The Mind of the Food Worker
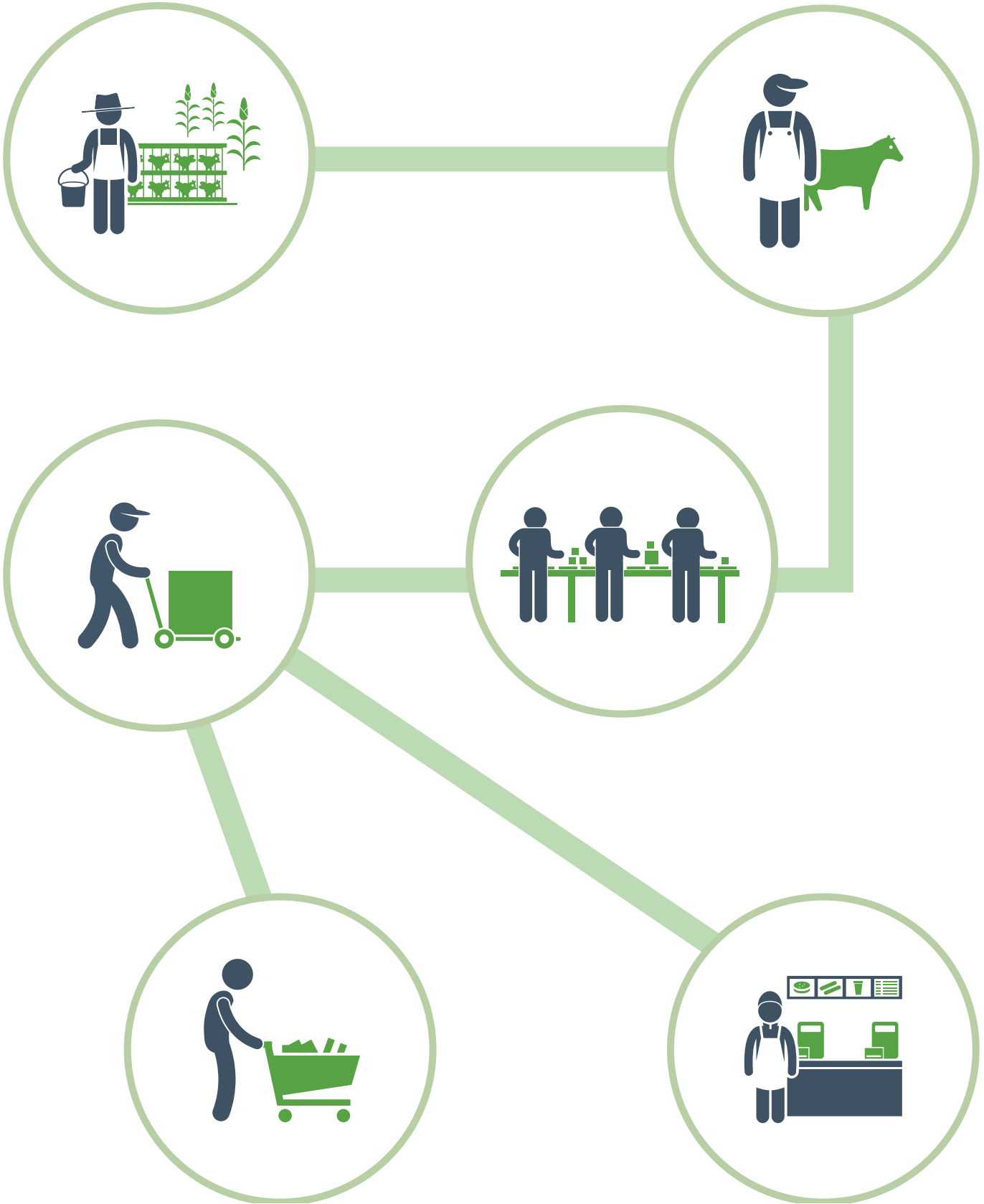
Behaviors and Perceptions that Impact Safety and Operations

An independent study by the Center for Research and Public Policy of frontline workers, supervisors, and leaders across the food system.

The Mind of the Food Worker Behaviors and Perceptions that Impact Safety and Operations

Contents

Executive Summary

Over 20 million United States and Canadian frontline food workers grow, process, distribute, cook, and serve the food that is eaten by over 355 million consumers every day. They are the vital link of a complex food system from farm to fork. And every day, each of the 20 million food workers makes individual decisions that impact food safety, workplace safety, product quality, and operations.

Despite the food worker's importance to the food industry and consumers, there is limited research to understand the food worker's motivations, attitudes, and perceptions about their workplace. What do they think about their employer, food safety, workplace safety, training, and job satisfaction?

In order to gain insights into food worker perceptions and behaviors, the Center for Research and Public Policy (CRPP) conducted an independent online survey among 1,203 food workers across the entire food system. Additionally, CRPP surveyed 79 food industry leaders to identify any perception gaps between frontline workers and corporate leadership. The study was commissioned by Alchemy Systems.

Job Satisfaction and Employer Affinity

Only **66.1%** of workers are *satisfied* with their job.

Given the critical role frontline workers play in safety and productivity, a **66.1%** satisfaction rate has the potential to create safety risks and sub-optimal quality.

87.3% of workers would *serve the food* they make to their family and children.

The ultimate litmus test of a food worker's relationship with the employer shows a small, but notable portion do not "believe" in the product they are making.

61.3% of workers say their *quality of life* is "very good" or "good".

61.3% food workers report having a good/very good quality of life and another **23.4%** report "neutral." Only **15.0%** report a "poor" or "very poor" quality of life.

Impact on Food Safety

50.8% of workers either "always" or "frequently" **come to work when they are sick.**

A majority of food workers come to work sick despite the health risk they pose to fellow workers and to the food they handle.

Workers believe management places the **highest importance on food safety.**

Worker's believe management's #1 priority is food safety over product sales and employee/worker safety.

90.2% of food workers **feel responsible** for the safety and well-being of their customers.

A solid and impressive majority of U.S. and Canadian food workers, 90.2%, say they feel very (59.0%) or somewhat (31.2%) responsible for the safety and well-being of their customers.

Impact on Worker Safety
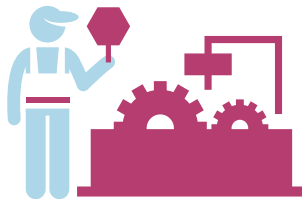
93% of workers **have confidence** to stop working when there is a safety or product problem.

The food industry has made great strides in making food and workplace safety top of mind and empowering workers to take action. However, **6.4%** of the workforce is still not comfortable forcing a line shutdown in case of an issue.

Workers believe companies value product safety over **workplace safety.**

Worker's perception of their companies is that food safety comes first, product sales second, and workplace safety third.
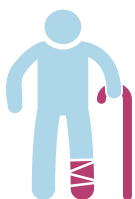
17.1% of workers say they were **injured in their first year.**
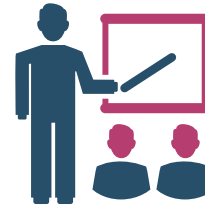
The first-year injury rate indicates that safety programs – especially for new employees – still have room for improvement.
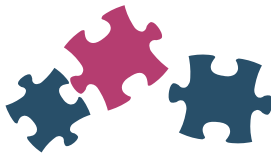
Driving Operational Efficiency
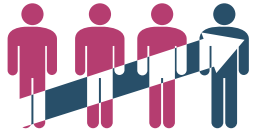
24% *production efficiency potential.*

Leaders believe that if the bottom quartile was as productive as the top quartile, production efficiency would rise **24%.**

37.2% of workers and **42.7%** of supervisors say that **training is too complex and difficult to understand.**

Given the critical role frontline workers play in safety and productivity, poor training can create safety risks and compromise quality and brand standards.

19.8% of workers say they received **too little onboarding training.**

Almost one in five workers start their jobs without confidence that they know the proper procedures.

Communication Gaps between Leaders and Frontline Workers

Leadership 92 %

Workers 85 %

92% of leadership feel **workers are safe from injuries,** but **85%** of workers feel the same way.

Workers 52%

Leadership 32.6%

52% of frontline workers indicate they **have reported safety problems at work,** while only **32.6%** of leaders estimated the same.
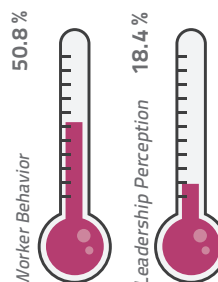
Leadership

Workers

Leaders suggest that only **19.7%** of workers **remember** all or most of their initial training versus **79.2%** of workers.

50.8 %

18.4 %

Worker Behavior

Leadership Perception

50.8% of workers either "always" or "frequently" come to **work when they are sick**, while leaders believe only **18.4%** of workers would come to work when sick.

Methodology

The Center for Research & Public Policy (CRPP) was commissioned by Alchemy Systems to conduct a study on U.S. and Canadian food workers, supervisors, and leadership.

The research consisted of three components:

1. An online survey of 1,203 food workers across the entire food chain. The survey was conducted from July 3-16, 2015. Respondents worked at farms, ranches, slaughter houses, meat and food processing plants, dairies, commercial bakeries, cafeterias, restaurants, grocery deli departments, and food distribution companies. The survey respondents were proportional to their employment levels based on Bureau of Labor Statistics (BLS) employment data. The survey focused on the following topics:

   ▶ Job satisfaction, employer affinity, and quality of life

   ▶ Experiences and views on food safety and workplace safety

   ▶ Personal health and injury rates

   ▶ Perceptions of employer support on the job

   ▶ Views on employment, advancement, and job satisfaction

   ▶ Use of technology, internet, and social media

   ▶ Perceptions of training/coaching

   ▶ Preferences for learning/training methods

   ▶ Questions specific to supervisors, and

   ▶ Demographics

2. The food industry leader research consisted of an online survey of managers and executives. The online surveys were conducted July 20 – August 7, 2015. A total of 79 surveys were completed. The leadership survey focused on the following topics:

   ▶ Views on food safety, workplace safety, and production efficiency

   ▶ Preferred vs. actual time allocations on key activities

   ▶ Assessment of operational strengths and weaknesses

   ▶ Views on efficiency and worker productivity gaps

   ▶ Employee onboarding and training processes

   ▶ Gaps between worker and leader perceptions

3. Finally, 836 food worker and supervisor (same topics as #1 above) surveys were administered on-site at production, processing, and distribution facilities from July 27 – August 7, 2015. These results are available to participating companies and are NOT presented within this report.

Process

Survey input was provided by leadership at Alchemy Systems. Survey design at CRPP is a careful, deliberative process to ensure fair, objective, and balanced surveys. Staff members with years of survey design experience edit out any bias. Further, all scales used by CRPP (either numeric, such as one through ten, or wording, such as strongly agree, somewhat agree, somewhat disagree, or strongly disagree) are balanced evenly. And placement of questions is carefully accomplished so that order has minimal impact.

All facets of the online survey were managed by CRPP's senior staff. These aspects include: survey design, pre-test, computer programming, broadcasting surveys, coding, editing, data entry, verification, validation and logic checks, computer analysis, analysis, and report writing.

Size and Error Rate

Statistically, a sample of 1,203 represents a margin for error of +/-3.0% at a 95% confidence level.

In theory, a sample of 1,203 food workers will differ no more than +/-3.0% than if all food workers were contacted and included in the survey. That is, if random probability sampling procedures were reiterated over and over again, sample results may be expected to approximate the large population values within plus or minus 3.0% -- 95 out of 100 times.

Readers of this report should note that any survey is analogous to a snapshot in time, and results are only reflective of the time period in which the survey was undertaken. Should concerted public relations or information campaigns be undertaken during or shortly after the fielding of the survey, the results contained herein may be expected to change and should be, therefore, carefully interpreted and extrapolated.

Furthermore, it is important to note that all surveys contain some component of "sampling error." Error that is attributable to systematic bias has been significantly reduced by utilizing strict, random-probability procedures. This sample was strictly random in that selection of each potential respondent was an independent event, based on known probabilities.

Each qualified panel sample member had an equal chance for participating in the study. Statistical random error, however, can never be eliminated but may be significantly reduced by increasing sample size.

Confidentiality

As required by the Code of Ethics of the National Council on Public Polls and the United States Privacy Act of 1974, The Center for Research and Public Policy, Inc. maintains the anonymity of respondents to surveys the firm conducts. No information will be released that might, in any way, reveal the identity of the respondent.

All of the analyses, findings, data, and recommendations contained within this report are the exclusive property of Alchemy Systems (www.alchemysystems.com). No information regarding these findings will be released without the written consent of an authorized representative of Alchemy Systems.

Key Findings

Job Satisfaction and Employer Affinity

- Overall job satisfaction was recorded at just 66.1% among food workers surveyed. 20.0% are either somewhat dissatisfied or very dissatisfied.

- 87.3% of food workers said they would serve food they make to their family/children. 9.9% said they would not. Similarly, 85.5% would recommend the product(s) to family/friends.

- Among twelve reasons for coming to work, the most important to food workers are: income (73.3%), support family/others (47.8%), save money (42.7%), sense of self-worth (40.8%), and interest in job/career (40.2%).

- Just over three-fifths of all food workers surveyed, 61.3%, suggested their quality of life was very good or good. Another 23.5% provided a neutral rating while 15.0% reported poor or very poor quality of life.

- 26.0% of food workers said they have no plans to leave their current job. However, some, 10.3%, plan on remaining less than one year, 26% plan on remaining for less than three years.

- 80.3% of food workers said their relationship with their manager/supervisor is very good or good.

- Solid majorities of food workers either strongly or somewhat agree with the below job related statements:
  - My employer wants to keep me here – 84.6%
  - My employer respects differences among employees – 84.1%
  - I would recommend my company to friends/family seeking employment – 77.4%
  - I want to move up in this company – 75.9%
  - This job meets or exceeds my expectations – 75.6%

Impact on Food Safety

- Food workers were asked what was most important to their employers - product safety, product sales, or employee safety. Product safety ranked the highest.

- Over one-half of all food workers, 50.8%, indicated they "always" (18.5%) or "frequently" (32.3%) go to work when they are sick. Another 37.7% indicated "sometimes" (22.1%) or "seldom" (15.6%). Only 5.6% said "never."

- Among six reasons cited, the primary reasons for going to work when sick were "don't want to let co-workers down" (46.8%), "can't afford to lose pay" (45.2%), and "don't believe I would be contagious" (33.7%).

- An impressive majority of U.S. and Canadian food workers, 90.2%, suggested they feel very (59.0%) or somewhat responsible (31.2%) for the safety and well-being of their customers.

Impact on Job Safety

- 93.0% of food workers suggested they have the confidence to stop working when they witness a safety or product problem.

- 19.8% of food workers said they received too little job safety training.

- Food workers believe employers value product sales (34.2%) over employee safety (22.1%).

- 52% of workers and supervisors have found and reported safety problems.

- 24.1% of workers and supervisors responded that they have been injured at their current job.

- 17.1% of workers and supervisors have had an injury in the first year of the current job.

Driving Operational Efficiency

- 60.2% of employees learned their jobs directly from co-workers, supervisors or managers.

- 39.3% of employees noted that training is sometimes too complicated or difficult to understand.

- The average overall positive rating for training received was only "fair" (65.8%). The highest overall positive ratings were for job safety (67.9%) and job function (67.1%). The lowest positive ratings were for onboard training (64.9%).

- 21.9% of food workers responded that they have missed training in the past because they can't leave their job.

- Only 56.8% of workers said they receive coaching from supervisors or managers frequently or somewhat often. Over 52.0% turn to coaching from co-workers either frequently or somewhat often.

- Workers and supervisors' use of computing/ mobile devices is lower than the general population, but not by much.
  - 73.7% have or use a laptop
  - 68.7% have or use computers
  - 66.8% have or use smartphones
  - 50.7% have or use tablets

Communication Gaps between Leaders and Frontline Workers

- 92.1% of leadership believe that workers agreed with the statement "I feel safe from injuries at work in my job;" however, only 84.6% of workers actually agreed with the statement.

- Leaders suggested that only 19.7 % of workers remember all or most of their initial training, versus 79.2% of workers who report remembering the initial training.

- Leaders believe only 18.4% of workers either "always" or "frequently" come to work when sick. In fact, 50.8% of workers come to work when sick.

- 52% of workers indicated they have reported safety problems at work, but only 32.6% of leaders surveyed suggested the same.

Job Satisfaction and Employer Affinity

The U.S. and Canadian food system employs over 20 million frontline food workers and supervisors. With the recovery from the Great Recession, limited immigration/guest workers, and an aging workforce, the "war for talent" is intensifying.

The Mind of the Food Worker survey asked several questions to get a multi-faceted view on frontline workers' job satisfaction and affinity for their employer.

The fundamental question is why they chose to work in the first place. When asked to choose among eleven possible reasons for coming to work every day, the most important reasons were: income, support family, save money, sense of self-worth, and interest in job/career (Exhibit 1).

EXHIBIT 1: REASONS FOR HEADING TO WORK

| Reasons for Heading to Work	Composite*	Supervisor	Worker
For the income	73.3%	69.3%	75.7%
To support family/others	47.8	53.4	44.5
To save money	42.7	44.2	41.9
Sense of self-worth	40.8	45.5	38.0
Interest in my job/career	40.2	52.9	32.6
To get experience	33.1	32.7	33.2
Interest in company	31.6	42.4	25.3
To set an example	23.4	33.4	17.4
To save money for travel	20.9	23.5	19.3
To learn a trade	19.8	26.5	15.8
To save money for education	13.1	15.2	11.8

*Composite is the total response for both supervisor and worker responses

The primary reason to work in the food sector is financial. So if income can be derived from any job/industry, how satisfied are workers in the food system?

In response to the question, "How would you rate your current job satisfaction (on a scale from "very satisfied" to "not at all satisfied," just 62.7% of frontline workers say they are satisfied. For supervisors, satisfaction is somewhat higher at 71.7%. The composite 66.1% job satisfaction rate means that over a third of frontline workers are not satisfied with their job situation (Exhibit 2).

EXHIBIT 2: JOB SATISFACTION

**Q: How would you rate your job satisfaction?**
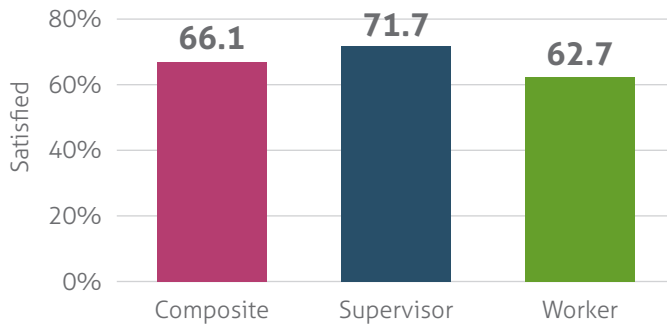
Further analysis by income and job type shows that lower earners and hourly workers are more dissatisfied (Exhibit 3).

So why are over a third of frontline workers not satisfied with their jobs? And what implications does it have on food safety, worker engagement/attention, workplace safety, and production efficiencies and effectiveness?

Clearly there are many factors at play, and each factor can differ by facility and organization. Some possible reasons are:

▶ The food industry has always been a challenging place to work. It's hard work - whether picking produce in the heat, working in a chilled meat packing facility, handling fast moving packaged food/beverages, moving product quickly through the supply chain, or serving food at restaurants.

▶ The work is routine. When performing the same activity/motion/process repeatedly, it's easy for workers to go on autopilot and disengage.

▶ Workers – especially younger and hourly workers – have other work options that are less demanding for similar pay.

EXHIBIT 3: WORK DISSATISFACTION LEVELS BY DEMOGRAPHICS
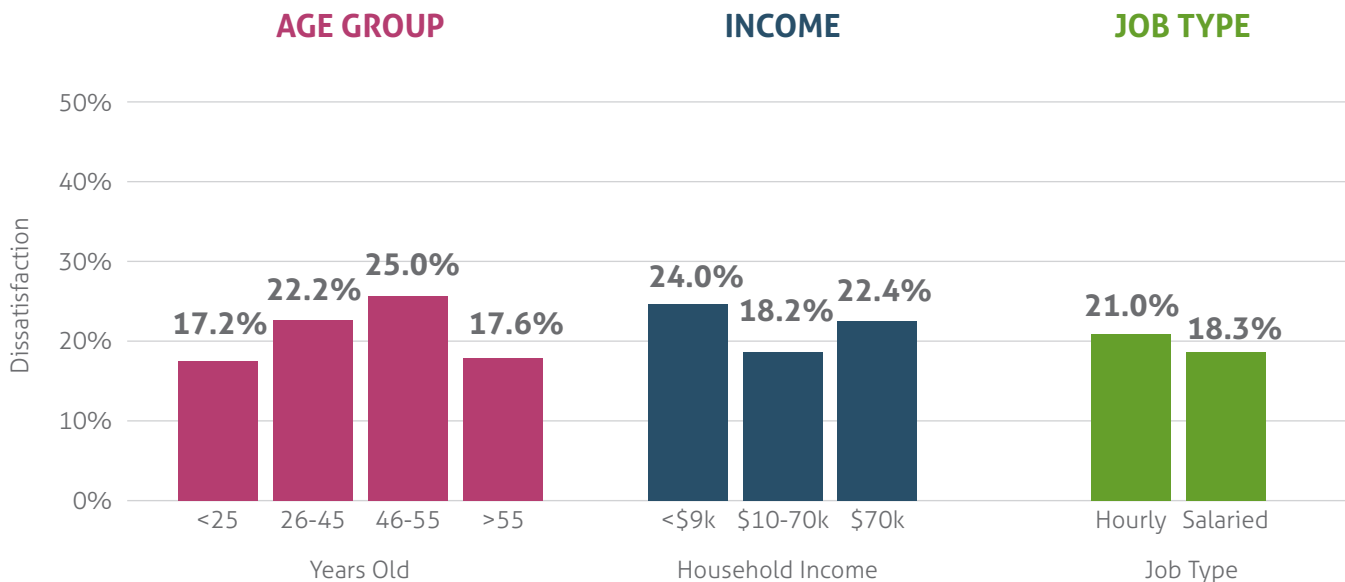
Interestingly, when asked about their overall quality of life, the results were somewhat better. When asked "What is your quality of life today?" on a scale of very good to very poor, 61.3% rated their quality of life as good or very good, 23.5% neutral, and only 15% poor or very poor. This indicates that although the job satisfaction may not be high, the overall quality of life is higher.

This is also reflected in the next question – intent to stay. When asked, "How much longer do you plan to remain at your current job," 44.5% of workers and 37.2% of supervisors responded five years or less (Exhibit 4).

Finally, to get a high-level sense of workers' affinity with their employer, the survey asked, "If workers would serve the food they make to my own family and children," and 87.3% of workers strongly or somewhat agreed. Similarly, 85.5% said they would recommend the company's products to friends and family. These are both indicators of positive affinity to the employer and belief in the quality of the product (Exhibit 5). However, this also reveals that a portion of workers are not comfortable serving the food they handle.

EXHIBIT 4: INTENT TO STAY AT JOB

Number of Years Planning to Remain at Job	Composite	Supervisor	Worker
Less than one year	10.3%	4.5%	13.7%
One to less than three years	15.7	15.7	15.7
Three to less than five years	15.8	17.0	15.1
Five to less than ten years	14.6	18.6	12.2
Ten years or more	7.8	11.2	5.8
No plans of leaving	26.0	25.6	26.3
Unsure	9.8	7.4	11.2

EXHIBIT 5: EMPLOYER AFFINITY LEVELS

Statements About Employer	Composite	Supervisor	Worker
I would serve the food we make to my own family or children	87.3%	90.8%	85.3%
I would recommend our product(s) to friends and family	85.5	89.7	83.0
I do believe my employer wants to keep me working here	84.6	90.1	83.7
My employer respects differences among employees such as race, gender, religious beliefs	84.1	88.1	81.7
I would recommend my company/organization to friends and family seeking employment	77.4	84.5	73.2
I want to move up or be promoted within this company/organization	75.9	87.4	69.1
This job meets or exceeds my expectations	75.6	82.3	71.7

Impact on Food Safety

Frontline food workers and supervisors have a direct and immediate impact on food safety. Their actions (or inactions) can result in costly food recalls or deadly outbreaks. For example, according to a CDC study on foodborne norovirus outbreaks[1], "infected food handlers were the source of 53% of outbreaks and may have contributed to 82% of outbreaks." The survey posed a battery of questions on food safety to gauge worker and supervisor attitudes and perceptions.

Worker illness becomes even more concerning if a food worker goes to work with "reportable symptoms" or specific "reportable illnesses" as defined by the National Center for Environmental Health. In such situations, it is possible a food worker can unintentionally introduce pathogens into food production and create a public health risk.

In order to assess worker perceptions of how companies prioritize safety, respondents were asked, "Which ONE of the following - food product safety, product sales, or employee/worker safety - is the most important to your employer?"

The good news is that food safety is top of mind. Frontline workers responded that product/food safety is their company's #1 priority.

When asked "Do you feel personally responsible for the safety and well-being of your customers?" 90.2% responded they feel very or somewhat responsible (Exhibit 6).

EXHIBIT 6: RESPONSIBILITY FOR FOOD AND PRODUCT SAFETY

Feeling Responsible?	Composite	Supervisor	Worker
Very responsible	59.0%	62.2%	57.2%
Somewhat responsible	31.2	30.9	31.4
Total: Very & Somewhat Responsible	**90.2**	**93.0**	**88.6**
Not very responsible	5.3	3.6	6.3
Not at all responsible	1.6	1.8	1.5
Never really thought about it	1.7	1.1	2.0
Unsure	1.3	0.5	1.7

[1]CDC: Epidemiology of Foodborne Norovirus Outbreaks, United States, 2001–2008

http://wwwnc.cdc.gov/eid/article/18/10/12-0833_article by Aron J. Hall, Valerie G. Eisenbart, Amy Lehman Etingüe, L. Hannah Gould, Ben A. Lopman, and Umesh D. Parashar

However, many food workers are not aware of the impact they can have on customers simply by going into work when they are ill. In response to the question, "when you are sick, how often do you still go to work?" a surprising 50.8% say "always" or "frequently" (Exhibit 7).

When asked about the reasons for going to work when sick, the top three responses (multiple responses allowed) were:

▶ Don't want to let co-workers down (46.8%)
▶ Can't afford to lose pay (45.2%)
▶ Don't believe I would be contagious (33.7%)

Based on these findings, the food industry faces a significant challenge to ensuring food workers are educated and aware of the impact of coming to work sick, not only on their co-workers, but also on food products and consumers.

Workers who work while sick can also pose a workplace injury risk to themselves and co-workers if they are operating heavy machinery and taking medicine that can impair motor skills.

Finally, one of the more notable findings of the survey is that almost 87.3% of food workers would serve the food they make to their own families and 85.5% would not recommend the products to friends and family (Exhibit 8).

EXHIBIT 7: FREQUENCY OF WORKERS GOING TO WORK WHEN SICK

Going to Work when Sick	Composite	Supervisor	Worker
Always	18.5%	17.5%	19.1%
Frequently	32.3	34.5	30.9
Sometimes	22.1	24.7	20.6
Seldom	15.6	12.6	17.4
Never	5.6	5.8	5.4
Unsure	0.8	0.9	0.8
Don't Get Sick	5.1	4.0	5.7

EXHIBIT 8: SERVING AND RECOMMENDING FOOD PRODUCTS

87.3%
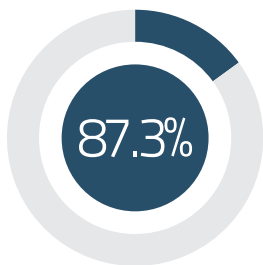
87.3% of food workers **would serve the food** they make to their own families and children.

85.5%
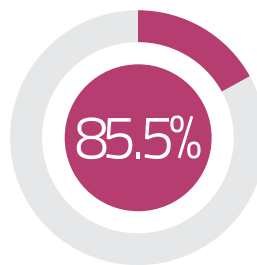
85.5% of food workers **would recommend the products they make** to friends and family

Impact on Workplace Safety

Growing, processing, distributing, and cooking food can sometimes be hazardous to the frontline workforce. Food companies have made strides in improving workplace safety, but how do workers perceive their employer's commitment to their safety?

When workers and supervisors were asked "which ONE of the following – food/product safety, product sales, or employee/worker safety - is the most important to your employer?" the top answer was food safety. That's the good news.

The bad news is that workplace safety was perceived as a lower priority than product sales (Exhibit 9). If this is indeed the reality, then companies should consider realigning priorities. If it is a false perception, then

additional communications between management and frontline workers are needed to ensure alignment.

Most food companies' goals are to send workers home just as safe as they arrived. Unfortunately, more work needs to be done to achieve that goal. According to the survey, 24.1% of workers have been injured on their current job. First year injury rates are also high with 17.1% of respondents reporting they were injured in the first year of their job (Exhibit 10).

EXHIBIT 9: WORKER PERCEPTIONS ON EMPLOYER PRIORITIES

What is Most Important to the Employer?	Composite	Supervisor	Worker
Food product safety	39.6%	39.5%	39.8%
Product sales	34.2	33.9	34.3
Employee / worker safety	22.1	24.0	21.0
Unsure	4.1	2.7	4.9

EXHIBIT 10: WORKPLACE SAFETY CONCERNS

Employee Statements on Safety	Composite	Supervisor	Worker
I have found and reported a safety problem at my current job	52.0%	59.3%	47.7%
I have been injured at my current job	24.1	26.1	22.9
I was injured in the first year of my current job	17.1	18.9	16.0

These high numbers do not correlate with Recordable Incident Rates (RIRs), which are much lower. It is possible that workers are not fully reporting all injuries or the injuries do not meet the RIR criteria.

Regardless, worker responses to this anonymous survey indicate there may be gaps that need to be addressed. A contributing factor could be that 20.6% of workers feel they received too little job safety training prior to actually doing their job (Exhibit 11).

60.5% of supervisors and managers surveyed felt that "lack of training is the chief cause of workplace injuries within their facility." (Exhibit 12).

There is some positive news on the workplace safety front. The survey showed 93% of frontline workers are comfortable with stopping production to address a product or safety issue. And if there is a concern, 89.8% have the confidence to question a manager (Exhibit 13).

Both statistics are very positive, but are they good enough? How many workers actually make the decision to stop production to address a product or safety issue? What about those who do not feel comfortable stopping production when they identify a safety risk? These are all questions food companies need to explore with their frontline workers and supervisors.

EXHIBIT 11: AMOUNT OF JOB SAFETY TRAINING

69.6
ABOUT RIGHT

20.6
TOO LITTLE

7.7
TOO MUCH

2.1
UNSURE
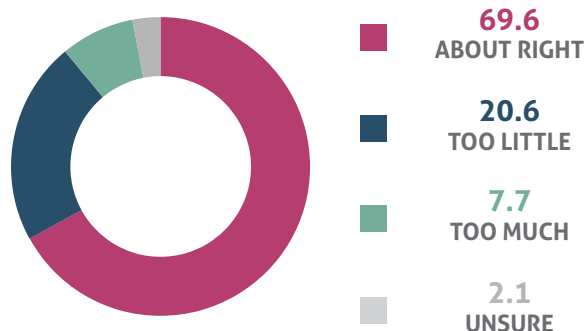
EXHIBIT 12: IMPACT OF TRAINING ON INJURIES

60.5% of supervisors feel lack of training is the chief cause of workplace injuries

EXHIBIT 13: EMPLOYEE COMMUNICATION ON SAFETY CONCERNS

Employee Statements	Composite	Supervisor	Worker
You have the confidence to stop working when you see a safety or product problem	93.0%	93.9%	92.4%
When you have a concern, you have the confidence to question a manager or supervisor when you disagree	89.8	91.0	89.1

Driving Operational Efficiency

Food companies compete in a mature, moderate-growth environment with intense pressure on margins. They are continually seeking opportunities to drive operational efficiency and expand margins.

To guage the progress made, the survey asked food company leaders about their company's level of inefficiency. The results were surprising. Only 11.8% of leaders think that inefficiency is at 1-10% level. 61.8% believe that inefficiency is at 11% - 30% level. And another 21.1% believe it is even higher (Exhibit 14).

The large levels of self-reported inefficiencies by leadership indicate that there are significant opportunities to leverage the frontline workforce to help improve operations.

In fact, the survey asked the leaders, "If the least productive (bottom 25%) of your own workforce was as productive as the top 25%, by what percentage would that increase efficiency at your company?" On average, they predicted efficiency would increase by 24% (Exhibit 15). These are very high numbers that highlight the hidden value of better leveraging frontline workers and supervisors.

So how can all employees be trained, coached, and managed so that they are as productive and efficient as the top quartile employees?

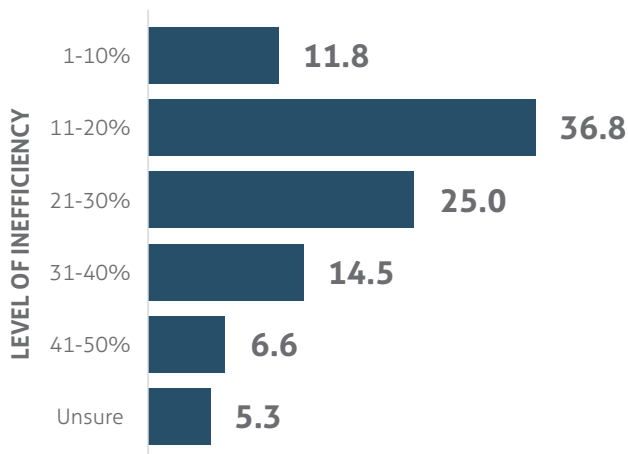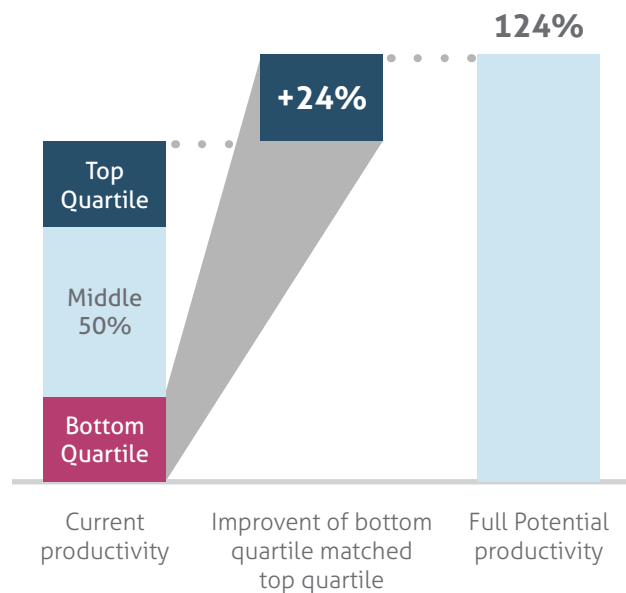EXHIBIT 14: LEADERSHIP PERCEPTION OF INEFFICIENCY LEVELS

EXHIBIT 15: EFFICIENCY POTENTIAL

Job Training

Effective job and safety training is critical for any frontline food job. The survey asked workers to rate the training along nine characteristics a scale of one to ten. The average score rating across all nine characteristics was a six. The highest ratings were for job safety and job function training. The lowest ratings were for onboard training and helping get to know the culture of the company (Exhibit 16).

20.6% of workers felt they did not receive a sufficient amount of training to perform their job duties safely (Exhibit 17). This not only creates a higher safety risk for the worker, but also for customers and co-workers.

The quality of training is also a concern. Considering the diverse demographics and languages of workers in the food industry, training the frontline workforce effectively across all cultures and age groups can be a challenge. In fact, 39.3% of workers and supervisors 'strongly agree' or 'somewhat agree' that sometimes training is too complicated or difficult to understand (Exhibit 18).

EXHIBIT 16: TRAINING CHARACTERISTICS

Characteristics Rated	Very Poor — Poor — Fair — Good — Very Good
Helped you do your job safely	Good
Helped you do your own job well	Good
Teaching regulations you need to or should know	Good
Helped you get to know your company's products and services	Fair
Helped prevent injuries	Fair
Being memorable and or easily remembered	Fair
Helped you feel safe at work	Fair
The quality of onboard training received	Poor
Helped you get to know the culture of your company	Fair
AVERAGE	Fair

EXHIBIT 17: WORKER TRAINING FREQUENCY AND ADEQUACY PERCENT RESPONSES

Workers	Too little	Too much	About right
Job safety training	20.6%	7.7%	69.6%
Updates to training	27.5	10.0	57.6
Time you spend with a supervisor, manager or coach on training	22.4	11.2	62.2
The amount of training received before starting your job	21.9	11.2	63.7

EXHIBIT 18: COMPLEXITY PERCENT RESPONSES

Training Statements	Composite	Supervisor	Worker
Sometimes training is too complicated or difficult to understand	39.3%	42.7%	37.2%

Interestingly, 42.7% of supervisors also felt that training is too complicated and difficult to understand for their diverse frontline workforce. This could be due to the training lacking effective instructional design or key information. The quality, content, and delivery of training materials may need to be re-evaluated to ensure they are meeting the needs of workers across the board.

The survey also indicates that 21.9% of workers and supervisors miss training because of job demands (Exhibit 19).

Supervisors and managers were also surveyed on additional training dimensions (Exhibit 20). Supervisors and managers for the most part seem to have the tools and information needed to appropriately train their employees. They also seem to know which methods work and how they are received by their workers.

Frontline workers want to get involved and engaged in training development. The survey shows 66.8% of workers want to be included in training development.

Including workers in training development can increase engagement and compliance. Workers who see themselves or co-workers in situations demonstrating the correct way to perform their job skills are more invested in performing their duties correctly and being an example to their co-workers.

Workers also want training to go beyond just the rules/processes to follow. They want to know the rationale. In fact, 92.4% of workers felt "knowing 'why' your are doing something is as important as knowing the 'how'."

EXHIBIT 19: MISSED TRAINING DUE TO WORK DEMANDS PERCENT RESPONSES

Statements	Composite	Supervisor	Worker
I have missed training opportunities at work because I just can't leave my job to attend	21.9%	26.7%	18.9%

EXHIBIT 20: SUPERVISOR AND MANAGER PERSPECTIVE ON TRAINING

Statements	Stongly Agree or Agree
I have the confidence to train my employees effectively	87.9%
I would say I have "the right information" to train properly	87.2
I have the authority to "shut things down" when I see an unsafe situation	84.5
I am given ample time to train employees that work under my direction	84.1
I receive adequate training on "how to train"	82.7
I have the time, tools and knowledge to successfully train my employees	82.5
I receive adequate training on "how to discipline" employees	80.9
I have enough funding to train my employees	77.6
The "huddle" approach to training works well	70.4
The "huddle" approach to training is well received by employees	70.0

Coaching & Relationships

Supervisor and manager coaching of frontline workers are a critical part of building a safe and productive work culture. Coaching helps managers and supervisors validate employees so they know exactly what is required to perform their job safely and successfully. Unfortunately, only 51.8% of workers say they get a sufficient amount of coaching (frequent or somewhat often). The rest do not feel they get adequate coaching (Exhibit 21).

As a consequence of insufficient supervisory coaching, more than half of workers report that they get their coaching from a co-worker (Exhibit 22).

This raises a concern on whether or not they are getting the proper and consistent training and knowledge to make the best choices in their day-to-day activities.

EXHIBIT 21: FREQUENCY OF MANAGER / SUPERVISOR COACHING

	Composite	Supervisor	Worker
Frequently	16.2%	21.1%	13.1%
Somewhat often	40.6	43.9	38.6
Frequently & Somewhat Often	56.8	65.0	51.8
Rarely	35.4	29.1	39.2
Never	6.8	5.4	7.7
Unsure	1.0	0.4	1.3

EXHIBIT 22: FREQUENCY OF CO-WORKER COACHING

	Composite	Supervisor	Worker
Frequently	13.5%	15.2%	12.4%
Somewhat often	38.5	42.2	36.4
Frequently & Somewhat often	52.0	57.4	48.7
Rarely	38.4	35.4	40.2
Never	8.8	6.3	10.4
Unsure	0.8	0.9	0.7

Communication Gaps Between Leaders and Frontline Workers

As part of the Mind of the Food Worker study, a separate survey of 79 food industry leaders was also conducted. By comparing this leadership survey to the worker survey, perception gaps were identified between what workers said and what the leaders believed to be true.

When asked how much of their initial training employees retained, 79% of workers suggested they retained 'all' or 'most' of their initial training. But leaders suggested only 19.7% of food workers are remembering 'all' or 'most' (Exhibit 24).

EXHIBIT 24: TRAINING RETENTION

79.2%   **19.7%**

What employees say they remember   What leaders say employees remember
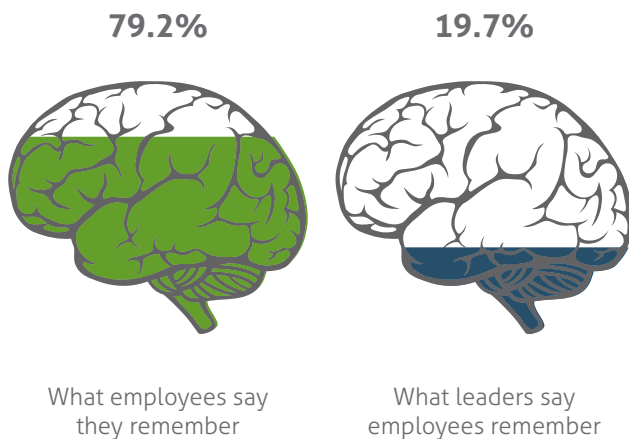
Additional communication gaps were discovered between leaders and workers in the critical areas of food and worker safety. One of the most surprising insights is the gap in leader perception vs. actual worker behavior when it comes to working while sick (Exhibit 25).

EXHIBIT 25: REPORT TO WORK SICK

18.4 %   50.8 %

Leadership Perception   Worker Behavior
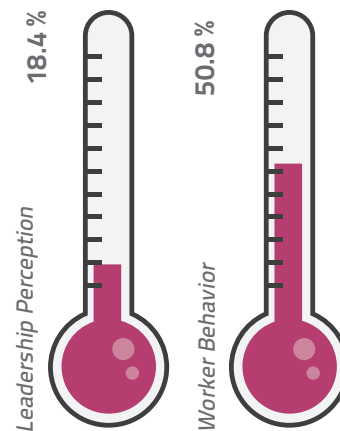
Leaders said they believed that only 18.4% of workers would come to work sick, when in reality 50.8% of workers come to work sick. This is a major gap between leadership perception and actual worker behavior.

It is important to ensure that employees who come to work sick are not posing a threat to themselves, other co-workers, or to the safety of the product. Leaders may want to consider looking at root causes within their companies and review HR policies and practices, supervisors/ management oversight, and better communication with frontline workers.
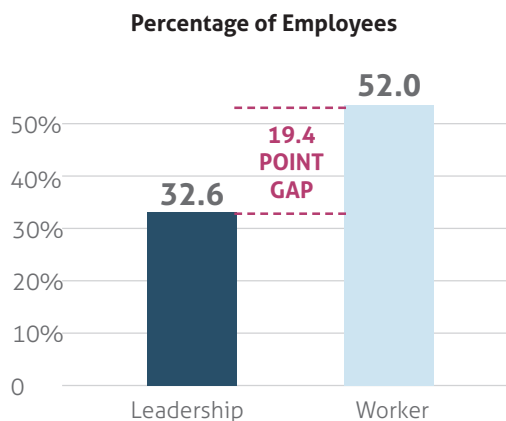
Though not a large gap, when leadership was asked what they thought employees would feel about the statement "I feel safe from injuries at work in my job" the results indicated 92.1% of leadership believed workers agreed with the statement. But the workers survey reveals that 84.6% of workers agreed. The 15.4% point gap suggests more consideration of safety policies and potential hazards may be necessary.

When leaders were asked to estimate how many employees would say they have found and reported a safety problem, they answered 32.6%. Workers answered 52.0%. The 19.4 point difference also indicates major perception gaps (Exhibit 27).

Additional questions in the leader survey asked participants to rate their own organizations on different characteristics from food safety to communication with frontline employees. The overall average rating was considered to be just "fair" at 64%, indicating there is significant opportunity for improvement (Exhibit 28).

The highest ratings were for product/food safety and worker safety. This is encouraging news as leaders have

placed caring about the safety of the food they produce/provide and the safety of their workers at the top of the list.

Employee retention and providing adequate tools to do an effective job also rated well. Preparation for how to best work with Millennials is a challenge.

EXHIBIT 27: REPORTING SAFETY PROBLEMS

Percentage of Employees

EXHIBIT 28: LEADERSHIP RATINGS ON WORKFORCE CHARACTERISTICS

Appendix

Demographics

The following tables represent the demographic characteristics of the 1,203 respondents from the online survey.

Age	Composite	Supervisor	Worker
Average	42.78	42.60	42.89

Hispanic?	Composite	Supervisor	Worker
Yes	12.3	12.1	12.4

Non-Hispanic Race?	Composite	Supervisor	Worker
White	72.2	73.5	71.7
Black or AA	6.2	4.0	7.6
Asian	6.9	7.6	6.5
Native Hawaiian or Pacific Islander	0.2	0.2	0.3
American Indian	0.9	1.8	0.5
Other	1.0	0.7	1.4

Total Household Income	Composite	Supervisor	Worker
Under $9,999	2.1	0.9	2.8
$10,000 to less than $40,000	28.3	13.3	37.2
$40,000 to less than $70,000	29.3	27.0	30.7
$70,000 to less than $100,000	21.1	29.4	16.1
$100,000 or more	16.1	27.2	9.6

Marital Status?	Composite	Supervisor	Worker
Single / never married	23.4	16.8	27.4
Married or partner	63.5	74.0	57.2
Widowed	2.6	2.0	2.9
Divorced	9.1	6.7	10.5
Separated	1.3	0.4	1.7
Other	0.2	---	0.3

Rent / Own?	Composite	Supervisor	Worker
Rent	30.7	19.5	37.3
Own	67.7	79.4	60.8
Unsure	0.9	0.9	0.9
RF	0.7	0.2	0.9

Education	Composite	Supervisor	Worker
Eighth grade or less	0.1	---	0.1
Some HS	1.5	0.4	2.1
HS graduate or GED	16.6	6.7	22.4
Some technical school	3.9	2.0	5.0
Technical school graduate	5.9	5.6	6.1
Some college	25.8	21.7	28.2
College graduate	35.9	47.8	28.8
Post-graduate degree	10.0	15.5	6.8
RF	0.3	0.2	0.4

Born in US?	Composite	Supervisor	Worker
Yes	77.4	78.7	76.6

Age Arrived in US if Not Born in US	Composite	Supervisor	Worker
Average	19.96	17.02	16.92

English is Primary Language?	Composite	Supervisor	Worker
Yes	92.8	93.5	92.4

Children in Home	Composite	Supervisor	Worker
None	47.2	39.3	51.8
1 – 2	41.2	49.4	36.4
3 – 4	9.8	10.1	9.6
5 or more	1.3	0.7	1.6
Unsure	---	---	---
Prefer not to answer	0.6	0.4	0.7

People Living in Household	Composite	Supervisor	Worker
One	16.4	11.2	19.4
2 – 3	51.5	48.3	53.4
4 – 5	25.4	35.7	19.3
5 – 6	5.8	4.3	6.8
7 or more	0.9	0.4	1.2
Unsure	---	---	---

Company Credentials

CRRP

The Center for Research & Public Policy (CRPP) is a think tank. CRPP is a full-service research and public policy consulting firm specializing in qualitative and quantitative research, program evaluation, strategic plans, program management, community needs assessments, policy, political and opinion polling as well as community involvement research. The firm manages the polling institutes for major colleges and universities nationwide. What distinguishes CRPP from other market research firms is that our work also focuses on issues involving public policy, government services, and regulated industries. CRPP is headquartered in Vermont with offices in New Hampshire and Arizona.

Alchemy

Alchemy is the global leader in innovative solutions that help food companies engage with their workforces to drive safety and productivity. Over two million food workers at 15,000 locations use Alchemy's tailored training, coaching, and communications programs to reduce workplace injuries, safeguard food, and increase yield. From farm to fork, Alchemy works with food growers, manufacturers, processors, packagers, distributors, and retailers of all sizes to build a culture of operational excellence.