



**LEDC 2007 Workforce Survey
Full Report
August, 2007**

LEDC 2007 WORKFORCE SURVEY

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LEDC 2007 WORKFORCE SURVEY EXECUTIVE SUMMARY

THE RESEARCH

- Electronic survey of London businesses in the Manufacturing, IT and Life Sciences sectors
- Sample of 115 businesses

KEY LEARNING

- The issue of workforce shortages was recognized by the London business community as a current problem, particularly in the IT and Manufacturing sectors. For example, half of the responding companies had unfilled positions currently and 60% had experienced difficulty filling positions and/or had compromised their requirements ... while 10% had decided against expanding in London because they could not find staff.
- Moreover, the problem was expected to escalate in the future, and respondents anticipated that all of the responses described above would intensify.
- Difficulty in identifying sources of qualified candidates was considered to be an industry wide problem.
- The challenges of recruitment were felt more acutely by the smaller businesses, which typically did not have Human Resources Managers.

IMPLICATIONS FOR LEDC'S WORKFORCE ACTIVITIES

- LEDC's involvement in workforce initiatives was heartily endorsed. There was an opportunity to increase visibility of current endeavours, as well as to expand the range of initiatives. New programs that assisted in recruitment, as directly as possible, garnered the greatest interest.

LEDC 2007 WORKFORCE SURVEY FULL REPORT

BACKGROUND

- LEDC recognized four years ago that, as the result of an aging population and declining birth rate, coupled with economic growth, “one of the greatest challenges facing Canadian business today and into the future is a shortage of skilled workers”.
- Workforce development was targeted as a priority and LEDC has developed several new strategies that include initiatives in four broad areas:
 - o build workforce capacity – quantity and quality;
 - o raise awareness of workforce development;
 - o improve workforce practices of SME’s;
 - o enhance links between learning and working.
- LEDC commissioned a Workforce Development Survey in 2003, which included businesses across all sectors and addressed the perceived availability, quality and retention of London’s workforce.
- The 2007 Workforce Survey was intended to build on the 2003 learnings, with a more specific target audience: London businesses in the Manufacturing, IT and Life Sciences sectors.
- The application of the 2007 findings will be to inform ongoing development of the LEDC Workforce Strategy, by providing input from local businesses.

OBJECTIVES

The primary objectives of the survey were to:

- determine the extent to which London businesses in the Manufacturing, IT, and Life Sciences sectors perceived a **workforce shortage**, currently and for the future; to quantify the past and expected impact of such a shortage; and to explore job areas where shortages are an issue;
- as a backdrop, to explore **hiring and retention**: to quantify past and expected changes in company size, determine how employees are being sourced currently, and identify the nature and magnitude of hiring/retention challenges facing the businesses;
- to better understand perceptions of **LEDC's workforce activities**: that is, to measure awareness of current initiatives and to evaluate the perceived usefulness of a range of potential LEDC offerings in the area of workforce.

Secondary objectives of the survey were to:

- gather **impressions of London's workforce**, in terms of education, skills, experience and work ethic;
- **profile the responding companies** by sector, in terms of the geographic scope of operations, employment base, presence of HR professionals within the local organization, extent to which collective agreements were in place, and incidence of language requirements for staff.

METHODOLOGY

- The survey was conducted electronically, with LEDC accessing the universe of London companies from its data base of companies in the Manufacturing, IT and Life Sciences sectors.
- Insights designed the questionnaire, with input from LEDC. A three step process was then conducted, to the end of maximizing the response rate and urging the participation of the largest companies (which was integral to painting an accurate picture of the workforce situation).
 - o STEP ONE: Early in 2007, Terry Green of Insights contacted the largest employers in each sector, and conducted in-depth telephone interviews with those who were willing. The result of this phase was three completions with manufacturing companies, two with IT and three with those in the Life Sciences sector.
 - o STEP TWO: In March of 2007, Insights' telephone staff called the next largest companies from each sector, offering to conduct the interview by phone or provide the link for electronic completion. In Life Sciences, all companies with ten or more employees were contacted, while in IT the companies with fifteen or more employees were called; in Manufacturing the lower cutoff was 75 employees. In cases where contact was not made after multiple calls, messages were left encouraging participation.
 - o STEP THREE: In the spring of 2007, email invitations were sent to all companies that had not responded ... followed by two reminders.
- The overall response rate, as detailed below, was 18%.

RESPONSE RATE BY SECTOR

	Manufacturing	IT	Life Sciences	Total
full list: # companies invited to participate	436	148	46	630
# companies responding	79	22	14	115
response rate	18%	15%	30%	18%

- As compared to the proportional breakdown of the full list by sector, Life Sciences companies were somewhat over-represented in the sample while IT companies were under-represented. Weightings were applied to the data so that the totals that are presented appropriately reflect the population of Manufacturing, IT, and Life Sciences companies in London. These totals can be considered accurate within a range of plus or minus 8% (at a 90% confidence level). Results for the Manufacturing sector have a margin of error of plus or minus 10%, and results for the IT and Life Sciences sectors should be interpreted with caution, due to small sample sizes.

DISTRIBUTION OF RESPONDING COMPANIES: FULL LIST VS SAMPLE

	Manufacturing	IT	Life Sciences	Total
full list	69%	23%	8%	100%
responding companies	69%	19%	12%	100%

- In the manufacturing sample, larger companies were over-represented (46% of respondents were from companies of 100+ employees, while 18% of the companies on the complete list for this sector were large). Similarly, larger companies were slightly over-represented in the IT sector. In both instances, about 40% of the employees in the sector for London as a whole were represented by the responding companies. In Life Sciences, the larger organizations are under-represented if the Hospitals are removed from the equation ... and 8% of the employment base in this sector is represented by the sample. If the Hospitals are included, on the other hand, the majority of employees in the sector are represented. Throughout the report, the Hospitals have been removed from the presentation of results in a few instances, primarily relating to staff numbers, in order to protect their confidentiality.

RESPONSE BY COMPANY SIZE

# full time employees	Manufacturing		IT		Life Sciences (excluding hospitals)	
	Full List	Sample	Full List	Sample	Full List	Sample
< 100	82%	54%	97%	85%	93%	100%
100 +	18%	46%	3%	15%	7%	--
Total	100%	100%	100%	100%	100%	100%
Total # full time employees	30,604	12,510	2,735	1,016	2,120	159
% full time employees represented by survey	41%		37%		8%	

- Throughout the report, results have been presented in total, by sector, by company size and – where relevant – by the position of the respondent. The sample sizes, unless otherwise indicated are the number of respondents minus those who did not respond: that is ...

Manufacturing	79 respondents
IT	22 respondents
Life Sciences	<u>14 respondents</u>
Total	115 respondents

PROFILE OF RESPONDING COMPANIES: SUMMARY

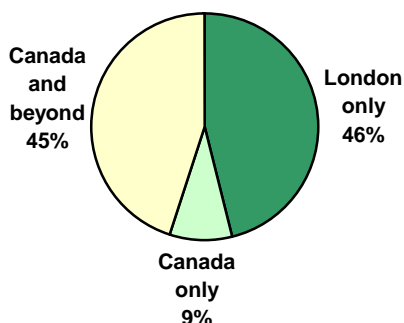
LOCATION	<ul style="list-style-type: none">• 81% had head offices in London• Tended to be purely local OR have locations beyond Canada
CURRENT EMPLOYMENT BASE	<ul style="list-style-type: none">• Manufacturing companies were the largest (46% with 100+ employees) and over represented in the sample• IT companies next largest but only 20% with 100+ employees.• Excluding the hospitals, all Life Sciences respondent companies were small• Full time employees constitute over 90% of workforce for all sectors (again excluding hospitals)• Job functions vary by sector; student jobs commonly offered, especially by manufacturing and – secondarily – IT companies
HR PRESENCE	<ul style="list-style-type: none">• All large companies and nearly a third of small had a dedicated HR person/position
RESPONDENT	<ul style="list-style-type: none">• Primarily owner / president (especially for smaller) and HR manager (especially for larger)
UNIONIZATION	<ul style="list-style-type: none">• 26% of responding companies had collective agreements in place, covering 67% of their workforces on average• Unions were five times more common among large companies
STAFF LANGUAGE REQUIREMENTS	<ul style="list-style-type: none">• 21% of companies required bilingual staff – predominantly French (18%), with some need for Spanish and Chinese / Mandarin / Japanese (5% respectively)

PROFILE: LOCATION

LOCATION

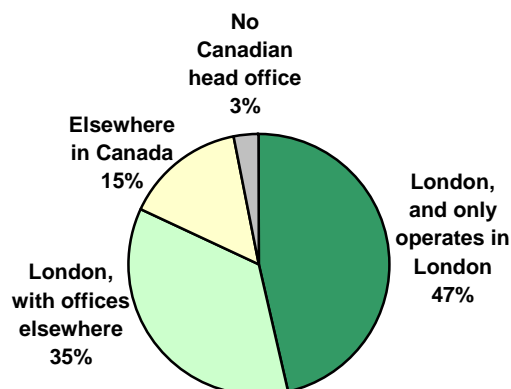
- 81% had head offices in London
- Tended to be purely local OR have locations beyond Canada

Company Locations



- Responding companies tended to be purely local (46%) ... or to have locations beyond Canada (45%).
- The smaller (<100 employees) companies were relatively more likely to operate only in London (59%) while the larger (100+ employees) companies were more apt to have international locations (83%).
- Life Sciences companies had the highest incidence of operating from London only (71%).

Location of Company's Head Office



- Fully 81% of responding companies had their head offices in London ... and four of ten of these also had offices beyond London.
- The larger companies were relatively less likely to be headquartered in London (63% vs 90% for the companies with <100 staff).

Company Locations and Head Office by Company Size and Sector

Company Locations	Total # Employees		Sector		
	≤ 100	100+	Mfg	IT	Life Sciences
London only	59%	17%	42%	48%	71%
Canada only	10%	--	8%	14%	--
beyond Canada	31%	83%	50%	38%	29%
Head Office Location					
London	90%	63%	76%	91%	93%

NOTE: Throughout the report, shaded boxes indicate findings that are different at a statistically significant level.

PROFILE: CURRENT EMPLOYMENT BASE

CURRENT EMPLOYMENT BASE

- Manufacturing companies were the largest (46% with 100+ employees) and over represented in the sample
- IT companies next largest but only 15% with 100+ employees.
- Excluding the hospitals, all Life Sciences respondent companies were small
- Full time employees constitute over 90% of workforce for all sectors (again excluding hospitals)
- Job functions vary by sector; student jobs commonly offered, especially by manufacturing and – secondarily – IT companies

COMPANY SIZE

- Respondents from the Life Sciences (excluding hospitals) and IT sectors represented smaller (<100 employees) companies almost exclusively (100% and 85% respectively), while nearly half of the responding manufacturing companies were large employers (100+ employees). Compared to the full lists of companies provided by LEDC, large companies were significantly over-represented in the manufacturing sector, slightly over-represented in the IT sector and slightly under represented in the Life Sciences sector (when hospitals are removed).
- The average number of employees in the IT companies was three times that of the Life Sciences companies ... and the manufacturing companies were by far the largest with an average of over three times as many staff as the IT companies.

Average # employees	Manufacturing	IT	Life Sciences (excluding hospitals)
Full time	181	51	16
Total	188	56	18

Number of Full Time Employees, by Sector			
% companies with:	Manufacturing	IT	Life Sciences (excluding hospitals)
< 50 employees	45%	60%	100%
51 – 99	9%	25%	--
Subtotal: <100	54%	85%	100%
100 – 399	30%	15%	--
400 – 999	13%	--	--
1000 +	3%	--	--
Subtotal: 100+	46%	15%	--
Total	100%	100%	100%
Average # full time employees	181	51	16

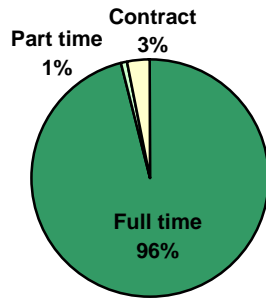
PROFILE: CURRENT EMPLOYMENT BASE

FULL TIME VS. OTHER

- The workforce in companies from all sectors was over 90% full time and 2% or less part time, with contract employees making up the difference.

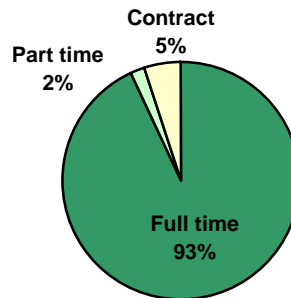
Distribution of Employees by Form of Tenure

Manufacturing



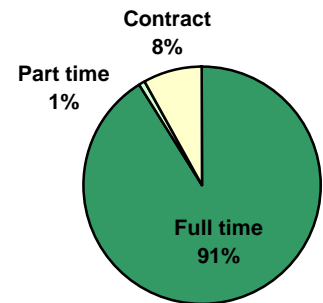
Average # employees in total: 188

Life Sciences (excluding hospitals)



Average # employees in total: 18

IT



Average # employees in total: 56

Distribution of Employees by Job Type

Manufacturing	
management	11%
administrative support	7%
skilled trades	11%
production staff	54%
other	17%
total	100%

- Not surprisingly, the job functions varied by sector. Management accounted for just over 10% of the workforce in IT and Manufacturing, and constituted a quarter of all staff in the smaller Life Sciences companies.

Life Sciences (excluding hospitals)	
management	26%
professional / clinical	15%
sales / marketing	19%
technicians	10%
production staff	13%
other	18%
total	100%

IT	
management	13%
production staff	31%
operations (project managers, analysts, designers)	26%
sales / marketing	13%
other	18%
total	100%

PROFILE: CURRENT EMPLOYMENT BASE

OTHER WORK OPPORTUNITIES

- In terms of additional work opportunities, student jobs were most commonly offered.
 - Between 50% and 60% of the manufacturing companies had student co-op and student summer job positions ... while about a quarter had apprenticeship positions.
 - The IT companies were also quite active in hiring students, while the Life Sciences companies were less so.
 - Unpaid volunteer or work experiences were relatively less common, offered by 10-20% of companies across the sectors.

Incidence of Other Work Opportunities

	Manufacturing	IT	Life Sciences (excluding hospitals)
Paid co-op students or interns			
% offering	51%	60%	20%
avg # positions, for those who offered	5	3	1
Summer students			
% offering	57%	30%	20%
avg # positions, for those who offered	14	3	2
Unpaid volunteer or work experience positions			
% offering	13%	10%	20%
avg # positions, for those who offered	4	1	2
Apprenticeships			
% offering	26%	NA	NA
avg # positions, for those who offered	2	NA	NA

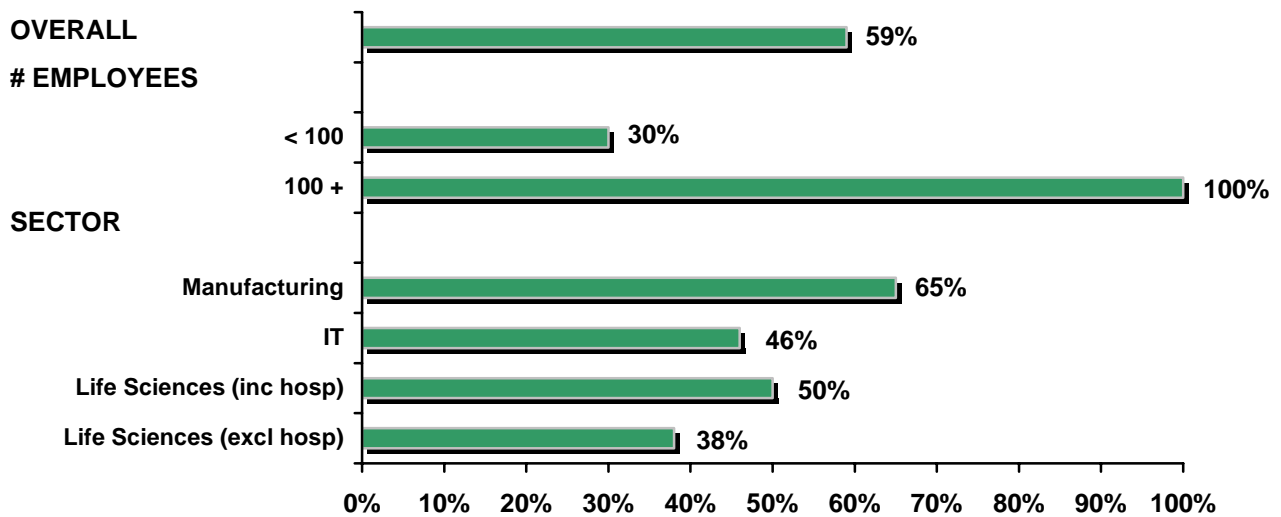
PROFILE: HR PRESENCE

HR PRESENCE

- All large companies and nearly a third of small had a dedicated HR person/position.

- The fact that all of the large companies had a dedicated HR person meant that the manufacturing sector, which had a relatively higher proportion of larger companies, had the greatest incidence of HR professionals.

% of Companies That Had a Dedicated HR Person

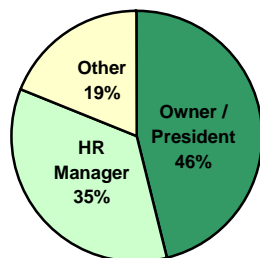


PROFILE: RESPONDENT

RESPONDENT

- Primarily owner / president (especially for smaller) and HR manager (especially for larger)

Respondent's Position



- The respondent to the survey was most often the owner, President or CEO. This was particularly the case for:
 - smaller companies, as only a third of these respondents had a dedicated HR person;
 - the IT and Life Sciences respondents, which were almost exclusively small companies.
- The second most common responding position – and the one that dominated in larger companies, all of which had a dedicated HR person – was the HR manager.
- “Other” respondents were most often operations managers (6%) or accounting/financial managers (5%).

Respondent's Position by Company Size and Sector

	# Employees		Sector		
	< 100	100 +	Manufacturing	IT	Life Sciences
Owner / President	68%	18%	41%	59%	57%
HR manager	16%	64%	42%	18%	21%
Other	16%	19%	18%	23%	21%

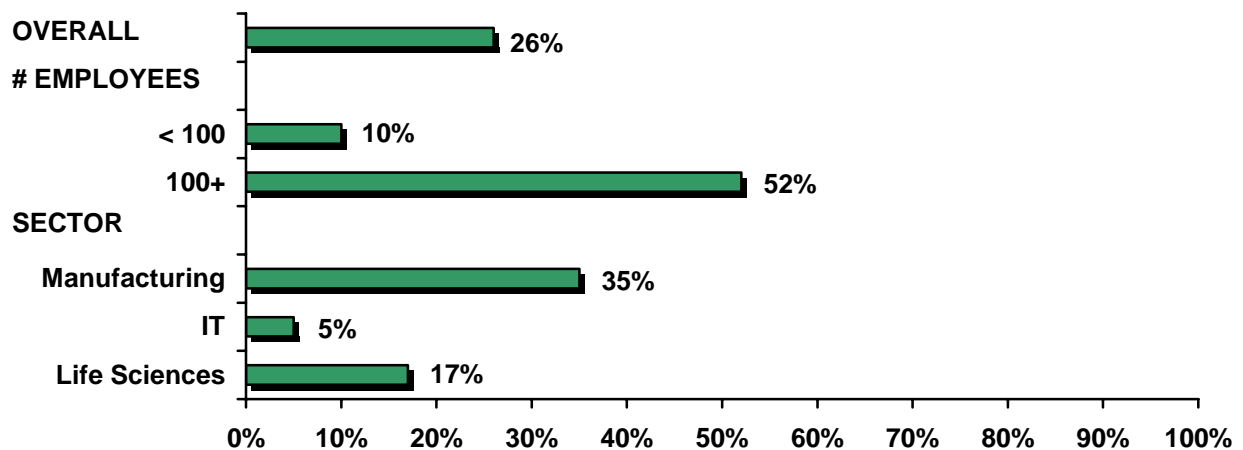
PROFILE: UNIONIZATION

UNIONIZATION

- 26% of responding companies had collective agreements in place, covering 68% of their workforces on average.
- Unions were five times more common among large companies.

- Just over half of the larger companies, and 10% of the smaller ones, had a collective agreement in place for at least part of their workforce. The proportion of employees covered by the agreement ranged from 81% for the smaller companies to 63% for the larger ones (for an overall average of 68%, for those companies with agreements).
- By sector, the incidence of unionization was highest among manufacturing companies (35%) ... followed by the Life Sciences sector (17%), which included the hospitals (excluding the hospitals, there was no unionization in this sector).

% of Companies Where Any Part of the Workforce is Covered by a Collective Agreement



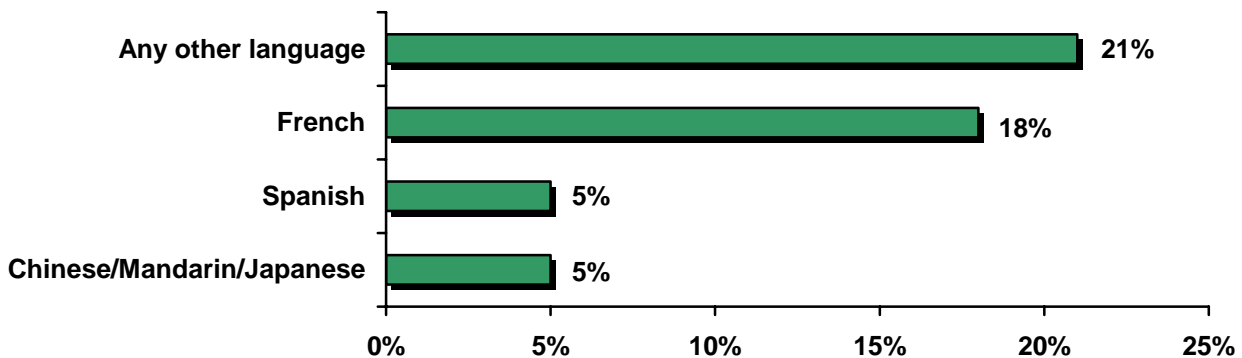
PROFILE: STAFF LANGUAGE REQUIREMENTS

STAFF LANGUAGE REQUIREMENTS

- 21% of companies required bilingual staff – predominantly French (18%), with some need for Spanish and Chinese/Mandarin/Japanese (5% respectively).

- Some 21% of responding companies required staff who could speak a language other than English to do their jobs; this did not vary significantly by sector, but was relatively more common among larger companies.
- French was the language in greatest demand, cited by 18% of companies requiring – on average – 8 staff who could speak this language. Spanish and Chinese/Mandarin/Japanese were required by fewer companies (5% respectively) and demand was much lower on the part of these companies (2 staff, on average, for each).

% of Companies Who Required Staff Who Could Speak Languages Other Than English To Do Their Jobs



% of Companies Who Required Staff Who Could Speak Languages Other Than English To Do Their Jobs, by Company Size and Sector

% companies requiring:	# Employees		Sector		
	< 100	100 +	Manufacturing	IT	Life Sciences
Any other language	17%	27%	20%	20%	25%
French	11%	26%	17%	16%	25%
Spanish	5%	5%	4%	8%	--
Chinese/Mandarin/Japanese	7%	3%	4%	8%	--

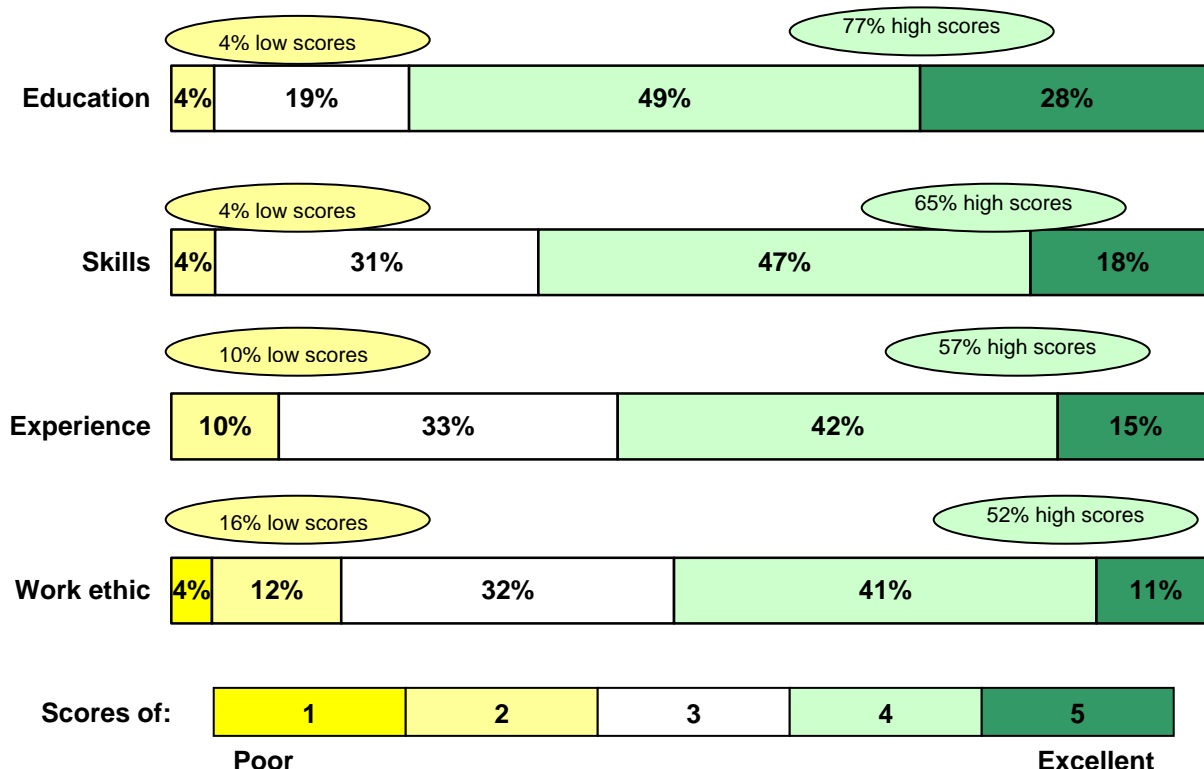
IMPRESSIONS OF LONDON'S WORKFORCE

IMPRESSIONS OF LONDON'S WORKFORCE

- Average to above average scores on all dimensions: education, skills, experience, and work ethic.
- Education rated relatively most favourably (77% high scores), skills next most (65%) with experience and work ethic least (57% and 52% high scores).

- London's workforce was evaluated on a five point scale, from poor to excellent, in terms of education, skills, experience and work ethic. Three-quarters gave high scores (4,5) for education and two-thirds gave high scores for skills; only 4% gave low scores on these dimensions. In contrast, experience and work ethic were rated somewhat less favourably (57% and 52% high scores vs 10% and 16% low scores, respectively).
- There were no significant differences by sector, but larger companies tended to be more positive when evaluating the skills, experience, and work ethic of London's workforce. The owner/presidents (who were more often responding on behalf of the smaller companies) tended to be relatively more critical than other respondents, particularly in terms of experience and work ethic.

Impressions of London's Workforce



NOTE: detail of scores by company size, sector and respondent's position is shown on the following page.

IMPRESSIONS OF LONDON'S WORKFORCE

Impressions of London's Workforce by Company Size, Sector, and Respondent's Position

% high scores (4,5)	# Employees		Sector			Respondent's Position		
	< 100	100 +	Mfg.	IT	Life Sciences	Pres. / Owner	HR Manager	Other
education	76%	79%	79%	74%	70%	73%	80%	82%
skills	58%	76%	62%	68%	80%	53%	69%	87%
experience	47%	72%	62%	52%	40%	42%	73%	65%
work ethic	44%	64%	51%	55%	50%	38%	65%	63%

HIRING AND RETENTION: SUMMARY

CHANGES IN COMPANY SIZE

- Growth in workforce expected to accelerate for responding companies
 - increase in employee numbers reported by 43% for past year ... and expected by 63% in upcoming year
 - decrease reported by 25% in past year ... but expected by only 5% in upcoming year
 - manufacturing generally least buoyant sector
 - more than half of the respondents felt that past year staff turnover levels were acceptable

MEANS OF SOURCING EMPLOYEES

- Use wide variety of means, with just over half extending searches beyond London
- Local newspapers and electronic job boards most common means of outreach
- HR professionals have greater likelihood of employing each of the search mechanisms

HIRING / RETENTION CHALLENGES

- Identifying sources of qualified candidates was a serious issue, challenging up to half of respondents overall
- A perceived shortage of candidates – in London particularly (62%), but also industry wide (52%) – was rated as the major factor contributing to hiring / retention difficulties
- HR managers appeared better equipped to deal with this challenge than the owner / president or other respondents
- Persuading candidates to work in London was also highly rated as a challenge (by 29%), overshadowing persuading candidates to work for the respondent's company, per se (19%). (NB: Our assumption is that these would be candidates from outside of London or students graduating.)
- Retention took a back seat to hiring, in terms of the inherent challenge but was an issue nonetheless for a minority (20% high scores)

HIRING AND RETENTION: CHANGES IN COMPANY SIZE

CHANGES IN COMPANY SIZE

- Growth in workforce expected to accelerate for responding companies
 - o increase in employee numbers reported by 43% for past year ... and expected by 63% in upcoming year
 - o decrease reported by 25% in past year ... but expected by only 5% in upcoming year
 - o manufacturing generally least buoyant sector
 - o more than half of the respondents felt that past year staff turnover levels were acceptable

PAST GROWTH

- Over the past year, 43% of the companies indicated that their total number of employees had increased ... by 20 persons, on average. The IT and Life Sciences sectors were much more apt to have grown, with 67% and 58% indicating increases ... as compared to only a third of the manufacturing companies. This translated to stronger growth among the smaller companies in the sample, in general.
- In contrast, a quarter of the companies had experienced reductions in their total numbers of employees over the past year ... by 26 persons, on average. Larger companies and companies in the Manufacturing sector, accounted for the lion's share of the decreases.
- Overall, there had been a small overall increase in the employment represented by the responding companies as a group, with an average of 20 hires per company vs 17 who had left. The respondents in the Life Sciences sector were satisfied with their past year turnover in over 80% of cases, whereas only about 60%, overall, had similar sentiments. Larger firms were even less likely to find turnover acceptable, when compared to smaller companies.

Changes in Company Size

Past Growth (from one year ago) % who said total # employees had:



AVERAGE # EMPLOYEES HIRED OVER PAST YEAR = 20 (or 17, excluding hospitals)

HIRING AND RETENTION: CHANGES IN COMPANY SIZE

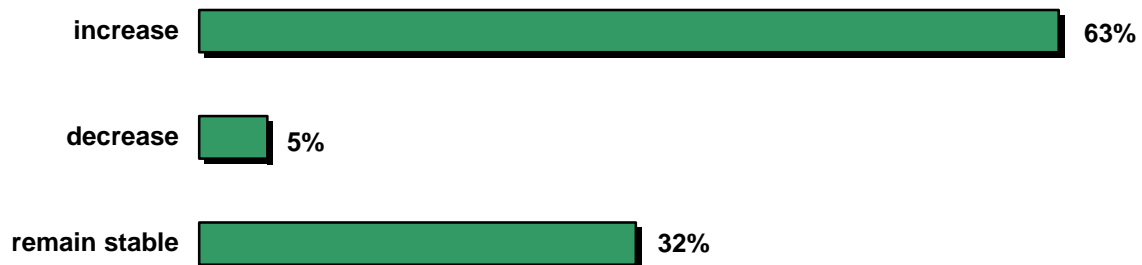
Turnover During the Past Year

Average Number of Employees Who:	Overall		by Company Size		by Sector			
	Incl hospitals	Excl hospitals	< 100	100+ (incl hospitals)	Mfg	IT	Life Sciences incl hospitals	Life Sciences excl hospitals
were hired	20	17	6	42	19	17	39	3
left	17	9	3	39	11	6	103	2
% who felt their turnover was acceptable	61%	61%	64%	56%	59%	60%	83%	90%

EXPECTED GROWTH

- Expectations for growth over the next year were robust, in comparison with past year changes in company size. The estimates suggested an overall expansion of the workforce represented by the respondents, and fully 63% of the respondents expected to increase their employee base, by 13 employees on average. Smaller companies, and those in the IT sector, were most likely to predict expansion (72% and 81% respectively)
- Only 5% of respondents predicted a decrease in total staff numbers; 5 of these 6 companies were in the Manufacturing sector – and all but one of the six indicated that the decrease would be fewer than 30 staff.

Expected Growth (over the next one year) % who said total # employees would:



AVERAGE # EMPLOYEES TO BE HIRED OVER NEXT YEAR = 23 (or 14, excluding hospitals)

HIRING AND RETENTION: CHANGES IN COMPANY SIZE

Changes in Company Size, by Company Size and Sector

	Company Size		Sector			
	< 100	100+ (including hospitals)	Mfg	IT	Life Sciences (including hospitals)	Life Sciences (excluding hospitals)
PAST GROWTH, PAST YEAR						
Average # employees hired	6	42	19	17	39	3
Change in company size						
% increased	50%	29%	33%	67%	58%	60%
Avg # of increase	4	69	26	12	32	3
% decreased	16%	41%	34%	5%	8%	10%
Avg # of decrease	8	38	28	2	2	2
% stable	34%	30%	33%	29%	33%	30%
EXPECTED GROWTH, NEXT ONE YEAR						
Average # employees expected to hire	6	50	15	15	119	3
Expected change in company size						
% expecting increase	72%	47%	57%	81%	58%	60%
Avg # of increase	6	31	12	12	31	3
% expecting decrease *	2%	10%	6%	--	17%	20%
% expecting no change	26%	43%	37%	19%	25%	20%

*sample too small (6 companies expected a decrease) to give average number of decrease

HIRING AND RETENTION: MEANS OF SOURCING EMPLOYEES

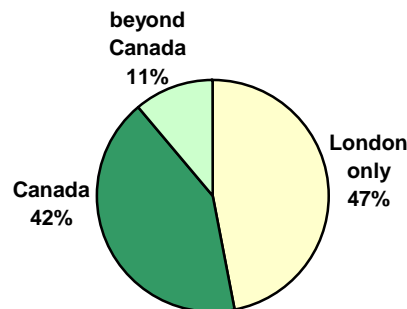
MEANS OF SOURCING EMPLOYEES

- Use wide variety of means, with just over half extending searches beyond London
- Local newspapers and electronic job boards most common means of outreach
- HR professionals have greater likelihood of employing each of the search mechanisms

GEOGRAPHIC EXXTENT OF SEARCHES

- Just over half of the responding companies had extended searches beyond London, when seeking employees to work locally. This was especially true of larger companies (70% looked beyond London, vs 42% of smaller companies) and of those in the IT sector (74% vs 45% for Manufacturing and 60% for Life Sciences). The impact of online search mechanisms on this statistic should be considered.

Geographic Extent of Searches to Find Employees to Work in London (for those who had hired during the past year, n=97)

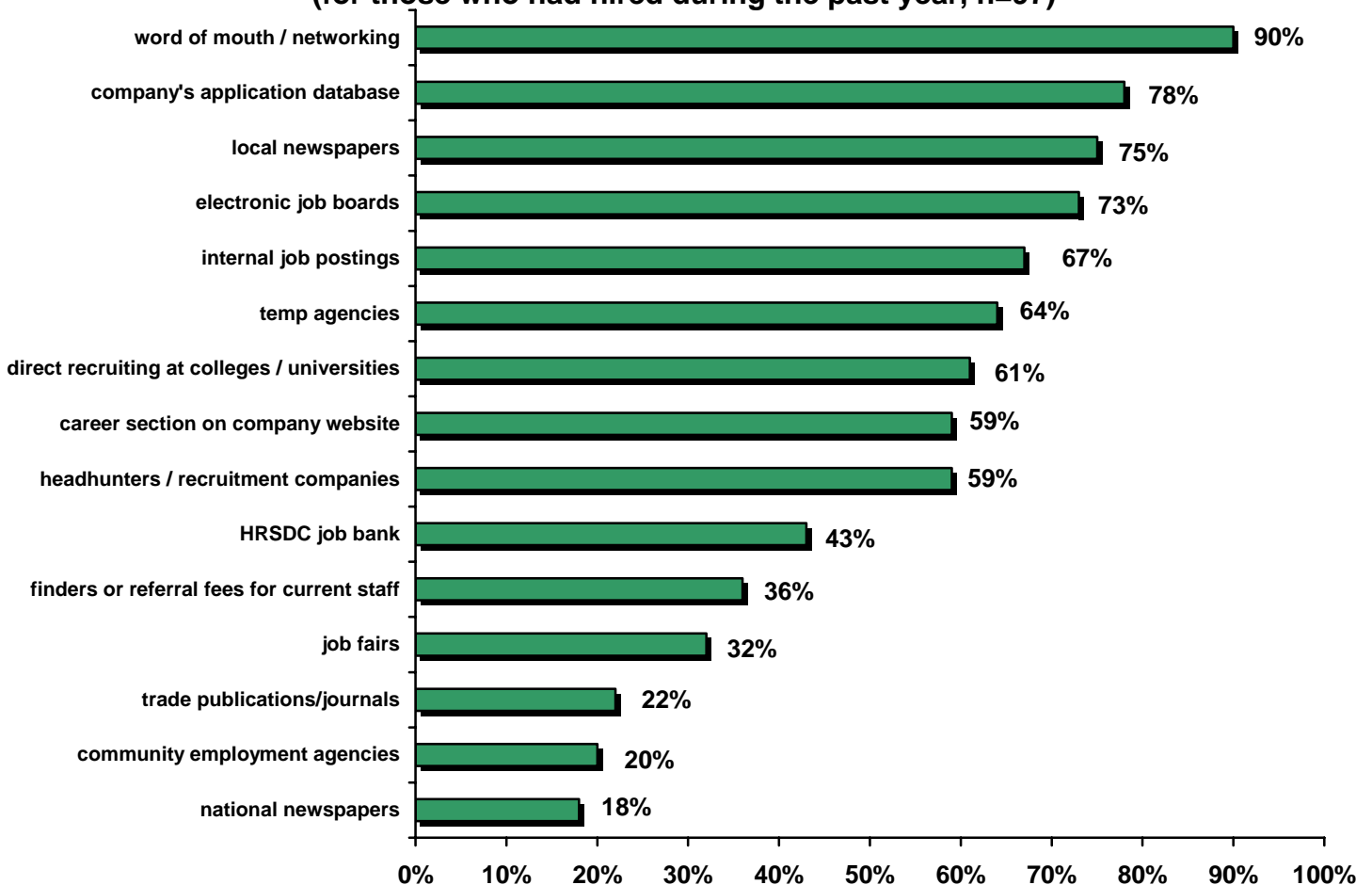


HIRING AND RETENTION: MEANS OF SOURCING EMPLOYEES

MEANS OF SOURCING

- Companies had used a wide range of diverse means of searching for new employees. While word of mouth and applications received at the company were most common, it was interesting that electronic job boards and local newspapers were used almost equally, as the main means of outreach.
- The HR managers who responded to the survey tended to have a higher incidence of using virtually all means of search (excepting the HRSDC job bank).

% of Companies That Had Used Various Means of Searching for New Employees (for those who had hired during the past year, n=97)



HIRING AND RETENTION: MEANS OF SOURCING EMPLOYEES

Means of Sourcing Employees, by Company Size, Sector and Respondent's Position
(for those who had hired during the past year, n=97)

% giving high scores (4,5)	# Employees		Sector			Respondent's Position		
	< 100	100+	Mfg	IT	Life Sciences	President / Owner	HR Manager	Other
Geographic Extent of Search								
London	58%	30%	55%	26%	40%	54%	40%	46%
Canada	33%	59%	42%	47%	30%	35%	51%	43%
beyond Canada	9%	11%	3%	26%	30%	12%	9%	11%
Means of Searching								
word of mouth	87%	94%	92%	90%	78%	89%	97%	82%
company's application database	73%	86%	76%	78%	90%	73%	91%	59%
local newspapers	65%	91%	80%	53%	100%	68%	82%	79%
electronic job boards	61%	89%	68%	84%	82%	62%	86%	75%
internal job postings	45%	97%	68%	68%	46%	43%	94%	67%
temp agencies	48%	91%	73%	50%	13%	58%	77%	54%
direct recruiting at colleges / universities	53%	71%	59%	74%	40%	58%	59%	75%
career section of company website	53%	64%	52%	74%	78%	53%	66%	59%
recruitment companies	40%	84%	56%	72%	46%	41%	79%	63%
HRSDC job bank	45%	42%	51%	17%	55%	56%	33%	26%
finders fees to staff	30%	43%	26%	63%	40%	31%	36%	49%
job fairs	16%	56%	29%	42%	20%	23%	45%	27%
trade publications	20%	28%	20%	21%	50%	19%	26%	23%
community employment agencies	22%	19%	24%	11%	20%	22%	21%	13%
national newspapers	15%	24%	16%	11%	55%	11%	19%	32%

HIRING AND RETENTION: CHALLENGES

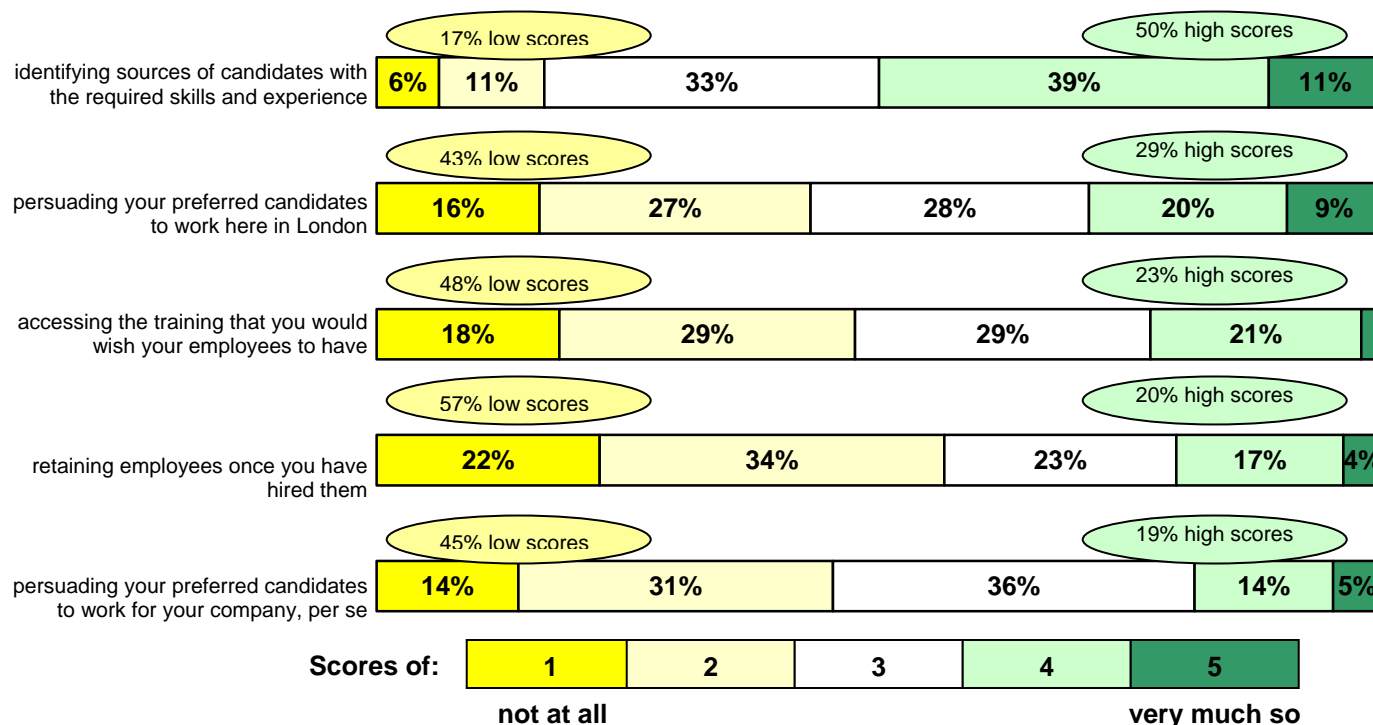
HIRING / RETENTION CHALLENGES

- Identifying sources of qualified candidates was a serious issue, challenging up to half of respondents overall
- A perceived shortage of candidates – in London particularly (62%), but also industry wide (52%) – was rated as the major factor contributing to hiring / retention difficulties
- HR managers appeared better equipped to deal with this challenge than the owner / president or other respondents
- Persuading candidates to work in London was also highly rated as a challenge (by 29%), overshadowing persuading candidates to work for the respondent's company, per se (19%). (NB: Our assumption is that these would be candidates from outside of London)
- Retention took a back seat to hiring, in terms of the inherent challenge but was an issue nonetheless for a minority (20% high scores)

NATURE OF THE CHALLENGES

- The most significant challenge relating to hiring and retention – given high scores by fully half of respondents – was identifying sources of candidates with the required skills and experience. Smaller companies felt this particularly acutely (58% high scores vs 37% for larger companies).
- Persuading candidates to work in London was the next most significant hurdle (29% high scores) ... and was more of a challenge than convincing candidates to work for the respondent's company, per se (19% high scores).
- Relatively speaking, accessing training and retention were of lesser concern ... but still received high scores, as issues posing challenges, from 23% and 20% of respondents.

Extent to Which Various Aspects of Hiring and Retention Pose a Challenge for Companies



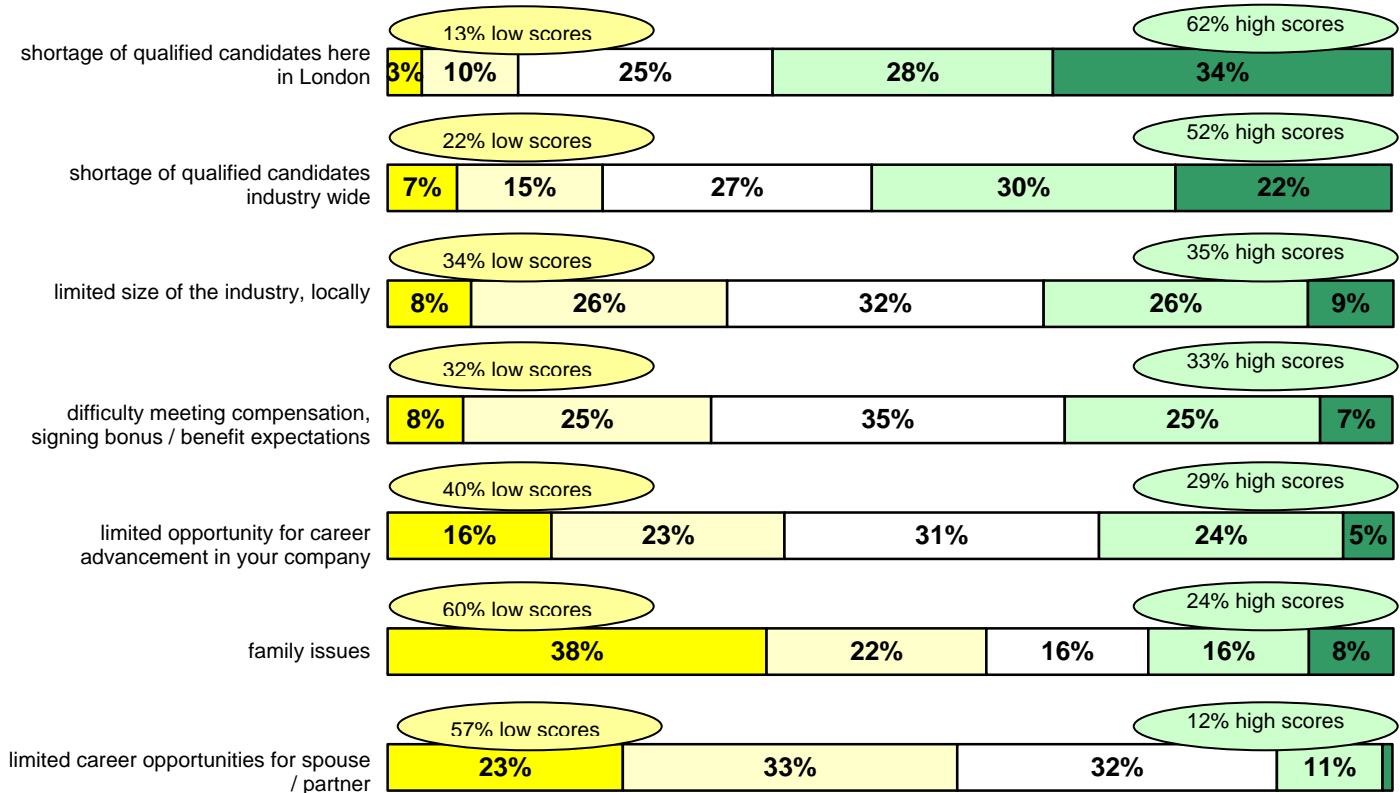
HIRING AND RETENTION: CHALLENGES

REASONS FOR THE CHALLENGES

- Those who had any degree of difficulty with hiring (persuading candidates to work in London and/or for their company) and retention in London – and nearly 85% fell into this category – were asked to indicate the extent to which various factors contributed to the difficulties they were having.
 - A shortage of qualified candidates was the top reason, by far ... with 62% giving high scores to a perceived shortage of qualified candidates in London, per se, and 52% giving high scores to this as an industry wide issue. The data suggests that HR managers – who proliferated as respondents on behalf of larger companies – are better equipped to source candidates. Although these managers also pinpointed a shortage of qualified candidates in London as the biggest factor causing their hiring / retention problems, only 43% gave it very high scores ... compared to 70% of owner / president respondents and 82% of other respondents. The fact that HR professionals had a higher level of use of virtually all means of recruiting corroborates this theory.
 - The respondents were split equally in assessing the impact of the limited size of the local industry; overall, a third gave high scores to this, as a factor that created hiring and retention challenges ... while a third gave medium scores, and a third gave low scores. It was much less of an issue for the Life Sciences respondents, and somewhat more of an issue for IT.
 - About a third gave high marks to their company's difficulty in meeting compensation expectations, and just under a third felt that limited advancement opportunities in their own company was a major issue inhibiting hiring / retention.
 - Finally, family concerns were clearly also a factor ... albeit relatively less of an issue (high scores from 24%, with 12% awarding high scores to spousal career opportunities).

HIRING AND RETENTION: CHALLENGES

Extent to Which Various Factors Contribute to Hiring and Retention Difficulties
(for those who had experienced difficulty, n=97)



Scores of: **1** **2** **3** **4** **5**
 Not at all Very much so

HIRING AND RETENTION: CHALLENGES

Hiring / Retention Challenges, by Company Size, Sector and Respondent's Position

% giving high scores (4,5)	# Employees		Sector			Respondent's Position		
	< 100	100+	Mfg	IT	Life Sciences	President / Owner	HR Manager	Other
Extent of challenge								
identifying sources of candidates with the required skills and experience	58%	37%	48%	57%	46%	60%	30%	62%
persuading your preferred candidates to work here in London	26%	33%	25%	38%	33%	33%	20%	38%
accessing the training that you would wish your employees to have	23%	26%	25%	19%	17%	21%	25%	23%
retaining employees once you have hired them	17%	25%	22%	19%	8%	19%	25%	16%
persuading your preferred candidates to work for your company, per se	14%	26%	24%	10%	--	13%	22%	25%
Factors contributing to challenges								
shortage of qualified candidates here in London	70%	51%	60%	68%	58%	70%	43%	82%
shortage of qualified candidates industry wide	63%	39%	49%	58%	55%	60%	38%	62%
limited size of industry, locally	37%	29%	34%	42%	17%	39%	22%	55%
difficulty meeting compensation, signing bonus and/or benefit expectations	33%	35%	36%	32%	8%	33%	34%	29%
limited opportunity for career advancement in your company	33%	20%	30%	32%	17%	33%	22%	35%
family issues	22%	29%	33%	5%	8%	19%	36%	14%
limited career opportunities for spouse / partner	10%	15%	12%	11%	8%	9%	16%	7%

WORKFORCE SHORTAGES: SUMMARY

MAGNITUDE OF WORKFORCE SHORTAGES

- Workforce shortages considered to be a major problem for London, overall (54% high scores) ... affecting responding companies in a significant way currently (32%), and expected to have even more of an impact for the future (72%)
- Of greatest concern in the IT sector, followed by Manufacturing ... with Life Sciences reporting the least impact

RESPONSES

- Shortages have created significant impacts for responding businesses, which are expected to escalate in the future
 - o 6 of 10 have had trouble filling positions or had compromised requirements
 - o half currently have unfilled positions
 - o a third have had to offer greater monetary incentives
 - o 10% have decided against expanding in London because of difficulty finding staff

JOB AREAS WHERE SHORTAGES ARE AN ISSUE

- Particular job areas where shortages were most notable were:
 - o **for IT:** categories of operations, production and management ... with a particular need for software developers and programmers
 - o **for Manufacturing:** skilled trades, especially tool and die / machinists
 - o **for Life Sciences:** professional and clinical (especially research assistants and – for the hospitals – nurses) followed by technicians and management

WORKFORCE SHORTAGES: MAGNITUDE OF THE ISSUE

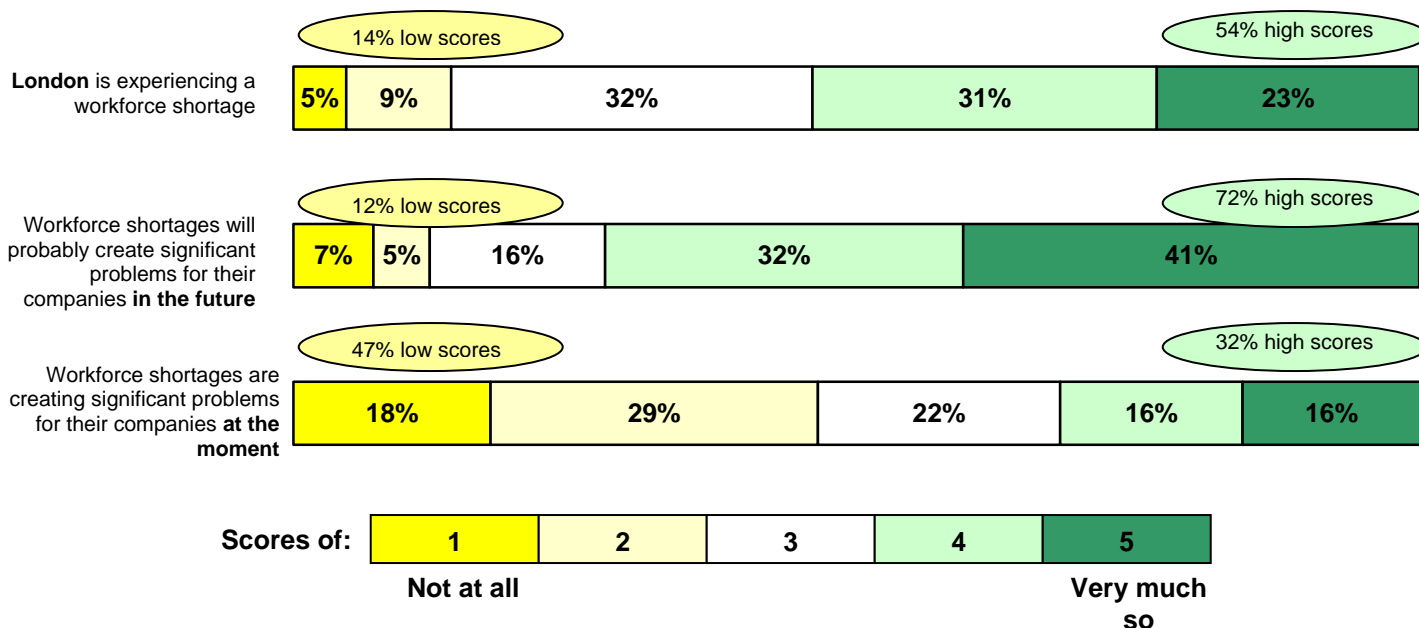
MAGNITUDE OF WORKFORCE SHORTAGES

- Workforce shortages considered to be a major problem for London, overall (54% high scores) ... affecting responding companies in a significant way currently (32%), and expected to have even more of an impact for the future (72%)
- Of greatest concern in the IT sector, followed by Manufacturing ... with Life Sciences reporting the least impact

- There was a general consensus that London was experiencing a workforce shortage (54% high scores) ... and a sense that workforce shortages were a problem that would escalate dramatically in the future for the responding companies. A third of respondents felt shortages were a significant problem for their companies today, while half did not ... but nearly three-quarters expected shortages to create a significant problem in the future, while only 12% did not.
- By sector, workforce shortages were most significant for the IT sector, followed by Manufacturing ... and relatively least severe for Life Sciences.

	Workforce shortages are a significant problem:	
	NOW	FOR THE FUTURE
IT	48%	78%
Manufacturing	29%	73%
Life Sciences	9%	46%

Extent of the Workforce Shortage Issue



WORKFORCE SHORTAGES: MAGNITUDE OF THE ISSUE

Extent of the Workforce Shortage Issue by Company Size and Sector

% high scores (4,5)	Company Size		Sector			
	< 100	100+	Mfg	IT	Life Sciences (including hospitals)	Life Sciences (excluding hospitals)
London is experiencing a workforce shortage	67%	34%	53%	62%	39%	27%
Workforce shortages will probably create significant problems for their companies in the future	74%	69%	73%	78%	46%	46%
Workforce shortages are creating significant problems for their companies at the moment	38%	25%	29%	48%	9%	9%

WORKFORCE SHORTAGES: RESPONSES

RESPONSES

- Shortages have created significant impacts for responding businesses, which are expected to escalate in the future
 - 6 of 10 have had trouble filling positions or had compromised requirements
 - half currently have unfilled positions
 - a third have had to offer greater monetary incentives
 - 10% have decided against expanding in London because of difficulty finding staff

- Workforce shortages were having very real impact on the operations of most of the responding companies, mostly notably in the IT sector, secondarily in Manufacturing, and relatively less so for Life Sciences.
- Specifically, 6 of 10 companies reported that they had experienced difficulty in filling some positions and/or compromised recruitment qualifications. Fully half had unfilled positions due to difficulty finding appropriate candidates, a third had been forced into offering greater monetary incentives than they would have preferred, and 10% indicated that they had decided against expanding in London because of difficulty in finding staff. All of these trends were expected to intensify for the future.

Extent of Various Responses to Workforce Shortages

% who say their company:

has unfilled positions, due to difficulty finding appropriate candidates



experiences difficulty in filling some positions



has hired people with fewer qualifications or less experience than would have been ideal



has had to offer greater monetary incentives than preferred



has decided against expanding in London because of difficulty finding staff



WORKFORCE SHORTAGES: RESPONSES

Extent of Various Responses to Workforce Shortage, by Company Size and Sector

	Company Size		Sector			
	< 100	100+	Mfg	IT	Life Sciences (including hospitals)	Life Sciences (excluding hospitals)
Has unfilled positions, due to difficulty finding appropriate candidates						
currently	50%	54%	46%	75%	25%	10%
expects to, in the future	69%	68%	67%	78%	60%	60%
Experiences difficulty in filling some positions						
currently	57%	69%	60%	75%	33%	20%
expects to, in the future	74%	78%	75%	83%	50%	50%
Has hired people with fewer qualifications or less experience than would have been ideal						
in the past	68%	47%	60%	55%	75%	70%
expects to, in the future	54%	54%	63%	33%	33%	33%
Has had to offer greater monetary incentives than preferred						
in the past	35%	39%	38%	35%	25%	30%
expects to, in the future	44%	53%	49%	44%	40%	40%
Has decided against expanding in London because of difficulty finding staff						
in the past	8%	13%	9%	10%	17%	20%
expects to, in the future	21%	12%	16%	28%	10%	10%

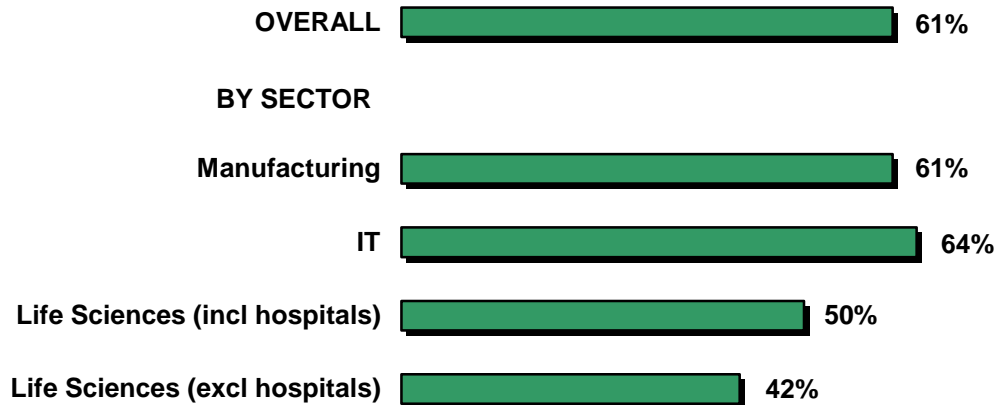
WORKFORCE SHORTAGES: JOBS

JOB AREAS WHERE SHORTAGES ARE AN ISSUE

- Particular job areas where shortages were most notable were:
- **for IT:** categories of operations, production and management ... with a particular need for software developers and programmers
- **for Manufacturing:** skilled trades, especially tool and die / machinists
- **for Life Sciences:** professional and clinical (especially research assistants and – for the hospitals – nurses) followed by technicians and management

- For the upcoming year, 61% of responding companies (slightly more in IT, and fewer in Life Sciences) had at least one specific job area in which they expected a shortage. The main areas of expected shortages were:
 - o **for IT** – operations, production and management (mentioned by 20%-30%), with software developers and programmers mentioned by a third of IT respondents ... and computer graphics and senior management mentioned by 14% respectively;
 - o **for manufacturing** – skilled trades, in particular (for 51%) ... with tool and die / machinists mentioned specifically by 23% in the sector – followed by engineers (15%);
 - o **for Life Sciences** – professional/clinical (38%), followed by technicians and management positions; research assistants were mentioned specifically by 38% of those in the sector while hospitals mentioned nursing in particular.

% of Companies That Specified At Least One Job Area in Which They Expect a Shortage Over the Next One Year

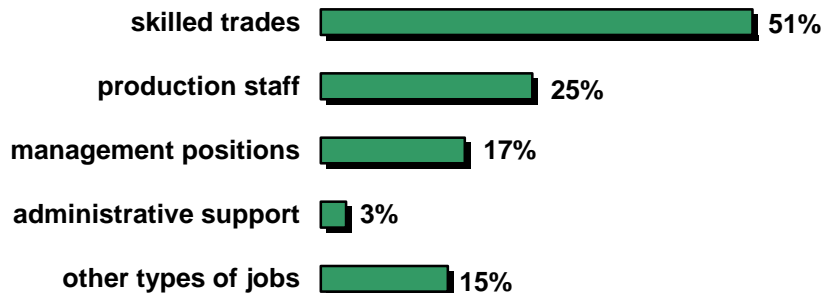


WORKFORCE SHORTAGES: JOBS

% of Companies That Expect Workforce Shortages in Particular Job Types, Over the Next One Year (n=total sample, including those who did not respond)

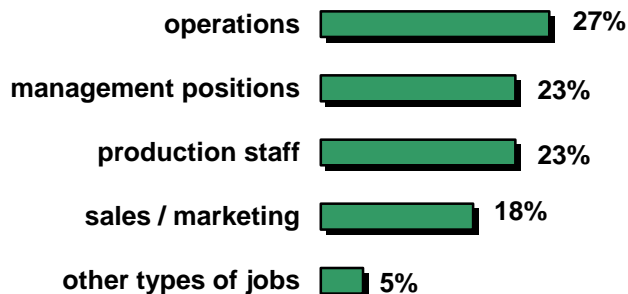
MANUFACTURING

% expecting a shortage in:



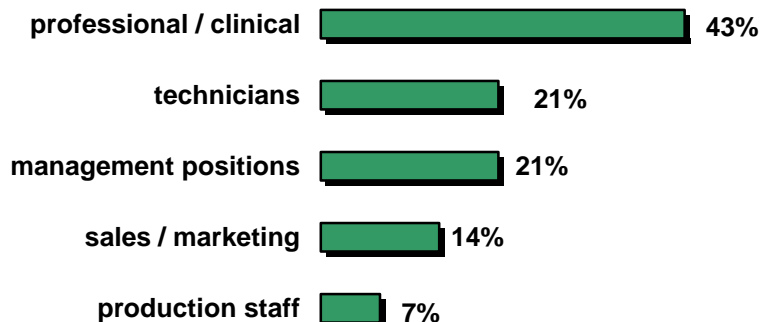
IT

% expecting a shortage in:



LIFE SCIENCES (including hospitals)

% expecting a shortage in:



WORKFORCE SHORTAGES: JOBS

Unaided Mention of Specific Job Types That Respondents Expect to Have Difficulty Filling

SECTOR	% Mentioning Each Type of Job
IT	
Software developers / Programmers	32%
Sales	14%
Computer graphics	14%
Senior management	14%
Accounting / Financial	5%
Customer service	5%
Senior IT project managers	5%
People managers	5%
Other	9%
MANUFACTURING	
Tool and die / machinists	23%
Engineers	15%
Electricians	13%
Production workers	10%
Millwrights	9%
Welders / pipefitters	8%
Sales	6%
Programmers	5%
Accounting / Financial	5%
Production supervisors	5%
Computer designers	4%
Senior management	4%
Press operators	4%
Supervisors	3%
Research	3%
Customer service	3%
Heavy duty mechanic	3%
Other	15%
LIFE SCIENCES	
Research assistant	38%
Technicians	13%
RN	13%
Pharmacists	13%
Doctors	13%
Managers	13%
Sales	6%
HR Coordinator	6%
Other	19%

PERCEPTIONS OF LEDC'S WORKFORCE ACTIVITIES: SUMMARY

AWARENESS OF LEDC'S WORKFORCE ACTIVITIES

- Generally, only about a quarter of respondents felt well informed of LEDC's workforce initiatives or saw LEDC as a "go to" source ... implying an opportunity to increase visibility
- Higher level of concurrence that LEDC is making efforts in terms of specific workforce activities, particularly presentation of London as a good place to live and work (high scores from 69%)
- Considerable awareness (38%) and use (12%) of Goodmovelondon.com and Experience Works (30% and 6%) overall ... with larger companies and HR managers having relatively higher awareness

USEFULNESS OF POTENTIAL LEDC OFFERINGS

- High level of receptivity to additional LEDC workforce initiatives; at least a third, and as many as half or more, gave high scores to the proposed activities
- Greatest relative interest in programs that assist in recruiting, as directly as possible
 - o providing access to a London database of potential recruits stood out as top rated idea (74% high scores)
 - o various HR related supports drew high scores from approximately 35-40% - lower than the interest in recruitment related ideas but considerable, nonetheless

ACCESSING HR INFORMATION

- Facilitating online access to London specific information on HR issues, while of interest (a quarter saw it as useful), did not come across as a top priority ... particularly as compared to recruitment related initiatives
- Not a high level of unmet need, as only 18% saw sourcing HR information as challenging for their company

PERCEPTIONS OF LEDC'S WORKFORCE ACTIVITIES: AWARENESS

AWARENESS OF LEDC'S WORKFORCE ACTIVITIES

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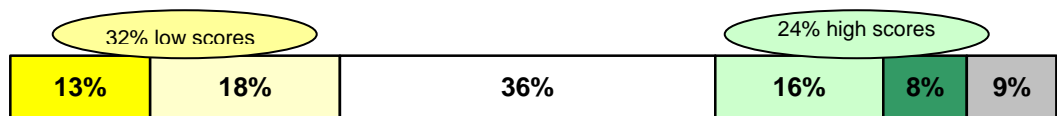
IN GENERAL ...

- There is a clear opportunity to increase the profile of LEDC's workforce activities, as only about a quarter of respondents, respectively, judged themselves to be well informed in this regard ... or saw LEDC as a "go to" source for help with their company's workforce issues. Indeed, nearly a third gave low scores on both of these dimensions.
- Awareness did not vary significantly by sector or in terms of the respondent's position. Although there was a tendency for larger companies to have greater awareness, the numbers were still relatively low (approximately a third aware for larger companies vs a quarter for smaller).

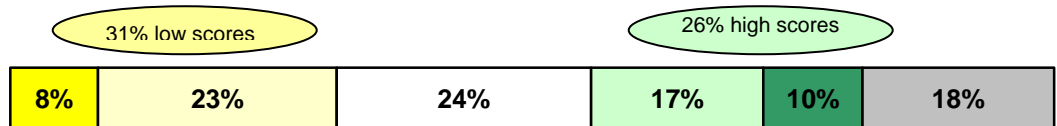
Awareness of LEDC's Workforce Activities, in General

Extent to which respondents ...

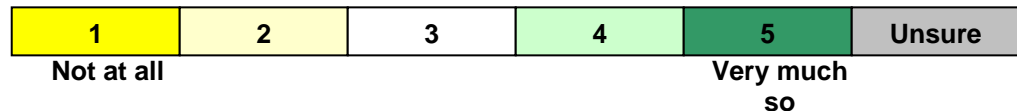
Feel informed about LEDC's activities in the area of workforce



See LEDC as a place that you could turn for help with workforce issues that your company may be facing



Scores of:



PERCEPTIONS OF LEDC'S WORKFORCE ACTIVITIES: AWARENESS

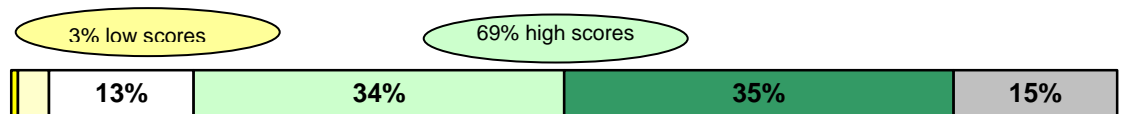
IN TERMS OF SPECIFIC INITIATIVES ...

- Specific workforce endeavours tended to have considerable visibility ... most particularly efforts to present London as a good place to live and work. When respondents were asked to assess how active LEDC was in terms of various specific workforce initiatives (on a five point scale from "not at all" to "very much so") nearly 70% gave high scores with respect to this item. Between a third and 40% gave high scores concerning LEDC's efforts to increase the pool of skilled and experienced workers and encouraging local post secondary graduates to seek work in London ... while a quarter felt that LEDC was very active in providing programs to help businesses attract appropriate employees. Reinforcing the opportunity for communication of existing initiatives, the level of non-responses to those questions overwhelmed the proportion of low scores.
- As with the general awareness questions, larger companies were more likely to recognize LEDC's specific initiatives, particularly with respect to presenting London as a good place to live and work, and in terms of encouraging graduates to stay in London. Otherwise, there were no significant differences by sector or with respect to the respondent's position.

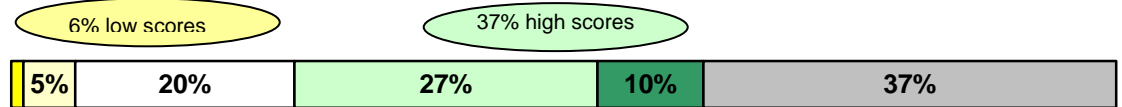
Awareness of Specific LEDC Workforce Initiatives

Extent to which respondents feel that LEDC ...

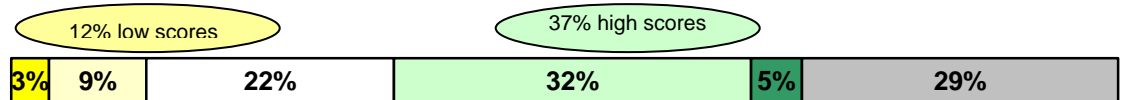
Is making efforts to present London as a good place to live and work



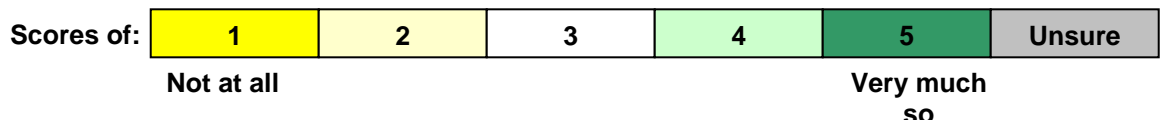
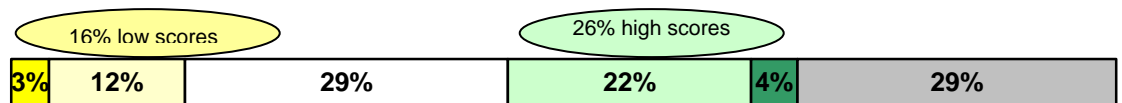
Encourages students graduating from Western, Fanshawe College and other Colleges to seek jobs in London



Is making efforts to increase the pool of skilled and experienced workers in London



Provides programs that can help businesses attract appropriate employees

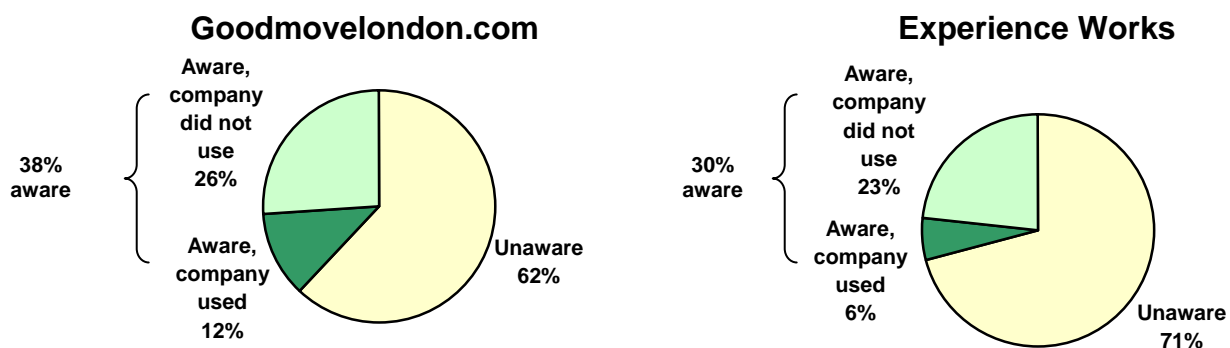


PERCEPTIONS OF LEDC'S WORKFORCE ACTIVITIES: AWARENESS

AS FOR EXPERIENCE WORKS AND GOODMOVELONDON.COM ...

- Nearly four of ten companies were aware of **Goodmovelondon.com**, and 12% had used it. This high level of awareness no doubt influenced the fact that seven of ten respondents gave high marks to the notion that LEDC is making efforts to present London as a good place to live and work ... but we can infer that other aspects of LEDC's activities are also creating this impression.
- **Experience Works** had a somewhat lower awareness level, at 30% ... and 6% of companies had used it. HR managers were much more aware of this initiative than other respondents, with virtually half having heard of it; this relates to higher awareness among manufacturing companies, as HR managers were much more likely to have responded on behalf of these firms (because such companies were larger and more apt to have an HR manager).
- Both Experience Works and Goodmovelondon.com had somewhat higher levels of use and awareness among the larger companies.

Awareness and Use of Experience Works and Goodmovelondon.com



PERCEPTIONS OF LEDC'S WORKFORCE ACTIVITIES: AWARENESS

Awareness of LEDC's Workforce Initiatives, by Company Size, Sector and Respondent's Position

% giving high scores (4,5)	# Employees		Sector			Respondent's Position		
	< 100	100+	Mfg	IT	Life Sciences	President / Owner	HR Manager	Other
re extent to which respondents ...								
feel informed about LEDC's activities in the area of workforce	23%	30%	26%	19%	15%	26%	24%	18%
see LEDC as a place that you could turn for help with workforce issues that your company may be facing	26%	33%	29%	19%	23%	27%	29%	18%
re the extent to which they think LEDC								
is making efforts to present London as a good place to live and work	67%	87%	67%	77%	57%	68%	73%	63%
encourages students graduating from Western, Fanshawe College and other Colleges to seek jobs in London	32%	52%	41%	27%	36%	36%	45%	26%
is making efforts to increase the pool of skilled and experienced workers in London	37%	44%	38%	36%	29%	32%	41%	41%
provides programs that can help businesses attract appropriate employees	26%	34%	30%	18%	14%	20%	33%	28%
% who use, and are aware of								
Experience Works								
used	4%	10%	8%	--	17%	9%	6%	--
aware	26%	36%	37%	10%	25%	20%	48%	17%
Goodmovelondon.com								
used	6%	22%	12%	10%	25%	14%	16%	--
aware	31%	49%	35%	45%	42%	32%	56%	22%

PERCEPTIONS OF LEDC'S WORKFORCE ACTIVITIES: PERCEIVED USEFULNESS OF POTENTIAL LEDC OFFERINGS

USEFULNESS OF POTENTIAL LEDC OFFERINGS

- High level of receptivity to additional LEDC workforce initiatives; at least a third, and as many as half or more, gave high scores to the proposed activities
- Greatest relative interest in programs that assist in recruiting, as directly as possible
 - providing access to a London database of potential recruits stood out as top rated idea (74% high scores)
 - various HR related supports drew high scores from approximately 35-40% - lower than the interest in recruitment related ideas but considerable, nonetheless

- Respondents provided input regarding the perceived usefulness of a range of potential LEDC offerings in the workforce area. All of the ideas received high scores from at least a third of the respondents, and typically 40-50%, conveying a receptive environment for increasing LEDC's workforce initiatives.
- Consistently, the HR managers showed relatively greater enthusiasm for the potential programs.
- Among the initiatives that were tested, those that related to **recruitment** were of greatest interest. Specifically, concepts that had the potential to put the companies in touch with candidates drew the most positive reaction and providing access to a London database of potential recruits stood apart as the best received of all of the initiatives by far, garnering high scores from three-quarters of respondents.
- Initiatives relating to enhancing the company's HR knowledge and capabilities generated relatively less enthusiasm but, nonetheless, drew high scores from between a third and 40% of respondents.

TOP CONCEPT (74% high scores)

- access to a London database of potential recruits

SECOND TIER: RECRUITMENT RELATED (approximately 45% - 55% high scores)

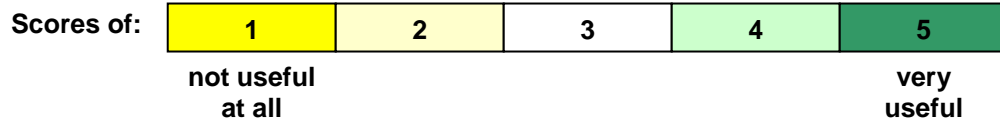
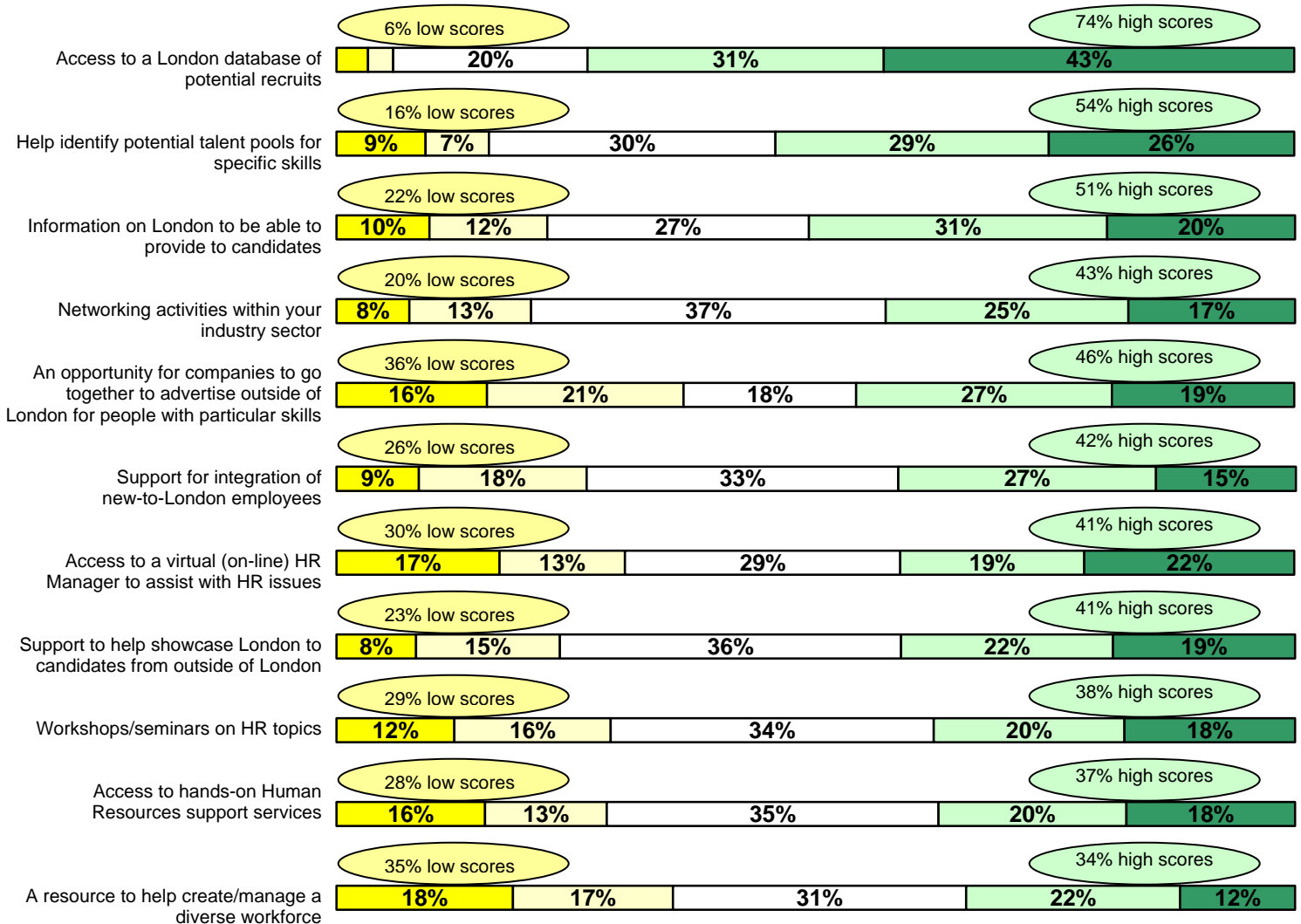
- additional concepts that put employers in touch with sources of recruits
 - identification of skill based talent pools
 - co-operative advertising for particular skill sets
 - showcasing London to out of town candidates
- provision of information on London to candidates

THIRD TIER: HR RELATED (approximately 35% - 40% high scores)

- support for integration of new employees
- industry networking, workshops / seminars, and resources
- access to virtual HR manager or hands-on HR support

PERCEPTIONS OF LEDC'S WORKFORCE ACTIVITIES: PERCEIVED USEFULNESS OF POTENTIAL LEDC OFFERINGS

Perceived Usefulness of Various Potential LEDC Offerings



PERCEPTIONS OF LEDC'S WORKFORCE ACTIVITIES: PERCEIVED USEFULNESS OF POTENTIAL LEDC OFFERINGS

Perceived Usefulness of Various Potential LEDC Offerings by Company Size, Sector and Respondent's Position

% giving high scores (4,5)	# Employees		Sector			Respondent's Position		
	< 100	100+	Mfg	IT	Life Sciences	President / Owner	HR Manager	Other
Access to a London database of potential recruits	66%	88%	82%	56%	56%	66%	90%	63%
Help identify potential talent pools for specific skills	51%	60%	55%	56%	44%	54%	68%	31%
Information on London to be able to provide to candidates	43%	65%	52%	50%	44%	46%	70%	30%
Networking activities within your industry sector	46%	37%	48%	33%	22%	38%	51%	39%
An opportunity for companies to go together to advertise outside of London for people with particular skills	40%	57%	46%	50%	33%	46%	56%	28%
Support for integration of new-to-London employees	43%	39%	33%	39%	33%	33%	61%	28%
Access to a virtual (on-line) HR Manager to assist with HR issues	40%	43%	49%	17%	44%	34%	59%	28%
Support to help showcase London to candidates from outside of London	40%	44%	42%	39%	44%	40%	48%	32%
Workshops/seminars on HR topics	38%	38%	40%	33%	33%	33%	60%	11%
Access to hands-on Human Resources support services	32%	46%	45%	17%	25%	35%	42%	35%
A resource to help create/manage a diverse workforce	31%	41%	39%	22%	33%	27%	51%	23%

PERCEPTIONS OF LEDC'S WORKFORCE ACTIVITIES: ACCESSING HR INFORMATION

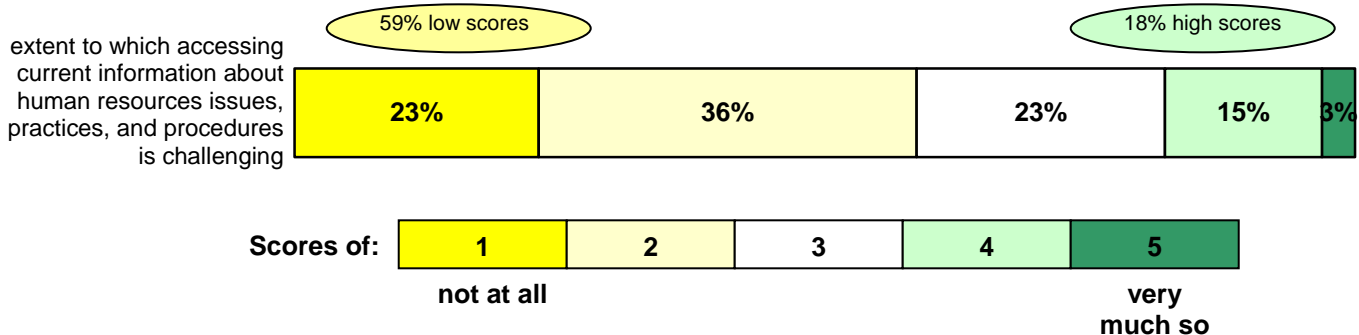
ACCESSING HR INFORMATION

- Facilitating online access to London specific information on HR issues, while of interest (a quarter saw it as useful), did not come across as a top priority ... particularly as compared to recruitment related initiatives
- Not a high level of unmet need, as only 18% saw sourcing HR information as challenging for their company

CHALLENGE RELATED TO ACCESSING HR INFORMATION

- Only a minority of respondents (18%) indicated that it was challenging for their company to access current information regarding human resources issues. The respondents from the Life Sciences sector, which had the greatest incidence of small companies, were much more apt to see this as a challenge.

Extent to Which Accessing HR Information Poses a Challenge for Companies



Extent to Which Accessing HR Information is Challenging, by Company Size, Sector, and Respondent's Position

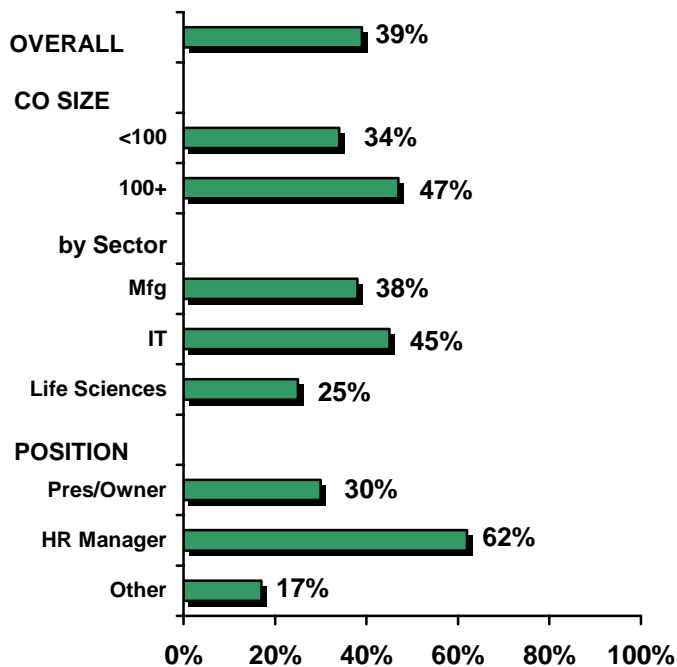
% giving high scores (4,5)	# Employees		Sector			Respondent's Position		
	< 100	100+	Mfg	IT	Life Sciences	President / Owner	HR Manager	Other
extent to which accessing HR information is challenging	21%	15%	17%	14%	42%	15%	23%	15%

PERCEPTIONS OF LEDC'S WORKFORCE ACTIVITIES: ACCESSING HR INFORMATION

ONLINE ACCESS TO LONDON SPECIFIC INFORMATION

- Some 39% of respondents had gone online during the past year to learn more about HR issues or programs specific to London. When asked whether there was any London specific HR information that they felt it would be helpful to have online, a quarter of respondents replied in the affirmative. The differential between the two findings suggests that there was not a high degree of unmet need with respect to local HR information.
- The specific information that was cited most frequently by this subset (named spontaneously by a third) was **compensation ranges**.
- HR managers – along with larger companies, which were more apt to have such managers – had been most involved in seeking out HR information online in the past, and showed the greatest interest in being able to access London specific information electronically in the future. By sector, IT respondents were relatively most interested, particularly in the prospect of accessing particular HR information relevant to London.

% Respondents Who Had Gone Online During Past Year to Learn More About HR Issues or Programs Specific to London



% Respondents Felt It Would be Useful to Have Particular London Specific HR Information Available Online

