# Employment Prospects 2023-31

## Outlook for the London Economic Region

Smart Prosperity Institute

LONDON ECONOMIC DEVELOPMENT CORPORATION

**About the London Economic Development Corporation**

The London Economic Development Corporation (LEDC) is the lead economic development agency for London, Canada. Established in 1998, LEDC is a not-for-profit organization that is funded by the City of London through a Purchase of Service Agreement. Working with business, government, academic institutions, and industry partners, LEDC supports the growth of existing businesses, attracts new businesses to London, and strives to ensure companies have the talent, resources, and business conditions they need to continue scaling. LEDC focuses on growing London's primary economic sectors — Agri-Food, Advanced Manufacturing, Digital Media and Tech, Health, and Professional Services. Growth in these sectors creates additional jobs through supply chains, service, retail industries, and more.

**About Smart Prosperity Institute**

Smart Prosperity Institute is a national research network and policy think tank based at the University of Ottawa. We deliver world-class research and work with public and private partners to advance practical policies and market solutions for a stronger, cleaner economy.

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## Ten Key Points From This Report

1.  London's population and economy are booming, so it is vital that the city has the infrastructure, housing, and amenities to support this growth. Availability and affordability of housing, once a significant advantage for the London economic region, is a critical issue, especially for recruiting younger workers who are entering the housing market for the first time. Availability and affordability of child care is also vitally important, to support a growing number of families with young children.

2.  Just under half of all the forecasted job openings in the advanced manufacturing, health, construction, and information technology sectors in the London economic region will be created through retirements. These openings are a tremendous opportunity for people looking to enter these sectors (or looking to move up within their employer). Still, it comes with a significant loss of experienced and skilled workers.

3.  Retiring journeypersons will limit the capacity of the apprenticeship system to train new entrants to skilled trades. In the compulsory trades, this pressure will be the most acute. New approaches such as encouraging people on waiting lists for apprenticeships to relocate to places without waiting lists may help to mitigate this issue.

4.  In combination with new positions needed to support growth, the domestic supply of labour will be insufficient to fill all of these job openings, meaning that skilled people from around the world will be needed in even greater numbers than they are today.

5.  Immigrants will be a key recruitment source in many occupations but will be especially important in some health occupations. Improving not just the intake of immigrants but also speeding up and smoothing their transition into working in the roles they are trained for will be critical.

6.  The provincial government should consider a program similar to the FAST NB program to match employers with international skilled workers.

7.  Ensuring that we have housing and mobility options that are affordable and work for people who will be filling these jobs over the next six years is critical. A lack of housing and transit options is a barrier to attracting and retaining employees, particularly at the entry-level.

8.  Ending homelessness is seen as an urgent priority that will not only help people who are experiencing homelessness but also businesses that are located in the core.

9.  The massive disruption of norms related to working in an office has ongoing impacts, as foot traffic in the core of London remains low, commercial vacancies remain high, labour markets have deepened, and commutes are becoming longer but less frequent.

10. All levels of government and postsecondary institutions need to work together in new ways to ensure that the education system, housing, transit and immigration are aligned to meet the labour market needs of the London economic region.

# Employment Projections at a Glance

The London economic region is projected to need tens of thousands of workers over the next eight years to replace retiring workers and to keep pace with projected levels of employment growth. These projections, which cover *some but not all* of the occupations in each of the four sector reports, do not consider the rapid rate of recent investments announced in the area — for example, Volkswagen's announced electric battery manufacturing plant in St. Thomas and all the spinoff jobs it will create in the sector. The graph below shows projected job openings for select occupations from each sector.

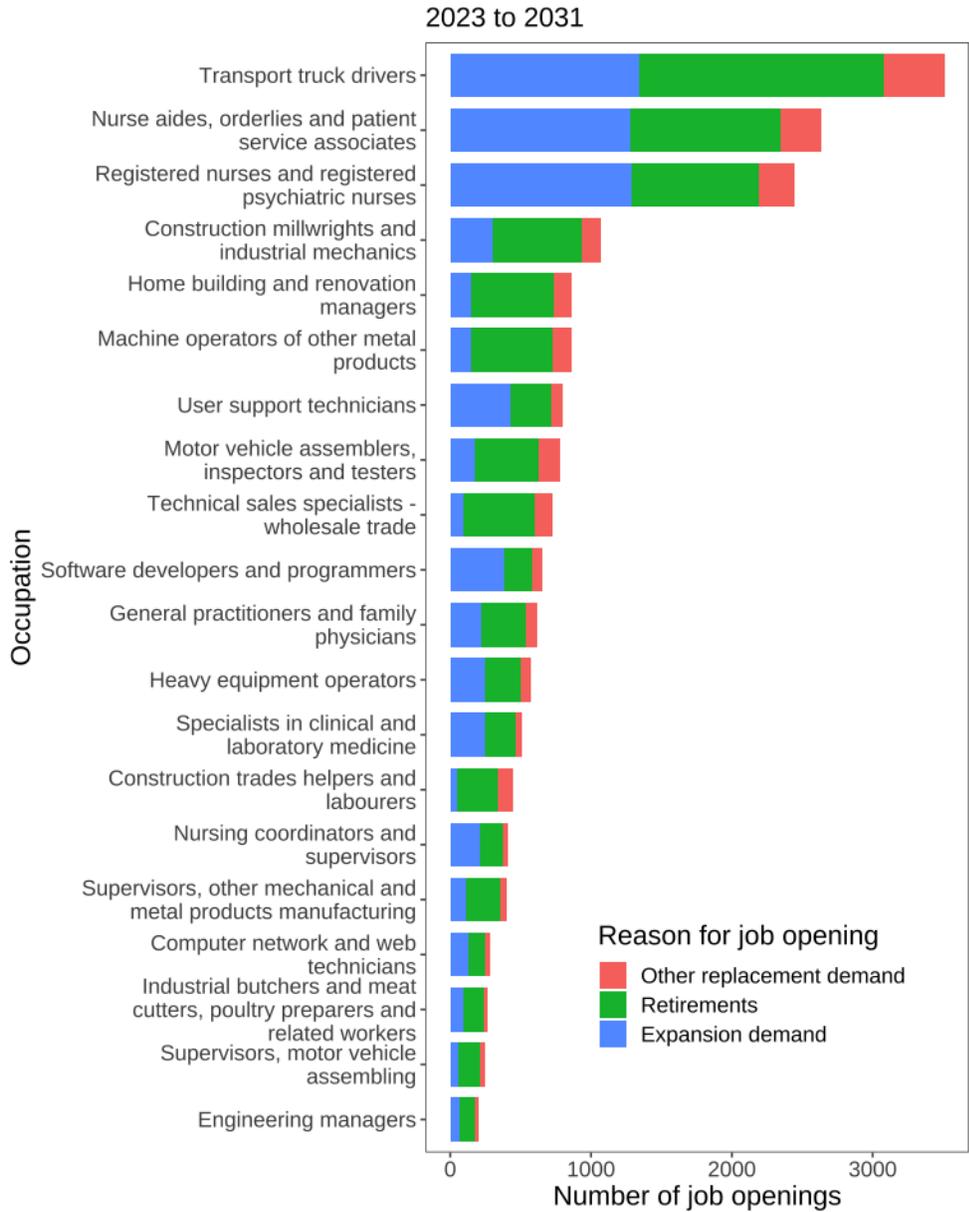**Composite Projection of Job Openings for Select Occupations, Elgin-Middlesex-Oxford**

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## Introduction

The London region's economy and population are booming. This population boom includes international students attracted to higher education opportunities at Fanshawe and Western, immigrants to Canada seeking new opportunities, and families with young children, moving out of the Greater Toronto Area, seeking family-friendly, attainable housing.

This population boom comes at a time when employers are grappling with the demographic wave of Baby Boomers retiring. Retirement rates are generally expected to increase over the next decade, with fewer working-age people for each retirement-age adult nationwide, reaching a historic low ratio of two working-age people for each retiree in 2035. To increase the size of the Canadian labour force, the federal government has increased its targets for admitting new permanent residents, which will reach 500,000 per year by 2025.[1]

These two general trends of an aging population and increasing working-age immigrants are well understood. But how do they vary at the local level and by occupation? Building on the Canadian Occupational Projection System (COPS) for 2022-2031, this report provides a summary outlook for the expected number of job openings for critical occupations in four sectors in the London region — advanced manufacturing, health, construction and information technology, until 2031.

To explore what employers are experiencing right now in terms of attracting and retaining talent, London Economic Development Corporation (LEDC) and Smart Prosperity Institute (SPI) facilitated a series of roundtable discussions with leading employers in each of the four sectors about these region-specific and occupation-specific forecasts for job openings, contemporary labour market challenges they are facing and opportunities for public policy changes that would help in meeting expected demands for labour over the next eight years.

Addressing these challenges will take an enlightened labour market and immigration policies. However, policymakers must also take a more holistic view and recognize that to attract and retain labour, London must be a great place to raise a family. This will require London to have an adequate supply of housing, along with daycare facilities and other child-friendly infrastructure. It requires safe streets, and transit options so residents can easily access job opportunities. A big picture outlook is required to ensure an adequate supply of skilled labour for the London area's growing employers.

Four sector-specific reports were published covering more than 75 different occupations. This summary outlook report includes selected data, issues and recommendations from all four reports.

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[1] Source: https://www.canada.ca/en/immigration-refugees-citizenship/news/2022/11/an-immigration-plan-to-grow-the-economy.html

## Rapid growth in the London economic region

With one of the fastest-growing cities in Canada at its core, the London economic region – comprising the census divisions of Elgin, Middlesex and Oxford – has grown significantly over the past five years, adding roughly 63,000 people and 20,000 new dwellings. This rapid growth is a departure from past trends, where the region's population was growing more slowly.

Figure 1 shows selected components of population growth in each census division over the past ten years. All three parts of the overall economic region are experiencing relatively higher growth rates, but the sources of that growth differ, with Middlesex attracting a greater share of immigrants and net non-permanent residents (primarily international students) and Oxford and Elgin attracting a greater share of people moving from elsewhere in Ontario (intraprovincial migrants).



Figure 1: Selected components of population growth
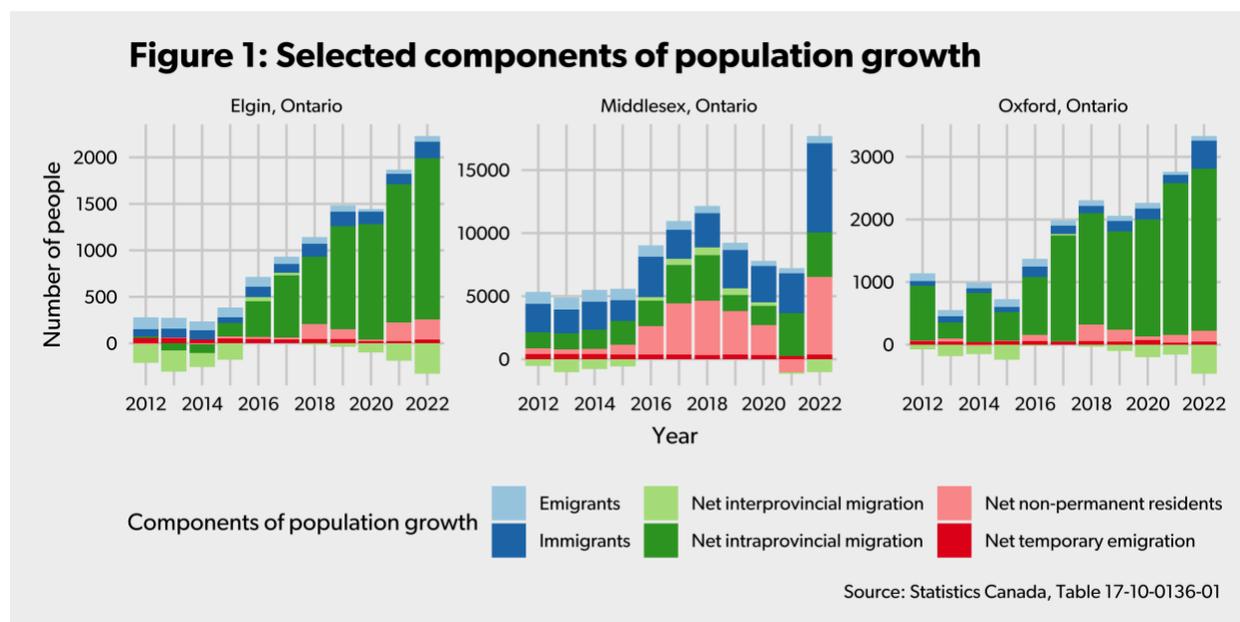
## Focus on four sectors: health, advanced manufacturing, construction and information technology

### Health

The health sector is a significant component of the London economic region, accounting for more than 32,200 jobs.[2] Employment in the sector covers a wide range of occupations – the nurses and physicians in hospitals, personal support workers, nurses aides, medical laboratory technicians, veterinarians, therapists, dentists and dental hygienists, just to name a few – in both the broader public sector, private sector and nonprofit sector.

The economic region includes three of the 57 Ontario health teams – Elgin, Middlesex-London and Oxford – that support more than 660,000 patients within and beyond the region. With close

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[2] Source: 2021 Census of Population. The 2021 Census reports occupations using the 2021 National Occupation Classification System; the 2016 Census reports using the 2016 National Occupation Classification system. Since the 2021 NOC was a structural update, there are some differences in how occupations are coded. This report uses the 2021 NOC.

relationships and affiliations with Western University, both London Health Sciences Centre and St. Joseph's Healthcare London are regional centres for patient care and training of new health professionals. It is part of the larger West region, the second-largest of the Ontario health regions with just over four million people, which stretches from Waterloo to Tobermory to Windsor and Niagara.

The region is also a centre for health and life science research and commercial enterprises, including, for example, Lawson Health Research Institute, Robarts Research Institute, Trudell Medical International, Starlim and Jones Healthcare Group.

As shown in Figure 2, people working in health occupations live throughout the London economic region with relatively higher concentrations close to St. Joseph's Health Care, University Hospital, Victoria Hospital and Children's Hospital in the City of London (dark blue on the map). This concentration is perhaps unsurprising, given that London Health Sciences Centre and St. Joseph's Health Care employ over 20,000 people.

**Figure 2: Employment in health occupations, London economic region and Southern Ontario**
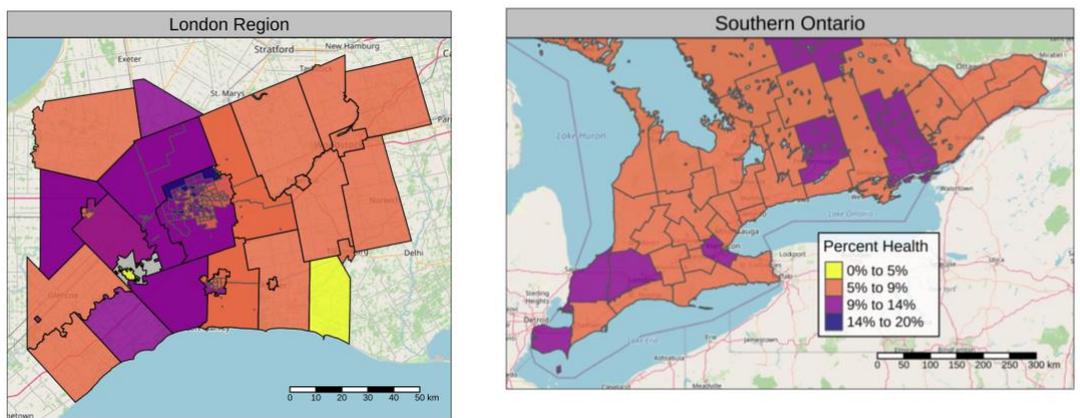


**Advanced manufacturing**

Advanced manufacturing is a critical sector in the London economic region, accounting for more than 34,000 jobs.[3] More than 500 companies employ people in this sector, which includes manufacturers in aerospace, materials, automotive, transportation, defense and building products.

Spanning both sides of the 401 corridor and located halfway between the Greater Toronto and Hamilton region to the East and Windsor / Detroit to the West, the region has a strong network of suppliers in these industries. Like many other areas in the broader Great Lakes region, the manufacturing sector in the London CMA was heavily impacted by the 2009 recession – employment in the sector has declined by almost 14% from 2006 levels even as the overall population has increased by 19%.

As shown in Figure 3, employees of these companies, classified as occupations in manufacturing or utilities, live throughout the London economic region with relatively higher concentrations in the East and Southeast parts of the City of London and the core and Northern parts of the City of St. Thomas

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[3] Source: LEDC, https://www.ledc.com/advanced-manufacturing. 2021 Census reports 17,220 jobs in London CMA in manufacturing and utilities; 2006 Census reports 19,980.

(orange and yellow on the map), close to major transportation corridors where significant clusters of manufacturers are located.

**Figure 3: Employment in manufacturing occupations, London economic region and Southern Ontario**
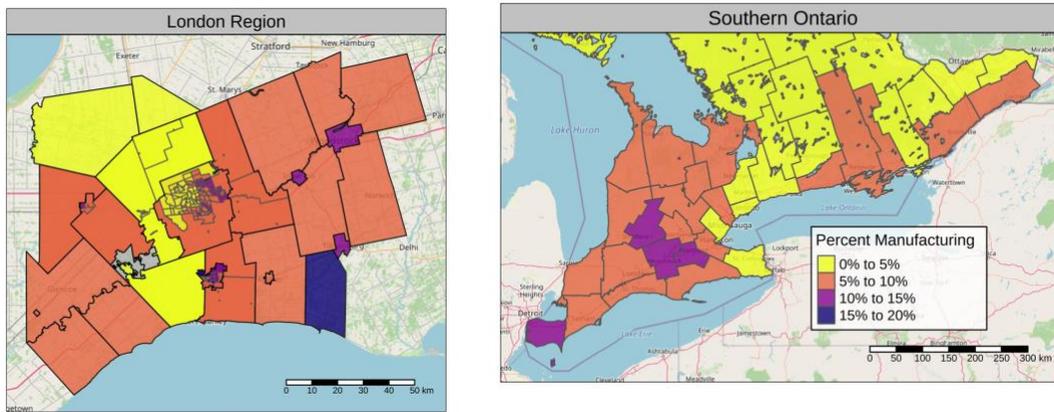


## Construction

The London region is booming in terms of construction activity. Cranes dot the horizon in the central City of London, which has experienced six consecutive years of elevated construction activity, as measured by building permit values and municipal capital expenditures. For example, in the City of London, the annual value of construction requiring building permits averaged $1.3 billion from 2016 to 2021, which is 50% higher than the previous five-year period average. Average annual municipal capital expenditures have similarly increased by 37% from an annual average of $181 million to an annual average of $248 million (authors' calculations from City of London building division reports for December of each year and City of London capital budget monitoring reports). New housing construction has accelerated outside of London as well, as documented in Smart Prosperity Institute's report *The Growth of London Outside of London*.

As shown in Figure 4, employees of construction companies and self-employed tradespeople, classified as occupations in trades, transportation and equipment operators, live throughout the London economic region with relatively higher concentrations in the East and Southeast parts of the City of London and rural municipalities (orange and yellow on the map).

**Figure 4: Employment in trades and transport occupations, London economic region and Southern Ontario**
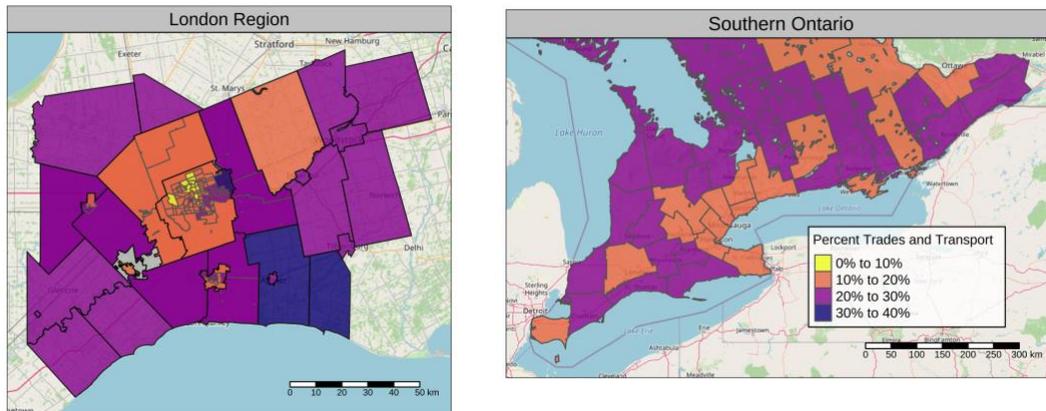


### Information technology

London is home to more than 400 companies that employ more than 16,000 people in the digital media and technology sector.[4] It is the home base for the fast-growing fintech Paystone and established market leaders like Voices.com, Digital Extremes and Info-Tech Research Group, to name a few. The region is also a centre for education and training, with Western University enrolling more than 1,000 undergraduate and graduate students in computer science and Fanshawe College enrolling more than 3,000 students in various information technology programs.[5]

Overall employment in natural and applied science occupations in the Elgin, Middlesex and Oxford census divisions increased by 6,220, from 17,515 in 2016 to 23,725 in 2021. This growth in employment in natural and applied science occupations is occurring throughout the economic region, with Oxford and Elgin census divisions gaining slightly (~5% growth) and most of the growth in natural and applied science occupations focused in the Middlesex census division (~36% growth).

As shown in Figure 5, people working in information technology are relatively concentrated in the core, North and West of the City of London (dark purple on the map). Still, they live throughout the city and wider economic region.

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[4] Source: LEDC, 2023. "Digital media and tech." https://www.ledc.com/digital-media-tech
[5] For data on enrolment at Western University, see https://www.uwo.ca/ipb/databook/04/cscitb04.html. For Fanshawe College, see https://data.ontario.ca/dataset/college-enrolment.

**Figure 5: Employment in trades and transport occupations, London economic region and Southern Ontario**
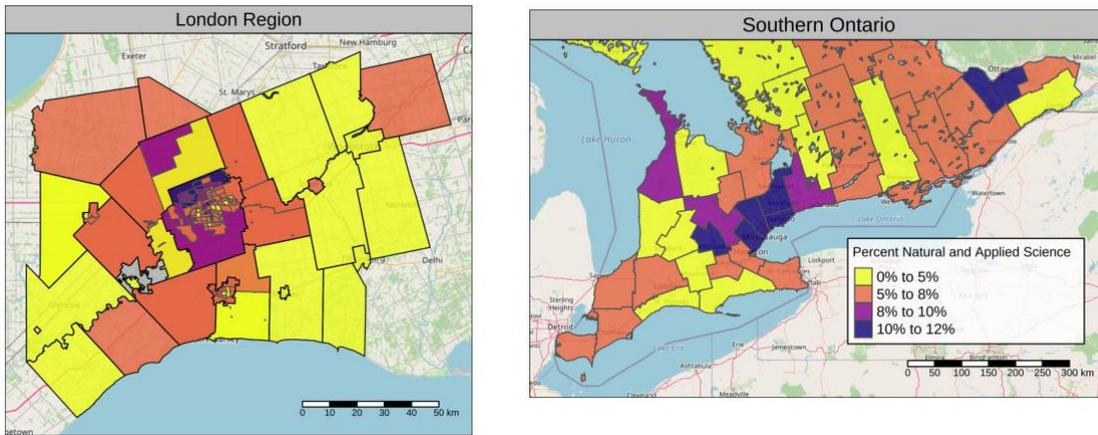


## Outlook for select occupations

The Elgin-Middlesex-Oxford area will need tens of thousands of new workers to replace retiring workers and keep up with projected expansion demand in the four sectors. The Institutional Research team at Fanshawe College has developed employment projections at the occupational level for 2023-31. This summary outlook report presents data on a selection of occupations, five from each of the four sectors; see the individual sector reports for more information.

These projections, while vital, cannot capture the whole story. In particular, projecting expansion demand is particularly challenging, as models can only project forward past trends. They lack on-the-ground knowledge of, for example, upcoming investments, plant openings, hospital capital plans and municipal housing targets. Given the renewed interest in on-shoring manufacturing and producing the technologies needed to hit net-zero emissions and ambitious municipal housing targets, these are almost certainly underestimates of future employment growth.

Figure 6 provides projected job openings in select occupations for the years 2023 to 2031 for the Elgin-Middlesex-Oxford region. The projections are broken down into three components: those that will occur due to *retirement*, those that will occur due to projected *expansions*, and those that occur for *other reasons*, which can include workers switching occupations or industries. Detailed breakdowns for each of the 20 occupations can be found in the individual sector reports.

**Figure 6: Composite Projection of Job Openings for Select Occupations, Elgin-Middlesex-Oxford**



2023 to 2031
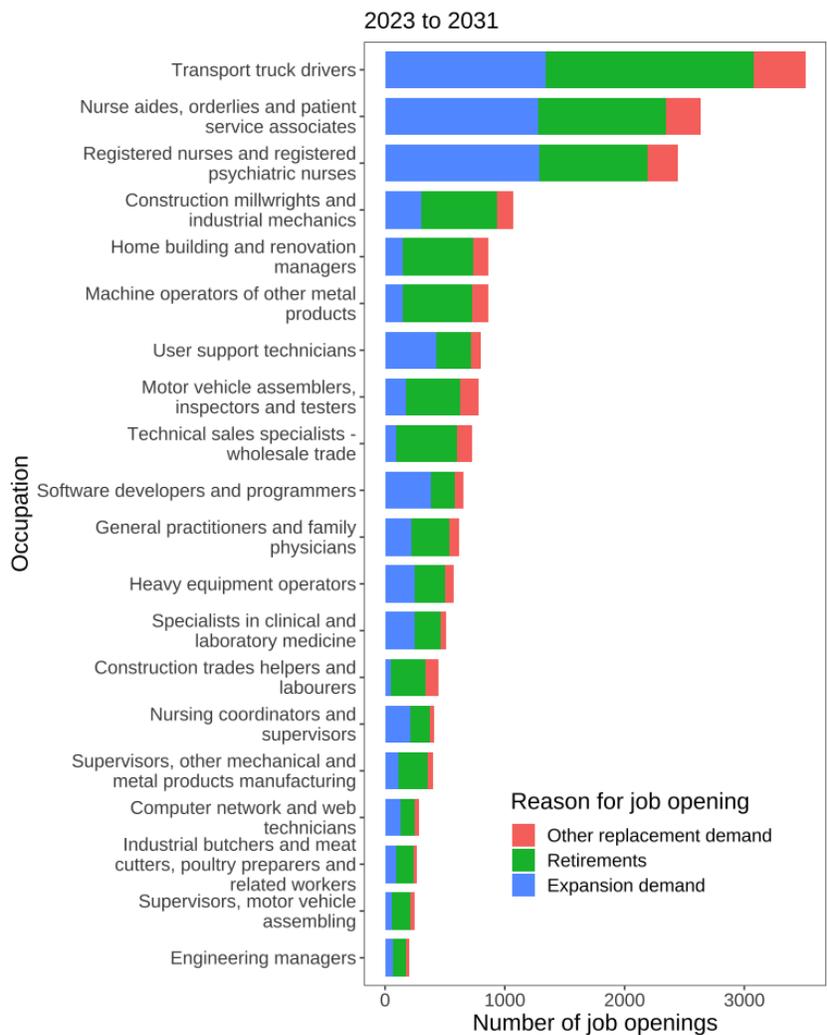
Figure 7 shows the number of people working in these occupations in Elgin-Middlesex-Oxford in 2023. In total, these 20 occupation codes include 54450 jobs, with over 29000 of those jobs in five NOC codes: Transport truck drivers (73300), Nurse aides, orderlies and patient service associates (33102), Registered nurses and registered psychiatric nurses (31301), Motor vehicle assemblers, inspectors and testers (94200), Construction trades helpers and labourers (75110).

**Figure 7: Number of jobs in select occupations, Elgin-Middlesex-Oxford**

2023
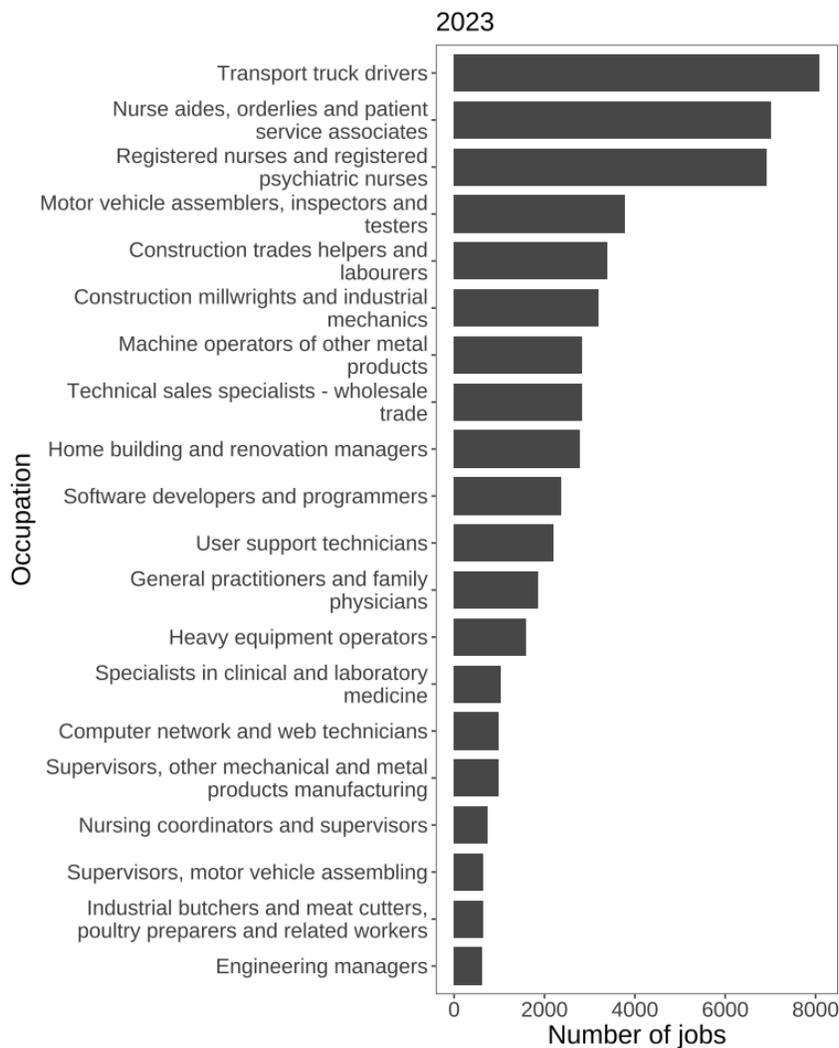


## Retirements will drive most of the job openings

Across the 20 occupations, as Baby Boomers reach retirement age between now and 2031, retirements are projected to account for between 30.2% and 69.1% of job openings in these select occupations in EMO. In total numbers, retirements are projected to be particularly significant in terms of overall job openings for the following occupations:

- Transport truck drivers (73300): 1,737 projected retirements
- Nurse aides, orderlies and patient service associates (33102): 1,068 projected retirements
- Registered nurses and registered psychiatric nurses (31301): 910 projected retirements
- Construction millwrights and industrial mechanics (72400): 634 projected retirements
- Home building and renovation managers (70011): 586 projected retirements

Almost 9000 people in these occupations are projected to retire over the next eight years, representing a significant loss of experienced supervisors and workers. The highest rates of retirement are in supervisory occupations (~25%+).

In addition to the job openings created through retirements, the expansion demand estimates calculated by Fanshawe College's institutional research team indicate that growing demand will drive additional job openings. The five highest areas of growth in terms of jobs needed to meet expansion demand:

- Transport truck drivers (73300): 1,343 new jobs
- Registered nurses and registered psychiatric nurses (31301): 1,286 new jobs
- Nurse aides, orderlies and patient service associates (33102): 1,275 new jobs
- User support technicians (22221): 429 new jobs
- Software developers and programmers (21232): 382 new jobs

New employees will be a mix of new graduates and skilled immigrants, but the mix varies considerably by occupation. There are three general sources to fill these job openings: new graduates, immigrants, and people already working in other occupations.

Supervisory occupations are the most likely to be filled by people working in other occupations (including more junior roles within the same organization), accounting for at least 60% of job openings for engineering and IT managers. New graduates are projected to account for between 7% and more than 100% of all job seekers, depending on the occupation.

Outside of sales occupations and accounting technicians, immigrants are projected to be a significant recruitment source. This is especially true in some occupations, like software engineers and designers, where immigrants are projected to fill more than 60% of job openings.

## View from Employers: Labour Market Challenges

LEDC convened a roundtable discussion facilitated by Smart Prosperity Institute at Fanshawe College's South Campus in London to understand the labour market challenges employers in the health, advanced manufacturing, construction and information technology sectors are facing. More than 40 people from different kinds of employers and organizations participated, along with staff from LEDC, Elgin Middlesex Oxford Workforce Development Board and Fanshawe College.

The following issues are a short-list of issues described in each sector report, organized by theme. Some of these issues were raised in more than one sector roundtable.

### Immigration, education and training

1. **Retirements in skilled trades putting pressure on the apprenticeship system**. In skilled trades like carpentry and plumbing, for example, a significant number of apprentices are needed in the talent pipeline to replace the retiring journeypersons. The pressure of upcoming retirements is felt within the apprenticeship system itself, as the very people who are expected to retire over

the next ten years are training apprentices now. This pressure is particularly acute in compulsory trades.

2. **Supporting immigrants so they can succeed**. "It's not as simple as just heading to Mexico and hiring some welders." Participants saw immigration as critical to meeting their labour market needs but also recognized that a lot needs to be done to ensure that immigrants are supported and successful when they settle in the London economic region. Employers are helping with many aspects of the immigration and settlement process, including finding housing, but the process can be slow. The rapid settlement of Ukrainian refugees came up as something that is working reasonably well.

3. **An uneven legacy of the points system for economic immigrants**. Decades of the points system approach to economic immigration to Canada has resulted in millions of skilled immigrants with advanced degrees settling in Canada, which has been critical to Canada's economic growth and has expanded Canada's labour force. Participants shared that kids in these immigrant white collar households, similar to kids in non-immigrant white collar households, are less likely to seek out careers in the skilled trades. So the tremendous value-add from economic immigrants has not helped to expand the labour supply for skilled trades as much as it has for other occupations.

**Cost-of-living, competitiveness and attracting and retaining talent**

4. **Increasing home prices are eroding one of the London region's historic advantages**. Participants recognized that increasingly expensive housing, whether homeownership or rental, erodes one of London's competitive advantages over other regions. Although housing in London is still relatively inexpensive compared to the GTHA, and the "Don't Tell Toronto" campaign has had some success, the cost of housing relative to compensation has increased significantly. Essentially, unaffordable housing is acting like a payroll tax on employers. The Government of Alberta's advertising campaign communicating the same message, not just in Toronto but in London, should be a warning sign.

5. **Turnover is high in some junior positions, in part due to a lack of transit**. Employers experiencing relatively high turnover in junior manufacturing positions are concerned about mobility options for their workforce, especially public transit. Outside of London, the lack of public transit was mentioned as a competitive disadvantage that puts upward pressure on wages. Within the City of London, the lack of frequency of industrial transit routes and long walking distances from public transit stops on roads without sidewalks was highlighted for the same reason – it's hard to attract (and especially retain) workers when getting to work reliably and conveniently often requires the additional expense of owning a car.

6. **Ending homelessness should be a top priority**. In part because so many information technology employers are located in the core of London, employers and their teams witness daily the outcomes of a broken system of income supports, unaffordable rental housing, inadequately-funded mental health care, and lack of addiction treatment capacity: people experiencing homelessness. People experiencing homelessness deserve better, and all levels of government

need to work together to end homelessness in our region. Beyond the direct benefits of doing so for people experiencing or are at risk of experiencing homelessness, perceptions of safety downtown, which are negatively affected by the general sense of social disorder, would also improve.

7. **A mismatch between perceptions of careers and reality**. In several sectors, from health care to advanced manufacturing to construction, employers are concerned that perceptions of careers in their sector, especially amongst young people, are limiting interest in the meaningful, fulfilling work they see people doing every day.

8. **Pandemic disruption, remote and hybrid work, is ongoing**. The pandemic's disruption of many long-standing norms – for example, working five days a week in an office with coworkers – is ongoing. At a high level, participants asked whether the focus is on jobs for people who live in the London economic region, whose employers may be outside the region, or on jobs for people who work for employers that are based in the London economic region, whether they live in the region or elsewhere. An ongoing challenge for employers is matching their work culture and norms with the expectations of potential hires. Several participants noted that although hybrid working arrangements may vary from employer to employer, they seem to have staying power. Generally, this was perceived to have deepened the labour pool for employers in the London economic region. But a shift to hybrid or remote work by office workers generally, not just in the information technology sector, was also recognized as reducing foot traffic in the core and diminishing the general sense of vitality during office hours.

## View from Employers: How to Solve Labour Market Challenges

The following ideas about how to solve some of the labour market challenges identified by employers are a short-list of ideas described in each sector report, organized by theme. Some of these issues were raised in more than one sector roundtable and are a synthesis of those separate discussions.

### Immigration, education and training

1. **Making immigration easier and more streamlined**. Participants shared stories of highly-trained mid-career workers who have enrolled as international students in Canadian college programs as a pathway to eventually settle in Canada. For example, a fully-trained engineer from Brazil who enrolled in a program at Fanshawe College. Making it easier for workers with these kinds of skills to settle in Canada would expand the labour supply for skilled trades. The Facilitating Access to Skilled Trades (FAST) program in New Brunswick was highlighted as a promising practice that is accelerating the settlement of Red Seal endorsed workers in New Brunswick. Ontario's Express Entry Skilled Trades stream provides a pathway to permanent residency for workers with work experience in Ontario, but there are still barriers to getting those workers to the province in the first place.

2. **Global Talent Stream Category B should be expanded**. Innovations like the global talent stream are not helping address the labour market challenges many of these employers face. Participants highlighted that the relatively short list of global talent occupations is making it not

beneficial for them as employers. Adding occupations that are projected to be in high demand and where the domestic labour supply is projected to be insufficient to the list of Category B occupations would help.

3. **Aligning international student enrolment in Ontario colleges with key occupational priorities**. The significant increase in international student enrolment in Ontario colleges over the past decade has not resulted in a proportionally high increase in the number of new graduates entering skilled trades from college programs. If Ontario's colleges continue to grow their international student enrolments, aligning program intake targets with the needs of the skilled trades will be important in meeting the challenges posed by growth and retirements over the next 5-10 years. Although this can be done at the local level through close collaboration between employers, unions, agencies and Fanshawe College, participants identified that this is an opportunity in many communities in Ontario.

4. **Credential recognition, bridging programs and time for training.** To address the acute challenges in many health sector occupations, the credentials of internationally-trained medical graduates must be better recognized, bridging programs should be available in more communities (for example, for cardiac perfusionists) and funders of health services should recognize the significant time needed for experienced staff to train new grads (for example, paramedic preceptors).

5. **The provincial nominee program needs to work well for the London economic region**. One employer shared a frustrating story of recruiting a very talented embedded firmware developer who was an international student and recent grad from Fanshawe College. The employer lost this employee to another province that was more welcoming to the employee's brother, who had the same skills. Instead of gaining another much-needed skilled worker, the employer lost the person they had already onboarded. Making sure that the Ontario Immigrant Nominee Program (OINP) is meeting the needs of the London region's employers was identified as critically important

### Cost of living, competitiveness and attracting and retaining talent

6. **Improving housing availability and affordability**. Although people who are selling homes in higher priced markets like the GTHA and moving to the London region may see London as a more affordable option, this is not the case for younger workers who are not homeowners, people who prefer to rent or people who are moving from lower-cost housing markets within or outside of Canada. Population growth and aging is driving healthcare demand up, but these same factors also drive up the cost of homeownership and renting while supply is tight.

7. **Inter-city mobility needs to be improved dramatically**. Even with ubiquitous remote meeting options, business travel between urban areas is expected in the information technology sector, especially for high-growth companies that are seeking to raise capital from outside the region. Improving mobility options – both to the airport and the train station – would be very helpful in selling the overall region as a strong base for companies to grow. Adding back the early Via Rail train to Toronto was a good start, but we should be aiming for much higher – high frequency rail

on dedicated track at a bare minimum. London is the fourth busiest train station in the entire Via network. But improving affordable, convenient options between mid-size cities in Southwestern Ontario would also be helpful – think Waterloo to London – as hybrid working arrangements make longer distances but less frequent commutes more common.

8. **Revitalize the core by ending homelessness and converting empty buildings**. Participants stressed the urgent need for all levels of government and the whole community to take action to end homelessness. Converting vacant commercial space that is currently contributing little to the vitality of the core into housing was identified as an opportunity to add more housing and more people in the core while reducing commercial vacancy.

## Final Thoughts

Advanced manufacturers in the London economic region are managing a significant transition in their workforces. In addition to the opportunities created by growing demand, they are losing experienced, skilled personnel in various occupations. Many employers are investing in their existing workforce, cross-training and creating pathways for advancement within the company to bridge the gap between their most experienced and mid-career workers.

Health sector workers have faced a lot of challenges for well over two years of the COVID-19 pandemic. Facing a significant loss of experienced people across the board in many healthcare occupations, increasing demand related to a growing and aging population and significant educational requirements for many new hires, the challenge of recruiting, training and retaining the next generation of workers in the health sector is perhaps the most acute.

Employers and labour unions involved in the broad construction sector in London are managing through a triple-whammy of very high demand, escalating costs for materials and a limited supply of qualified workers. The accelerating wave of retirements in key occupations in the skilled trades is a significant challenge to building enough housing and infrastructure to support Ontario's projected growth.

The challenges facing information technology sector employers are not limited to their sector. Still, because their workforce is typically younger, they are different from those that employers in many other sectors are facing. Rather than being focused on losing experienced people to a massive wave of retirements, these employers focus on the talent pipeline coming from Canadian and international postsecondary institutions, shifting expectations and norms around in-person, remote and hybrid working arrangements.

The lower cost of housing (relative to the GTHA), once an advantage in selling the London region to future employees, has instead become a major issue as the cost of homeownership and renting has increased relative to incomes and many people being hired into entry-level positions have only ever known a high-cost housing market.

Public transit service is not seen as reliable, frequent or fast enough to provide the quality of service people need to avoid the cost of owning and operating a car. Making it easier and safer to get around by

public transit, biking, or walking would help to lower the overall cost of living and better connect people to jobs.

The worsening crisis of homelessness, which is not limited to London but is especially acute in the core, must be addressed urgently by all levels of government and the whole community. As employers with offices in the core, employees of these companies see daily how the status quo is not working.

While many of the direct actions that should be taken are provincial responsibilities, the municipal government should also play a role, especially regarding the availability and affordability of housing and transportation mobility options connecting the core with universities and colleges and employers throughout the region.

Employers are navigating a difficult labour market by undertaking many internal initiatives. Some of their challenges are specific to their sectors and are detailed in the sector reports. However, they need postsecondary institutions and governments at all levels to focus on five key areas: affordable and attainable housing, ending homelessness, improving immigration pathways and making sure it is meeting the labour market needs of the region, the talent pipeline of domestic and international students, and high-quality transportation mobility options within and outside the city.

# Data Appendix

## Method of calculating forecasts at the Elgin-Middlesex-Oxford level

COPS provides national-level projections for 293 occupational groupings covering the more than 500 specific NOC codes. Using EMSI Lightcast Analyst software, Fanshawe College's Institutional Research team has estimated expansion demand at the EMO for each occupation. These estimates represent the number of new jobs required to meet expected changes in overall demand in the industry – in most cases, it is positive, but expansion demand could be negative. Overall, at the EMO level, expansion demand for these case occupations ranges from 1.5% at the low end to 29.2% at the high end from 2023 to 2031.

To estimate the number of job openings arising from retirements and other replacement demand, the rate of change for each component at the national level (2023 to 2031) has been applied to the baseline number of jobs in each occupation at the EMO level. Essentially, locally estimated expansion demand is added to estimates of the rates of retirements and other job openings at the national level to develop a composite projection of job openings at the EMO level. Although it would be preferable to develop EMO-level estimates of retirements and job openings for other reasons, data are not available.

An example will illustrate the general method. NOC 70011 is Homebuilding and Renovation Managers. At the national level, 21% of workers in NOC 70011 are expected to retire between 2023 and 2031. That translates to 586 forecasted retirements over the same period in EMO. Another 130 jobs in that same occupation are expected to open for other reasons. Combined with the estimate of expansion demand at the EMO level of 148 net new jobs, that results in a total of 864 total job openings between 2023 and 2031.

Table 1: Expansion demand (new jobs) 2023 to 2031, Elgin Middlesex Oxford economic region

| Occupation (NOC Code) | Net New Jobs | % Change from 2023 |
|---|---|---|
| Motor vehicle assemblers, inspectors and testers (94200) | 171 | 4.5 |
| Machine operators of other metal products (94107) | 145 | 5.1 |
| Supervisors, other mechanical and metal products manufacturing (92023) | 115 | 11.8 |
| Industrial butchers and meat cutters, poultry preparers and related workers (94141) | 91 | 14.3 |
| Supervisors, motor vehicle assembling (92020) | 58 | 9.0 |
| Transport truck drivers (73300) | 1,343 | 16.6 |
| Construction millwrights and industrial mechanics (72400) | 300 | 9.4 |
| Heavy equipment operators (73400) | 246 | 15.5 |
| Home building and renovation managers (70011) | 148 | 5.3 |
| Construction trades helpers and labourers (75110) | 51 | 1.5 |
| Registered nurses and registered psychiatric nurses (31301) | 1,286 | 18.6 |
| Nurse aides, orderlies and patient service associates (33102) | 1,275 | 18.2 |
| Specialists in clinical and laboratory medicine (31100) | 246 | 23.9 |
| General practitioners and family physicians (31102) | 217 | 11.7 |
| Nursing coordinators and supervisors (31300) | 215 | 29.2 |
| User support technicians (22221) | 429 | 19.5 |
| Software developers and programmers (21232) | 382 | 16.2 |
| Computer network and web technicians (22220) | 132 | 13.4 |
| Technical sales specialists - wholesale trade (62100) | 95 | 3.4 |
| Engineering managers (20010) | 68 | 11.1 |

Table 2: Composite projection of job openings, 2023 to 2031, Elgin Middlesex Oxford economic region

| Occupation (NOC Code) | Reason for job opening | | | Total | As % of 2023 Jobs |
|---|---|---|---|---|---|
| | Expansion demand | Retirements | Other | | |
| Motor vehicle assemblers, inspectors and testers (94200) | 171 | 457 | 152 | 780 | 20.7 |
| Machine operators of other metal products (94107) | 145 | 583 | 133 | 861 | 30.3 |
| Supervisors, other mechanical and metal products manufacturing (92023) | 115 | 239 | 43 | 397 | 40.6 |

| | | | | | |
|---|---|---|---|---|---|
| Industrial butchers and meat cutters, poultry preparers and related workers (94141) | 91 | 146 | 30 | 267 | 42.0 |
| Supervisors, motor vehicle assembling (92020) | 58 | 157 | 29 | 244 | 37.9 |
| Transport truck drivers (73300) | 1,343 | 1,737 | 429 | 3,509 | 43.4 |
| Construction millwrights and industrial mechanics (72400) | 300 | 634 | 133 | 1,067 | 33.5 |
| Heavy equipment operators (73400) | 246 | 252 | 72 | 570 | 35.8 |
| Home building and renovation managers (70011) | 148 | 586 | 130 | 864 | 31.0 |
| Construction trades helpers and labourers (75110) | 51 | 283 | 113 | 447 | 13.2 |
| Registered nurses and registered psychiatric nurses (31301) | 1,286 | 910 | 252 | 2,448 | 35.4 |
| Nurse aides, orderlies and patient service associates (33102) | 1,275 | 1,068 | 291 | 2,634 | 37.6 |
| Specialists in clinical and laboratory medicine (31100) | 246 | 215 | 48 | 509 | 49.5 |
| General practitioners and family physicians (31102) | 217 | 319 | 81 | 617 | 33.2 |
| Nursing coordinators and supervisors (31300) | 215 | 155 | 37 | 407 | 55.3 |
| User support technicians (22221) | 429 | 288 | 85 | 802 | 36.5 |
| Software developers and programmers (21232) | 382 | 198 | 75 | 655 | 27.7 |
| Computer network and web technicians (22220) | 132 | 119 | 35 | 286 | 28.9 |
| Technical sales specialists - wholesale trade (62100) | 95 | 502 | 129 | 726 | 25.7 |
| Engineering managers (20010) | 68 | 106 | 30 | 204 | 33.3 |

Table 3: Recruitment sources, 2023-2031, Selected Occupations in Elgin Middlesex Oxford economic region

| | Recruitment source | | |
|---|---|---|---|
| Occupation (NOC Code) | New Graduates | Immigrants | Other |
| Motor vehicle assemblers, inspectors and testers (94200) | 61.7% | 158.3% | -143.3% |
| Machine operators of other metal products (94107) | 54.2% | 33% | -3.6% |

| | | | |
|---|---|---|---|
| Supervisors, other mechanical and metal products manufacturing (92023) | 30% | 5.3% | 48.4% |
| Industrial butchers and meat cutters, poultry preparers and related workers (94141) | 67.4% | 73.7% | -81.7% |
| Supervisors, motor vehicle assembling (92020) | 30% | 5.3% | 48.4% |
| Transport truck drivers (73300) | 28.6% | 25.3% | 35.3% |
| Construction millwrights and industrial mechanics (72400) | 62.7% | 9.5% | 22.6% |
| Heavy equipment operators (73400) | 52.6% | 8.7% | 35.9% |
| Home building and renovation managers (70011) | 4.7% | 6.2% | 73.1% |
| Construction trades helpers and labourers (75110) | 220.4% | 140.3% | -269.4% |
| Registered nurses and registered psychiatric nurses (31301) | 101.4% | 15% | -23.9% |
| Nurse aides, orderlies and patient service associates (33102) | 48.7% | 33.7% | 6.6% |
| Specialists in clinical and laboratory medicine (31100) | 71.1% | 23.5% | -14.1% |
| General practitioners and family physicians (31102) | 46.2% | 17.4% | -3.3% |
| Nursing coordinators and supervisors (31300) | 32.9% | 3% | 58.4% |
| User support technicians (22221) | 92.2% | 23.1% | -11.2% |
| Software developers and programmers (21232) | 116.5% | 40.9% | -45.8% |
| Computer network and web technicians (22220) | 96.8% | 61.7% | -43.6% |
| Technical sales specialists - wholesale trade (62100) | 52.6% | 12.3% | 27% |
| Engineering managers (20010) | 12.1% | 20.3% | 92.2% |