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# Hard to Fill Jobs: 2016 EmployerOne Survey Results

LABOUR FORCE SHORTAGES IN THE LONDON ECONOMIC REGION

## Acknowledgements

This report investigates the presence of talent shortages in London Economic Region. The report is based on a body of data collected by the Elgin, Middlesex and Oxford Workforce Planning and Development Board (EMO WPDB) from employers located in the region through the Employer One survey. The 2016 Employer One survey results indicate that a large proportion of regional employers experienced difficulties finding talent during 2015. The report taps into better understanding the talent shortages issue and the associated explanatory factors. The results and conclusions reported here are useful to HR and employment counselors in advising their clients, employers in aligning their attraction retention strategies, as well as the regional planners, analysts, and decision makers in developing their adaptive workforce strategies.

Report written by Emilian Siman, Data specialist at EMO WPDB      © March 2016

Guidance and expertise kindly provided by Debra Mountenay - Executive Director of EMO WPDB and Martin Withenshaw – London Project Director at EMO WPDB.



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## 1. Introduction

Labour force shortages appear to be at the top of the challenging issues list that most advanced economies are currently battling. Aging population and “Baby Boomers” cohort effects upon the labour force of many nations were acknowledged concerns for many years now. However, the urgency of looking closer at these issues came with year 2011, when the leading edge of the baby boomers reached the retirement age (65 years old). Since 2011, and for the next twenty years, we’ll witness significant changes to unfold upon our national, provincial, regional and local workforce.

The Baby Boom generation (1946 to 1965) is the largest generation in Canada. According to Statistics Canada (2015, December), in 2011 about 29 percent of the Canadian population was included in this cohort. By the year 2031 all the baby boomers will reach the retirement age and the proportion of seniors will reach 23 percent, compared to 15 percent in 2011 (Statistics Canada, 2015, December).

This demographic change is associated to an expected decline of working population as well as a decline of labour productivity due to the replacement of an experienced and well trained older cohort with a younger and less experienced cohort. Evidence from the London Economic Region (Statistics Canada, 2016, January) indicates thus far marginal effects. The labour force in the region has maintained its size for the past five years at about 350,000 people while participation rate decreased from 65.6 percent in 2011 to 63.4 percent in 2015. These results signal that some of these demographic effects may be more intensely showing their presence in the region in the near future. Regional forecast developed by Ontario Ministry of Finance (2014) shows that larger effects will materialize on the London Economic Region labour force as we enter 2030’s. Beyond this demographic dynamic, the rapid evolution of technology is challenging the regional employers in finding qualified skills for their production and service operations.

Among the regional initiatives to attract and retain talent in the London Economic Region, EMO Workforce Planning and Development (EMO WPDB) facilitates community consultations, develop workforce analyses and plans, and facilitates the regional conversation between employers and job seekers. The first step in this process is to understand the complexities of labour shortages developed in the region. In order to address this matter, the EMO WPDB conducts annually a survey on labour challenges that regional employers faced in the past year, or expect to encounter next year. The present report is providing a unique perspective on a part of the information collected in 2016 through the Employer One survey. The focus of the present report is on hiring challenges, hard-to-fill positions, and development of future talent challenges. The document includes descriptive statistics, hypotheses and inferences derived from the observed results. The attempt to expand the depth of analysis to cross-tabulations and/or correlational analysis is limited by the nature and volume of data collected.

A large proportion of regional employers have expressed their concern on finding skills for their operations in the region. Developing more in depth conversations with employers by economic sectors and/or by specific group of skills would lead to the development of adaptive workforce strategies that will align the regional talent to the workforce needs.

## 2. Methodology

The present report is based on an online data collection made during the month of January of 2016 in Elgin, Middlesex and Oxford region, otherwise known as the London Economic Region. This effort is the fourth annual deployment of the Employer One Survey (questionnaire), which is designed to capture HR challenges encountered by regional employers. The information collected through the survey is grouped under three main sections: A) Organizational and Workforce Characteristics, B) Workforce Changes and C) Skill Shortages, Training and Educational Needs. Under section B of the survey, a subset of questions collects answers associated with hiring issues, and more specifically with the difficulty of finding regional talent to fill their job vacancies. Cross sectional connections among the collected information enrich the level of findings and conclusions.

In 2016, EMO WPDB has collected 320 usable surveys with various degrees of completion. The usability was established as containing “at least one answer provided to a question different than those capturing demographic characteristics.” The sample was extracted from a universe of 19,273 employers from the London Economic Region (CDP, n.d.). EMO WPDB used a stratified random sampling procedure based on geography, sector, and business size. Target numbers have been established per geography and subsequently per economic sector and business size. Through memorandums of understanding (MOUs) signed during 2014 with 40 community partners a first wave of invitations to complete the survey was deployed. A second wave of invitations to participate to the survey was based on a stratified random selection of employers in the region from a regional sampling frame compiled from Scott’s Directory. A set of sample descriptive statistics are presented in the next section.

The data collected has been cleaned of duplicates and not useful records. Excel functions have been used to develop the descriptive statistics and other in depth analyses. Hypotheses and inferences have been developed wherever seemed fit. A written report has been developed based on the analyses.

### 3. Descriptive statistics

#### 3.1 The sample

The sample approaches the proportional representation of the entire population of employers by municipality and county in the London Economic Region. Figure 1 illustrates the distribution of the usable questionnaires per geography.

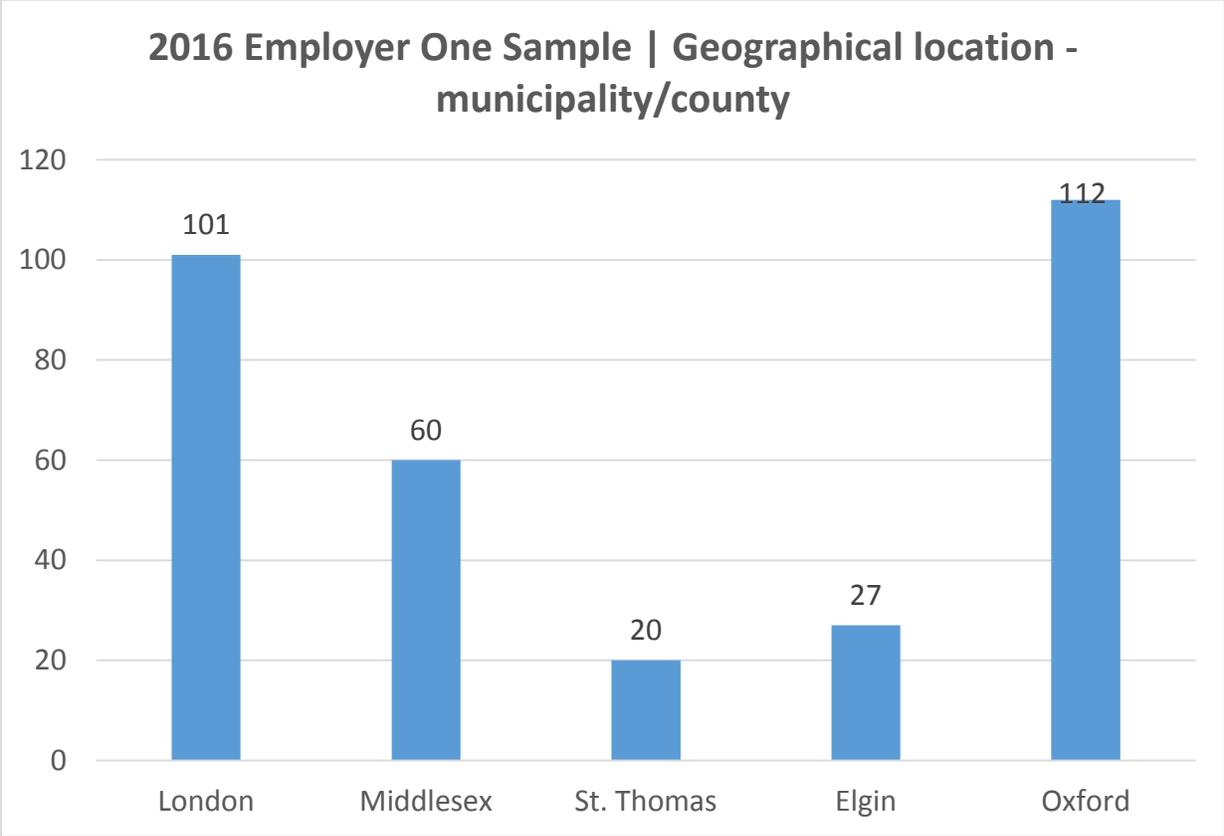


Figure 1

**2016 Employer One Sample | Is your bussines or organization a start-up (established in the last five years)?**

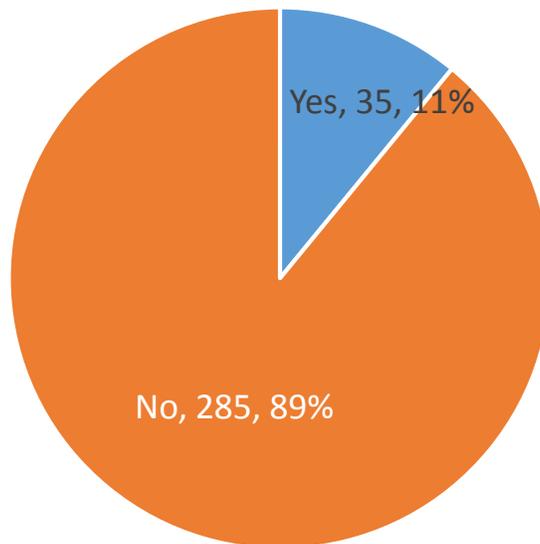


Figure 2

As shown in Figure 2, only a small proportion of employers from the sample were “start-ups,” indicating that the large majority of employers who offered their opinions on labour issues were experienced employers (established more than five years ago). The 11 percent of the sample captured the labour issues experienced by the new entrepreneurs.

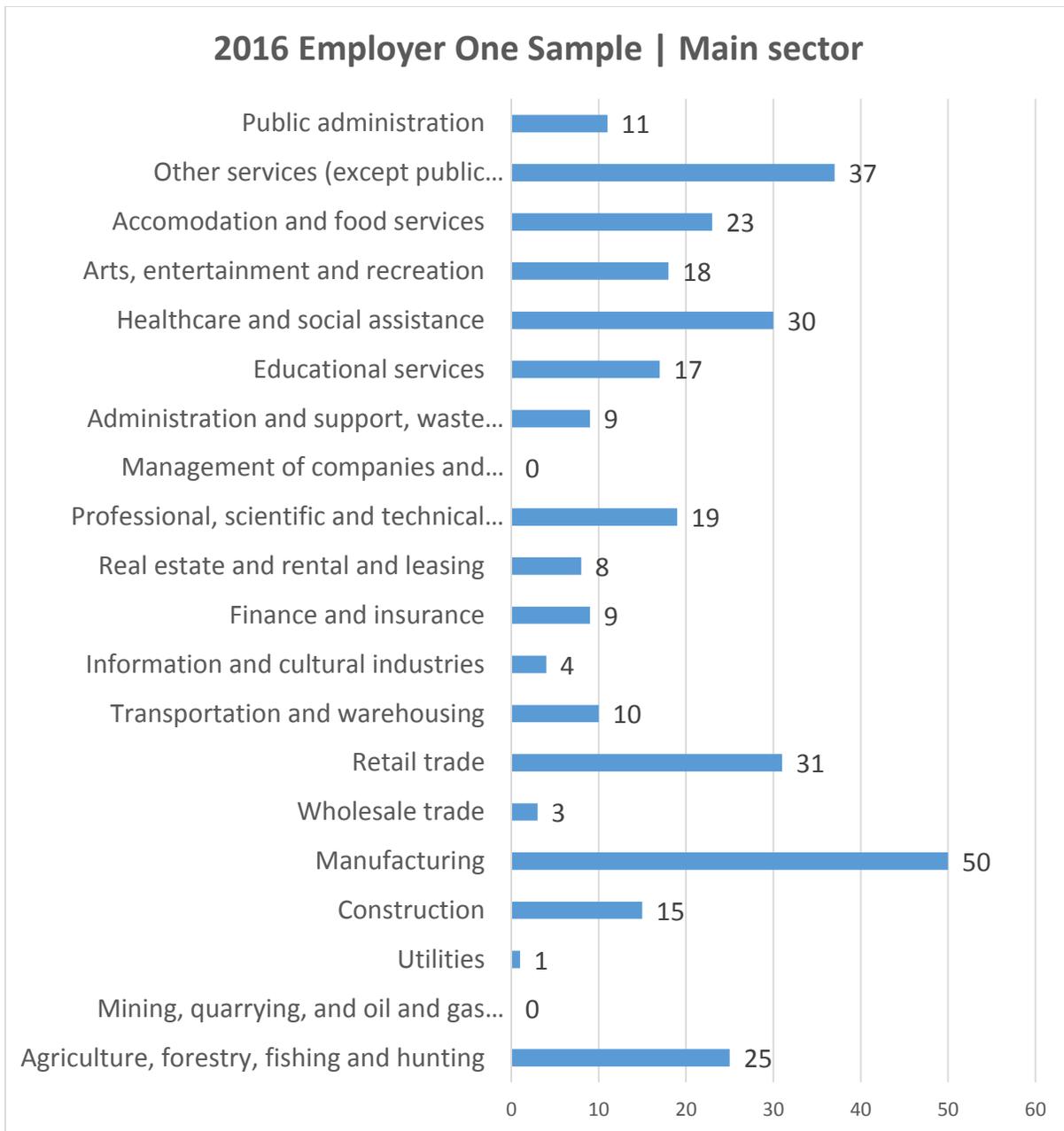


Figure 3

Further, when looking at the sample distribution by sector (Figure 3), one would observe a good representation of the dominant sectors in the London Economic Region: Agriculture, Forestry, Fishing and Hunting, Manufacturing, Retail trade, Healthcare and Social Assistance, Accommodation and Food Services, and Other Services (excepting Public Administration).

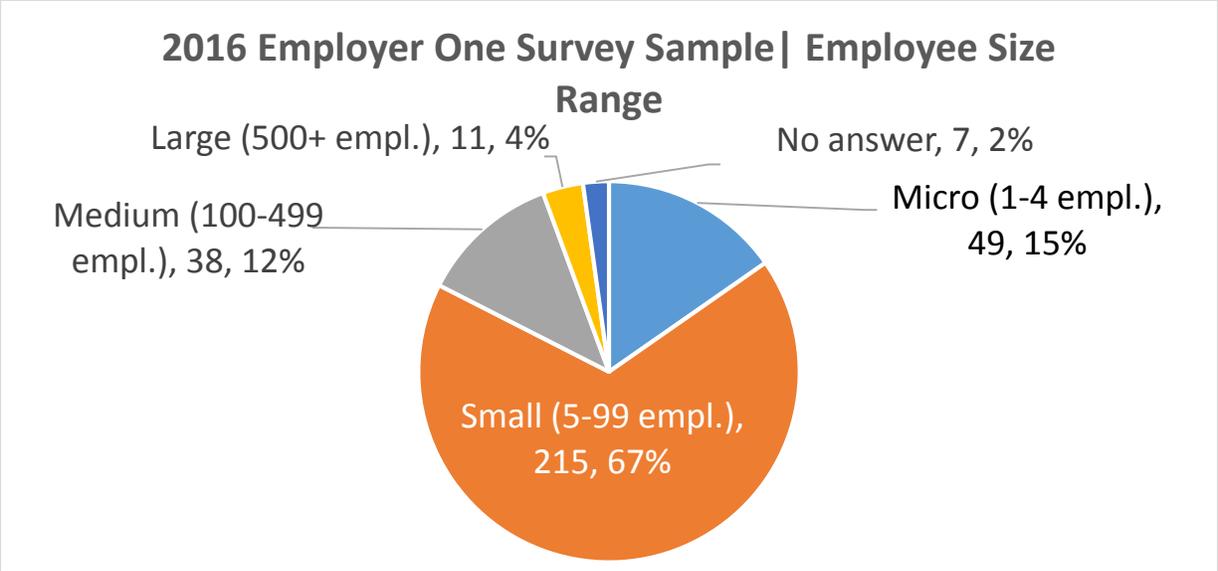


Figure 4

The third strata of the sampling was business size. Figure 4 illustrates the distribution of the answers collected by the business size. The sample exhibited a close representation to the distribution of employers by size across the London Economic Region: a large majority in the micro, small and medium size business categories.

Table 1. Proportions of sample’s workforce by age group and type-duration of employment. Percent of a total of 38,037 people

	Full-time	Part-time	Contract	Seasonal	Total
<b>Under 25 year olds</b>	3.82	3.75	1.75	3.48	<b>12.8</b>
<b>25 to 54 year olds</b>	49.94	7.81	8.23	1.33	<b>67.31</b>
<b>55 year olds and over</b>	14.97	2.83	1.59	0.5	<b>19.89</b>
<b>Total</b>	<b>68.73</b>	<b>14.39</b>	<b>11.57</b>	<b>5.31</b>	<b>100</b>

Data source: 2016 Employer One Survey

Regarding the proportions of workforce by age group and/or type-duration of work, the employers within the sample confirmed that a large proportion of their workforce (more than 69 percent) were employed permanent and full-time. Also, the respondents indicated that about 67 percent of their workforce was between the ages of 25 and 54, approximately 20 percent of their workforce was 55 years old and older, and about 13 percent of the workforce was under 25 years old. Table 1 provides a synopsis of the aggregate workforce of the employers participating in the survey.

### 3.2 Workforce changes and hard-to-fill positions

A large majority of employers (78 percent) responding to Employer One Survey in 2016 indicated that they hired during 2015 (see Figure 5).

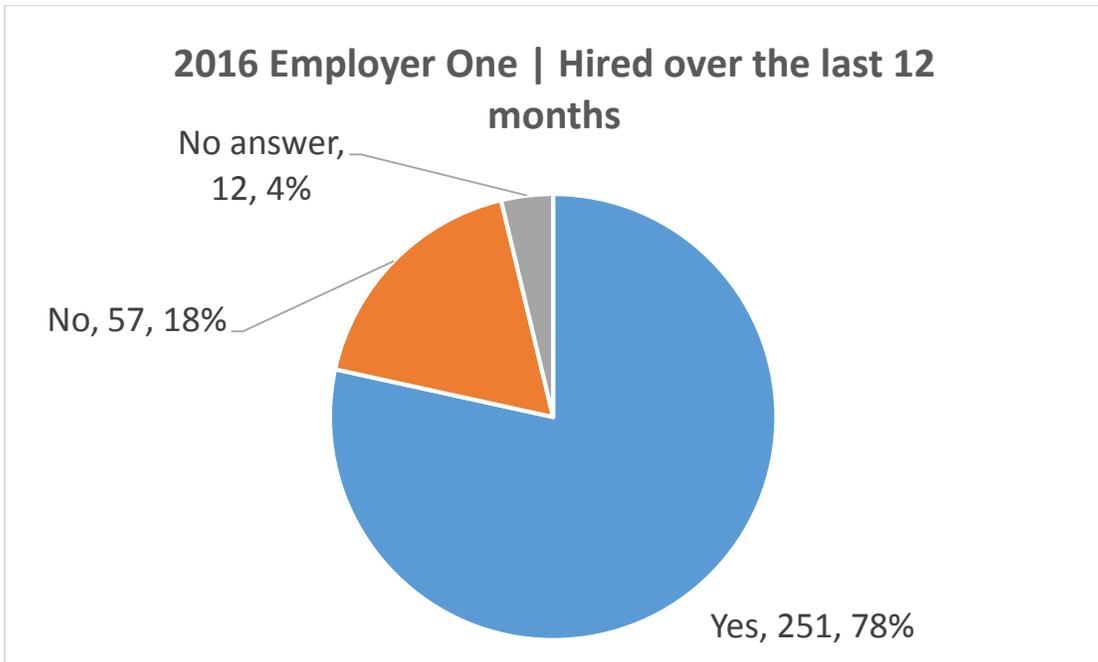


Figure 5

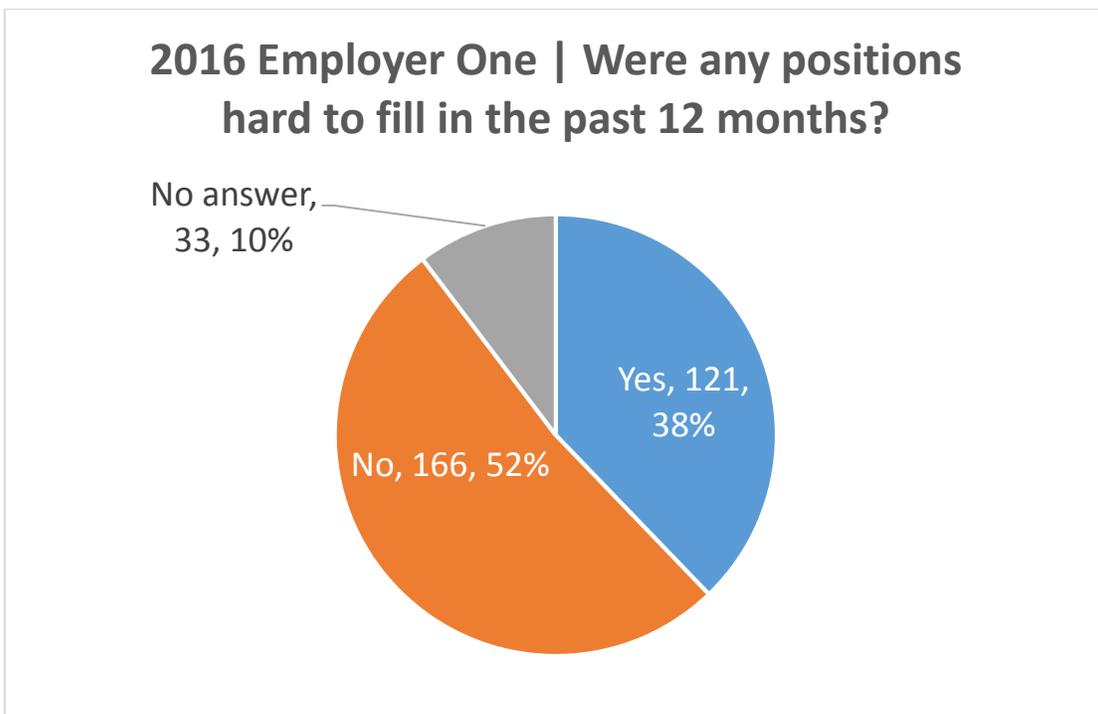


Figure 6

## 2015 Employer One | Hard to fill the earlier specified positions?

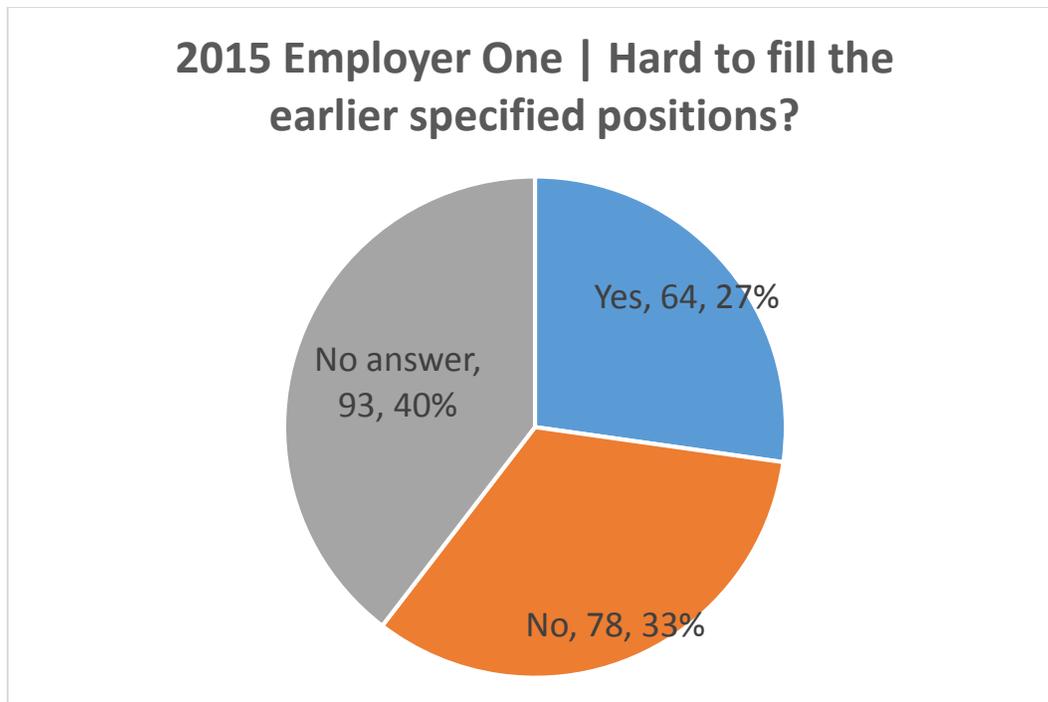


Figure 7

A large proportion of the regional employers (38%) indicated experiencing difficulty in recruiting talent during 2015 (Figure 6). The percentage of the employers confirming this struggle has increased relative to the 2015 Employer One survey, 38% vs. 27% respectively (see Figure 7). These results are similar to the ones reported by Manpower Group (2015): 32% of the employers in Canada were experiencing difficulties in recruiting talent in 2015. The 2016 Employer One survey results suggest that in London Economic Region the difficulty of finding the right skills is slightly more severe than at the national level.

The talent shortage issue is expected to aggravate as more and more baby boomers approach the retirement age (Statistics Canada, 2015, December). The notice of skills' shortage by employers in London Economic Region during 2015 has to be correlated with the labour market conditions. During 2015 the average unemployment rate in London Economic Region (5.9%) has been approaching the natural unemployment rate (Statistics Canada, 2016, January), which means that the available regional pools of talent were at their minimums.

Further, a set of quantitative-qualitative questions have been asked to the 2016 sample in order to better understand what are these hard-to-fill jobs, and eventually identify any potential causes. Table 2 presents an inventory of unique hard-to-fill jobs (titles) indicated by the 2016 employers' sample. The table provides a translation of these hard-to-fill jobs into occupations based on 2012 National Occupational Classification code. This translation allowed further aggregation of the results for a simplified preview. Most of the identified shortages of talent were not special, or rare, occupations associated with the latest technological advancements. On the contrary, many common job titles were identified by the regional employers as hard-to-fill; meaning job vacancies requiring a longer time for them to fill than normal.

Table 2. Hard-to-fill jobs indicated by the employers included in the 2016 Employer One survey

NOC - 2 digits group	NOC - 3 digit group	Occupational group translation (NOC - 4 digits group)	Identified <i>hard-to-fill</i> jobs	
0 Management occupations	012 Managers in financial and business services	0121 Insurance, real estate and financial brokerage managers	Business development manager	
		0122 Banking, credit and other investment managers	Senior manager	
		0124 Advertising, marketing and public relations managers	Marketing manager - digital or retail	
		0513 Recreation, sports and fitness program and service directors	Team manager	
	060 Corporate sales managers	0601 Corporate sales managers	Regional sales manager	
	062 Retail and wholesale trade managers	0621 Retail and wholesale trade managers	Deli manager	
	065 Managers in customer and personal services, n.e.c.	0651 Managers in customer and personal services, n.e.c.	Cook supervisor	
	071 Managers in construction and facility operation and maintenance	0714 Facility operation and maintenance managers	Building manager - on site	
	11 Professional occupations in business and finance	111 Auditors, accountants and investment professionals	1111 Financial auditors and accountants	Senior team accountant, team accountant
			1112 Financial and investment analysts	Financial analyst
1114 Other financial officers			Financial advisor	
		1123 Professional occupations in advertising, marketing and public relations	Fund developer, communications specialist, mission funding coordinator, sales and marketing	

12 Administrative and financial supervisors and administrative occupations	121 Administrative services supervisors	1212 Supervisors, finance, and insurance office workers	Accounting supervisor
	124 Office administrative assistants - general, legal and medical	1241 Administrative assistants	Administration
13 Finance, insurance and related business administrative occupations	131 Finance, insurance and related business administrative occupations	1311 Accounting technicians and bookkeepers	Accounting
		1411 General office support workers	Bilingual clerk, office administration
14 Office support occupations	141 General office workers		
	143 Financial, insurance and related administrative support workers	1431 Accounting and related clerks	Account support
21 Professional occupations in natural and applied sciences	213 Civil, mechanical, electrical and chemical engineers	2132 Mechanical engineers	HVAC engineer
		2133 Electrical and electronics engineers	Controls manager, electrical controls designer
		2141 Industrial and manufacturing engineers	Quality engineer
	217 Computer and information systems professionals	2171 information systems analysts and consultants	Quality assurance
		2173 Software engineers and designers	Engineer/software development
		2175 Web designers and developers	Web developer
22 Technical occupations related to natural and applied sciences	221 Technical occupations in physical sciences	2211 Chemical technologists and technicians	Process technician

	223 Technical occupations in civil, mechanical and industrial engineering	2232 Mechanical engineering technologists and technicians	Automation system/robot technician, controls programmer - robotics, mechanical designer, mechanical engineering designer
		2232 Mechanical engineering technologists and technicians	HVAC technician
		2233 industrial engineering and manufacturing technologists and technicians	CNC programmer
	224 Technical occupations in electronics and electrical engineering	2242 Electronic service technicians (household and business equipment)	Service technicians
	225 Technical occupations in architecture, drafting, surveying, geomatics and meteorology	2251 Architectural technologists and technicians	Architectural technician/designer
	226 Other technical inspectors and regulatory officers	2264 Construction inspectors	Building and plumbing inspector
	228 Technical occupations in computer and information systems	2282 User support technicians	Technical support
31 Professional occupations in health (except nursing)	314 Therapy and assessment professionals	3142 Physiotherapists	Physiotherapist
40 Professional occupations in education services	402 College and other vocational instructors	4021 College and other vocational instructors	IT training coordinator, skills training facilitator, training consultant
	403 Secondary and elementary school teachers and educational counsellors	4032 Elementary school and kindergarten teachers	French teacher

41 Professional occupations in law and social, community and government services	415 Social and community service professionals	4151 Psychologists	Mental health therapist	
		4156 Employment counsellors	Bilingual employment consultant, bilingual outreach manager, employment advisor, employment specialist	
42 Paraprofessional occupations in legal, social, community and education services	421 Paraprofessional occupations in legal, social, community and education services	4212 Social and community service workers	Service worker, support worker II	
		4214 Early childhood educators and assistants	Accredited francophone childhood educator, early childhood educator	
44 Care providers and educational, legal and public protection support occupations	441 Home care providers and educational support occupations	4412 Home support workers, housekeepers and related occupations	Housekeeper, personal support worker (PSW)	
	442 Legal and public protection support occupations	4423 By-law enforcement and other regulatory officers, n.e.c.	Property inspector	
51 Professional occupations in art and culture	513 Creative and performing artists	5133 Musicians and singers	Contract music educator	
52 Technical occupations in art, culture, recreation and sport	522 Photographers, graphic arts technicians and technical and coordinating occupations in motion pictures, broadcasting and the performing arts	5223 Graphic arts technicians	Stylist	
		524 Creative designers and craft person	5241 Graphic designers and illustrators	Interactive media design
		5254 Program leaders and instructors in recreation, sport and fitness	Summer aquatic staff	

62 Retail sales supervisors and specialized sales occupations	622 Technical sales specialists in wholesale trade and retail and wholesale buyers	6221 Technical sales specialists - wholesale trade	Sales engineer - HVAC
	623 Insurance, real estate and financial sales occupations	6232 Real estate agents and sales persons	Real estate agent
63 Service supervisors and specialized service occupations		632 Chefs and cooks	6235 Financial sales representatives
	6321 Chefs		Chef, chef assistant, chef manager
	6322 Cooks		Cook, line cook, seasonal cook/chef
64 Sales representatives and salespersons - wholesale and retail trade	641 Sales and account representatives - wholesale trade (non-technical)	6411 Sales and account representative - wholesale trade (non-technical)	Inside business sales, sales professional
	642 Retail salespersons	6421 Retail salespersons	Retail sales, sales, sales assistant
65 Service representatives and other customer and personal services occupations	651 Occupations in food and beverage service	6513 Food and beverage servers	Server
		655 Customer and information services representatives	Customer services
		656 Other occupations in personal service	Estheticians
67 Service support and other service occupations, n.e.c.	671 Food counter attendants, kitchen helpers and related support occupations	6711 Food counter attendants, kitchen helpers and related support occupations	Barista with experience, cooking preparation person, dishwasher, kitchen helper
	673 Cleaners	6731 Light duty cleaners	Room attendant
72 Industrial, electrical and construction trades	720 Contractors and supervisors, industrial, electrical and construction trades and related workers	7205 Contractors and supervisors, other construction trades, installers, repairers and services	Building maintenance - handy person

723 Machining, metal forming, shaping and erecting trades	7231 Machinists and machining and tooling inspectors	Machinist	
	7231 Machinists and machining and tooling inspectors	CNC machinist	
	7232 Tool and die makers	Tool & die maker	
	7233 Sheet metal workers	Mechanic	
	7237 Welders and related machine operators	Welder	
724 Electrical trades and electrical power line and telecommunications workers	7241 Electricians (except industrial and power system)	Electrician	
	7242 Industrial electricians	Industrial electrician	
725 Plumbers, pipefitters and gas fitters	7251 Plumbers	Plumber	
727 Carpenters and cabinetmakers	7271 Carpenters	Framer	
	7271 Carpenters	Carpentry apprentice	
728 Masonry and plastering trades	7281 Bricklayers	Mason	
729 Other construction trades	7295 Floor covering installer	Flooring installer, flooring technician	
73 Maintenance and equipment operation trades	731 Machinery and transportation equipment mechanics (except motor vehicle)	7311 Construction millwrights and industrial mechanics	Millwright, petroleum mechanic
		7313 Refrigeration and air conditioning mechanics	HVAC technician
		7316 Machine fitters	Fitter

	732 Automotive service technicians	7321 Automotive service technicians, truck and bus mechanics and mechanical repairers	Automotive technician, certified Chrysler technician, licensed auto technician
		7322 Motor vehicle body repairers	Automotive painter
74 Other installers, repairers and services and material handlers	745 Longshore workers and material handlers	7452 Material handlers	Labourer, material handler
		7452 Material handlers	Forklift operator
75 Transport and heavy equipment operation and related maintenance occupations	751 Motor vehicle and transit drivers	7511 Transport truck drivers	AZ driver
		7514 Delivery and courier service drivers	Skilled delivery/warehouse
76 Trades helpers, construction labourers and related occupations	761 Trades helpers and labourers	7611 Construction trades helpers and labourers	Installation assistant
84 Workers in natural resources, agriculture and related production	843 Agriculture and horticulture workers	8431 General farm workers	General farm work, heavy machinery operator
		8432 Nursery and greenhouse workers	Horticultural assistant (production worker)
86 Harvesting, landscaping and natural resources labourers	861 Harvesting, landscaping and natural resources labourers	8611 Harvesting labourers	Mushroom harvester
92 Processing, manufacturing and utilities supervisors and central control operators	924 Utilities equipment operators and controllers	9241 Power engineers and power systems operators	Stationary engineers

94 Processing and manufacturing machine operators and related production workers	941 Machine operators and related workers in mineral and metal product processing and manufacturing	9416 Metalworking and forging machine operators	Press operator
		9417 Machining tool operators	Production operator
95 Assemblers in manufacturing	952 Mechanical, electrical and electronics assemblers	9522 Motor vehicle assemblers, inspectors and testers	Automotive assembler, assembler, machine assembly
	953 Other assembly and related occupations	9536 Industrial painters, coaters and metal finishing process operators	Professional painter
96 Labourers in processing, manufacturing and utilities	961 Labourers in processing, manufacturing and utilities	9619 Other labourers in processing, manufacturing and utilities	Production, production labourer, production operator, production worker, general labourer

Note: Job titles as Apprentice, Assistant Manager, Engineer, Inspection, Installer, Labourer, and Supervisor are too general and very difficult to fit into a specific occupational group unless they are tied to a sector, or specialty (e.g. Chemical Engineer, Mechanical Engineer, Software Engineer, etc.)

Further aggregating the information shows that the shortages in the region are resting in occupations associated to *Management* (Business and Finance), *Professionals and Paraprofessionals* (Social Sciences, Law, Natural and Applied Sciences, Health Sciences, Community and Government Services, Protection Services, Education, Arts and Culture), *Technical* (Natural and Applied Sciences, Arts, Recreation and Sports), *Trades* (Industrial, Electrical, Construction, and Maintenance), *Retail and Wholesale Sales, Truck Drivers and Heavy Equipment Operators, Service Workers* (Food and Accommodation, IT, and Business), and *Production Workers* (Agriculture and Natural Resources, Manufacturing and Utilities, and Trades). These results should be correlated to the industrial structure of employers in London Economic Region. These results are useful to the employment service providers in guiding and explaining to their clients the pulse of the regional market, to the regional educational institutions in adjusting their services according to the current market needs, as well as to the workforce analysts, planners and regional leaders in defining regional labour force strategies.

2016 Employer One survey went a step further in grasping the issues associated to talent shortages in the region by asking the employers who struggled finding talent in 2015 to “select the top 3 reasons why they were hard-to-fill” and “select the top 3 competencies for “hard-to-fill” positions.”

Table 3 shows that the top 3 reasons were: “not enough applicants,” “lack of qualifications,” “lack of technical skills” and/or “lack of motivation, attitude, or interpersonal abilities.”

Table 3. Reasons of why these jobs were hard-to-fill

<b>Reason</b>	<b>Votes</b>
<b>Not enough applicants</b>	<b>64</b>
<b>Lack of qualifications (education level/credentials)</b>	<b>54</b>
<b>Lack of technical skills</b>	<b>53</b>
<b>Lack of motivation, attitude, or interpersonal abilities</b>	<b>53</b>
Lack of work experience	47
No applicants at all	14
Inability to compete with other employers	13
Other	5
Lack of language requirements	3
Inability to assess a foreign educational qualification or credential	2

Note: “Lack of technical skills” had the same number of votes as “lack of motivation, attitude, or interpersonal abilities.”

“Not enough applicants” and “not finding qualifications and skills” seem logical to the top reasons for shortage of talent. However, “lack of motivation, attitude, or interpersonal abilities” or “lack of work experience” seem to be unexpected reasons, but they could be addressed by providing general or customized training, or by integrating applicants into an organizational culture promoting motivation, attitude, or interpersonal abilities.

On the other hand, Table 4 shows that the top 3 competencies that regional employers were seeking for hard-to-fill vacancies were: “work ethic, dedication, dependability,” “technical” and “self-motivated/ability to work with little or no suspension.” This list seemed to be slightly different from the top three competencies that employers listed as characterizing their current workforce, which included only “soft” workforce competencies: “work ethic, dedication, dependability,” “communication” and /or “customer service” and “self-motivated/ability to work with little or no supervision.” The “technical competencies” (“hard” competencies) are definitely a sought after group for hard-to-fill positions. However, they have been ranked a lot lower when employers described their current workforce. “Technical competencies and qualifications” are critical factors when selecting for hard-to-fill jobs.

Table 4. The top 3 competencies for hard-to-fill positions

<b>Competency</b>	<b>Votes</b>
<b>Work ethic, dedication, dependability</b>	<b>65</b>
<b>Technical</b>	<b>55</b>
<b>Self-motivated/ability to work with little or no supervision</b>	<b>43</b>
Teamwork/interpersonal	36
Communication (both oral and written)	32
Problem solving, reasoning, creativity	28
Customer service	23
Professionalism	18
Time management or organizational	17
Willingness to learn	14
Analytical/research	5
Computer literacy	4
Other	2

## 4. Cross tabulations

A step forward toward increasing the understanding of the regional shortages of talent in London Economic Region is to cross tabulate some demographic data with the responses associated to the “hard-to-fill positions” question. The first such attempt is provided in Table 5, illustrating the cross tabulation of experienced difficulty in recruiting talent against the geographical location of the employers. The results presented in Table 5 show that a larger number of employers from Middlesex County encountered hard-to-fill jobs during 2015 than employers in Elgin County and Oxford County, 55 vs. 20 and 46 respectively. However, relative to the total responses within the geography (% within location) a larger proportion of employers in Elgin County indicated that they experienced “hard-to-fill jobs” in 2015 than employers in Middlesex County or Oxford County, 42.55% vs. 34.16% or 38.81%. Therefore, although Middlesex employers had the largest contribution to the “Yes” response regarding hard-to-fill jobs, followed in decreasing order by Oxford County and Elgin County, relative to the total responses in their own geography the order is reversed; Elgin County had the largest relative percentage of employers experiencing hard-to-fill jobs followed by Oxford County and Middlesex County. These results suggest the presence of a relationship between geographical location and difficulty of finding talent. More testing is required for a full confirmation of this relationship between the variables in question, e.g. chi square test.

Table 5. Summary of hard-to-fill jobs by location. 2016 Employer One survey.

Were any positions hard to fill in the last 12 months?			Yes	No	No answer	Total
Location	Elgin County	Counts	20	27	0	47
		% within location	42.55	57.45	0	100
		% within hard-to-fill	16.53	16.27	0	14.69
		% of total	6.25	8.44	0	14.69
	Middlesex County	Counts	55	86	20	161
		% within location	34.16	53.42	12.42	100
		% within hard-to-fill	45.45	51.81	60.61	50.31
		% of total	17.19	26.88	6.25	50.31
	Oxford County	Counts	46	53	13	112
		% within location	41.07	47.32	11.61	100
		% within hard-to-fill	38.02	31.93	39.39	35
		% of total	14.38	16.56	4.06	35
Total	Counts	121	166	33	320	
	% within location	37.81	51.88	10.31	100	
	% within hard-to-fill	100	100	100	100	
	% of total	37.81	51.88	10.31	100	

Table 7 provides a summary of the cross tabulation of answers to “hard to fill jobs” and “business size” questions. Overall, the largest contributor group to the “Yes” choice on the “hard-to-fill jobs” question is the “Small” size business category (5-99 employees), by 73.55%, followed by “Medium” size business category (100-499 employees), by 15.7%. However, if one looks at the proportion of “Yes” answers from the “hard-to-fill” question relative to its business size group total answers (% within size), he or she will observe an inverse U shape effect. The relative percentage within business size group increases from Micro (14.29%) to Medium (50%) business size before decreasing on Large businesses (36.36%). Therefore, the larger the business size, the more likely to experience a talent shortage, but this up to the point when the business size becomes “Large” when the likelihood of experiencing difficulty of finding talent drops. These results indicate the presence of a relationship between business size and the difficulty of finding talent in the region. More testing is advised to fully confirm this relationship, e.g. chi square test.

Table 7. Summary of “hard-to-fill jobs” by “business size.” 2016 Employer One survey.

Were any positions hard to fill in the last 12 months?			Yes	No	No answer	Total
Business size	Micro (1-4 empl.)	Counts	7	41	1	49
		% within size	14.29	83.67	2.04	100
		% within hard-to-fill	5.79	24.7	3.03	15.31
		% of total	2.19	12.81	0.31	15.31
	Small (5-99 empl.)	Counts	89	108	18	215
		% within size	41.4	50.23	8.37	100
		% within hard-to-fill	73.55	65.06	54.55	67.19
		% of total	27.81	33.75	5.63	67.19
	Medium (100-499 empl.)	Counts	19	13	6	38
		% within size	50	34.21	15.79	100
		% within hard-to-fill	15.7	7.83	18.18	11.88
		% of total	5.94	4.06	1.88	11.88
	Large (500+ empl.)	Counts	4	3	4	11
		% within size	36.36	27.27	36.36	100
		% within hard-to-fill	3.31	1.81	12.12	3.44
		% of total	1.25	0.94	1.25	3.44
Not specified (NA)	Counts	2	1	4	7	
	% within size	28.57	14.29	57.14	100	
	% within hard-to-fill	1.65	0.6	12.12	2.19	
	% of total	0.63	0.31	1.25	2.19	
Total	Counts	121	166	33	320	
	% within size	37.81	51.88	10.31	100	
	% within hard-to-fill	100	100	100	100	
	% of total	37.81	51.88	10.31	100	

The third cross tabulation investigated was the “hard-to-fill jobs” by “received free employment services” answers, Table 8. If excluding the “no answer” categories, this would be a 2 x 2 cross tabulation. The results indicate that a slightly larger number of non-receivers of free employment services indicated that they experienced “hard-to-fill jobs,” 60 vs. 53 respectively. However, if looking to the relative proportions within the category answers on the “received free employment services” question (% within free service), a larger proportion of employers who “received free employment services” than those who “didn’t receive free employment services” reported experiencing difficulty in finding talent, 59.55% vs. 32.79% respectively. The logical association between these two variables would be that the employers who experienced shortages of talent connected (received services) with free employment services. These results suggest the presence of a relationship between receiving assistance from a free employment service and experiencing a shortage of talent during 2015. It is advised that further testing is performed for confirming this relation between the variables, e.g. chi square testing.

Table 8. Summary of “hard-to-fill jobs” by “received free employment services.” 2016 Employer One survey.

		Were any positions hard to fill in the last 12 months?				
		Yes	No	No answer	Total	
Did you receive any assistance from a free employment service agency?	Yes	Counts	53	35	1	89
		% within free service	59.55	39.33	1.12	100
		% within hard-to-fill	43.8	21.08	3.03	27.81
		% of total	16.56	10.94	0.31	27.81
	No	Counts	60	122	1	183
		% within free service	32.79	66.67	0.55	100
		% within hard-to-fill	49.59	73.49	3.03	57.19
		% of total	18.75	38.13	0.31	57.19
	No answer	Counts	8	9	31	48
		% within free service	16.67	18.75	64.58	100
		% within hard-to-fill	6.61	5.42	93.94	15
		% of total	2.5	2.81	9.69	15
Total	Counts	121	166	33	320	
	% within free service	37.81	51.88	10.31	100	
	% within hard-to-fill	100	100	100	100	
	% of total	37.81	51.88	10.31	100	

A similar attempt has been explored by cross-tabulating the “hard-to-fill jobs” answers by the “use of paid services” answers. A summary of this analysis is provided in Table 9. These results show that overall more employers who didn’t “use a paid employment service” than those who “used a paid employment service” reported experiencing “hard-to-fill jobs” issues during 2015, 91 vs. 23. However, relative to the total answers by answer-groups on “use of a paid recruitment agency,” a larger proportion of the employers who used a paid recruitment agency” also indicated “experiencing “hard-to-fill jobs” issues than employers reporting “not using a paid recruiting agency,” 67.65% vs. 38.08% respectively. A logical connection between these variables would be that the employers who experienced “hard-to-fill jobs” issues engaged with paid recruitment services. Basically these results allow us to notice the presence of a relationship between these two variables. More testing is advised, e.g. chi square test.

Table 9. Summary of the “hard-to-fill” by “the use of paid employment services.” 2016 Employer One survey.

Were any positions hard to fill in the last 12 months?			Yes	No	No answer	Total
Did you use a paid recruitment agency?	Yes	Counts	23	11	0	34
		% within paid services	67.65	32.35	0	100
		% within hard-to-fill	19.01	6.63	0	10.63
		% of total	7.19	3.44	0	10.63
	No	Counts	91	147	1	239
		% within paid services	38.08	61.51	0.42	100
		% within hard-to-fill	75.21	88.55	3.03	74.69
		% of total	28.44	45.94	0.31	74.69
	No answer	Counts	7	8	32	47
		% within paid services	14.89	17.02	68.09	100
		% within hard-to-fill	5.79	4.82	96.97	14.69
		% of total	2.19	2.5	10	14.69
Total	Counts	121	166	33	320	
	% within paid services	37.81	51.88	10.31	100	
	% within hard-to-fill	100	100	100	100	
	% of total	37.81	51.88	10.31	100	

The last cross tabulation analysis involved the “hard-to-fill” and “the top 5 hiring methods used” answers. The intent with this analysis is to observe any differences between employers reporting talent shortages and those not experiencing shortages of talent in the methods used during 2015. Tables 10 and 11 provide snapshots of these answers by category.

Comparing the two ranking lists of used recruiting methods, one would observe that those who didn't report experiencing "hard-to-fill" issues used as the top recruiting method the "word of mouth/personal contacts/referrals/informal networks" whereas employers indicating that they experienced talent shortages used as their top recruiting method the "Online job boards/postings". As one could observe there is a slight difference between top 5 lists between the two groups, mainly the order of the used methods. However, further investigation is needed in order to define a distinct difference between the hiring methods used by the two groups.

Table 10. Top 5 hiring methods used by the employers responding "No" to the hard-to-fill jobs question

"No," we had no hard-to-fill jobs during 2015

	Score 1	Score 2	Score 3	Score 4	Score 5	Total score
Word of mouth/personal contacts/referrals/informal networks	6	3	23	32	55	484
Online job boards/postings	8	9	15	19	28	287
Company's own internet site	11	12	12	13	12	183
Unsolicited resumes	10	9	14	19	7	181
Social media	13	13	8	17	6	161
Government employment centres or websites	7	9	11	11	11	157
Non-government or community employment service centres or websites	10	13	5	10	6	121
Newspaper ads	6	16	10	3	7	115
On-site job signs or posters	4	5	5	6	3	68
Trade or professional association publications/sites	5	3	10	3	3	68
On-site recruitment at schools, colleges, or universities	5	4	5	3	3	55
Other	4	4	1	2	6	53
Executive search companies or temporary help agencies	6	4	1	1	1	26
Job fairs	3	1	2	0	1	16

Table 11. Top 5 hiring methods used by the employers responding “Yes” to the hard-to-fill jobs question “Yes,” we had hard-to-fill jobs during 2015. Counts.

	Score 1	Score 2	Score 3	Score 4	Score 5	Total score
Online job boards/postings	4	7	13	13	38	299
Word of mouth/personal contacts/referrals/informal networks	9	15	24	18	14	253
Government employment centres or websites	8	6	12	14	14	182
Company's own internet site	4	13	9	6	15	156
Unsolicited resumes	10	6	9	16	4	133
Non-government or community employment service centres or websites	4	5	9	12	7	124
Social media	8	6	5	12	5	108
Executive search companies or temporary help agencies	6	6	4	6	4	74
Newspaper ads	7	11	3	3	3	65
Trade or professional association publications/sites	5	6	4	3	4	61
On-site job signs or posters	4	4	6	2	4	58
On-site recruitment at schools, colleges, or universities	4	4	7	2	1	46
Job fairs	0	0	1	2	0	11

## 5. Conclusions

The present report explores the potential presence of talent shortages in the London Economic Region. Based on a primary data collection from Employer One survey that was deployed during the month of January 2016, several labour challenges for the regional employers were identified and analyzed. The results presented in the document suggest that a large proportion of employers (38%) faced difficulties in finding the right talent for their needs during 2015, a proportion that is forecasted to rise in the near future. An extensive list of jobs branded as “hard-to-fill” by regional employers has been compiled and aggregated, which could inform regional workforce planning. Surprisingly the list of “hard-to-fill” jobs include numerous common occupations from the groups of Management, Professionals, Technical, Sales, Trades, Truck Drivers and Heavy Equipment Operators, Service Workers and Production Workers, associated to dominant economic sectors in London Economic Region: Banking and Insurance, Construction, Agriculture, Education, Transportation, Food and Accommodation, Health, and Services. Subsequence questions explored causes and explanations associated to the talent shortage issue. Among the top reasons for the talent shortage issues were “lack of applicants,” lack of qualifications,” “lack of technical skills,” and “lack of motivation/attitude/ or interpersonal abilities.” In addition, the

data helped identify the top 3 sought competencies for “hard-to-fill” jobs: “work ethic, dedication, dependability,” “technical,” and “self-motivated/ability to work with little or no supervision.” The analyses showed a difference between the top competencies characterizing the current workforce and the competencies sought for “hard-to-fill” jobs. The technical competencies and qualifications seem to be an important factor in recruiting for hard-to-fill” jobs. However, as indicated earlier, the employers could reduce some of the shortages through providing or finding general and customized training, or through integrating new hires in an organization’s culture that prizes and promotes motivation, attitude and interpersonal skills’ growth.

Through cross-tabulation analyses, relationships between “hard-to-fill jobs” and “geographical location,” “business size,” “the use of free or paid services,” and “the top 5 recruitment methods employed” have been identified. More statistical testing and analysis is required for a full confirmation of these relationships.

## 6. Future Research

Significant improvement in collecting data has been achieved throughout the years. Enhancements of the sampling procedures are targeted for the future. A more accurate process of collecting data will avoid carrying forward any sampling biases into data analyses.

Feedback from the community presentations indicated that the survey should be supplemented with more in depth questions about regional talent shortages.

More extensive testing of the relationships among variables described in this report is needed. A logistic regression model can be built and tested to confirm the explanatory power of several suggested factors for “experiencing difficulties in finding regional talent.”

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