figure 9. Payroll size and unit count.

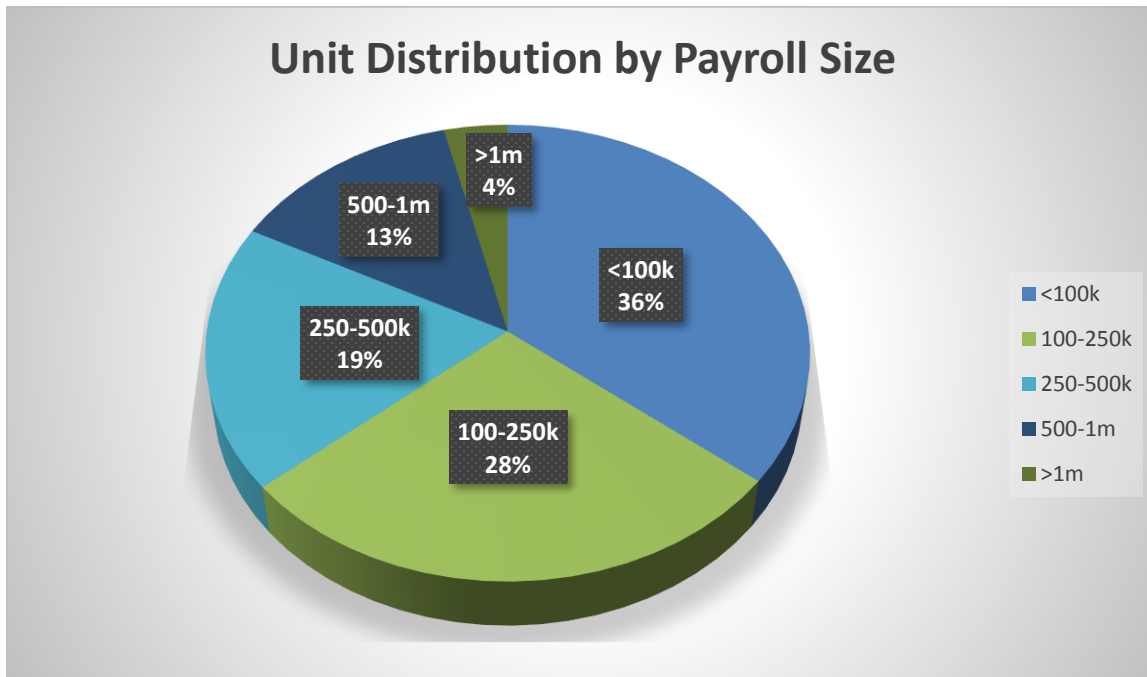
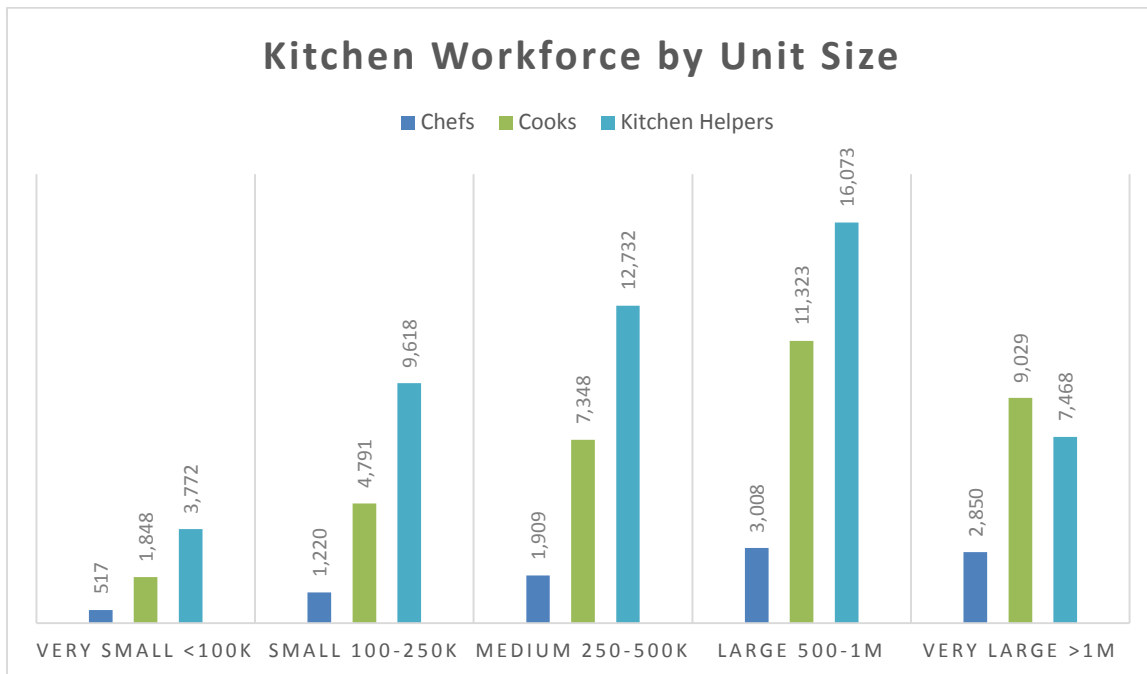


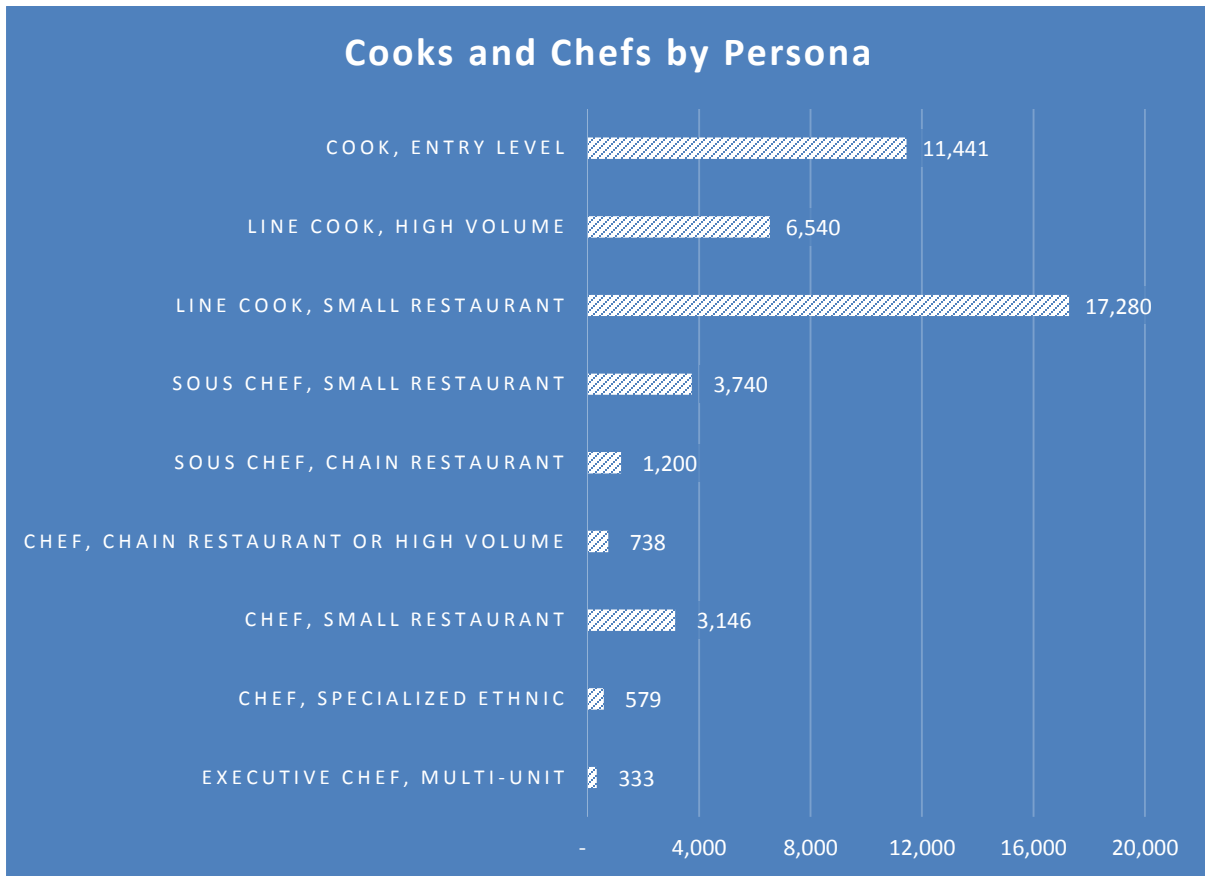
Figure 10. Kitchen workforce distribution by unit size.



*Breakdown by Persona*

Although data for Cooks and Chefs<sup>8</sup> was aggregated for the majority of the workforce distribution analysis, the current distribution by persona (**Figure 11**) is indicative of the types of Cooks and Chefs making up the largest proportion of the workforce and will further inform training and development needs.

*Figure 11. Cooks and Chefs by persona.*



<sup>8</sup> Note: Sous Chefs and all Chef Personas are aggregated into overall Chef numbers in all other sections of this study.

## Compensation

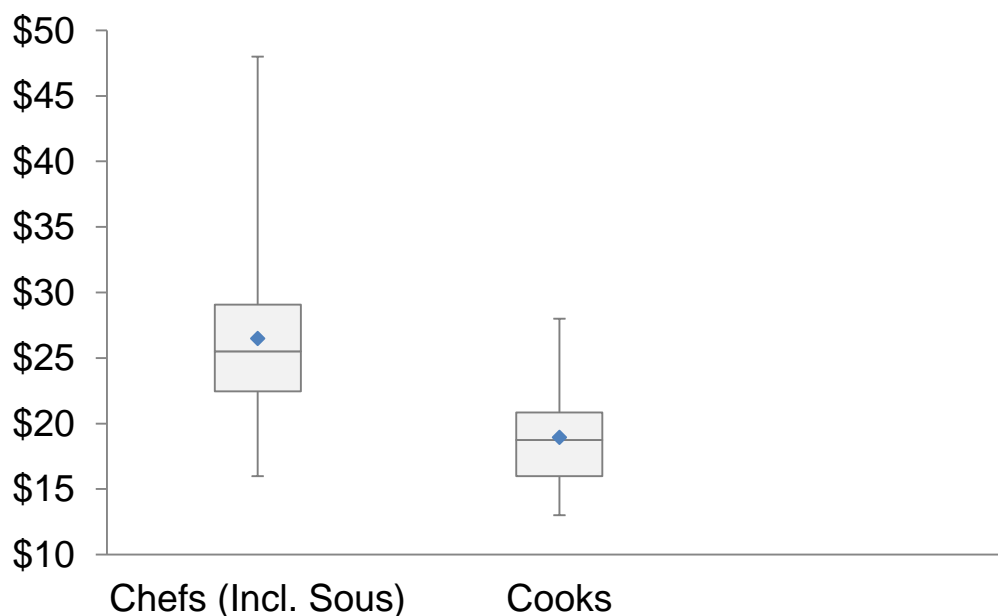
*Observation 2: Compensation varies widely by employer type, with independent restaurants offering lower overall compensation than larger organizations / chains.*

Compensation structures vary between Cooks and Chefs, with sous chefs somewhere in between. Cooks generally receive hourly compensation plus participation in the gratuity (tip) pool. Chefs tend to be in salaried positions with the opportunity for bonuses based on performance against key performance indicators (e.g., food costs). Some observations included:

- Chefs that were paid on an hourly basis were almost exclusively found in the catering sector
- Chefs who receive gratuities are actively involved in cooking and are not part of a large chain
- Bonuses for sous chefs are usually less than bonuses for chefs in terms of proportion of base salary
- Cooks who don't receive gratuities tend to be in institutional and unionized environments
- Cooks who receive bonuses were found in catering and camp sectors

Wage and benefits varied greatly by industry segments. Structured interview results indicated BC's large chains appear to provide the highest compensation for both Chefs and Cooks. Compensation at independents tends to be lower, with catering and institutional foodservice providing mid-range compensation. Unionized positions in mobile catering and institutional foodservice often pay more than comparable non-unionized positions (**Figure 12**).

*Figure 12. Average hourly compensation data from structured interviews.*



This was further corroborated by the employee survey, which showed similar patterns as indicated in **Table 5**.

*Table 5. Salary information gathered from employee survey*

Annual Compensation	Chain Chef	Independent Chef	Chain Cook	Independent Cook	Institutional/ Self-Employed
<b>Responses</b>	52	95	20	35	59
<b>Mean</b>	\$61,968	\$56,443	\$36,039	\$31,229	\$53,209
<b>Median</b>	\$60,000	\$51,400	\$33,920	\$30,625	\$45,500
<b>&lt; \$35,000</b>	0%	7%	53%	82%	14%
<b>\$35,000 – &lt; \$45,000</b>	20%	25%	21%	15%	35%
<b>\$45,000 - &lt; \$60,000</b>	27%	30%	26%	3%	21%
<b>\$60,000 or higher</b>	52%	38%	0%	0%	30%

Results from go2HR’s structured interviews and employee survey indicate that the compensation range for Cooks and Chefs is much wider than previously reported, with somewhat higher median compensation.<sup>9</sup> (**Table 6** and **Figure 13**).

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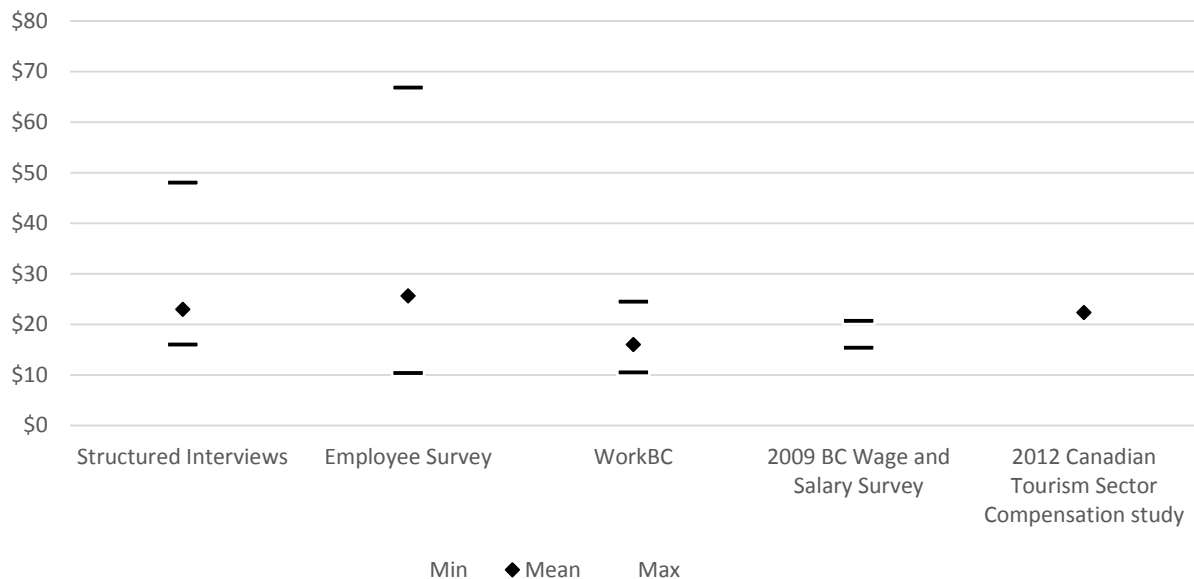
<sup>9</sup> (1) Base Wage excludes gratuities and bonuses

(2) Salary compensation was converted into an hourly wage rate based on a 40-hour work week and a 52-week year. Averages were calculated with a weighting based on responses from different age bands within the occupational group to adjust for age bias in the sample.

Table 6. Consolidated and weighted data from employee survey.

	Base Compensation (excl. bonus, grats)		Total Compensation (incl. bonus, grats)	
	Chefs	Cooks	Chefs	Cooks
minimum	\$10.38	\$10.25	\$11.54	\$10.25
10 <sup>th</sup> percentile	\$16.31	\$12.00	\$17.50	\$12.79
Q1	\$19.00	\$13.00	\$20.45	\$13.78
Average	\$25.63	\$16.55	\$27.53	\$17.23
Median	\$23.08	\$15.00	\$24.13	\$15.91
Q3	\$30.29	\$19.90	\$32.64	\$20.00
90 <sup>th</sup> percentile	\$36.90	\$22.00	\$42.91	\$23.20
maximum	\$66.83	\$28.66	\$70.29	\$31.54

Figure 13. Comparison of base compensation for Chefs from different sources.



Median results for Cooks are generally well aligned across the structured interviews, employee survey and other studies. However, both the structured interviews and employee survey results suggest a much higher upper bound for compensation (**Figure 14**)

Figure 14. Comparison of base wage rates<sup>10</sup> and ranges for Cooks from various data sources.



<sup>10</sup> Base wages do not include bonuses or gratuities

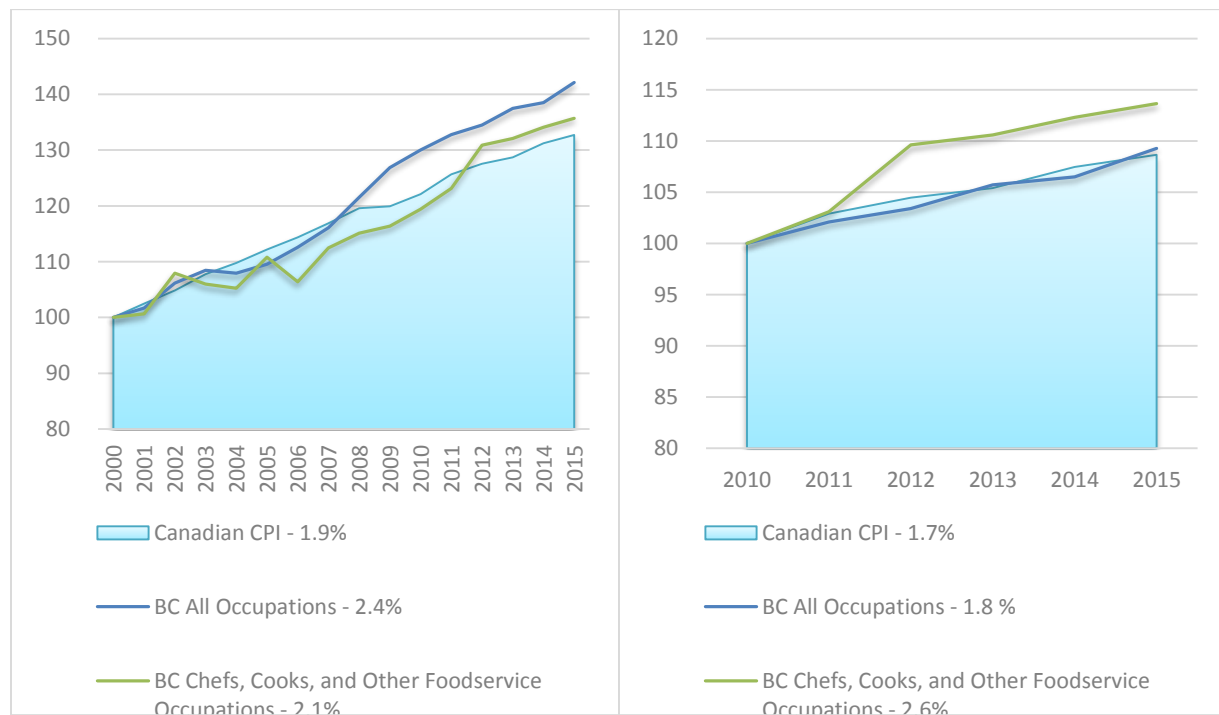


## Labour Shortages

*Observation 3: Compensation does not appear to be increasing faster than for other occupations, but there is other evidence of some current sector-wide shortages.*

One of the leading indicators of a current labour shortage is accelerated wage growth compared to other occupations or industries. Compensation growth for Cooks and Chefs and other foodservice occupations has kept relative pace with other occupations, growing at an annual rate of 2.1% since 2000. This is somewhat higher than average annual CPI growth of 1.9% over the period, but somewhat lower than the all occupation average of 2.4%. There appears to have been a lag in 2008-2009 compared to the overall economy, which ties into timing of the global financial crisis that hit the foodservice industry hard as sales volumes declined due to less disposable income. There was a correction in 2011-12, partly influenced by a raise in BC's minimum wage from \$8.00 to \$10.25 over that period as well as strong industry growth, which rebounded from a decline in 2009 and limited growth in 2010-2011. **(Figure 15)**

Figure 15. 15-year and 5-year wage growth rates.



Wage growth rates aside, there are other indicators of shortages across the industry to consider. Just prior to this project, go2HR conducted a broader based study on the economic impact of labour shortages in BC on the tourism industry as a whole. Raw data from that industry survey provided additional perspective on current Cook and Chef shortages in the industry. Of respondents likely to employ kitchen staff, 61% reported a vacancy in 2014 and 39% reported a vacancy for a kitchen position (Cook, Chef, or Kitchen Helper) **(Table 7)**

Table 7. Vacancy prevalence in 2014.<sup>11</sup>

	Employers with Kitchen Staff	Other Respondents	All Observations
Indicate vacancy	135	100	235
Indicate kitchen staff vacancy	88	-	103
Indicate no vacancy	88	139	227
<b>Total Observations</b>	<b>223</b>	<b>239</b>	<b>462</b>
Overall vacancy prevalence <sup>12</sup>	61%	42%	51%
Kitchen staff vacancy prevalence <sup>13</sup>	39%	-	-

In addition to showing relatively high vacancy rates, kitchen staff positions were consistently ranked as one of the most difficult positions to fill.

- 64% of employers with a vacant kitchen staff position ranked it as the “hardest to fill”
- 90% of employers with a vacant kitchen staff position ranked it in their top three “hardest to fill”
- Over 90% of kitchen staff vacancies involved the vacancy of either a cook or a chef.

Of employers reporting vacancies for kitchen staff, 73% of employers with a vacant kitchen staff position identified themselves as facing a labour shortage, compared to 57% for other employers who were also experiencing vacancies. Reported shortages were not exclusive to certain regions or employer types, but certainly more pronounced.

- Shortages are less, but still high for seasonal employers (44% compared to 52% for non-seasonal employers)
- Shortages are more pronounced outside of the Vancouver Coast and Mountains (VCM) and Vancouver Island (VI) tourism regions (46% for VCM and VI and 56% for all other regions)
- Small firms (revenue <\$1M) appear less adept than large firms (revenue > \$1M) at dealing with kitchen staff vacancies in a way that prevents labour shortages - 83% of small firms who experience a kitchen staff vacancy also report a shortage. This is more muted for larger firms with a kitchen staff vacancy, for whom 69% will also report a shortage

<sup>11</sup> Source BC Economic Impact Survey 2015 (go2HR)

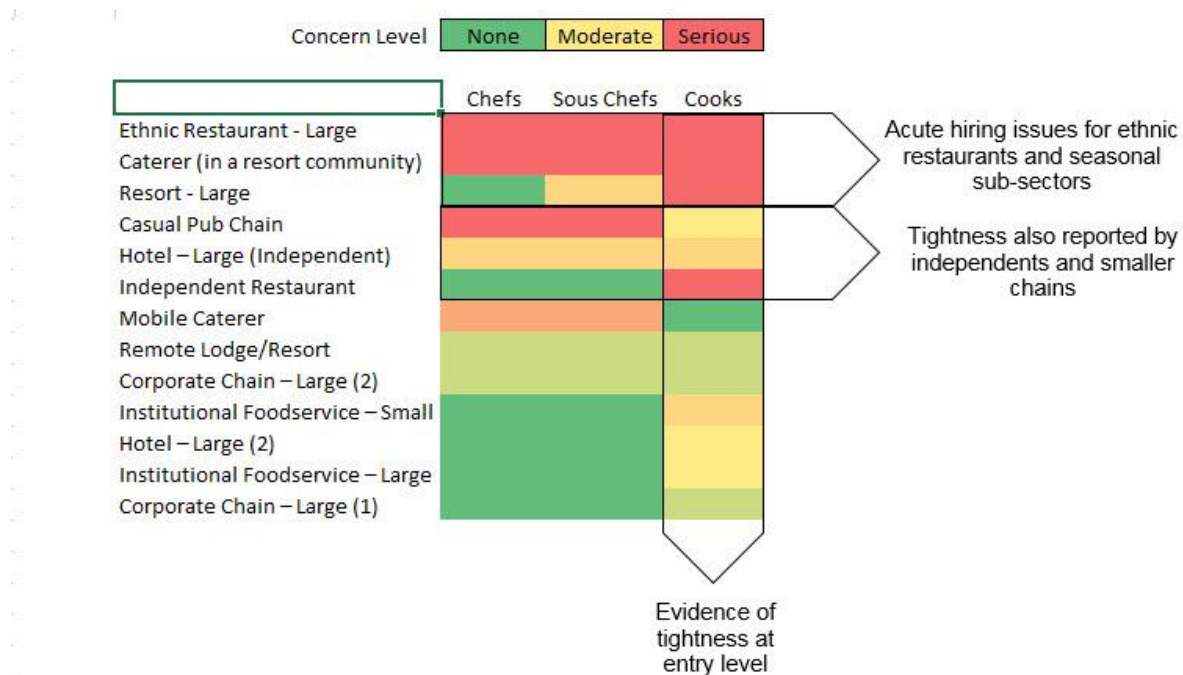
<sup>12</sup> Overall Vacancy Prevalence refers to the % of employers who indicated at least one vacancy in any position (including non Kitchen Staff)

<sup>13</sup> Kitchen Staff Vacancy Prevalence refers to the % of employers who indicated at least one vacancy in a Kitchen Staff position (cook, chef or kitchen helper)

*Observation 4: There are signs of increasing labour market tightness, particularly at the entry level, and pockets of more acute issues for certain sub-sectors.*

When asked specifically about hiring shortages, most structured interview participants noted increasing challenges in hiring at the entry level. More acute issues were limited to specific sub-sectors: ethnic restaurants, independent restaurants and seasonal / resort employers (**Figure 16**)

Figure 16. Concern with hiring challenges and shortages among structured interview participants.<sup>14</sup>



<sup>14</sup> Figure 16 is a heat map illustrating the level of concern with hiring and shortages, as reflected in responses to questions such as:

- “How would you characterize employee turnover for this position?”;
- “In the past year, have you experienced difficulty hiring or filling vacant positions for this position?”;
- “How would you describe shortages today compared to previous years?”;
- “Describe the nature of the shortage for this position type”; and
- “Why do you think you have been experiencing shortages for this position”.

Assessing the level of concern is primarily a qualitative exercise. Colors close to red (e.g., orange) indicate increasing levels of concern, while colors closer to green (e.g., pale green) indicate lower levels of concern. Yellow represents a moderate level of concern.

The highest level of concern (red) indicate areas where shortages are having a material negative impact on ability to sustain or grow operations. For example, one firm had to close down a location and distribute the employees across remaining locations to meet operational requirements.

Summaries of qualitative feedback from each of these sub-sectors is as follows:

#### Ethnic Restaurants

- Extensive shortages experienced at all levels, which has limited restaurant expansion
- Hiring is almost exclusively from (1) other ethnic restaurants and (2) foreign workers via the Temporary Foreign Worker (TFW) or Provincial Nominee Program (PNP)
- Challenging to hire resident Canadians because they lack specialized cooking and/or language skills
- Increasingly difficult to source new hires through both the TFW/PNP programs, which although they have different requirements the themes were common to both immigration streams
  - Length of process (up to 18 months)
  - English/French language requirements limits pool of applicants
  - Expense (\$10K/employee)

#### Independent Restaurants

- Perceived increase in competition from other restaurants, particularly large chains
- Inability to match higher wages offered elsewhere due to tight budgets
- Lack of applicants for entry level positions and/or applicants are under-skilled
  - Work ethic, food knowledge and scratch cooking skills are common areas for lacking skills
  - Lack of applicants is considered a more serious problem than under-skilled staff for some employers
- Particularly challenging to hire in smaller cities and towns (outside of Vancouver)
- Young people do not view entry level positions as the beginning of a career – often exit the industry (go back to school, etc.)

#### Seasonal. Resort Employers

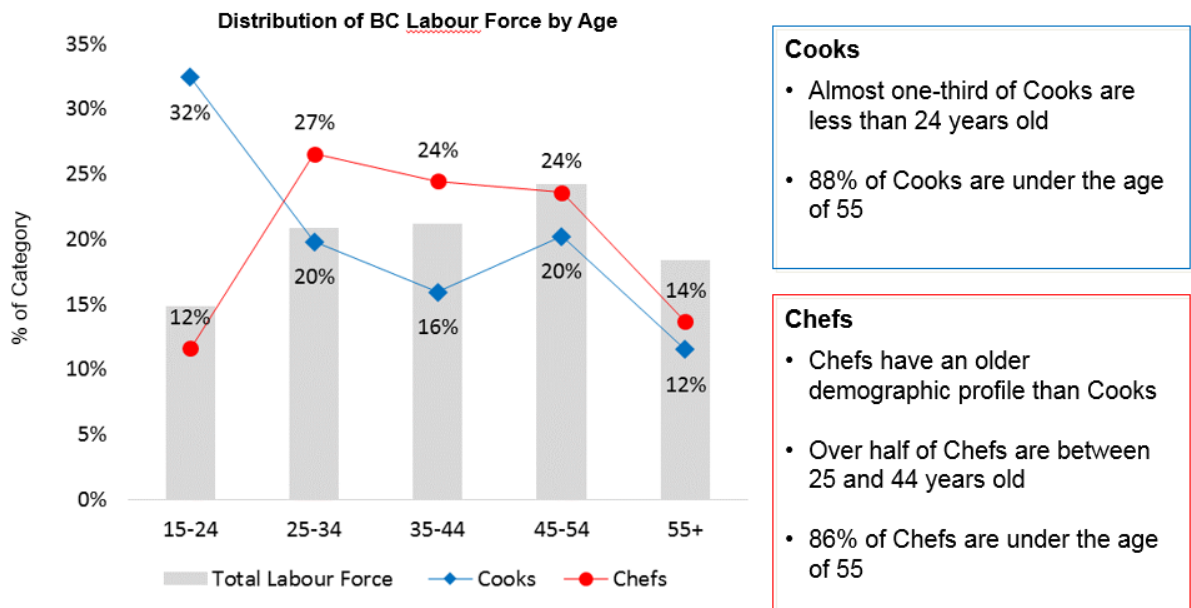
- Chronic, worsening staffing shortages experienced in seasonal areas like Whistler, the Okanagan and Tofino
- Significant declines in applicants means it takes much longer to fill positions
- Applicants are typically underqualified (i.e. employers are hiring people without all of the skills they need to make do), but “quantity” remains a larger issue than “quality” for most positions
- Reliance on foreign workers, particularly in Whistler (the highest proportion being working holiday visa holders, but also needing some TFW, and sponsoring many of those to stay through PNP)
- Affordable housing is an issue in both the Okanagan and Whistler

Given the proportions of ethnic restaurants and small independent restaurants, these factors affecting specific sub-sectors are of significant importance

### Demographic impact

One reason that the sector may be experiencing increased labour market tightness for entry level positions is related to demographics. The age of people working as Cooks and Chefs differs significantly from the broader BC labour force. Most notably, the age at which people exit the occupation (i.e. retirement age) for both Cooks and Chefs is significantly lower than the provincial average age of 62, with 67% of Cooks under the age of 45, versus 57% for the broader labour force (**Figure 17**).

Figure 17. Age distribution of Cooks and Chefs.<sup>15</sup>



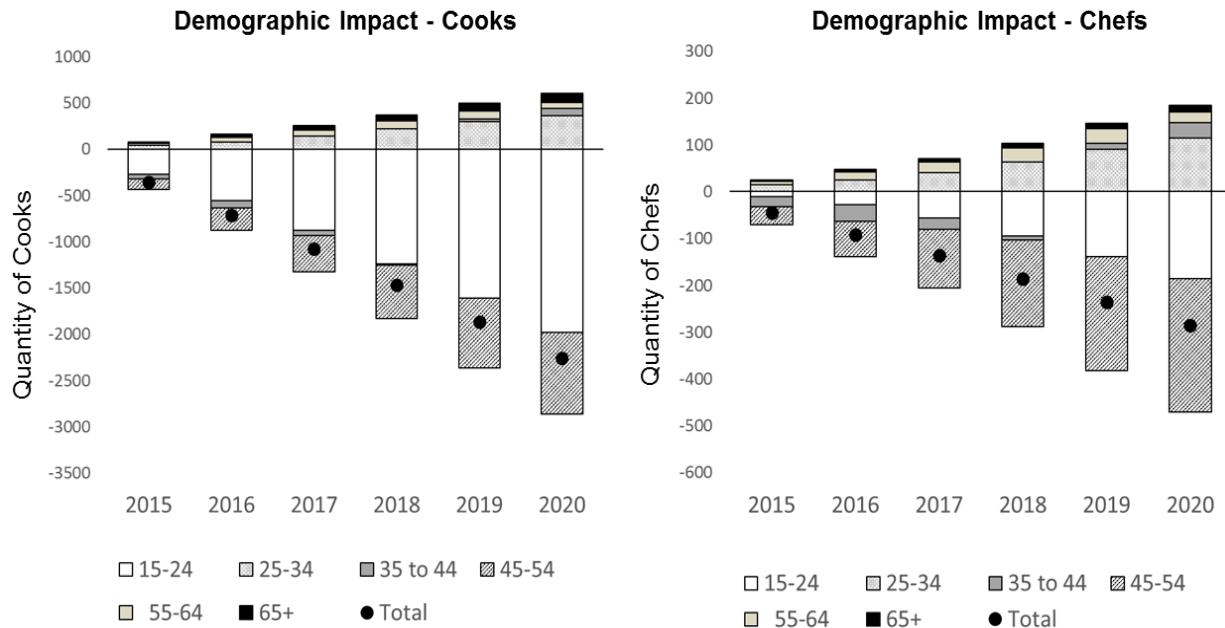
This was corroborated by the employee survey, in which the majority of Cook respondents were under 34 and the majority of Chef respondents between 35 and 54. Of those who had left the industry, the largest grouping (40%) left the industry between the ages of 35 and 44.

The shrinking 15-24 and 45-54 age groups are creating the most drag on Chefs and Cooks. Cooks are more heavily affected by the shrinking amount of 15-24 year olds, while Chefs are more heavily affected by 45-54 year olds.

<sup>15</sup> Sources: Statistics Canada, 2011 National Household Survey, Statistics Canada Catalogue no. 99-012-X2011033

Graphs in **Figure 18** illustrate the effect that the changing age profile has on the potential supply of Cooks and Chefs. The impact is calculated by taking the difference between the quantity of Cooks/Chefs in a scenario where the age distribution is changing, compared to a scenario where the age distribution is constant. The overall rate of population growth in both scenarios is constant, but is allowed to vary across age groups.

Figure 18. Demographic impact on the potential supply of Cooks and Chefs. Age segments above the 0 line are growing and those below are shrinking.



Approximately 60% of Cooks are male, and this has changed little over time. Chefs rely even more heavily on the male demographic, although this has declined somewhat in recent years. Currently 60% of Cooks and 74% of Chefs are male. <sup>16</sup>

Existing data on age and gender distribution among Cooks and Chefs was reinforced in the Employee Survey, with an interesting note – the largest percentage of Cooks and Chefs over 45 are working in institutional foodservice or are self-employed (**Table 8**).

<sup>16</sup> Sources: Statistics Canada, 2011 National Household Survey, Statistics Canada, 2006, 2001, 1996, 1991 Census of Population, Statistics Canada Catalogue no. 99-012-X2011033, 97F0012XCB2001022 and 97-559-XCB2006012

Table 8. Age and gender distribution from employee survey.

	Chain Chef	Independent Chef	Chain Cook	Independent Cook	Institutional/ Self-Employed
<b>Responses</b>	52	95	20	35	59
<b>Age</b>					
18 - 24	6%	2%	30%	40%	0%
25 - 34	29%	33%	35%	37%	14%
35 - 44	40%	51%	20%	17%	24%
45 - 54	21%	7%	10%	6%	47%
55 or older	4%	7%	5%	0%	15%
<b>Gender</b>					
Male	92%	83%	65%	69%	69%
Female	8%	17%	35%	31%	31%

## Growth Projections

*Observation 5: Independent of the labour market supply situation, growth in demand for Cooks and Chefs is expected to be positive as a result of general economic growth, changing consumer preferences (less cooking at home) and other factors. In addition, when labour force demand is measured as “headcount”, the part-time /full-time structure of the industry becomes an important driver of demand.*

The BC LMO (2015) projects demand for Cooks and Chefs at a growth rate of 1.5% for the next 10 years. This is consistent with longer-term historic trends, but below the growth rates experienced over the last five years. (**Table 9**)

Table 9. Historical and projected growth rates from different sources.

Source	Historical Data		Projections		Data Range
	Last 10 years	Last 5 years	Next 5 years	Next 10 years	
<b>2014-2024 LMO</b>					2015-2024
Cooks and Chefs BC Employment			1.5%	1.5%	
Cooks and Chefs BC Demand			1.4%	1.4%	2016-2025
<b>2015-2025 LMO Consultation</b>					
Food Services and Drinking Places Demand			1.5%	1.3%	2005-2014
<b>Labour Force Survey</b>					
Cooks and Chefs BC Employment	1.0%	6.1%			
Cooks and Chefs BC Labour Force	0.7%	5.0%			2016-2025
<b>Foodservice Units (Restaurants Canada)</b>	0.1%	3.3%			
<b>SEPH employment</b>					2005-2015
Food Services and Drinking Places	3.3%	3.3%			
<i>Low</i>	0.1%	3.3%	1.4%	1.3%	
<i>Average</i>	0.6%	4.8%	1.5%	1.4%	
<i>High</i>	1.0%	6.1%	1.5%	1.5%	

For the purposes of evaluating labour force supply/demand levers, we have selected a “base case” growth rate of 1.5%. However, there are a number of reasons that demand could exceed this pace:

**Disposable Income:** Higher disposable income will tend to increase restaurant traffic and demand for foodservice. Changes to disposable income are driven by employment, population growth and the economic cycle

**Foreign Exchange Rate:** A weaker Canadian dollar drives restaurant traffic in two ways: more BC-bound tourism from the U.S., and less outbound tourism by locals



**Changing Preferences:** Consumer preferences appear to be shifting away from home cooking, driving demand for both foodservice and home meal replacement (HMR) products

**Retirements:** Retirements are an important demand factor for Cooks and Chefs, particularly given the relatively young retirement age of Cooks and Chefs relative to other professions, as well as an increase of retirement residences which provide full meal services

**Staffing Model:** The number of Cooks and Chefs required by the industry will increase when employers choose to hire more part-time rather than full-time staff

Conversely, changes in the opposite direction, such as a stronger Canadian dollar, and increase in full-time staff, and retention strategies that result in Cooks and Chefs working longer in the industry will have impacts in either reduced demand or increased supply.

In any case, the Labour Market historically tends to end up in equilibrium, as unavailable supply results in an inability to meet demand, which slows net growth.

## Employee Value Proposition

Results from the employee survey captured, from the employee's perspective, factors such as wages and benefits, training opportunities, career plans, employer policies on holidays and overtime, and a number of other factors that all play into the overall Employee Value Proposition. The intention was to capture other dynamics at play in the landscape of the kitchen as a work environment, which could be used as the lever with the greatest opportunity for impact to supply and demand – retention. Given that both occupations see an exit point substantially earlier than other occupations, strategies that reduce turnover and keep Cooks and Chefs working in the industry longer are critical, particularly in light of a shrinking supply of its primary demographic market.

*Observation 6: There was a significant contrast between the experiences of Chefs and Cooks working for hotel and restaurant chains versus smaller independent establishments.*

There was a significant contrast between the experiences of Chefs and Cooks working for hotel and restaurant chains versus smaller independent establishments. This was observed in a number of areas. In many cases, those working in institutional foodservice or that were self-employed show similar patterns to chain Cooks and Chefs.

### *Training and Apprenticeship*

Independent Chefs are the segment most likely to have completed an apprenticeship (68%) – and the most likely to have completed it in Canada (60%). One-third of chain Chefs have never been an apprentice. Consistent with their relative youth, independent Cooks are the segment most likely to be registered as apprentices (**Table 10**)

Table 10. Experience with apprenticeship and certification from employee survey

Apprenticeship in Cook Profession	Chain Chef	Independent Chef	Chain Cook	Independent Cook	Institutional/ Self-Employed
Responses	63	143	28	44	67
I completed an apprenticeship and my certification in Canada	44%	60%	29%	20%	39%
I completed an apprenticeship and certification in another country	14%	8%	0%	5%	12%
I am currently registered as an apprentice	5%	2%	14%	27%	6%
Was registered as an apprentice but didn't complete	3%	10%	14%	16%	4%
No, I have never been an apprentice in the cook profession	33%	20%	43%	32%	39%

Despite being less likely than their Independent counterparts to have completed apprenticeship training<sup>17</sup>, chain Chefs have more opportunities for advancement with their current employers. For example, chain Chefs are four times as likely as independent Chefs to report that, prior to taking their current position, they were working at a lower level kitchen position with the same employers.

Chain Chefs are significantly more likely than independent Chefs to receive training - particularly in areas that will prepare them for taking on management and executive-level responsibilities – e.g., management and supervisory training, professional development courses.

Other than apprenticeship training, independent Cooks report receiving very little internal or external training. 6-in-10 independent Cooks reported that they did not receive any training in the seven areas that were inquired about in the survey (**Table 11**). It is clear that independent Cooks are looking for at least some forms of training. With a few exceptions, independent Cooks placed just as much importance on a broad range of culinary skills and aptitudes.

<sup>17</sup> Participation in apprenticeship by large chain restaurants has been on the increase but is a fairly recent occurrence in large volumes

Table 11. Training and development opportunities

Training & Development Opportunities	Chain Chef	Independent Chef	Chain Cook	Independent Cook	Institutional/ Self-Employed
Base	42	88	18	33	45
In-house (corporate) training	74%	36%	67%	12%	40%
Apprenticeship training	40%	27%	39%	39%	20%
Professional certifications (CCC, Sommelier WSET training, etc.)	33%	13%	6%	3%	13%
Management / supervisory training	60%	26%	11%	9%	31%
University courses (toward diploma or degree)	5%	3%	6%	0%	7%
External courses and certificates (FOODSAFE, First Aid, etc.)	67%	43%	28%	9%	38%
Professional development courses (seminars, workshops, short courses, etc.)	60%	30%	6%	3%	36%
None	5%	33%	11%	58%	31%

### Compensation and benefits

Chain employees make more than their independent counterparts – chain Chefs make an average of 17% more and chain Cooks make an average of 11% more. However, these differences are conservative estimates of the disparity in compensation. First, chain Chefs and Cooks work significantly fewer hours than their Independent counterparts. Second, chain Chefs and Cooks are much more likely than their Independent counterparts to get basic and extended health coverage, dental insurance and pension and RRSP benefits.

The gap is particularly wide between chain Cooks and independent Cooks. Chain Cooks are twice as likely as independent Cooks to get extended medical coverage and four times as likely to get dental coverage. 6-in-10 chain Cooks get at least two weeks of annual vacation; while only 2-in-10 independent Cooks get at least two weeks of vacation (the majority of independent cooks get paid out a percentage with each cheque).

### Turnover and Career Path

Employer perspectives on turnover were fairly consistent, although the ranges varied considerably. Turnover in Chef positions ranged from 10-23% annually, in sous chef positions from 0-50%, and in Cook positions from 0-300%. The majority of employers viewed turnover as manageable across all position types. Unionized environments and large chains appear to have fewer issues with turnover. Pockets of unsustainably high turnover were identified, particularly in some independent and ethnic restaurants and unique operating environments, like mobile catering.

Also consistent with their relative youth, independent Cooks have been working in the industry for shorter periods of time – half have been in the industry fewer than five years. Chain Chefs have been in their current position for a longer period of time than independent Chefs have, while those with the longest tenure in the industry tend to be in institutional environments or self-employed (**Table 12**).

Table 12. Length of time in current position and industry.

Years Worked in the Food Service Industry	Chain Chef	Independent Chef	Chain Cook	Independent Cook	Institutional/ Self-Employed
Responses	52	95	20	35	59
Less than 1 year	0%	0%	10%	9%	2%
1 year to less than 5 years	8%	3%	20%	40%	8%
5 years to less than 10 years	12%	12%	30%	23%	5%
10 years to less than 20 years	37%	43%	25%	20%	27%
20 years or more	44%	42%	15%	9%	58%
Years in Current Position	Chain Chef	Independent Chef	Chain Cook	Independent Cook	Institutional/ Self-Employed
Less than 1 year	13%	21%	25%	51%	9%
1 year to less than 5 years	48%	49%	55%	43%	41%
5 years to less than 10 years	21%	15%	10%	6%	30%
10 years to less than 20 years	12%	11%	5%	0%	18%
20 years or more	6%	4%	5%	0%	2%

Chain Chefs are four times as likely as independent Chefs to report that, prior to taking on their current position, they were working at a lower level kitchen position within the same company.

Independent Chefs are almost twice as likely as chain Chefs to report that they were working in the same or similar position at a different company prior to taking on their current position.

Chain and independent Cooks are similar with the exception that chain Cooks are more likely to have been working in the same or similar position at a different company, while independent Cooks are more likely to have been working at a lower level position within the same company. However, in both groups, 3-in-10 cooks took a step down to their current position – having worked at a higher level kitchen position at a different company (**Table 13**).

Table 13. Career progression among Cooks and Chefs.

Position Prior to Current Position	Chain Chef	Independent Chef	Chain Cook	Independent Cook	Institutional/ Self-Employed
Responses	51	95	20	35	55
Working in the same or a similar kitchen position at a different company	29%	53%	35%	17%	40%
Working at a lower level kitchen position within the same company	47%	12%	0%	17%	11%
Working at a lower level kitchen position at a different company	14%	17%	5%	9%	7%
Working at a higher level kitchen position at a different company	8%	15%	30%	34%	20%
Working in a completely different job or industry (was not working in the kitchen)	0%	1%	20%	20%	11%
Other (please specify)	2%	3%	10%	3%	11%

When asked what their goals are over the next 1 to 3 years, the most common response among chain Chefs is that they want to be working at a higher level job within the same company. The most common response among independent Cooks is that they want to be working at a higher level job – but at a different company. Independent Chefs are split. They are the segment most likely to want to keep working in the same job for the same company, but also the segment most likely to aspire to owning their own business in the foodservice industry (**Table 14**).

Table 14. Career plans in the next 1-3 years.

Career Goals for 1-3 Years	Chain Chef	Independent Chef	Chain Cook	Independent Cook	Institutional/ Self-Employed
Responses	42	87	18	32	42
Keep working in the same job for the same company	12%	26%	0%	6%	19%
Working at a higher level job within the same company	48%	15%	39%	19%	21%
Working in the same job at a different company	2%	3%	6%	3%	5%
Working at a higher level job at a different company	14%	8%	22%	41%	14%
Owning and operating my own business in the foodservice industry	12%	29%	6%	9%	17%
Working in a related field (chef instructor, food or equipment)	2%	7%	6%	6%	7%
Working outside of the industry	5%	3%	11%	16%	10%
Retired from the industry	2%	3%	6%	0%	2%

### Hours of Work

Independent Chefs have a higher threshold for what they consider to be 'working too much'. Independent Chefs are more likely than chain Chefs to report working more than 50 hours per week but they are less likely to report that they are working far too much.

Given that some independent Cooks are working full-time and some are not, their experience varies. Relatively equal percentages report working less than 30 hours (23%) and more than 50 hours (26%). Accordingly, relatively equal percentages report not working as much as they would like (29%) and working more than they would like (28%). Chain Cooks and institutional/self employed Cooks and Chefs are most satisfied with their working hours – 63% and 56% respectively report that they are working about the right amount (**Table 15**). Note that chain Cooks and those working in institutional foodservice are much more likely to be unionized (42%) than independent Cooks (14%).

Table 15. Hours of work and satisfaction

<b>Hours Worked Per Week on Average</b>	<b>Chain Chef</b>	<b>Independent Chef</b>	<b>Chain Cook</b>	<b>Independent Cook</b>	<b>Institutional/ Self-Employed</b>
Responses	50	95	19	35	55
Less than 30 hours	0%	1%	16%	23%	15%
30 - 40 hours	6%	6%	47%	37%	35%
40 - 50 hours	48%	38%	32%	9%	27%
Over 50 hours	44%	54%	5%	26%	22%
<b>Satisfaction with Hours Worked</b>	<b>Chain Chef</b>	<b>Independent Chef</b>	<b>Chain Cook</b>	<b>Independent Cook</b>	<b>Institutional/ Self-Employed</b>
Not working nearly enough	0%	0%	0%	3%	2%
Working a little less than I would like	6%	2%	26%	26%	9%
About the right amount of work for me	40%	37%	63%	34%	56%
Working a little more than I would like	26%	41%	11%	11%	16%
Working far too much	26%	19%	0%	17%	15%

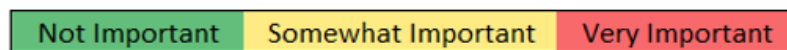
*Observation 7: Cooks and Chefs tend to be passionate about their careers but feel undervalued and overworked.*

*Skills and Attributes*

The last area that was explored was skills and attributes from both the employer’s and employee’s perspective. Both employees and employers highly value attention to detail, the ability to multitask and thrive in a fast paced, high pressure environment, while the importance of creativity varied within both groups (**Figure 19**).

*Figure 19. Employer feedback on important attributes.<sup>18</sup>*

	Chefs	Sous Chefs	Cooks
Clean (in work habits and appearance)	Very Important	Very Important	Very Important
Consistent and dependable	Somewhat Important	Somewhat Important	Very Important
Attention to detail	Somewhat Important	Somewhat Important	Somewhat Important
Calm and professional	Moderate	Moderate	Somewhat Important
Organized and efficient	Somewhat Important	Somewhat Important	Moderate
High endurance	Moderate	Moderate	Moderate
Competitiveness – desire to succeed	Very Important	Somewhat Important	Moderate
Thrives in high energy/high pressure environment	Moderate	Moderate	Moderate
Systems-oriented, sees the big picture	Very Important	Somewhat Important	Moderate
Committed to continual improvement	Somewhat Important	Somewhat Important	Moderate
Loyal to organization – long term stability	Somewhat Important	Moderate	Moderate
Creativity and innovation	Moderate	Moderate	Moderate
Comfortable with non-standard hours	Moderate	Moderate	Moderate
Entrepreneurial	Moderate	Moderate	Moderate



<sup>18</sup> Figure 19 is a heat map illustrating the level of importance of certain attributes to employee success, as reflected in respondent’s rankings of the set of attributes defined above. Assessing the level of importance is primarily a qualitative and subjective exercise. Colors close to red (e.g., orange) indicate increasing levels of importance, while colors closer to green (e.g., pale green) indicate lower levels of importance. Yellow represents a moderate level of importance.



- Being clean, consistent and dependable and attention to detail are important attributes for both chefs and cooks
- Organized and efficient, competitiveness, seeing the big picture, and loyalty to the organization are significantly more important for chefs than cooks
- Creativity and innovation, comfortable with non-standard hours and entrepreneurial were regarded as relatively unimportant compared to the other attributes.

Cooks and Chefs were also asked about what attracted them to the profession in the first place, which overwhelmingly was a love of food. Compared to chain Chefs, independent Chefs were more attracted to the profession because of its fast pace and the opportunity to be creative. Chain Chefs were more likely to first see the profession as a way of making money and then found that they liked it.

Compared to independent Cooks, chain Cooks were also more likely to first see the profession as a way of making money and then found that they liked it. They were also more likely to see the profession as offering good career opportunities and good wages and benefits (**Table 16**).

*Table 16. Reasons for being attracted to the career*

(% rating 4 or 5 out of 5) (1) Not Important → (5) Very Important	Chain Chef	Independent Chef	Chain Cook	Independent Cook	Institutional/ Self-Employed
Responses	39-42	84-87	16-18	31-32	39-42
Love of food	95%	94%	88%	88%	90%
Creativity	73%	85%	63%	72%	79%
Fast pace	66%	74%	63%	50%	65%
Fun work environment	64%	66%	61%	53%	63%
Started just as a way to earn money and found I liked it	63%	51%	53%	38%	51%
Good career opportunities	46%	40%	38%	19%	54%
Enjoy working non-standard hours	35%	22%	19%	22%	32%
Friends or family in industry	34%	14%	18%	23%	27%
Wages and benefits	30%	13%	24%	3%	23%

### *Reasons for Exit*

Reasons for leaving the industry varied, but those who have left the industry entirely and those who are now working in a related field were similar with respect to how long they worked as Cooks or Chefs and how old they were when they stopped.

Over 70% were working as Cooks or Chefs for at least 10 years (one-third had been working at least 20 years). 7-in-10 were between age 25 and 44 when they stopped – with the most common age band of exit being age 35 to 44 (40%).

The majority of respondents who had left the industry had done so primarily for work/life balance such as schedules out of sync with family members and long hours of work, but many also cited wages and benefits or greater opportunities elsewhere as being a factor. A number of people commented that they loved their job while they did it, but just burned out quickly.

These factors seem to magnify among female Cooks and Chefs, who cited that the nature of the industry with its long hours, evenings and weekends (when childcare is not commonly available) makes it more difficult for many female Cooks and Chefs, particularly when it comes to a time when people want to start families. There were also women who had worked in male-dominated kitchen environments that felt exposed to more aggressive and intimidating behavior and because of the isolation and exclusion felt they had less opportunities for advancement.

Taken together, the reasons that people who are no longer working in the industry give, for being attracted to the profession, and their training and occupational attainment, illustrate why some individuals choose to leave the industry entirely, while others choose to stop working as Cooks or Chefs but now work in a related field, such as culinary instructors or foodservice sales.

Relative to those who've left the industry entirely, those now working in related fields tend to be more motivated by their love of food (85% vs. 79%), the chance to be creative (79% vs. 68%), the fast-paced environment (66% vs. 59%) and the non-standard hours (42% vs. 27%).

Relative to those who are now working in a related field, those who have left the industry entirely tended to be more attracted to the profession as a way of earning money (56% vs. 46%), by the prospect of good career opportunities (50% vs. 44%) and good wages and benefits (38% vs. 21%). However, when they left the profession they had achieved less than their counterparts had. They were less likely to have completed an apprenticeship (44% vs. 64%), were more likely to be working as line Cooks (32% vs. 11%) and less likely to be working as Chefs (39% vs. 58%).

### *Net Promoter Score*

Net Promoter Score (NPS) is a valuation that compares the relationship between positive and negative responses and determines a net score based on the difference between detractors (those who rate between 0-6) and promoters (those that rate between 9-10). NPS is currently the most commonly used way of determining satisfaction in the tourism and hospitality industry. A positive NPS score indicates more people feel positively than negatively, and a negative score indicates dissatisfaction.

When asked the question: “How likely are you to recommend a career as a Cook or Chef to friends or family?”, detractors outnumber promoters by a wide margin across all segments. NPS scores are ‘least negative’ among chain Chefs and among the institutional/self-employed segment (**Table 17**)

Table 17. NPS scores across employee survey participant groups

Net Promoter Score	Chain Chef	Independent Chef	Chain Cook	Independent Cook	Institutional/ Self-Employed
Responses	50	120	21	36	46
0-6 (Detractors)	68%	72%	67%	67%	57%
7-8	16%	21%	29%	28%	28%
9-10 (Promoters)	16%	8%	5%	6%	15%
Net Promoter Score (Promoters minus Detractors)	-52%	-64%	-62%	-61%	-42%

The fact that the NPS is low even among those who are working in chain establishments and institutional foodservice – who are generally paid higher and receive better benefits - means that the industry still needs to do a lot of work to create conditions that will attract people to the profession and get them to stay over the long term, particularly in an environment that is very competitive for people entering the workforce.

Overall comments about working in the industry from those currently employed indicated that those working as Cooks are the most frustrated with the relative difficulty of their positions, when comparing compensation with other trades and occupations. Low wages for cooks was the most frequent additional comment cited in the employee survey, but hard/difficult work, a stressful environment, and a schedule that is difficult for those with families also were mentioned frequently. On the positive side, cooks felt that their work was highly skilled and they often love what they do, but in some cases felt that they were not appreciated, and felt an imbalance in how gratuities were shared between the front and back of the house staff.

### Consumer Perspectives

Traditionally, consumer reaction to price changes has some tolerance for inflation, but reacts adversely to dramatic change, referred to as “elasticity”. Secondary data from Restaurants Canada indicates that the impact of small price increases (1-2%) have little or no impact on demand, but sudden and more substantial shifts do decrease demand proportionately as consumers react. An example in point was the increase in restaurant prices by 7% due to the HST in BC saw a corresponding drop in restaurant sales of 3%, or slightly less than half.

Consumer research was conducted to evaluate whether or not a better understanding of why prices change, and if consumer behaviour would be different with a knowledge that a raise in menu prices was due to the industry increasing the employee value proposition through better wages and benefits. The survey was administered from May 19 to May 26, 2016. A total of 813 respondents completed the survey.<sup>19</sup> (**Table 2**)

The specific objectives of this research were to collect the following information:

- Current frequency and spending across 4 restaurant segments:
  - **Casual chains** – casual restaurants with table service, e.g., ABC, Denny’s, White Spot, etc.
  - **Casual independents** - independently owned and operated - not part of a chain; casual setting with table service.
  - **Upscale chains** - chain restaurants with a more upscale atmosphere and price point, e.g. Keg Steakhouse, Joey restaurants, Cactus Club, Earl’s etc.
  - **Fine dining** – independently owned and operated – not part of a chain; more formal atmosphere, often offering multi-course gourmet cuisine.
- How consumer demand shifts within each segment under different menu price conditions
- The type of shifts in demand that are likely to occur within each segment
- How demand shifts once consumers are aware of how much wages contribute to menu prices
- Factors influencing consumer restaurant choice
- Assumptions regarding what factors drive the price of menu items – how much do consumers believe menu prices are driven by wages versus other factors (e.g., cost of food, operating costs, profit)
- Assumptions and preferences around tip distribution

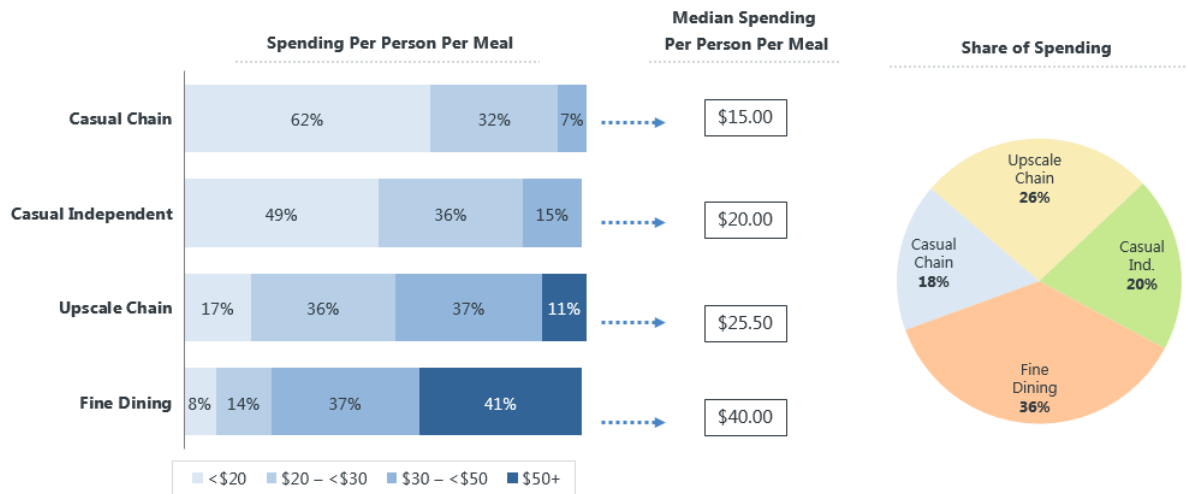
*Observation 8: Consumers are generally unaware of the cost structure in the foodservice industry, and are sensitive to dramatic price increases or a move away from the current tipping model. However, they are more tolerant of price change when they know they are going to increase wages and benefits.*

Almost half of those surveyed dine at Casual Chain or Casual Independent restaurants on a regular basis – i.e., at least once a month. Dining frequency at higher priced Upscale Chain and Fine Dining restaurants is lower – but still notable. In fact, as a share of total spending, Fine Dining and Upscale Chain restaurants account for 36% and 26%, respectively, compared to 20% for Casual Independent restaurants and 18% for Casual Chain restaurants (**Figure 20**). Average per person spending also varied, from \$15 for Casual Chains to \$40 for Fine Dining.

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<sup>19</sup> Consumer survey questions are found in Appendix VIII

Figure 20. Proportionate spending and average per person meal cost at different restaurant types



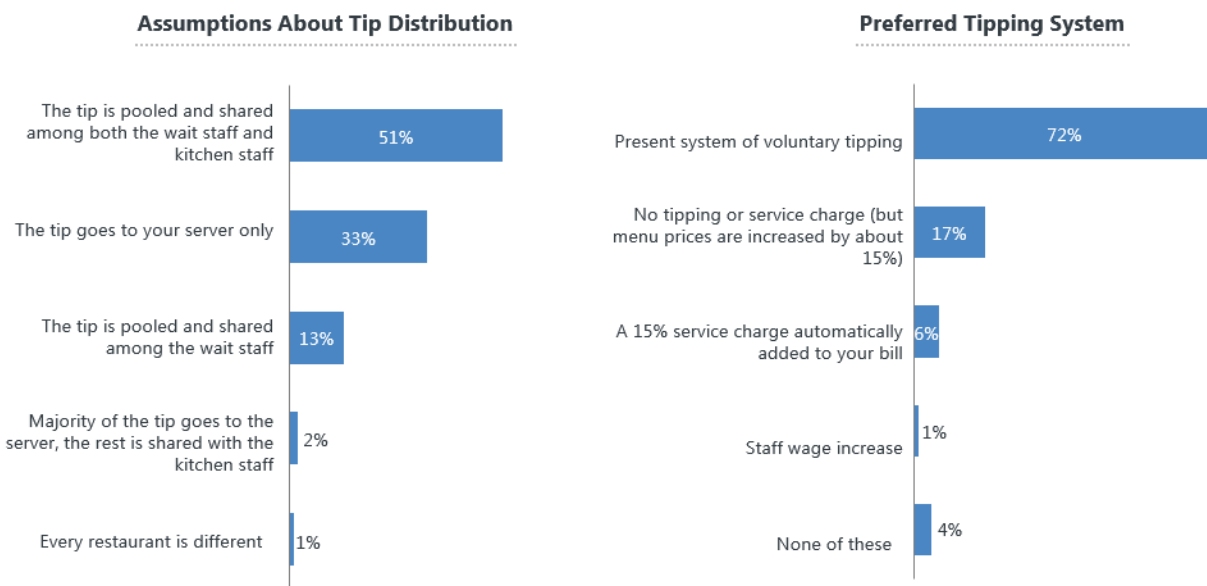
Food quality is the most important factor that influences diners’ choices of where to dine out – regardless of whether the establishment is a Casual Chain, Casual Independent, Upscale Chain or Fine Dining restaurant. Menu selection and service are equally important factors, followed by price. A restaurant’s reputation for how it treats its employees, whether or not it engages in ethical sourcing and eco-friendly practices are less important factors. However, those who frequent Fine Dining restaurants place more importance on these latter three factors (**Table 18**).

Table 18. importance of various factors when choosing a restaurant

% Rating 8-10 out of 10	Casual Chain	Casual Independent	Upscale Chain	Fine Dining
<b>Food Quality</b>	85%	84%	83%	86%
<b>Menu Selection</b>	70%	71%	72%	73%
<b>Level of Service</b>	68%	65%	70%	75%
<b>Price of Menu Items</b>	56%	63%	62%	63%
<b>Treatment of Employees</b>	32%	35%	35%	42%
<b>Ethically-Sourced Food</b>	29%	22%	28%	41%
<b>Eco-Friendly</b>	29%	27%	33%	39%

There is no clear majority assumption regarding how tips are distributed. Half of diners assume that tips are pooled and shared among both front staff and kitchen staff. One-third of diners assume that the tip goes only to the server. Diners express a strong preference for the current system of voluntary tipping because it gives them the ability to set the tip amount based on the service they receive. Very few (24%) prefer eliminating the tipping system and increasing menu prices by 15% to pay staff higher hourly wages (**Figure 21**). Those that support either service charges or higher overall prices instead of an expectation to tip view this as a way to ensure equitable staff compensation, and as a way to eliminate the ‘hassle’ of calculating a tip amount.

Figure 21. Consumer assumptions and preferences for tipping.

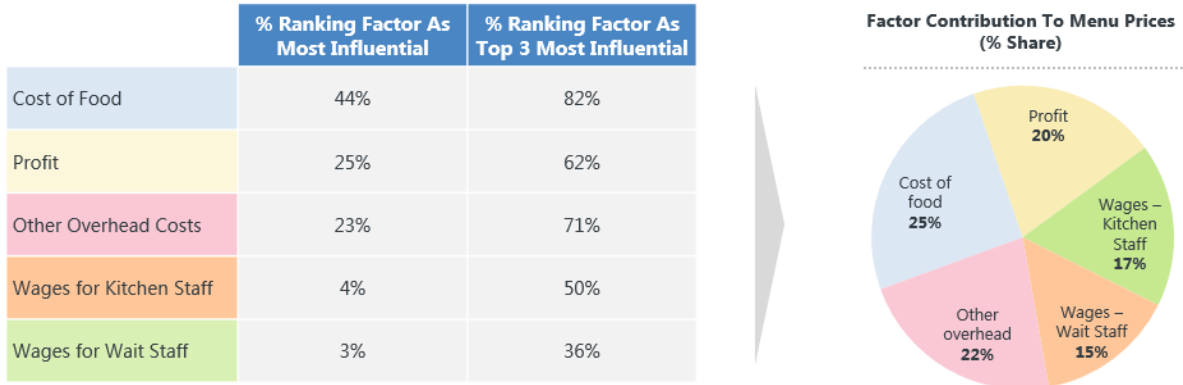


Diners generally overestimate the extent to which menu prices are influenced by a restaurant’s profit margin. Consumers on average assumed that 20% of the cost of a meal is going to profit (**Figure 22**), while actual margins in the foodservice industry are considerably slimmer. In fact, the range of profit margins by industry segment and size varies between 3.7% to 10.9%, averaging 8.3% in BC<sup>20</sup>. Note that reported profits do not include franchise/royalty fees which on average account for 2.5%, leaving ownership with a net profit margin of 5.7%.

Educating diners about the relatively thin margins in the industry, and about how menu prices are determined more generally, may make diners more accepting of price increases – i.e., they would be less likely to assume that restaurants are raising prices solely to put money in the owner’s pockets or ‘gouge’ consumers.

<sup>20</sup> Source: Restaurants Canada, *The 2015 Bottom Line*

Figure 22. Consumer assumptions about costs of restaurant meals



The vast majority of diners will not change their behaviour appreciably if menu prices are increased by 5%. A 10% increase does produce a downward shift in demand, but relatively few diners would stop eating out completely at a particular type of establishment under conditions of a 10% increase. A 20% increase produces a strong downward shift in demand with only one-quarter to one-third of diners intending to dine out as frequently as they do now.

It is important to note, however, that when diners learn that price increases are due to higher staff wages and benefits, diners are somewhat more likely to maintain the status quo with respect to their dining frequency (**Figure 23**).

Figure 23. Consumer reaction to price increases of varying levels in two scenarios – with no explanation, or knowing the increase is going to higher wages and benefits.





## RECOMMENDATIONS

All of the findings from research provide insights into strategies that can be used to ensure a balance labour market. Assumptions are that the current state is in relative balance, between the current number of employed Cooks and Chefs (44,342), plus allocating for current job vacancies (2,375) as unmet supply and unemployment (1,890) as unmatched demand.

Industry growth and supply rates, without any external forces, are projected to be slightly different with demand growing at a slightly higher rate than supply. A number of potential levers were identified that could alter the rate of supply and demand were considered, and the steering committee and other stakeholders determined that five supply levers and one demand lever had the potential to inform strategy and recommendations.

### Supply Levers:

#### *Lever 1: Increased in-migration*

Driver: Net International In-Migration

- An increase in net international in-migration could increase supply, however there were less than 500 total Cooks and Chefs that came to BC through one of the immigration pathways in 2015 (TFW or PNP). This number would have to increase substantially to have a lasting impact, and is dependent on immigration policy and provincial allocations.

Driver: Net Interregional In-Migration

- Net interregional migration (Cooks and Chefs who came to BC from other provinces and territories, less any BC Cooks and Chefs who left) could also have an impact, however the net number of interregional migrants was 112 in 2015. With the downturn in the Alberta economy, the net number may increase for at least the short term, but strategies to permanently recruit from other provinces and territories must be undertaken to increase the total supply through this channel.

#### *Lever 2: Decreased unemployment*

Driver: EI Beneficiaries

- Ensuring that any cooks in the labour force that are looking for work are able to secure employment is a lever that will match demand and supply to balance the labour market. However, there is always some frictional unemployment, and currently the number of vacant positions slightly outnumber the number of Cooks or Chefs that are unemployed.

#### *Lever 3: Improved recruitment and retention of women*

Driver: Women as a % of Workforce (Chefs and Cooks)

- Given the size of the occupation and the sharp decline in the number of female Cooks that go on to become Chefs, this has the potential to have a substantial impact on the supply. An increase of 5% in both the number of female cooks and chefs as a proportion of the workforce would completely balance the supply and demand.

*Lever 4: Improved retention*

Driver: Cooks and Chefs as a % of Workforce > Age 35

- As with the retention of women, the size of the occupation and the comparatively early exit from the Cook and Chef occupations offers perhaps the greatest opportunity. Cooks and Chefs comprise approximately 1.6% of the total labour force, but for those over 35, that share drops to 1.3%. Improving that retention rate to 1.4% would completely balance the labour supply.

*Lever 5: Increased recruitment*

Driver: Chefs and Cooks as a % of Workforce

- Cooks and Chefs have historically comprised 1.7% of the total labour force. That has remained fairly stable, but recently has slipped slightly to 1.6%. Re-establishing the 1.7% historical figure will provide enough additional Cooks and Chefs to meet demand.

Demand Levers:

*Lever 1: Staffing model (full-time vs part-time split)*

Driver: Percentage of part-time Chefs and Cooks

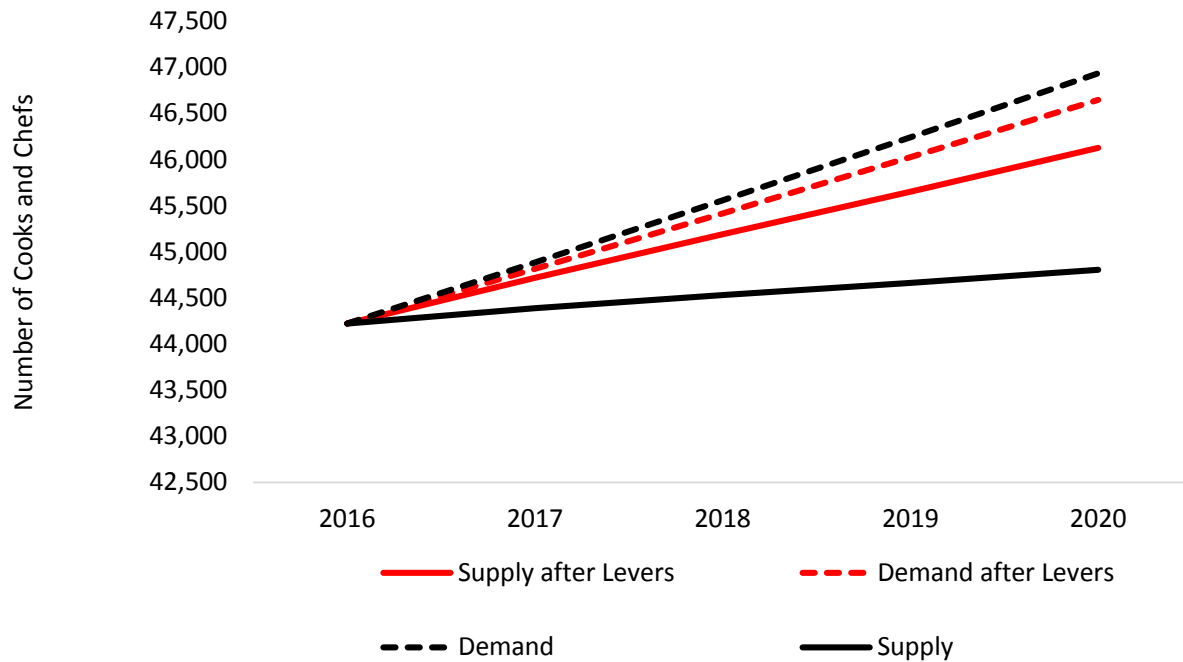
- While most Chefs work full-time, there are a substantial number of Cooks working part-time. The current employment of 44,000 Cooks and Chefs translates into actual Full Time Equivalents (FTE) of 37,000, so there is opportunity to increase the potential of the number of Cooks working full time to bring the headcount and FTE needs closer to equilibrium.

A fluid model was built to illustrate how each of these levers independently and together could balance the labour market. **Figure 24** shows one such scenario<sup>21</sup>, which shows that the net impact of increasing the percentage of Cooks and Chefs in the overall workforce from 1.6 to 1.65% and increasing the number of Cooks and Chefs over the age of 35 from 1.3 to 1.35% and a slight decrease (-1%) in the number of part time Cooks and Chefs would almost completely balance the labour market over the next 5 years.

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<sup>21</sup> Additional scenario models are shown in Appendix IX

Figure 24. How supply and demand levers can balance the labour market.



After evaluating various scenarios and the impact of each supply and demand lever on the overall labour market for Cooks and Chefs, industry provided a number of recommendations based on the research and findings. Included in these are a number of potential next phases through the Sector Labour Market Partnerships program.

*Recommendation 1: Support for small independent operators.*

Given the large number of small independent operators, and the fact that often they do not have the systems or resources available to them that larger organizations do, it is critical to develop strategies that can support the small independents across all cuisine types. Business coaching and training for independent operators and managers would benefit the industry in many ways.

- The ability to compete with larger organizations in wages and benefits by improving business performance in other areas, such as reducing food costs or operating expenses
- Better management of human resources and reducing staff burnout by offering more balanced schedules or 4-day work weeks, are a couple of the strategies larger employers are finding successful in improving productivity
- Menu engineering to provide more efficient use of existing staff and labour costs can also improve productivity and the bottom line, which in turn frees up additional resources
- Providing more training and development opportunities, and taking advantage of existing government grants and other training tax credits can also improve the skill level and efficiency of existing staff and improve retention rates through reduced turnover
- Promote group benefit plans that work for small employers at a reasonable cost

*Recommendation 2: Identify solutions for specific challenges faced by ethnic restaurants.*

Given the significant number of ethnic restaurants and relative proportion of the workforce, acute issues related to labour supply exist for a variety of reasons: language, a lack of local training in international cuisines, immigration policies to name a few. Further evaluation of these unique issues could provide some solutions to address these needs.

- Conduct a training needs assessment to evaluate the opportunity for local training in high demand ethnic cuisines. Indian, Chinese and Japanese cuisines had come up in research as areas that are particularly underserved and also comprise the largest proportions of the ethnic restaurant segment
- Evaluate barriers in current immigration policy that are additional constraints for foodservice operators. For example, Canadian certification such as the Red Seal provides additional points for immigration applicants, but the current certification is based solely on Western and European technique and terminology

*Recommendation 3: Develop strategies to improve the employee value proposition.*

Given low NPS across all Cook and Chef types as well as high turnover and early exit (retirement) rates, strategies that support improved retention are needed across all industry sectors. In addition, other levers that can adjust supply and demand may be available.

- Promote emerging practices that support greater work/life balance like alternative scheduling (e.g. a 4-day x10-hour work week or 4-days on 4-days off, as other occupations that work 12-hour shifts often use)
- Identify specific strategies to support the greater retention of women, such as job sharing, child care, and access to female mentors and role models
- Adjust prices and cost ratios as much as possible, with a focus at increasing the compensation for critical kitchen positions
- Evaluate the part-time and full-time balance – utilize as much full-time labour as possible, and look at fixed schedules for part-time staff

*Recommendation 4: Look for more opportunity to recruit unmatched or untapped labour supply.*

There will always be some job vacancies and unemployment, but better identification of the gaps between those looking for work and available positions could benefit the industry.

- Identify the need for upskilling or upgrade training to move Cooks and Chefs from one segment to another
- Identify alternative demographics that could be targeted instead of such a heavy reliance on the 15 to 24-year-old age group for Cooks
- Provide opportunities for older workers leaving other industries that have a passion for food to work in the industry
- Provide seasonal job matching or employee sharing between employers with similar needs

*Recommendation 5: Develop strategies to better inform consumers about their dining dollar*

Consumers will always be price sensitive to dramatic increases in prices, but better communication regarding the narrow margins and how the dining dollar is divided could benefit the industry.

- Develop marketing strategies that outline the cost and profit margins in the foodservice industry
- If price increases are going to improve wages and benefits, proactively communicate that message to the consumer audience

## CONCLUSION

The landscape of the foodservice industry is broad and varied. Cooks and Chefs work in restaurants, hotels, hospitals, care home, institutions, schools, camps, food trucks, and many other places. The purpose of this study was to gain a better understanding of the breadth and depth of the Cook and Chef workforce across British Columbia, and in turn identify the labour market forces at play, and strategies to help industry cope with growth and demographic shift.

There are certain aspects of the industry which are immovable. The majority of work for Cooks and Chefs will always be in evenings and on weekends, when the bulk of the population is on personal time. It will always be fast-paced, and high pressure, and require a certain amount of stamina from its workforce as the kitchen is a place that requires people to be on their feet all day. The commercial foodservice segments like restaurants and hotels are also subject to consumer preferences and trends, and very price sensitive. It is a competitive environment with tight margins, and that is not likely to change any time soon.

However, projects such as this, which bring the foodservice industry together to share best practices and information, can help to formulate strategies that are critical to supporting the industry in these times of growth, coupled with a shrinking supply of its traditional labour pool – young people looking to start their working lives.

There are certainly things industry can do to collaborate and to improve the employee value proposition. People working in the industry love certain aspects of it. Those aspects and lessons learned from segments of the broader foodservice industry can help to strengthen the industry as a whole.

Working on this project has been a fascinating journey for the project team, that we hope will lead to solutions for the industry everywhere.

## APPENDICES

### Appendix I - Definitions

“Persona”	Within the industry, there are various job types requiring certain personality traits or attributes in addition to specific technical skills and training. To capture these characteristics, a set of personas has been identified to help illustrate unique labour market drivers and dynamics that may not be apparent at the segment level. The same persona may occupy a similar position in different segments
“Segment”	Discrete sub-categories of industry employing Cooks and Chefs having broadly homogeneous characteristics in terms of required skills and training and labour force mobility
“Labour Market Shortage”	A segment or persona is experiencing a Labour Market Shortage when an Organizational Shortage is present at multiple organizations within that segment or persona
“Organizational Shortage”	A vacant position which cannot be filled through an organization’s standard hiring practices OR which has remained unfilled for over 3 months OR which was filled by a candidate who was materially underqualified for the position
“Turnover”	The total number of staff that have left a given position in a year divided by the annual peak number of staff for that position. Turnover includes both voluntary (left the position of their own choosing) and involuntary (let go or fired) turnover. A staff member who is promoted to a new position within the same organization would be included as having “left” the previous position
“Chef”	Supervisory and management positions with responsibility primarily focussed on kitchen operations. This would include both Chef and Sous Chef job titles in common industry terms, but also Kitchen Managers and assistant Kitchen Managers in some environments. Excludes managers with oversight for the entire business
“Cook”	Active front line food preparation roles at all skill levels that involve preparing and cooking foods from raw ingredients. Roles that purely assemble pre-prepared food items or do food preparation but no cooking are excluded
“Kitchen Helper”	Positions that involve the support roles in the kitchen, food assemble and some food preparation, but very limited in actual cooking, and almost exclusively from pre-prepared products. This includes dishwashers and the majority of quick serve non-supervisory staff, who may do some basic food preparation but also work in customer facing positions such as food counter attendants

## Appendix II - Persona Details

Persona		Role Definition
1	Executive Chef, Multi-unit / Large Hotel	<ul style="list-style-type: none"> <li>Oversees operations with multiple units, brands or food outlets in one or more large properties, such as a large hotel, resort, or restaurant chain</li> <li>A true executive role, no longer active in the kitchen except for product and menu development</li> </ul>
2	Chef, Specialized Ethnic Cuisine	<ul style="list-style-type: none"> <li>Operates a single unit independent property with a specific ethnic cuisine specialty</li> <li>Creates menus, runs the kitchen, and also works the line as needed in a supervisory role.</li> </ul>
3	Chef, Small Restaurant	<ul style="list-style-type: none"> <li>Operates a single unit independent property in a variety of price points.</li> <li>Creates menus, runs the kitchen, and also works the line as needed in a supervisory role.</li> </ul>
4	Chef, Chain Restaurant (or Kitchen Manager)	<ul style="list-style-type: none"> <li>Oversees a single unit property as a part of a larger organization</li> <li>Runs the kitchen, and delivers to corporate standards</li> </ul>
5	Chef, High Volume Production (or Senior Sous Chef)	<ul style="list-style-type: none"> <li>Supports the Executive Chef as a part of a larger organization</li> <li>Runs a single unit/department and delivers to corporate standards</li> </ul>
6	Sous Chef, Chain Restaurant / High Volume (or Junior Sous Chef)	<ul style="list-style-type: none"> <li>Supports the Chef as a part of a larger organization</li> <li>Leads the kitchen on specific shifts, and delivers to corporate standards</li> </ul>
7	Sous Chef, Small Restaurant	<ul style="list-style-type: none"> <li>Supports the Chef in day to day operations and oversees the kitchen in the Chef's absence.</li> <li>Creates daily specials and works the line as needed</li> </ul>
8	Line Cook, Small Restaurant	<ul style="list-style-type: none"> <li>Experienced and capable of working any station/shift in a small restaurant setting</li> <li>Handles bulk of the cooking duties, can lead junior members of the team</li> </ul>
9	Line Cook, High Volume / Production	<ul style="list-style-type: none"> <li>Capable of working any station/shift in a large restaurant or high volume setting</li> <li>Produces food in large quantities; can lead junior members of the team</li> </ul>
10	Cook, Entry Level and Aspirational	<ul style="list-style-type: none"> <li>Starting out a career in the kitchen</li> <li>Handles a single station or section but still needs some guidance</li> </ul>



### **Appendix III – Industry Segment Descriptions**

**Quick-Service Restaurants:** Includes counter service, cafeteria, food courts and take-out and delivery establishments

**Full-Service Restaurants:** Includes licensed and unlicensed fine-dining, casual and family restaurants as well as restaurant bars

**Caterers:** Includes contract caterers supplying food services to airlines, railways, institutions and recreation facilities, as well as social caterers providing food services for special events

**Drinking Places:** Includes bars, taverns, pubs, cocktail lounges and nightclubs primarily engaged in serving alcoholic beverages for immediate consumption. These establishments may also provide limited food service

**Accommodation Foodservice:** Foodservice in hotels, motels and resorts

**Institutional Foodservice:** Foodservice in hospitals, residential care facilities, schools, prisons, factories, remote facilities and offices. Includes patient and inmate meals

**Retail Foodservice:** Food service operated by department stores, convenience stores and other retail establishments

**Other Foodservice:** Includes vending, sports and private clubs, movie theaters, stadium and other season or entertainment operation

## Appendix IV - Project Steering Committee

Name	Title	Organization	Industry Sub-Sector (Segment) Expertise
Ian Milford	Principal	J. Ross Recruiters	Industry Recruiter
Chris Elliott	Senior Economist	Restaurants Canada	Industry Economist
Gilbert Noussitou	Chair, Culinary Arts	Camosun College	Education
Rod Butters	Owner	RauDZ Creative Concepts	Fine Dining (small independent)
KJ Dhaliwal	Purchasing Manager	The Keg	Large upscale chain (Steakhouse)
James Kennedy	Corporate Training Chef	White Spot	Full-Service Restaurants, Quick Service Restaurants
Grant Cousar	CEO	Whistler Cooks Catering	Caterers
Bernard Casavant	Manager, Culinary Arts	Okanagan College	Hotels, small restaurants, pub and bar
Chris Klufftinger	Culinary Logistics and Food Service Management Consultant	TMF Enterprises	Institutional, Business Services, Hospitals/Residential Care
Piyush Sihay	Self Employed		Institutional - Schools, Hotels, Cruise Ships
Dennis Loewen	Regional Executive Chef	Civeo Group	Remote Camps and Services
Lisanne Collett	Co-Owner	Edible Planet Catering	Mobile Catering (film)
Lt(N) Bryce Binder	Food Services Officer	CFB Esquimalt	Military

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## Appendix VI – Additional Supply and Demand Scenarios

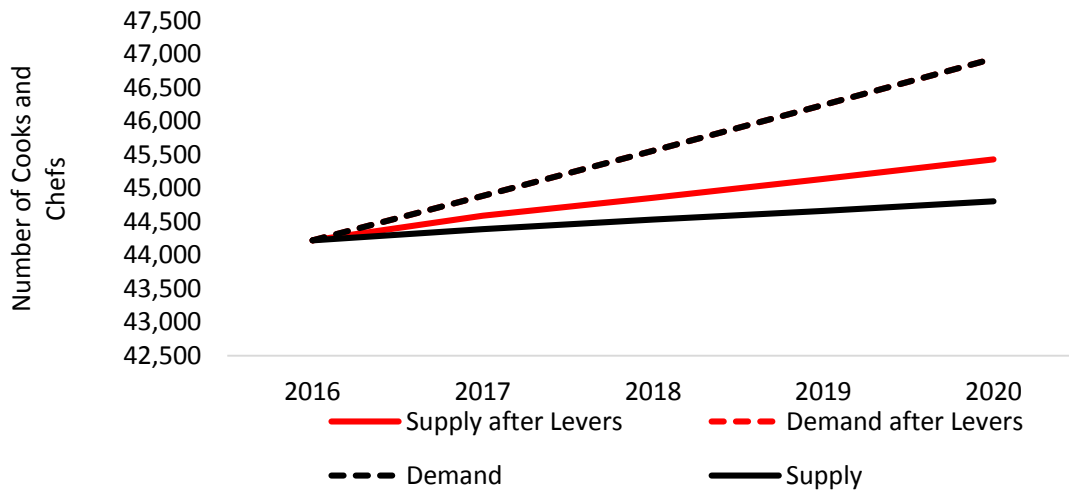
For the purposes of illustrating the relative impacts of each of the supply and demand levers the following additional scenarios were demonstrated to the steering committee.

### Supply Levers:

#### *Lever 1: Increased in-migration*

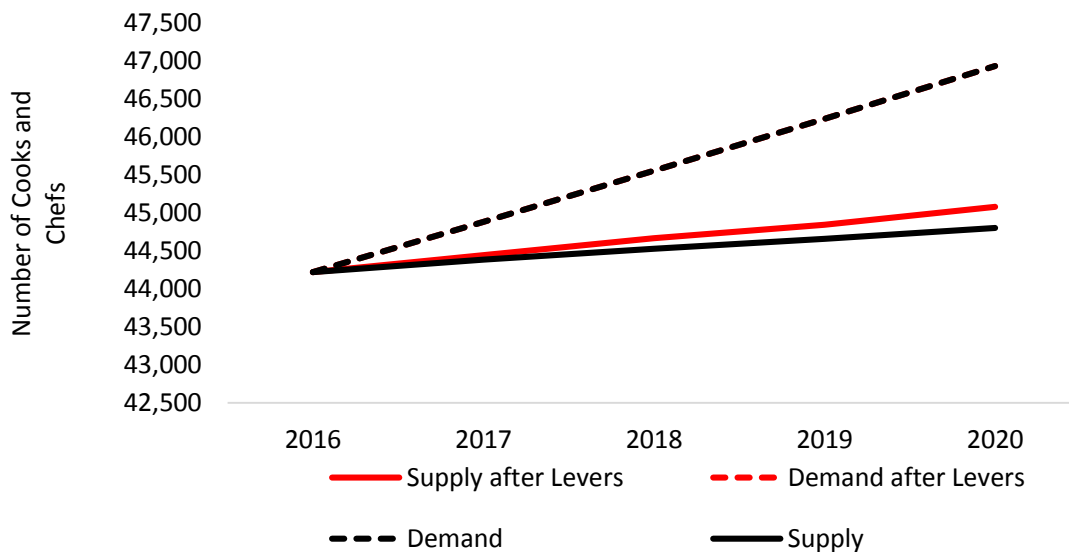
Driver: Net International In-Migration

- Increased by 50%



Driver: Net Interregional In-Migration

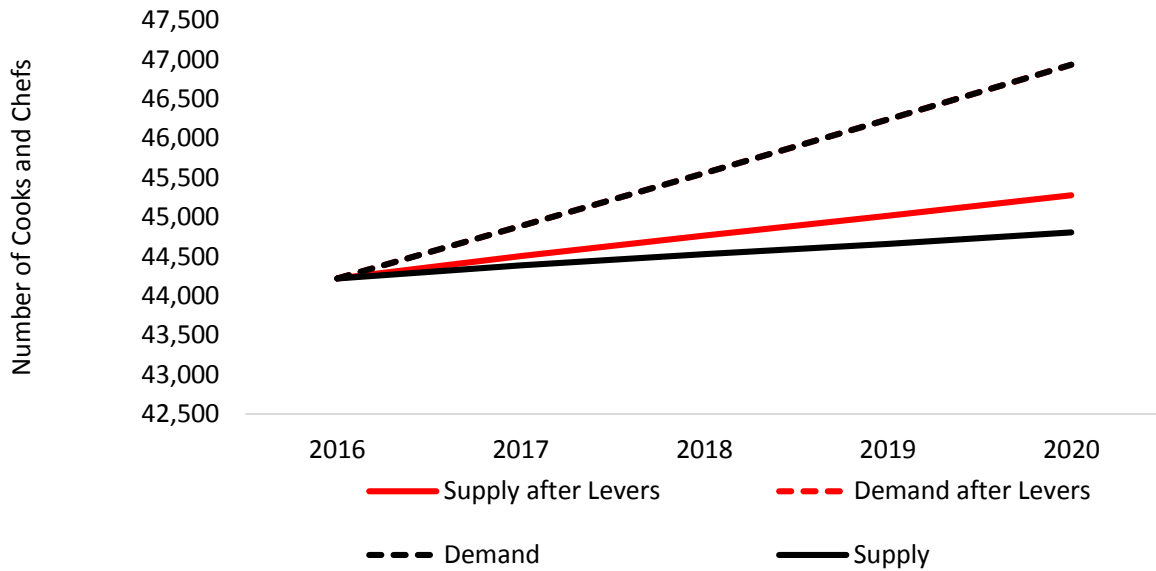
- Increased by 50%



*Lever 2: Decreased unemployment*

Driver: EI Beneficiaries

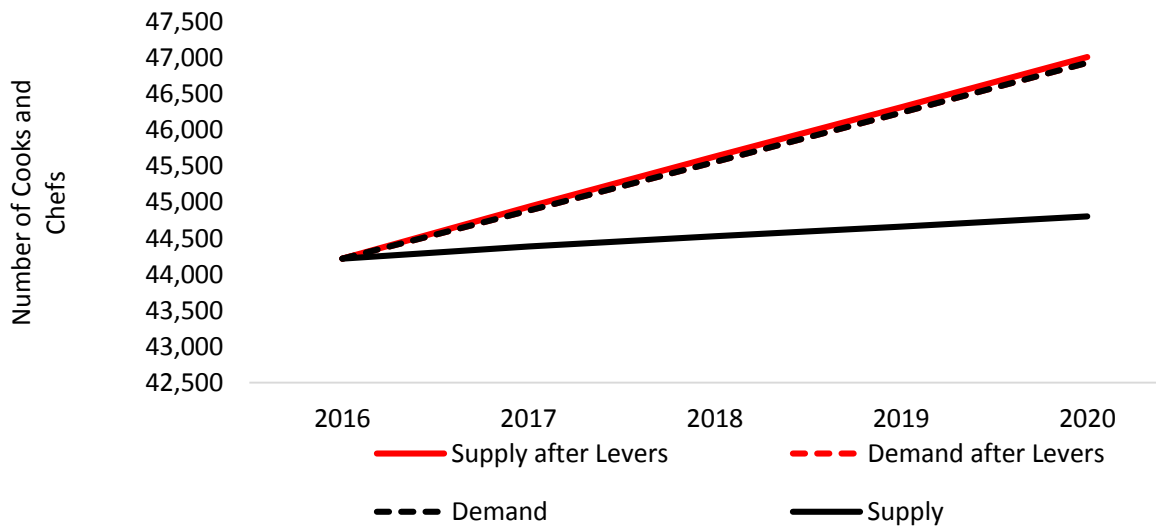
- Reduced by 25%



*Lever 3: Improved recruitment and retention of women*

Driver: Women as a % of Workforce (Chefs and Cooks)

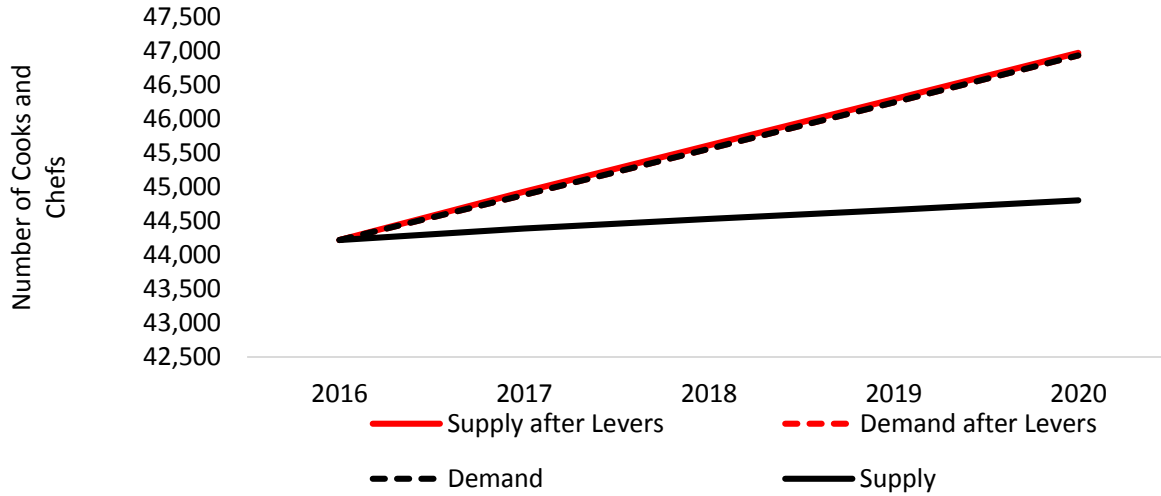
- Increased by 5% for both Cooks and Chefs



*Lever 4: Improved retention*

Driver: Cooks and Chefs as a % of Workforce > Age 35

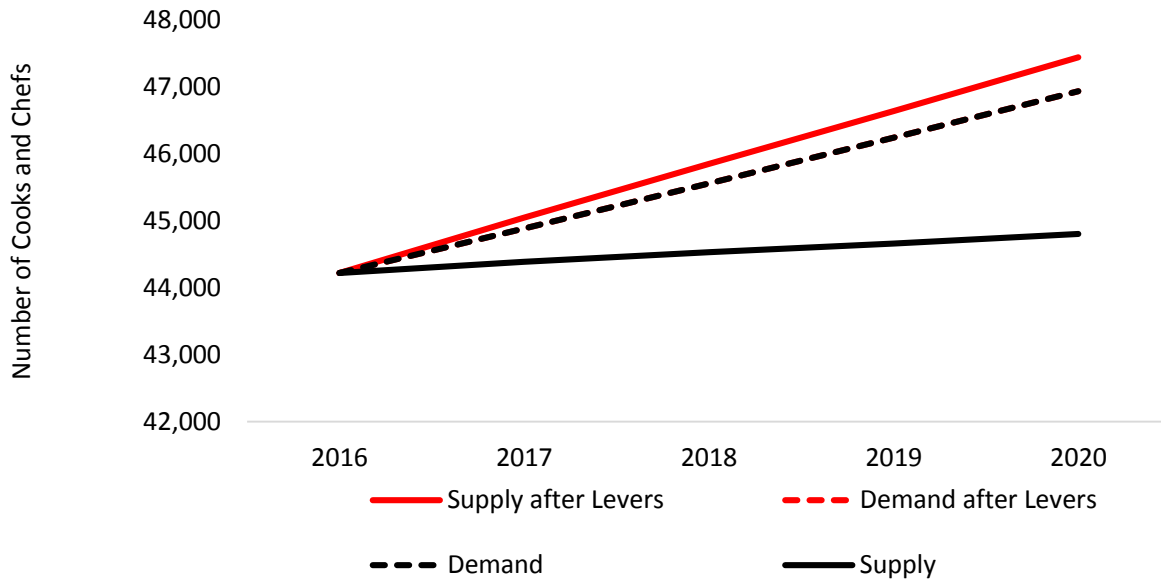
- Share over 35 increased to 1.4% from 1.3%



*Lever 5: Increased recruitment*

Driver: Chefs and Cooks as a % of Workforce

- Share increased to 1.7% from 1.6%

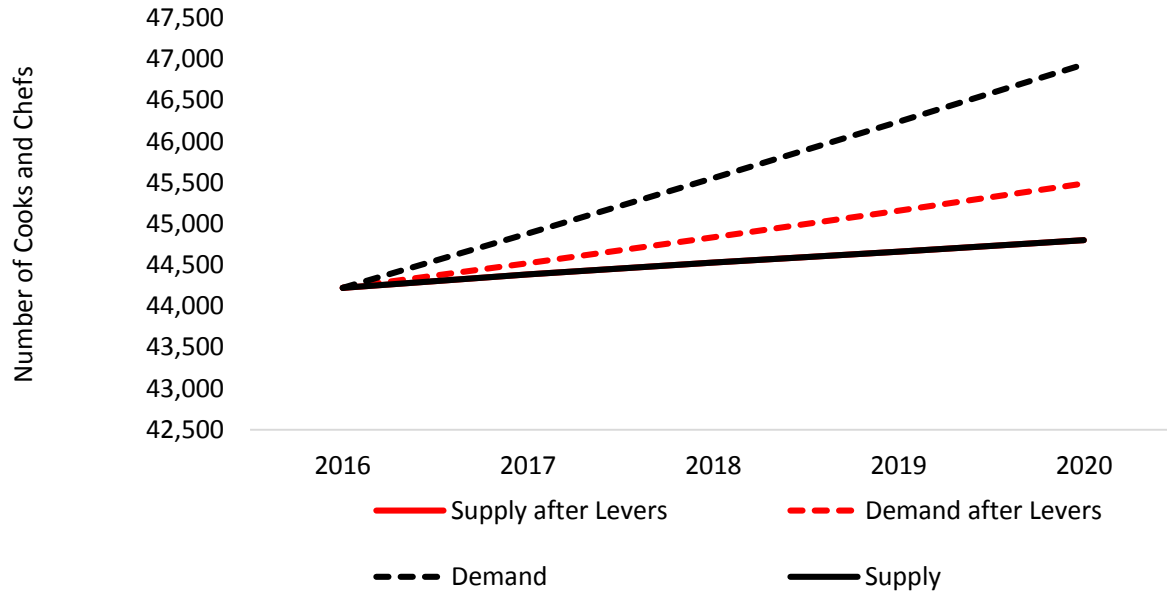


**Demand Levers:**

*Lever 1: Staffing model (full-time vs part-time split)*

Driver: Percentage of Part-Time Chefs and Cooks

- Reduce percentage of Cooks working part time by 5%





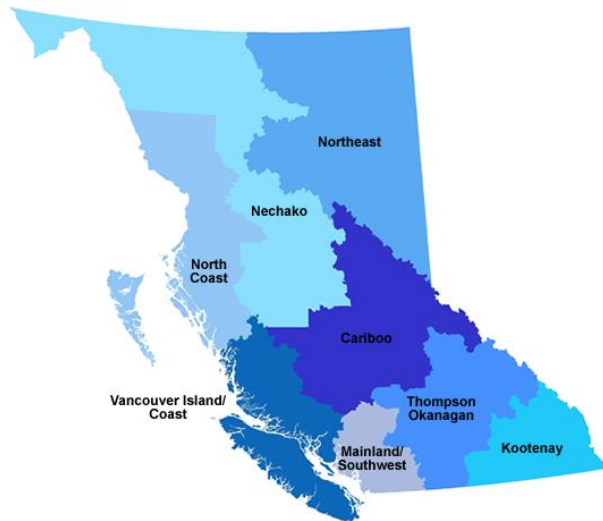
## Appendix VII – Structured Interview Questions

### General Questions:

**Q1: What is the name of your organization?**

**Q2: Where does your organization have kitchen operations in British Columbia? Select all that apply**

1. Cariboo
2. Kootenay
3. Mainland / Southwest
4. North Coast and Nechako
5. Northeast
6. Thompson Okanagan
7. Vancouver Island / Coast



**Q3: Please indicate your sector of operations. Select all that apply. Refer to Appendix V to see definitions, or click [HERE](#).**

1. Quick-Service restaurant
2. Full-Service restaurants
3. Caterers
4. Accommodation foodservice
5. Institutional foodservice
6. Retail foodservice
7. Other food service
8. Other (please specify)

**Q4: Please indicate if your business is part of a chain, or independent. Select all that apply.**

1. Chain (corporate owned)
2. Chain (franchise)
3. Independent

**Q5: Please specify months of peak season?**

**Peak season:**

### Persona Details

Persona		Role Definition
1	Executive Chef, Multi-unit / Large Hotel	<ul style="list-style-type: none"> <li>Oversees operations with multiple units, brands or food outlets in one or more large properties, such as a large hotel, resort, or restaurant chain</li> <li>A true executive role, no longer active in the kitchen except for product and menu development</li> </ul>
2	Chef, Specialized Ethnic Cuisine	<ul style="list-style-type: none"> <li>Operates a single unit independent property with a specific ethnic cuisine specialty</li> <li>Creates menus, runs the kitchen, and also works the line as needed in a supervisory role.</li> </ul>
3	Chef, Small Restaurant	<ul style="list-style-type: none"> <li>Operates a single unit independent property in a variety of price points</li> <li>Creates menus, runs the kitchen, and also works the line as needed in a supervisory role</li> </ul>
4	Chef, Chain Restaurant (or Kitchen Manager)	<ul style="list-style-type: none"> <li>Oversees a single unit property as a part of a larger organization</li> <li>Runs the kitchen, and delivers to corporate standards</li> </ul>
5	Chef, High Volume Production (or Senior Sous Chef)	<ul style="list-style-type: none"> <li>Supports the Executive Chef as a part of a larger organization</li> <li>Runs a single unit/department and delivers to corporate standards</li> </ul>
6	Sous Chef, Chain Restaurant / High Volume (or Junior Sous Chef)	<ul style="list-style-type: none"> <li>Supports the Chef as a part of a larger organization</li> <li>Leads the kitchen on specific shifts, and delivers to corporate standards</li> </ul>
7	Sous Chef, Small Restaurant	<ul style="list-style-type: none"> <li>Supports the Chef in day to day operations and oversees the kitchen in the Chef's absence.</li> <li>Creates daily specials and works the line as needed</li> </ul>
8	Line Cook, Small Restaurant	<ul style="list-style-type: none"> <li>Experienced and capable of working any station/shift in a small restaurant setting</li> <li>Handles bulk of the cooking duties, can lead junior members of the team</li> </ul>
9	Line Cook, High Volume / Production	<ul style="list-style-type: none"> <li>Capable of working any station/shift in a large restaurant or high volume setting</li> <li>Produces food in large quantities; can lead junior members of the team</li> </ul>
10	Cook, Entry Level and Aspirational	<ul style="list-style-type: none"> <li>Starting out a career in the kitchen</li> <li>Handles a single station or section but still needs some guidance</li> </ul>

**Q6: A Persona is ‘relevant’ to your organization if you employ staff of that Persona.**

“Job Title” refers to the actual job title used within your organization to refer to a given Persona. Multiple job titles may apply to a single Persona, for example Line Cook, Senior Line Cook, Second Cook are all possible job titles for the Line Cook, Small Restaurant Persona.

When filling out the table, please include only employees involved in food production. Please include cooks, chefs and kitchen helpers involved in food preparation but exclude front of house and supporting staff (e.g., servers, dishwashers, bussers).

**Please complete the table below.**

Persona (click link to jump to section)		Total Employed:		Unionized?	Job Titles
		Peak season	Off-season		
1	Executive Chef, Multi-unit / Large Hotel			<input type="checkbox"/>	
2	Chef, Specialized Ethnic Cuisine			<input type="checkbox"/>	
3	Chef, Small Restaurant			<input type="checkbox"/>	
4	Chef, Chain Restaurant (or Kitchen Manager)			<input type="checkbox"/>	
5	Chef, High Volume Production (or Senior Sous Chef)			<input type="checkbox"/>	
6	Sous Chef, Chain Restaurant / High Volume (or Junior Sous Chef)			<input type="checkbox"/>	
7	Sous Chef, Small Restaurant			<input type="checkbox"/>	
8	Line Cook, Small Restaurant			<input type="checkbox"/>	
9	Line Cook, High Volume / Production			<input type="checkbox"/>	
10	Cook, Entry Level and Aspirational			<input type="checkbox"/>	
11	Other (please specify) _____			<input type="checkbox"/>	
<b>Total Employees</b>					

**Q7: For each persona, on a scale of 0 to 10 please provide a ranking on how critical the impact of shortages are on operations. 10 would indicate shortages are having critical impacts on operation, while 1 would indicate little impact. Enter 0 for no shortage.**

<b>Persona (click link to jump to section)</b>	<b>Severity Ranking</b>
Executive Chef, Multi-unit / Large Hotel	
Chef, Specialized Ethnic Cuisine	
Chef, Small Restaurant	
Chef, Chain Restaurant (or Kitchen Manager)	
Chef, High Volume Production (or Senior Sous Chef)	
Sous Chef, Chain Restaurant / High Volume (or Junior Sous Chef)	
Sous Chef, Small Restaurant	
Line Cook, Small Restaurant	
Line Cook, High Volume / Production	
Cook, Entry Level and Aspirational	

Comments on shortage impacts:

**Q8: How have you compensated for staff shortages? Select all that apply**

1. No changes, shortages are not affecting us
2. Changes to Operations
  - a. Greater reliance on overtime for kitchen staff
  - b. Postpone growth or expansion of business
  - c. Reduce operating hours
  - d. Reduce restaurant scale (e.g., fewer tables)
  - e. Adjust menu to require less technical cooking skill
3. Changes to Hiring Approach
  - a. Posting more job ads
  - b. Working with recruitment firms
  - c. Actively pursuing foreign hires
  - d. Development of internal talent
4. Changes to Employee Value Proposition
  - a. Improved shift structure (e.g., 4 day work week)
  - b. Improved compensation structure or benefits
  - c. Improved career path
  - d. Improved personal development opportunities (e.g., training)
5. Other (please specify)

**Q9: Please note that Pastry Chefs should NOT be included in your responses to the remaining questions in this Questionnaire. However, if you do employ Pastry Chefs or Pastry Cooks, please indicate the number that you employ in the table below.**

	Full Time	Part Time
Number Employed (Peak Season)		
Number Employed (Off Peak)		

*Start of persona specific question block, repeats for each persona. Executive Chef Multi-unit / Large Hotel included as sample:*

**Executive Chef, Multi-unit / Large Hotel**

- Oversees operations with multiple units, brands or food outlets in one or more large properties, such as a large hotel, resort, or restaurant chain
- A true executive role, no longer active in the kitchen except for product and menu development

**Q10: Please indicate the number of Executive Chef, Multi-unit / Large Hotel that you employ as well their shift details.**

	Full Time	Part Time
Number Employed (Peak Season)		
Number Employed (Off Peak)		
Average hours worked per week		
Shifts per week		

**Q11: What is the demographic profile of your current Executive Chef, Multi-unit / Large Hotel staff? Please indicate the number of employees in each category.**

Age Range	
15-24	
25-34	
35-44	
45+	
TOTAL	

Gender Distribution (%)	
Male	Female

How has the demographic profile of this position changed over time?

Other comments on this position's demographic profile?

### Compensation

Compensation data is collected in this segment to support analysis of the economic impact of shortages across different Personas and segments. The purpose of the questions in this section is to understand total effective compensation by Persona.

**Q12: Is this a salaried position or an hourly position?**

1. Salaried
2. Hourly

**Please indicate a range for the salary or wage you indicated above (exclude gratuities and bonuses):**

**How have wages/salary increased for this position over the past year?**

**Q13: What percent (if any) of the gratuity pool is shared with *Executive Chef, Multi-unit / Large Hotel*?**

**If *Executive Chef, Multi-unit / Large Hotel* receives gratuities, please indicate the estimated dollar value of gratuities the employee would receive per week.**

**Q14: Does this position receive bonuses?**

1. Yes
2. No

Please indicate what percent of their total compensation is paid in bonuses:

Please provide a brief description of your bonus system or formula:

**Q15: Does this position receive additional benefits?**

1. Yes
2. No

**Q16: Do you offer this position any of the following benefits? Please select all that apply.**

1. Extended medical
2. Dental insurance
3. Pension
4. Staff meals
5. Transportation allowances
6. Ski passes
7. Other (Please specify)

**Please indicate any restrictions that apply for receiving these benefits**

1. Full time employees only
2. Not available to seasonal employees
3. Only available after working for more than a year
4. Other (Please specify)

Please describe the system in place that determines if this position receives these additional benefits. Please indicate what threshold is used to determine whether the staff member receives benefits (e.g., hours worked per week, months worked per year etc.)

**Skills, training and aptitudes**

**Q17: Please indicate the requirements for formal training for this position in the table below:**

<b>Formal Training</b>	<b>Mandatory</b>	<b>Preferred</b>	<b>Nice to have</b>	<b>Not needed</b>
Business Degree / Diploma	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership / Management Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certified Chef de Cuisine (CCC)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional Cook 3 (Red Seal)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional Cook 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional Cook 1 or Culinary School Certificate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOODSAFE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wine & Spirit Education (WSET)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Aid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corporate (In-house) training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q18: How many years of experience do you require employees in this position to have?**



**Q19: On a scale of 1 to 10 please indicate the importance of each skill and aptitude for this position. 1 indicates that this skill/attribute is of no importance, while 10 indicates that it is critical for success**

Skills		Ranking
Management	Manage food, labour and operational costs	
	Team leadership and coaching	
	Menu and recipe development	
	Other (please specify) _____	
Technical	Cooking ability (breadth and depth)	
	Precise motor skills (knife skills, etc.)	
	Production speed and efficiency	
	Other (please specify) _____	
Abilities	Work in a collaborative environment	
	Follow organizational standards and guidelines	
	Multi task and change priorities quickly	
	Work under high pressure and tight timelines	
	Work in a chaotic environment	
	Work independently	
	Lift and carry up to 50lb regularly	
	Other (please specify) _____	

Personality and Attributes		Ranking
Chefs only	Creativity and innovation	
	Competitiveness – desire to succeed	
	Entrepreneurial	
	Committed to continual improvement, pushes the envelope	
	Systems-oriented, sees the big picture	
	Other (please specify) _____	
Cooks and Chefs	Attention to detail	
	Loyal to organization – long term stability	
	Thrives in high energy/high pressure environment	
	Organized and efficient	
	Clean (in work habits and appearance)	
	Calm and professional	
	Comfortable with shift work and non-standard hours	
	Consistent and dependable	
	High endurance	
Other (please specify) _____		

**Hiring Trends:**

**Q20: In the past year, how many employees did you hire for this position type?**

**Q21: In the past year, how many employees left this position type for any reason?**

**Q22: How would you characterize employee turnover for this position?**

1. Unsustainably high
2. Higher than I would like, but manageable
3. Not a significant priority to reduce

**Q23: What are the main barriers to retaining current staff?**

1. No significant barriers
2. Higher wages offered elsewhere
3. More creative opportunities elsewhere
4. Work schedule is too demanding
5. Work is too unvaried / routine
6. Workers want to exit the cook/chef occupation
7. Other (please specify)

Please list what actions are being taken to help retain staff?

**Q24: Where do you typically hire new people for this position from? Please fill in percentages (should total 100%)**

Source of new <b>Executive Chef, Multi-unit / Large Hotel</b> hires	% of Total
Promoted from within the organization	
Referred to by someone within the organization	
Hired via a third party recruitment firm	
Recent high school graduate	
Recent culinary school graduate	
Other restaurant / kitchen	
Hired from outside Canada	
Union membership pool	
Other (please specify) _____	
<b>TOTAL</b>	<b>100%</b>

Please describe the main steps in the hiring process for this position.

Example: *Post job ad online, review applications, first round interviews, two day kitchen trial, final written contract. Total process typically takes one month.*

**Q25: In the past year, have you experienced difficulty hiring or filling vacant positions for Executive Chef, Multi-unit / Large Hotel?**

1. Yes
2. No

**Labour Shortages**

**Q26: Please describe the nature of the shortage for this position type**

Currently, how many vacant positions do you have that:

- Cannot be filled through your organization's standard hiring practices; OR
- Have remained unfilled for over 3 months; OR
- Were filled by a candidate or candidates who were materially underqualified for the position?

Compared to the previous 12 months, the number of shortages are:

1. Higher than average
2. Lower than average
3. Average

**Q27: How would you describe shortages today compared to previous years?**

1. Significantly better
2. Better
3. No change
4. Worse
5. Significantly worse

**Q28: Why do you think you have been experiencing shortages for this position? Select all that apply**

1. Not enough candidates, either qualified or partially qualified
2. Not enough qualified candidates (majority of applicants do not have the right qualifications / skills / aptitudes)
3. Competition from other restaurant businesses makes it difficult to hire qualified candidates
4. Competition from non-restaurant businesses / other industries makes it difficult to hire qualified candidates
5. Can't get employees to move to my region
6. Candidates are not interested in the job description (e.g., lack of opportunity to be creative, too many basic duties required etc.)
7. Other (please describe)

**Q29: When a candidate is hired who is under-skilled for the position, in which areas do they require improvement or training? Please indicate all that apply**

**Technical Skills**

1. Scratch cooking versus working from pre-prepared products
2. Knife skills
3. Food presentation / plating
4. Other (please specify)

**Aptitudes**

1. Language skills (e.g., official language skills, trade-specific terminology)
2. Production speed ("hustle")
3. Attention to detail
4. Creativity
5. Other (please specify)

**Familiarity with particular type of cooking or meal type**

1. Breakfast cooking
2. Specialized or ethnic cooking
3. Breadth of repertoire / versatility
4. Other (please specify)

**Another Persona?**

Click [HERE](#) to go to the Persona selection panel

**End of persona-specific questions [Executive Chef, Multi-unit / Large Hotel]**

## Appendix VIII – Consumer Survey Questions

### Screener

**Q1.** Where do you live?

Lower Mainland/Southwestern BC (e.g. GVRD, FV, Squamish-Lillooet)  
Vancouver Island/Coast  
Thompson-Okanagan/Kootenay  
Northern BC (north of 100 mile house)  
Other [TERMINATE]

**Q2.** You are...

Male  
Female

**Q3.** Into which of the following age groups do you belong?

18 to 24  
25 to 34  
35 to 44  
45 to 54  
55 to 64  
65 or older

**Q4.** Do you or does anyone in your household work in any of the following industries?

Market research [TERMINATE]  
Travel and tourism  
Food services [TERMINATE]  
Newspaper, radio/TV station [TERMINATE]  
None of the above [EXCLUSIVE]

**Q5.** Are you the person in the household who is responsible, or shares responsibility, for making decisions about where to eat out and/or how much to spend when eating out?

Yes, I am responsible  
Yes, I share responsibility  
No [TERMINATE]  
I never dine out [TERMINATE]

**Current consumer behaviour and motivators of choice**

**Q6.** How often do you eat out at each of these restaurants?

[RANDOMIZE A-D. CAN SHOW AS SC Q]

- a. **Casual chain** restaurants – casual restaurants with table service, e.g., ABC, Denny’s, White Spot, etc.
- b. **Upscale chain** restaurants – chain restaurants with a more upscale atmosphere, e.g. Keg Steakhouse, Joey restaurants, Cactus Club, Earl’s etc.
- c. **Casual independent** restaurants – independently owned and operated - not part of a chain; casual setting with table service.
- d. **Fine Dining independent** restaurants – independently owned and operated – not part of a chain; more formal atmosphere, offering multi-course gourmet cuisine.

[OPTIONS]

- Once a week or more often
- 1-3 times a month
- Once every two or three months
- 1-3 times a year
- Never

**[IF ‘NEVER’ FOR ALL FOUR, THEN TERMINATE]**

**Q7.** Now think of a **typical meal** that you would have at each of these restaurants. How much do you usually spend on a meal at each and for how many people would that amount usually cover?

Please think of the total before taxes and include only the total amount spent on **food items only**, so excluding drinks.

For example, if you usually eat out in a party of two, specify the total cost of that meal (for food items only) under ‘total cost’ and specify 2 under ‘number of people’.

[SHOW RESTAURANTS THAT THEY HAVE BEEN TO IN Q6]

	<b>Total cost for a typical meal:</b>	<b>Number of people (including yourself):</b>
a. Casual chain	\$	RANGE: 1+
b. Upscale chain	\$	RANGE: 1+
c. Casual independent	\$	RANGE: 1+
d. Fine dining independent	\$	RANGE: 1+



**Q8.** When you are choosing where to go out to eat at a [INSERT RESTAURANT TYPE BY MAKING A RANDOM SELECTION AMONG THE RESTAURANTS THE RESPONDENT GOES TO IN Q6], how much do the following factors influence your choice?

Please use a scale where 1 means 'does not influence my choice at all' and 10 means 'influences my choice a great deal'.

[RANDOMIZE]

- a. Price of the menu items
- b. Food quality
- c. Level of service
- d. Menu selection
- e. Food is ethically-sourced – i.e., the restaurant buys food from suppliers committed to sustainable food production and ethical labour standards
- f. Restaurant adopts eco-friendly practices – e.g., local food sourcing, organic ingredients
- g. The restaurant has a reputation for treating its employees well

[RESPONSE 1 TO 10, LABEL END POINTS, IN GRID FORMAT]

### Expectations and preferences for tipping

**Q9.** When it comes to tipping at restaurants, which of the following best reflects your assumption about how your tip is distributed?

[SC]

- a. The tip goes to your server only
- b. The tip is pooled and shared among the wait staff
- c. The tip is pooled and shared among both the wait staff and kitchen staff
- d. Other (specify)

**Q10.** Under the current system in BC, wait staff earn some of their income from wages and some from tips. Which system of tipping would you **most prefer**?

[SC]

- a. Present system of voluntary tipping
- b. A 15% service charge automatically added to your bill
- c. No tipping or service charge - but menu prices are increased by about 15% to pay both wait staff and kitchen staff higher hourly wages
- d. Other (specify)
- e. None of these [EXCLUSIVE]

**Q10B.** [ASK IF Q10=A-D. SHOW AFTER Q10] And why do you prefer that options?

RECORD VERBATIM

**Consumer assumptions about what drives menu prices**

We're now going to ask you about your assumptions of what influences the price of menu items.

**Q11.** Below are some factors that can influence the price of menu items. Please rank them based on how much you think each one influences the price.

For example, if you think the cost of food is the biggest factor that influences menu prices, then rank it first by dragging the item to the column on the right. Then drag the factor that you think has the next biggest influence, and so on.

[DRAG AND DROP]

[RANDOMIZE]	Ranking
a. Cost of food	
b. Profit	
c. Wages for kitchen staff	
d. Wages for wait staff	
e. Other overhead costs – for example, rent and utilities	

**Shifts in consumer demand**

[Q12-15: ONLY ASK FOR RESTAURANTS BEEN TO IN Q6. IF MORE THAN 1, RANDOMLY SELECT 1 TYPE OF RESTAURANT]

**Q12a-c.** You mentioned earlier that you usually spend **[\$ from Q7]** for a meal at **casual chain** restaurants. If that meal now cost **[new \$]**, what you would do?

PROG NOTE: CALCULATE NEW \$ BASED ON a) 5%, b) 10% AND c) 20% INCREASE  
RANDOMIZE WHICH NEW PRICE GETS PRESENTED FIRST.

- a. I would eat there less often and go elsewhere instead
- b. I would eat there as frequently as I do now and pay the difference
- c. I would stop going there entirely

**Q13a-c.** You mentioned earlier that you usually spend [**\$ from Q7**] for a meal at **upscale chain** restaurants. If that meal now cost [**new \$**], what you would do?

PROG NOTE: CALCULATE NEW \$ BASED ON 5 a) 5%, b) 10% AND c) 20% INCREASE.  
RANDOMIZE WHICH NEW PRICE GETS PRESENTED FIRST.

- a. I would eat there less often and go elsewhere instead
- b. I would eat there as frequently as I do now and pay the difference
- c. I would stop going there entirely

**Q14a-c.** You mentioned earlier that you usually spend [**\$ from Q7**] for a meal at **casual independent** restaurants. If that meal now cost [**new \$**], what you would do?

PROG NOTE: CALCULATE NEW \$ BASED ON a) 5%, b) 10% AND c) 20% INCREASE.  
RANDOMIZE WHICH NEW PRICE GETS PRESENTED FIRST.

- a. I would eat there less often and go elsewhere instead
- b. I would eat there as frequently as I do now and pay the difference
- c. I would stop going there entirely

**Q15a-c.** You mentioned earlier that you usually spend [**\$ from Q7**] for a meal at **fine dining independent** restaurants. If that meal now cost [**new \$**], what you would do?

PROG NOTE: CALCULATE NEW \$ BASED ON a) 5%, b) 10% AND c) 20% INCREASE.  
RANDOMIZE WHICH NEW PRICE GETS PRESENTED FIRST.

- a. I would eat there less often and go elsewhere instead
- b. I would eat there as frequently as I do now and pay the difference
- c. I would stop going there entirely

[Q16-19: ASK FOR SAME RESTAURANT TYPE AS IN q12-15]

**Q16a-c.** Now assume that the restaurant raised their menu prices to increase wages and benefits for kitchen staff. What would you do if your meal at **casual chain** restaurants that used to cost [**\$ from Q7**] is now [**new \$**]?

PROG NOTE: CALCULATE NEW \$ BASED ON a) 5%, b) 10% AND c) 20% INCREASE.  
RANDOMIZE WHICH NEW PRICE GETS PRESENTED FIRST.

- a. I would eat there less often and go elsewhere instead
- b. I would eat there as frequently as I do now and pay the difference
- c. I would stop going there entirely

**Q17a-c.** Now assume that restaurants raised their menu prices to increase wages and benefits for kitchen staff. What would you do if your meal at **upscale chain** restaurants that used to cost **[\$ from Q7]** is now **[new \$]**?

PROG NOTE: CALCULATE NEW \$ BASED ON a) 5%, b) 10% AND c) 20% INCREASE.  
RANDOMIZE WHICH NEW PRICE GETS PRESENTED FIRST.

- a. I would eat there less often and go elsewhere instead
- b. I would eat there as frequently as I do now and pay the difference
- c. I would stop going there entirely

**Q18a-c.** Now assume that restaurants raised their menu prices to increase wages and benefits for kitchen staff. What would you do if your meal at **casual independent** restaurants that used to cost **[\$ from Q7]** is now **[new \$]**?

PROG NOTE: CALCULATE NEW \$ BASED ON a) 5%, b) 10% AND c) 20% INCREASE.  
RANDOMIZE WHICH NEW PRICE GETS PRESENTED FIRST.

- a. I would eat there less often and go elsewhere instead
- b. I would eat there as frequently as I do now and pay the difference
- c. I would stop going there entirely

**Q19a-c.** Now assume that restaurants raised their menu prices to increase wages and benefits for kitchen staff. What would you do if your meal at **fine dining independent** restaurants that used to cost **[\$ from Q7]** is now **[new \$]**?

PROG NOTE: CALCULATE NEW \$ BASED ON a) 5%, b) 10% AND c) 20% INCREASE.  
RANDOMIZE WHICH NEW PRICE GETS PRESENTED FIRST.

- a. I would eat there less often and go elsewhere instead
- b. I would eat there as frequently as I do now and pay the difference
- c. I would stop going there entirely

**Q20.** If wages were increased for cooks and chefs working in BC restaurants, how likely do you think each of the following would occur?

Please use a scale where 1 means 'not at all likely' and 10 means 'very likely'.

- a. More people would enter the cooking profession
- b. Turnover among cooks and chefs would be lower
- c. The quality of food at restaurants would improve
- d. Menu prices would increase and people would eat out less
- e. Menu prices would increase but people would eat out the same as they do now

[RESPONSE 1 TO 10, LABEL END POINTS, IN GRID FORMAT]

## Demographics

A few final questions for statistical purposes...

**Q20.** Your total annual household income before taxes is ...

- Under \$25,000
- \$25,000 to \$49,999
- \$50,000 to \$74,999
- \$75,000 to \$99,999
- \$100,000 to \$149,999
- Over \$150,000
- Prefer not to answer/Don't know

**Q21.** Which of the following best describes you?

Are you...

- Self-employed
- Employed full-time (30 or more hours a week)
- Employed part-time (less than 30 hours a week)
- Currently not working
- Student
- Retired
- Taking care of family/ Homemaker
- Disabled/ on disability
- Other: \_\_\_\_\_
- Prefer not to answer

**Q22.** What is your current household status?

Single

Married without children (including common law)

Married with children in household (including common law)

Married with children not in household (including common law)

Divorced/Separated

Widow/Widower

Single Parent

Other: \_\_\_\_\_

## Appendix IX – Employee Survey Questions

## Professional Cook Research Project Employee Survey

## Professional Cook Labour Market Analysis Employee Survey

go2HR is conducting research in order to better understand the different types of cooks and chefs working in various industries and the challenges that employers are facing in finding, hiring, and keeping them. To look at an occupation like this is something that has never been done before in this depth, and will also provide some very informative details on the types of people working as cooks or chefs and what has motivated them during their careers.

Your feedback and comments are extremely important and we appreciate your time.

All of the information we gather is anonymous and your individual responses will be kept strictly confidential. Apart from some very basic demographic information, we will not be asking for any personal identifier information or specific names of your current or former employers. The insights we gather from this survey will help us better understand the current shortage of cooks and chefs and also help us communicate to employers, training providers, and government potential ways to help ensure the industry and those who work in it have meaningful long term careers.

## Professional Cook Research Project Employee Survey

These first few questions will help us ensure we hear from people with different backgrounds and experiences.

\* 1. Age:

\* 2. Gender

\* 3. Which language do you speak most often at home?

English

French

Other (please specify)



\* 4. Do you currently live and/or work in British Columbia?

- Yes
- No (please specify)

## Professional Cook Research Project Employee Survey

\* 5. Have you ever been an apprentice in the Cook profession?

- No
- Was registered as an apprentice but didn't complete
- I am currently registered as an apprentice
- I completed an apprenticeship and my certification in Canada
- I completed an apprenticeship and certification in another country (please specify)

## Professional Cook Research Project Employee Survey

\* 6. Which level of the Cook apprenticeship program are you currently in?

- PC 1
- PC 2
- PC 3
- I am registered in another apprenticeship program (please specify)

## Professional Cook Research Project Employee Survey

\* 7. Which of the following best describes you?

- Currently working as a cook or chef
- Currently employed as a cook or chef but on leave (medical, parenting, etc.)
- Unemployed cook or chef looking for work in the industry
- Unemployed and last worked as a cook or chef, but looking for work in a different field or industry
- Previously worked as a cook or chef but working in a different field, you've left the industry permanently
- Previously employed as a cook or chef but working in a related field (e.g. restaurant manager or owner, chef instructor, food or equipment sales, etc)
- Culinary student who is also currently working as a cook or chef
- Culinary student looking to enter the industry
- Other (please specify)

**Professional Cook Research Project Employee Survey**

\* 8. Which type of culinary program are you currently enrolled in?

- Full time post-secondary program at a public college or university
- Full time post-secondary program at a private culinary school
- High School Apprenticeship (ACE-IT) program
- High School Cafeteria training program
- Other (please specify)

**Professional Cook Research Project Employee Survey**

\* 9. What are the main reasons you are attracted to a career as a cook or chef? Please rate each according to how important they are to you.

	Not important				Very important
Fun work environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creativity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fast pace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Love of food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good career opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wages and benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enjoy working non-standard hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friends or family in industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

## Professional Cook Research Project Employee Survey

\* 10. What experience, if any, do you have in the industry, (check all that apply)

- Some experience in a quick service or fast food restaurant
- Some cooking experience in a full service restaurant
- Some experience in a different restaurant job (server, bartender, etc)
- I have work experience in a different job
- None, I am taking training for my first job
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 11. In which industry sector(s) are you looking for work? Please select all that apply.

- Quick-Service Restaurant:**  
counter service, cafeteria, food courts and take-out and delivery establishments
- Full-Service Restaurant:**  
licensed and unlicensed fine-dining, casual and family restaurants as well as restaurant bars
- Caterers:**  
includes both contract and social caterers
- Drinking Places:**  
bars, taverns, pubs, cocktail lounges and nightclubs
- Accommodation Foodservice:**  
hotels, motels and resorts
- Institutional Foodservice:**  
hospitals, residential care facilities, schools, prisons, factories, remote facilities and offices, includes patient and inmate meals
- Retail Foodservice:**  
department stores, convenience stores and other retail establishments
- Other Foodservice:**  
vending, sports and private clubs, movie theaters, stadium and other seasonal or entertainment operations
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 12. What are your goals as a cook or chef? Check all that apply.

- To own my own restaurant
- To become the chef of a hotel
- To become the chef of a well known restaurant
- To have a stable and long career in a large company
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 13. How long have you worked in the industry as a cook or chef?

## Professional Cook Research Project Employee Survey

\* 14. What are the main reasons you were attracted to a career as a cook or chef? Please rate each according to how important they were to you.

	Not important				Very important
Fun work environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Started just as a way to earn money and found I liked it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creativity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fast pace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Love of food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good career opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wages and benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enjoy working non-standard hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friends or family in industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

## Professional Cook Research Project Employee Survey

\* 15. What was the last position you held? Please pick one of the following categories which best represents the position and responsibilities.

- Executive Chef, Multi-unit / Large Hotel**
  - Oversees operations with multiple units, brands or food outlets in one or more large properties, such as a large hotel, resort, or restaurant chain
  - A true executive role, no longer active in the kitchen except for product and menu development
- Chef, Specialized Ethnic Cuisine**
  - Operates a single unit independent property with a specific ethnic cuisine specialty
  - Creates menus, runs the kitchen, and also works the line as needed in a supervisory role.
- Chef, Small Restaurant**
  - Operates a single unit independent property in a variety of price points
  - Creates menus, runs the kitchen, and also works the line as needed in a supervisory role
- Chef (or Kitchen Manager), Chain Restaurant**
  - Oversees a single unit property as a part of a larger organization
  - Runs the kitchen, and delivers to corporate standards
- Chef (or Senior Sous Chef), High Volume Production**
  - Supports the Executive Chef as a part of a larger organization
  - Runs a single unit/department and delivers to corporate standards
- Sous Chef, Chain Restaurant / High Volume**
  - Supports the Chef as a part of a larger organization
  - Leads the kitchen on specific shifts, and delivers to corporate standards
- Sous Chef, Small Restaurant**
  - Supports the Chef in day to day operations and oversees the kitchen in the Chef's absence.
  - Creates daily specials and works the line as needed
- Line Cook, Small Restaurant**
  - Experienced and capable of working any station/shift in a small restaurant setting
  - Handles bulk of the cooking duties, can lead junior members of the team
- Line Cook, High Volume / Production**
  - Capable of working any station/shift in a large restaurant or high volume setting
  - Produces food in large quantities; can lead junior members of the team
- Cook, Entry Level**
  - Starting out a career in the kitchen
  - Handles a single station or section but still needs some guidance
- Kitchen Helper or Assistant**
  - Does some food preparation or assembly of pre-prepared foods
  - Assists cooks or other kitchen staff but has little cooking experience
- Other (please specify)

\* 16. How long were you employed in the last position you held as a cook or chef?

\* 17. Which of the following best describes your last position?

\* 18. Was this position unionized?

Yes

No

\* 19. What were your total annual earnings, including bonuses and gratuities in your last position?

## Professional Cook Research Project Employee Survey

\* 20. Where was your last job as a cook or chef located? (see map for reference)



**Professional Cook Research Project Employee Survey**

\* 21. Why did you leave your last position?

- Business closed
- Laid off due to lack of work
- Terminated
- Left voluntarily (quit)
- Other (please specify)

**Professional Cook Research Project Employee Survey**



\* 22. Why did you quit your last position? Please indicate how each of the following factors influenced your decision.

	Not significant				Very significant		N/A
Moved to a different city or region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change in personal schedule or availability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hours too long / demanding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Salary / wages too low	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No opportunity to complete my training or apprenticeship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Schedule was too unpredictable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Did not want to work non-standard hours, e.g., late nights, early mornings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conflict with co-workers or supervisors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Working conditions were unsafe or unhealthy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Working conditions were too stressful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

## Professional Cook Research Project Employee Survey

\* 23. In which region are you looking for work? (Please refer to map for reference)



**Professional Cook Research Project Employee Survey**

\* 24. In which industry sector(s) are you looking for work? Please select all that apply.

- Quick-Service Restaurant:**  
counter service, cafeteria, food courts and take-out and delivery establishments
- Full-Service Restaurant:**  
licensed and unlicensed fine-dining, casual and family restaurants as well as restaurant bars
- Caterers:**  
includes both contract and social caterers
- Drinking Places:**  
bars, taverns, pubs, cocktail lounges and nightclubs
- Accommodation Foodservice:**  
hotels, motels and resorts
- Institutional Foodservice:**  
hospitals, residential care facilities, schools, prisons, factories, remote facilities and offices, includes patient and inmate meals
- Retail Foodservice:**  
department stores, convenience stores and other retail establishments
- Other Foodservice:**  
vending, sports and private clubs, movie theaters, stadium and other seasonal or entertainment operations
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 25. How long have you been looking for work as a cook or chef?

\* 26. Which type of employment are you currently looking for?

- Year round, full time
- Year round, part time
- Seasonal, full time
- Seasonal, part time
- Other (please specify)

\* 27. How many positions have you applied for in the last month?

\* 28. How many job interviews have you been to in the last month?

## Professional Cook Research Project Employee Survey

\* 29. What are some of the reasons you have not been able to find work as a cook or chef? Please check all that apply.

- Lack of job postings in the area I am looking
- Not getting call backs after applying for jobs
- Looking for full time work and only part time or temporary work is available
- Lack of Canadian work experience or credentials
- Available jobs don't match my skills or experience
- Available jobs pay too little
- Available jobs don't fit my schedule or availability to work
- Lack of transportation to get to available jobs
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 30. Please indicate the formal industry training you have taken. As well, please indicate if it is required for the positions you are applying for.

	Achieved or completed	Required for positions applying for
University Degree / Diploma	<input type="checkbox"/>	<input type="checkbox"/>
Leadership / Management Training	<input type="checkbox"/>	<input type="checkbox"/>
Certified Chef de Cuisine (CCC)	<input type="checkbox"/>	<input type="checkbox"/>
Professional Cook 3 (Cook Red Seal)	<input type="checkbox"/>	<input type="checkbox"/>
Professional Cook 2	<input type="checkbox"/>	<input type="checkbox"/>
Professional Cook 1 or Culinary School Certificate	<input type="checkbox"/>	<input type="checkbox"/>
FOODSAFE	<input type="checkbox"/>	<input type="checkbox"/>
First Aid	<input type="checkbox"/>	<input type="checkbox"/>
Other Culinary Certifications (foreign credentials)	<input type="checkbox"/>	<input type="checkbox"/>

Is there any other training that you have taken or that is required for jobs you are applying for? (please specify)

## Professional Cook Research Project Employee Survey

31. Do you have any additional comments that you would like to share about your experience looking for work as a cook or chef in British Columbia?

## Professional Cook Research Project Employee Survey

\* 32. At what age did you stop working in the industry as a cook or chef?

\* 33. How long did you work in the industry as a cook or chef in total?

## Professional Cook Research Project Employee Survey

\* 34. What are the main reasons you were attracted to a career as a cook or chef? Please rate each according to how important they were to you.

	Not important				Very important	
Fun work environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Started just as a way to earn money and found I liked it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creativity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fast pace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Love of food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good career opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wages and benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enjoy working non-standard hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friends or family in industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

## Professional Cook Research Project Employee Survey

\* 35. What was the last position you held? Please pick one of the following categories which best represents the position and responsibilities.

- Executive Chef, Multi-unit / Large Hotel**
  - Oversees operations with multiple units, brands or food outlets in one or more large properties, such as a large hotel, resort, or restaurant chain
  - A true executive role, no longer active in the kitchen except for product and menu development
- Chef, Specialized Ethnic Cuisine**
  - Operates a single unit independent property with a specific ethnic cuisine specialty
  - Creates menus, runs the kitchen, and also works the line as needed in a supervisory role.
- Chef, Small Restaurant**
  - Operates a single unit independent property in a variety of price points
  - Creates menus, runs the kitchen, and also works the line as needed in a supervisory role
- Chef (or Kitchen Manager), Chain Restaurant**
  - Oversees a single unit property as a part of a larger organization
  - Runs the kitchen, and delivers to corporate standards
- Chef (or Senior Sous Chef), High Volume Production**
  - Supports the Executive Chef as a part of a larger organization
  - Runs a single unit/department and delivers to corporate standards
- Sous Chef, Chain Restaurant / High Volume**
  - Supports the Chef as a part of a larger organization
  - Leads the kitchen on specific shifts, and delivers to corporate standards
- Sous Chef, Small Restaurant**
  - Supports the Chef in day to day operations and oversees the kitchen in the Chef's absence.
  - Creates daily specials and works the line as needed
- Line Cook, Small Restaurant**
  - Experienced and capable of working any station/shift in a small restaurant setting
  - Handles bulk of the cooking duties, can lead junior members of the team
- Line Cook, High Volume / Production**
  - Capable of working any station/shift in a large restaurant or high volume setting
  - Produces food in large quantities; can lead junior members of the team
- Cook, Entry Level**
  - Starting out a career in the kitchen
  - Handles a single station or section but still needs some guidance
- Kitchen Helper or Assistant**
  - Does some food preparation or assembly of pre-prepared foods
  - Assists cooks or other kitchen staff but has little cooking experience
- Other (please specify)

\* 36. In which industry sector did you last work as a cook or chef?

- Quick-Service Restaurant:**  
counter service, cafeteria, food courts and take-out and delivery establishments
- Full-Service Restaurant:**  
licensed and unlicensed fine-dining, casual and family restaurants as well as restaurant bars
- Caterers:**  
includes both contract and social caterers
- Drinking Places:**  
bars, taverns, pubs, cocktail lounges and nightclubs
- Accommodation Foodservice:**  
hotels, motels and resorts
- Institutional Foodservice:**  
hospitals, residential care facilities, schools, prisons, factories, remote facilities and offices, includes patient and inmate meals
- Retail Foodservice:**  
department stores, convenience stores and other retail establishments
- Other Foodservice:**  
vending, sports and private clubs, movie theaters, stadium and other seasonal or entertainment operations
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 37. Please indicate the type of business you last worked in.

- Institutional
- Chain (corporate owner)
- Chain (franchise)
- Independent
- Other (please specify)

\* 38. Was your last position unionized?

## Professional Cook Research Project Employee Survey



\* 39. Why did you leave the foodservice industry? Please indicate how important each of the following was a factor in your decision.

	Not significant				Very significant		N/A
Was only working as a cook or chef while studying for a different career	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Better opportunities in a different job or industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No opportunity to complete my training or apprenticeship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change in personal schedule or availability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hours too long / demanding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Salary / wages too low	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Schedule was too unpredictable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Did not want to work non-standard hours, e.g., late nights, early mornings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conflict with co-workers or supervisors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Working conditions were unsafe or unhealthy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Working conditions were too stressful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

40. Do you have any additional comments that you would like to share about your experience working as a cook or chef in British Columbia?

## Professional Cook Research Project Employee Survey

\* 41. At what age did you stop working in the industry actively as a cook or chef?

\* 42. How long did you work in the foodservice industry as a cook or chef in total?

\* 43. What is your current job?

- Culinary instructor
- Restaurateur
- Food and Beverage Manager or Director
- Food or beverage sales
- Food equipment sales
- Pastry chef
- Meat cutter
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 44. What are the main reasons you were attracted to a career as a cook or chef? Please rate each according to how important they were to you.

	Not important				Very important
Fun work environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Started just as a way to earn money and found I liked it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creativity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fast pace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Love of food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good career opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wages and benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enjoy working non-standard hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friends or family in industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

**Professional Cook Research Project Employee Survey**

\* 45. What was the last position you held as a cook or chef? Please pick one of the following categories which best represents the position and responsibilities.

- Executive Chef, Multi-unit / Large Hotel**
  - Oversees operations with multiple units, brands or food outlets in one or more large properties, such as a large hotel, resort, or restaurant chain
  - A true executive role, no longer active in the kitchen except for product and menu development
- Chef, Specialized Ethnic Cuisine**
  - Operates a single unit independent property with a specific ethnic cuisine specialty
  - Creates menus, runs the kitchen, and also works the line as needed in a supervisory role.
- Chef, Small Restaurant**
  - Operates a single unit independent property in a variety of price points
  - Creates menus, runs the kitchen, and also works the line as needed in a supervisory role
- Chef (or Kitchen Manager), Chain Restaurant**
  - Oversees a single unit property as a part of a larger organization
  - Runs the kitchen, and delivers to corporate standards
- Chef (or Senior Sous Chef), High Volume Production**
  - Supports the Executive Chef as a part of a larger organization
  - Runs a single unit/department and delivers to corporate standards
- Sous Chef, Chain Restaurant / High Volume**
  - Supports the Chef as a part of a larger organization
  - Leads the kitchen on specific shifts, and delivers to corporate standards
- Sous Chef, Small Restaurant**
  - Supports the Chef in day to day operations and oversees the kitchen in the Chef's absence.
  - Creates daily specials and works the line as needed
- Line Cook, Small Restaurant**
  - Experienced and capable of working any station/shift in a small restaurant setting
  - Handles bulk of the cooking duties, can lead junior members of the team
- Line Cook, High Volume / Production**
  - Capable of working any station/shift in a large restaurant or high volume setting
  - Produces food in large quantities; can lead junior members of the team
- Cook, Entry Level**
  - Starting out a career in the kitchen
  - Handles a single station or section but still needs some guidance
- Other (please specify)

\* 46. In which industry sector did you last work as a cook or chef?

- Quick-Service Restaurant:**  
counter service, cafeteria, food courts and take-out and delivery establishments
- Full-Service Restaurant:**  
licensed and unlicensed fine-dining, casual and family restaurants as well as restaurant bars
- Caterers:**  
includes both contract and social caterers
- Drinking Places:**  
bars, taverns, pubs, cocktail lounges and nightclubs
- Accommodation Foodservice:**  
hotels, motels and resorts
- Institutional Foodservice:**  
hospitals, residential care facilities, schools, prisons, factories, remote facilities and offices, includes patient and inmate meals
- Retail Foodservice:**  
department stores, convenience stores and other retail establishments
- Other Foodservice:**  
vending, sports and private clubs, movie theaters, stadium and other seasonal or entertainment operations
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 47. Please indicate the type of business you last worked in.

- Institutional
- Chain (corporately owned and operated)
- Chain (franchise)
- Independent
- Other (please specify)

\* 48. Was your last position unionized?

## Professional Cook Research Project Employee Survey

\* 49. Why did you leave an active role as a cook or chef in the foodservice industry? Please indicate how important each of the following impacted your decision.

	Not significant				Very significant		N/A
Wanted to apply my experience in a different role	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Better opportunities in a different job or industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change in personal schedule or availability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hours too long / demanding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Salary / wages too low	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Schedule was too unpredictable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Did not want to work non-standard hours, e.g., late nights, early mornings, weekends, holidays	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conflict with co-workers or supervisors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Working conditions were unsafe or unhealthy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Working conditions were too stressful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

\* 50. How important are the following skills from your previous experience as a cook or chef to your current role?

	Not at all important				Extremely Important		N/A
Culinary skills and knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Management and leadership skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food and labour costing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inter-personal skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Menu and product development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organizational and/or project management skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Professional Cook Research Project Employee Survey

Please answer the following two questions related to your leave and then continue to provide information on your regular position.

51. What is the reason for your current leave?

- Maternity/parenting leave
- Medical (work related injury or illness)
- Medical (not work related)
- Personal
- Other

52. When do you expect to return to your current position?

## Professional Cook Research Project Employee Survey

\* 53. Which type of culinary program are you currently enrolled in?

- Full time post-secondary program at a public college or university
- Full time post-secondary program at a private culinary school
- Workplace entry apprenticeship program
- High School Apprenticeship (ACE-IT) program
- High School Cafeteria training program
- Other (please specify)

54. Which level of the Professional Cook program are you currently in?

- PC1
- PC2
- PC3
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 55. What are your goals as a cook or chef? Check all that apply.

- To own my own restaurant
- To become the chef of a hotel
- To become the chef of a well known restaurant
- To have a stable and long career in a large company
- Other (please specify)

## Professional Cook Research Project Employee Survey



\* 56. Where do you work in your current job? (see map for reference)



**Professional Cook Research Project Employee Survey**

\* 57. In which industry sector do you work?

- Quick-Service Restaurant:**  
counter service, cafeteria, food courts and take-out and delivery establishments
- Full-Service Restaurant:**  
licensed and unlicensed fine-dining, casual and family restaurants as well as restaurant bars
- Caterers:**  
includes both contract and social caterers
- Drinking Places:**  
bars, taverns, pubs, cocktail lounges and nightclubs
- Accommodation Foodservice:**  
hotels, motels and resorts
- Institutional Foodservice:**  
hospitals, residential care facilities, schools, prisons, factories, remote facilities and offices, includes patient and inmate meals
- Retail Foodservice:**  
department stores, convenience stores and other retail establishments
- Other Foodservice:**  
vending, sports and private clubs, movie theaters, stadium and other seasonal or entertainment operations
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 58. Which of the following best describes your current employment?

- Year round, full time
- Year round, part time
- Seasonal, full time
- Seasonal, part time
- On call or in a temporary position
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 59. Please indicate the type of business you work in.

- Self-employed
- Institutional
- Chain (corporate owner)
- Chain (franchise)
- Independent

### Professional Cook Research Project Employee Survey

\* 60. How long have you worked in the foodservice industry in total?

### Professional Cook Research Project Employee Survey

\* 61. What is your current position? Please pick one of the following categories which best represents the position and responsibilities.

- Executive Chef, Multi-unit / Large Hotel**
  - Oversees operations with multiple units, brands or food outlets in one or more large properties, such as a large hotel, resort, or restaurant chain
  - A true executive role, no longer active in the kitchen except for product and menu development
- Chef, Specialized Ethnic Cuisine**
  - Operates a single unit independent property with a specific ethnic cuisine specialty
  - Creates menus, runs the kitchen, and also works the line as needed in a supervisory role.
- Chef, Small Restaurant**
  - Operates a single unit independent property in a variety of price points
  - Creates menus, runs the kitchen, and also works the line as needed in a supervisory role
- Chef (or Kitchen Manager), Chain Restaurant**
  - Oversees a single unit property as a part of a larger organization
  - Runs the kitchen, and delivers to corporate standards
- Chef (or Senior Sous Chef), High Volume Production**
  - Supports the Executive Chef as a part of a larger organization
  - Runs a single unit/department and delivers to corporate standards
- Sous Chef, Chain Restaurant / High Volume**
  - Supports the Chef as a part of a larger organization
  - Leads the kitchen on specific shifts, and delivers to corporate standards
- Sous Chef, Small Restaurant**
  - Supports the Chef in day to day operations and oversees the kitchen in the Chef's absence.
  - Creates daily specials and works the line as needed
- Line Cook, Small Restaurant**
  - Experienced and capable of working any station/shift in a small restaurant setting
  - Handles bulk of the cooking duties, can lead junior members of the team
- Line Cook, High Volume / Production**
  - Capable of working any station/shift in a large restaurant or high volume setting
  - Produces food in large quantities; can lead junior members of the team
- Cook, Entry Level**
  - Starting out a career in the kitchen
  - Handles a single station or section but still needs some guidance
- Kitchen Helper or Assistant**
  - Does some food preparation or assembly of pre-prepared foods
  - Assists cooks or other kitchen staff but has little cooking experience
- Other (please specify)

\* 62. How long have you been in your current position?

- Less than 1 year
- 1 year to less than 5 years
- 5 years to less than 10 years
- 10 years to less than 20 years
- 20 years or more

## Professional Cook Research Project Employee Survey

\* 63. What was the position you held before this one?

- Working in the same or a similar kitchen position at a different company
- Working at a lower level kitchen position within the same company
- Working at a lower level kitchen position at a different company
- Working at a higher level kitchen position at a different company
- Working in a completely different job or industry (was not working in the kitchen)
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 64. How many hours a week do you work on average?

- Less than 20 hours
- 20 - 30 hours
- 30 - 40 hours
- 40 - 50 hours
- Over 50 hours
- Other (please specify)

\* 65. How would you describe the number of hours you currently work?

- Not working nearly enough
- Working a little less than I would like
- About the right amount of work for me
- Working a little more than I would like
- Working far too much
- Other (please specify)

## Professional Cook Research Project Employee Survey

\* 66. How many shifts per week do you work on average?

# of full day shifts (over 5 hours)

# of part day shifts (5 hours or less)

# of split shifts

## Professional Cook Research Project Employee Survey

\* 67. Is your position unionized?

- Yes
- No

\* 68. Is your position salaried or hourly?

## Professional Cook Research Project Employee Survey

\* 69. What is your current salary, without gratuities or bonuses? Enter the amount in one of the following, whichever is most appropriate.

Per day

Per week

Per month

Per year

## Professional Cook Research Project Employee Survey

\* 70. What is your hourly rate of pay, without gratuities or bonuses? Do not include the dollar sign in your response.

## Professional Cook Research Project Employee Survey

\* 71. What are your employer's policies on overtime for your current position?

## Professional Cook Research Project Employee Survey

72. If you receive gratuities, please indicate the estimated dollar value of gratuities you typically receive per month. Do not include the dollar sign in your response.

## Professional Cook Research Project Employee Survey

\* 73. Do you receive bonuses or performance incentives in addition to your regular salary?

Yes

No

## Professional Cook Research Project Employee Survey

74. How much do you earn annually in bonuses or performance incentives? Do not include the dollar sign in your response.

## Professional Cook Research Project Employee Survey

\* 75. Do you receive additional benefits? Please select all that apply.

Basic medical (MSP) coverage

Extended medical coverage

Dental insurance

Pension or RRSP matching benefit

Staff meals

Transportation allowances

Cleaning allowances for uniforms

Company discounts

Other (please specify)

## Professional Cook Research Project Employee Survey



\* 76. What are you receiving in terms of paid vacation in your current position?

- 2 weeks of annual vacation
- 3-4 weeks of annual vacation
- 5 or more weeks of annual vacation
- Pay in lieu of holidays (% added to each cheque or paid out annually)
- Other (please specify)

\* 77. What policies are in place for statutory holidays in your current position? Check all that apply.

- Statutory holidays are a paid day off or I receive another day off in lieu if I have to work
- Paid at overtime rate on stat holidays if I have to work
- Paid at regular rate on stat holidays if I have to work
- Additional days (such as Boxing Day and Easter Monday) are also treated as stat holidays
- Other (please specify)

**Professional Cook Research Project Employee Survey**

\* 78. Please indicate the formal industry training you have taken, as well as what is required for your current position.

	Achieved or completed	Required for current position
University Degree / Diploma	<input type="checkbox"/>	<input type="checkbox"/>
Leadership / Management Training	<input type="checkbox"/>	<input type="checkbox"/>
Certified Chef de Cuisine (CCC)	<input type="checkbox"/>	<input type="checkbox"/>
Professional Cook 3 (Cook Red Seal)	<input type="checkbox"/>	<input type="checkbox"/>
Professional Cook 2	<input type="checkbox"/>	<input type="checkbox"/>
Professional Cook 1 or Culinary School Certificate	<input type="checkbox"/>	<input type="checkbox"/>
FOODSAFE	<input type="checkbox"/>	<input type="checkbox"/>
First Aid	<input type="checkbox"/>	<input type="checkbox"/>
Other Culinary Certifications (foreign credentials)	<input type="checkbox"/>	<input type="checkbox"/>

Other (please specify)

**Professional Cook Research Project Employee Survey**



## Professional Cook Research Project Employee Survey

81. Please list any additional skills that are required for your position.

## Professional Cook Research Project Employee Survey

\* 82. On a scale of 1-5, how important are the following attributes (personal qualities) required for your position?

	1 - Not at all important	2	3	4	5 - Extremely Important
Attention to detail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creativity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to follow directions and corporate standards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to work in a collaborative environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to multi-task and change priorities quickly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to work under high pressure and tight timelines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to work in a high volume environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to work independently	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Professional Cook Research Project Employee Survey

83. Please list any additional attributes (personal qualities) that are required for your position.

## Professional Cook Research Project Employee Survey

\* 84. What are the main reasons you were attracted to a career as a cook or chef? Please rate each according to how important they were to you.

	Not important				Very important	
Fun work environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Started just as a way to earn money and found I liked it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creativity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fast pace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Love of food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good career opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wages and benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enjoy working non-standard hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friends or family in industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

## Professional Cook Research Project Employee Survey

\* 85. How would you like your career to progress in the next 1-3 years?

- Keep working in the same job for the same company
- Working at a higher level job within the same company
- Working in the same job at a different company
- Working at a higher level job at a different company
- Owning and operating my own business in the foodservice industry
- Working in a related field (chef instructor, food or equipment sales, etc.)
- Working outside of the industry
- Retired from the industry
- Other (please specify)

**Professional Cook Research Project Employee Survey**

\* 86. What are the main factors in you wanting to change or leave your current job? Indicate how much each of the following is a factor in your decision.

	Not a factor				Very important factor		N/A
Looking to learn more in a different environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Better career opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No opportunity to complete my training or apprenticeship in current job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Better wages or benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More creative opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Work schedule is too demanding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Not getting enough hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Work is too unvaried / routine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Better work environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improved work / life balance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

## Professional Cook Research Project Employee Survey

87. Do you have any additional comments that you would like to share about your experience working as a cook or chef in British Columbia?

## Professional Cook Research Project Employee Survey

\* 88. How likely is it that you would recommend a career as a cook or chef to a friend or colleague?

Not at all likely

Extremely likely

0	1	2	3	4	5	6	7	8	9	10
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## Professional Cook Research Project Employee Survey

89. Thank you for your interest in our survey, but we are only gathering information from people who have worked, are working, or are looking for work as cooks and chefs.

- I have experience as a cook or chef, please return me to the survey!
- Ok, let me out of here!