



Building Our Economy Together: A Snapshot of London's Key Sectors

September 2025

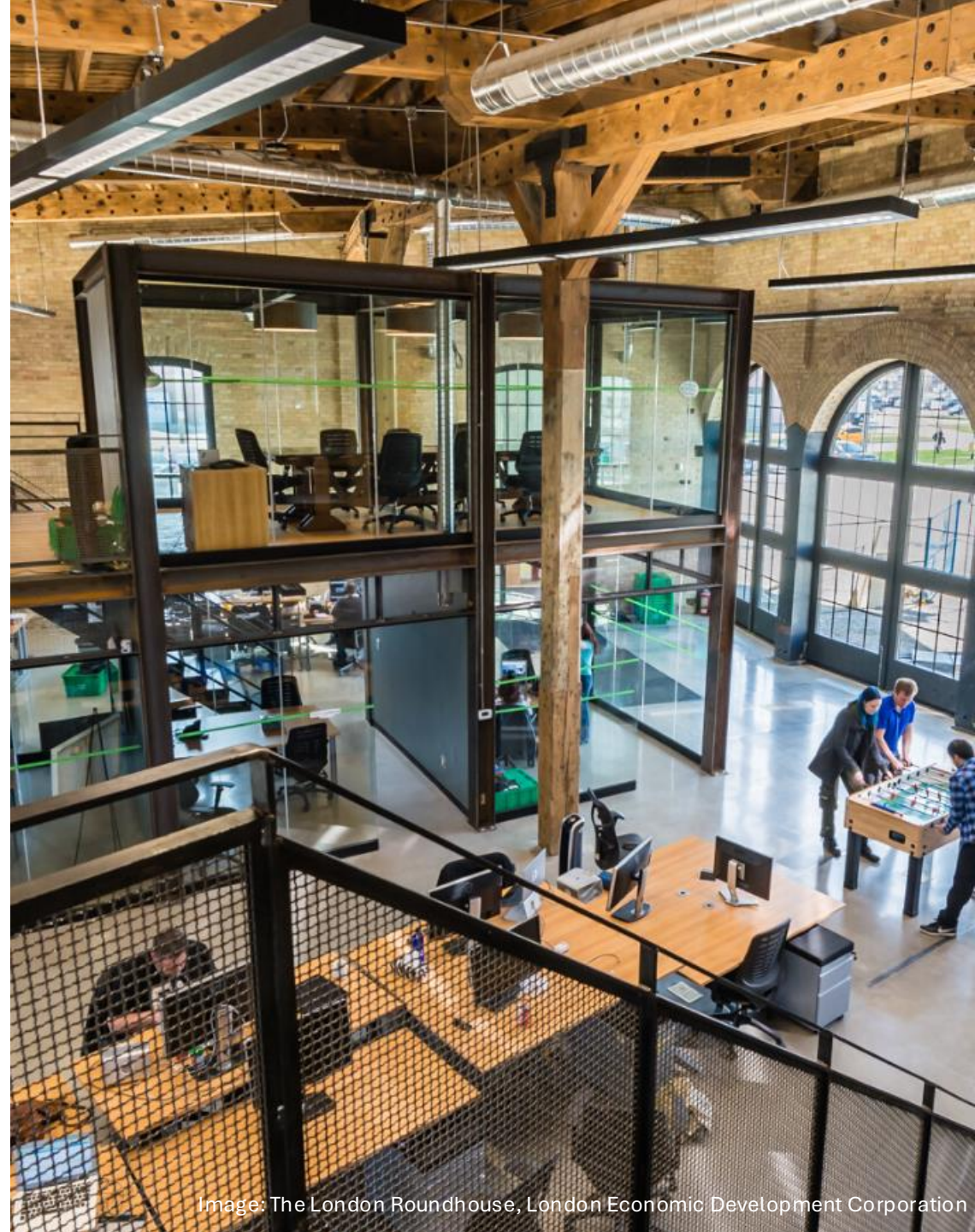


Image: The London Roundhouse, London Economic Development Corporation

Overview

This document has been prepared to support the September sector engagement sessions. It provides an overview of London's economic context and key sector trends to help frame discussion. The insights gathered through these sessions, together with this research, will directly inform the development of London's new Economic Development Strategy

The City of London is developing a new Economic Development Strategy to set a clear, actionable direction for economic growth. This strategy will align with the City's 2023–2027 Strategic Plan, particularly its commitment to:

- Equitable and sustainable economic growth
- Attracting and retaining top talent
- Fostering innovation and entrepreneurship
- Strengthening collaboration among economic partners

London's current economic foundation includes strong clusters in healthcare, manufacturing, and digital creative industries. However, challenges persist, particularly around talent, innovation, and ecosystem coordination. This strategy is an opportunity to refocus and reimagine London's economic future.

In September, leaders from five of London's key sectors will meet to share insights and ideas for ways the City can support economic growth. The interactive 90-minute roundtables will be facilitated by a team from Deloitte and will help identify sector-specific strengths, challenges, opportunities, and concrete actions, shaping both strategic directions and future implementation plans.

An economic development strategy is a focused, action-oriented plan that sets out a community's goals and priorities to drive sustainable growth, attract investment, create good jobs, and improve quality of life. It aligns local resources, policies, and partnerships to build a resilient economy and ensure long-term prosperity for residents and businesses.

What is local economic development?

WORKFORCE ATTRACTION AND RETENTION

Attract new talent to the community and retain existing workers through welcoming and inclusive environments, and access to housing, health care, childcare, education, transportation, career opportunities, and cultural amenities—ensuring businesses have access to the skilled workforce they need to grow.

WORKFORCE DEVELOPMENT

Enhance the skills, education, and employability of the local labour force through training programs, partnerships with educational institutions, and upskilling initiatives—aligning workforce capabilities with current and future employer needs.

INVESTMENT ATTRACTION

Draw new capital and business investment into the community by developing infrastructure and servicing, promoting local advantages, streamlining permitting processes, providing data and information, offering incentives, and marketing the area to domestic and international investors.

BUSINESS SUPPORT

Help existing businesses thrive and expand by providing resources, advisory services, networking opportunities, and access to funding, while reducing barriers to growth and fostering a business-friendly environment.



ENTREPRENEURS AND INNOVATION

Foster entrepreneurship and stimulate innovation by supporting startups, facilitating access to incubators and accelerators, providing mentorship, and encouraging commercialization of new ideas and technologies.

TOURISM

Increase visitor numbers and spending by promoting local attractions, events, and experiences—supporting tourism-related businesses, creating jobs, and generating economic benefits for the community.

DOWNTOWN DEVELOPMENT

Revitalize and enhance the downtown core as a vibrant, attractive, and economically active center—encouraging business activity, improving public spaces, and increasing residential and visitor engagement.

COMMERCIAL DISTRICT DEVELOPMENT

Support business clusters, improve infrastructure, and encourage new developments that meet community and market needs.

London's economic context

Where are we now?

London's economic context



Strong population growth

- London's population grew by 14% between 2019 and 2024, adding over 60,000 residents, making it the second-fastest growing city in Western Ontario.¹
- London/Middlesex County is projected to grow by 9% between 2024 and 2030, an increase of close to 55,000 residents. This growth rate is expected to surpass both Ontario's projected growth of 6% and Canada's projected growth of 3%.²



Changing demographic profile

- The 25-34 cohort is expected to rise by 35% between 2023-2051, offering London a strong base for workforce development and economic expansion.³
- Even so, London's population is aging, with 20% aged 65 or older compared to 16% across Ontario, posing both challenges and opportunities as retirees offset workforce gains from population growth, while demand for health care workers increases.⁴



Resilient, diverse business environment

- The city has demonstrated robust recovery from recent economic disruptions, with key sectors such as health care, education, and professional services driving employment gains.⁵
- The downtown commercial vacancy rate is 31.4% (~1.5 million sq. ft.)⁶ The City's Office-to-Rental CIP Incentive Program supports conversion of vacant office space for residential unit development.
- London's entrepreneurial landscape is supported by a high proportion of small and micro-businesses, reflecting adaptability and innovation.⁷

London's leading sectors

London saw an overall net growth of 18,380 jobs from 2019-2024.⁸ More than 70% of that growth was in these five sectors:



Health care and social assistance

4,590 net new jobs
15% growth
\$60,658 avg. salary



Professional, scientific and technical services

2,592 net new jobs
24% growth
\$75,003 avg. salary



Finance and insurance

2,193 net new jobs
23% growth
\$72,612 avg. salary



Construction

1,824 net new jobs
19% growth
\$71,160 avg. salary



Manufacturing

1,496 net new jobs
8% growth
\$66,378 avg. salary

12,695 net new jobs

\$861.2 million increased annual salary

A snapshot of London's talent



Workforce projections

- London's leading sectors will need 40,000 new hires from 2023-2031 due to economic growth and retirements.⁹
- 21% of Ontario's construction workforce is expected to retire by 2030, increasing pressure on an industry where 40% of employers already report labour shortages.¹⁰
- Shortages have been reported in truck driving and teaching positions, with more than 130 vacant positions reported by employers in June 2024.¹¹



Skill demands

- Advanced manufacturing (including food processing) requires skills in robotics and predictive analytics, while AI-driven diagnostics and telemedicine are reshaping the health care sector.¹²
- Technological advancements in the construction sector call for skills in Building Information Modeling (BIM), modular construction, and sustainable construction practices.¹³



Workforce trends

- Younger workers place greater value on work-life balance, flexibility, autonomy, learning, inclusivity, and meaningful work.¹⁴
- Remote work creates opportunities for people to live in London while working elsewhere, and for employers to tap into the global talent pool to fill critical roles and address labour shortages.

Economic participation of London's underrepresented communities

The economic participation of under-represented communities in London has a direct impact on the city's economic growth, social equity, and community well-being. Between 30,000 and 40,000 prime-age (25-44) non-participants could be available to enter the labour market if barriers to participation were addressed.¹⁵

Immigrants: Immigrants are an important workforce population group, representing 23.1% of the economic region's workforce.¹⁶ However, up to 8,500 more of the region's immigrants could enter the workforce if barriers are addressed.¹⁷ Despite high levels of post-secondary education, many immigrants are unable to find opportunities that are attractive and aligned with their skills.

Racialized communities: The 2021 Census reported 15.2% unemployment for visible minorities compared to just 11.6% for the rest of the population in London CMA. Survey results indicate that a sense of discouragement and perceived discrimination from employers has led many to withdraw from the labour market, affecting up to 21,000 people who would otherwise be available to work.¹⁸

Women: While lack of childcare is a common barrier to participating in the workforce, women also identify barriers such as lack of transportation, unavailability of jobs that match their schedule, and a lack of well-paying jobs. Addressing these barriers could enable an estimated 22,000 – 29,000 women to enter the workforce.¹⁹

A strategic priority for the City of London is fostering and leveraging strategic partnerships that promote collaboration, innovation, and investment in business and employment.

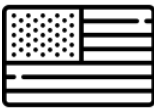
An example is the City's support for TechAlliance, which delivers talent programs that include micro-placements, a talent exchange, and a connecting program for newcomers.

Programs like the City's International Student Graduate Internship initiative provide valuable skill development opportunities and employment experience for recent international graduates.

Local impacts of macroeconomic trends

National and Provincial Trends

Local Impacts



US Tariff Threats and
Global Trade Realignments

Reduced demand creates uncertainty and may lead to job losses or reduced operations.

Higher costs and increased lag times reduce competitiveness.



Interest Rate Changes and
Economic Uncertainty

Affordable borrowing rates support small businesses, encouraging entrepreneurship and innovation, and potentially creating new jobs.

Overall economic uncertainty can dampen business confidence and investment in London, even with lower borrowing costs.



Shifting Supply Chains

London’s competitive edge may be eroded if supply chains realign to favour locations with lower trade costs or proximity to major markets.

Investment attraction opportunities (onshoring, defence spending) could offset effects of tariffs.



Housing Market Dynamics

London’s housing market remains more affordable than Toronto and Vancouver, which could attract talent and businesses seeking lower costs.

Rising costs and uncertainty may limit development.

London's economic context

Sector overviews and trends

Overview: Advanced Manufacturing and Industrial Technologies

National and provincial trends

- **Automation, AI, robotics, and Industrial Internet of Things (IIoT)** are now mainstream, with 62.1% of enterprises surveyed by Statistics Canada (in 2022) adopted at least one type of advanced technology.
- **Firms are working to regionalize or “reshore” supply chains** and diversify trade partners amid ongoing global disruptions and evolving trade policies, particularly with the U.S., which remains Canada’s largest export market.
- **Digital and automation skills retraining is a national imperative;** clusters like NGen are investing in modular workforce education and micro-credentials to address persistent skills shortages.

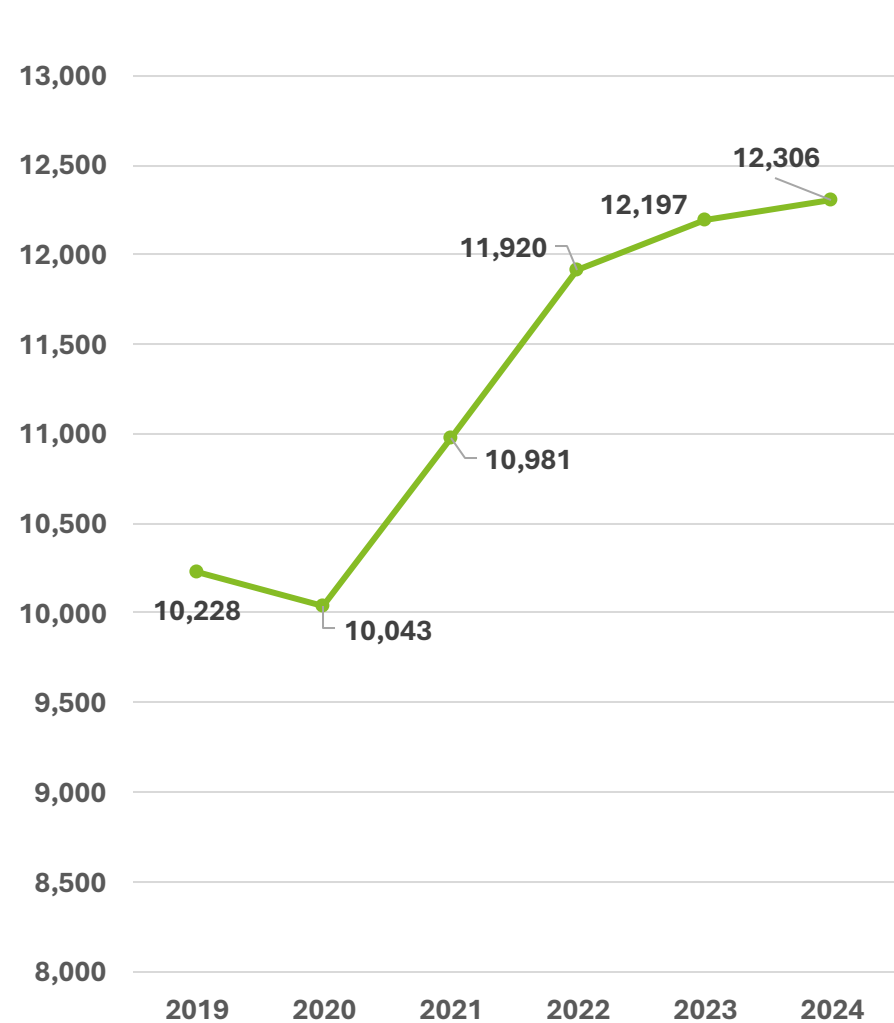
[The Daily — Survey of Advanced Technology, 2022](#)
[2025 Advanced Manufacturing Outlook Report](#)
[Canada's Advanced Manufacturing Cluster](#)
[Manufacturing Canada's Future](#)
[Regional Development Program: Advanced Manufacturing and Innovation Competitiveness Stream](#)

Emerging opportunities

- **Canada’s national NGen Advanced Manufacturing Supercluster** is investing up to \$427 million to accelerate deployment of advanced manufacturing technologies such as automation, machine learning, cybersecurity, and additive manufacturing (e.g., 3D printing).
- **Provincial funding support** through the Advanced Manufacturing and Innovation Competitiveness (AMIC) Stream supports Ontario SMEs investing in capital equipment, technology adoption, and skills development. Eligibility criteria encourage projects that create/upskill jobs and stimulate private investment across sectors such as aerospace, automotive, ICT, and life sciences.

Overview: Advanced Manufacturing and Industrial Technologies

London's employment trends



Source: Lightcast, datarun, 2025.8

London's employment concentration

NAICS	Description	2024 Jobs (London)	2024 Jobs (Ontario)	LQ
3333	Commercial and service industry machinery manufacturing	468	6,409	2.38
3119	Other food manufacturing	1,197	16,532	2.36
3391	Medical equipment and supplies manufacturing	580	9,964	1.89
3116	Meat product manufacturing	1,329	23,839	1.81
3121	Beverage manufacturing	1,052	20,384	1.68
3262	Rubber product manufacturing	166	4,471	1.21
5417	Scientific research and development services	1,353	36,860	1.19
5413	Architectural, engineering and related services	2,374	87,814	0.88
3364	Aerospace product and parts manufacturing	281	11,008	0.83
3345	Navigational, measuring, medical and control instruments manufacturing	222	9,618	0.75
3327	Machine shops, turned product, and screw, nut and bolt manufacturing	331	14,464	0.74
3331	Agricultural, construction and mining machinery manufacturing	211	9,250	0.74
3363	Motor vehicle parts manufacturing	1,447	64,864	0.73
3323	Architectural and structural metals manufacturing	437	23,724	0.60
3261	Plastic product manufacturing	521	44,884	0.38
3251	Basic chemical manufacturing	43	5,232	0.27
3332	Industrial machinery manufacturing	63	8,878	0.23
3339	Other general-purpose machinery manufacturing	107	16,662	0.21
3254	Pharmaceutical and medicine manufacturing	110	18,050	0.20
3321	Forging and stamping	13	2,136	0.20

Source: Lightcast, datarun, 2025.8

Sector overview: Digital, Tech and Creative Economy

National and provincial trends

- The digital economy in Canada is projected to **grow at a compound annual growth rate (CAGR) of around 9%** through 2025, spurred by the expansion of e-commerce, artificial intelligence (AI), and digital adoption in health and fintech.
- The traditional creative and cultural industries face disruption, but also opportunity, from new technologies (virtual/augmented reality, AI-driven content). **Lower interest rates and inflation** as of 2025 are reigniting discretionary spending and sectoral growth.
- The intersection of technology and creativity is accelerating, with **24% of information and cultural industry businesses using generative AI**, and ongoing adoption of virtual and augmented reality tools, especially in the media and entertainment sector.

[Canada - Digital Economy](#)

[Canada's Creative and Cultural Industries: 2025 Outlook](#)

[Ontario's Arts, Culture, and Creative Industries: Strengthening Competitiveness and Communities](#)

[Partnering to Power Ontario's Digital Future](#)

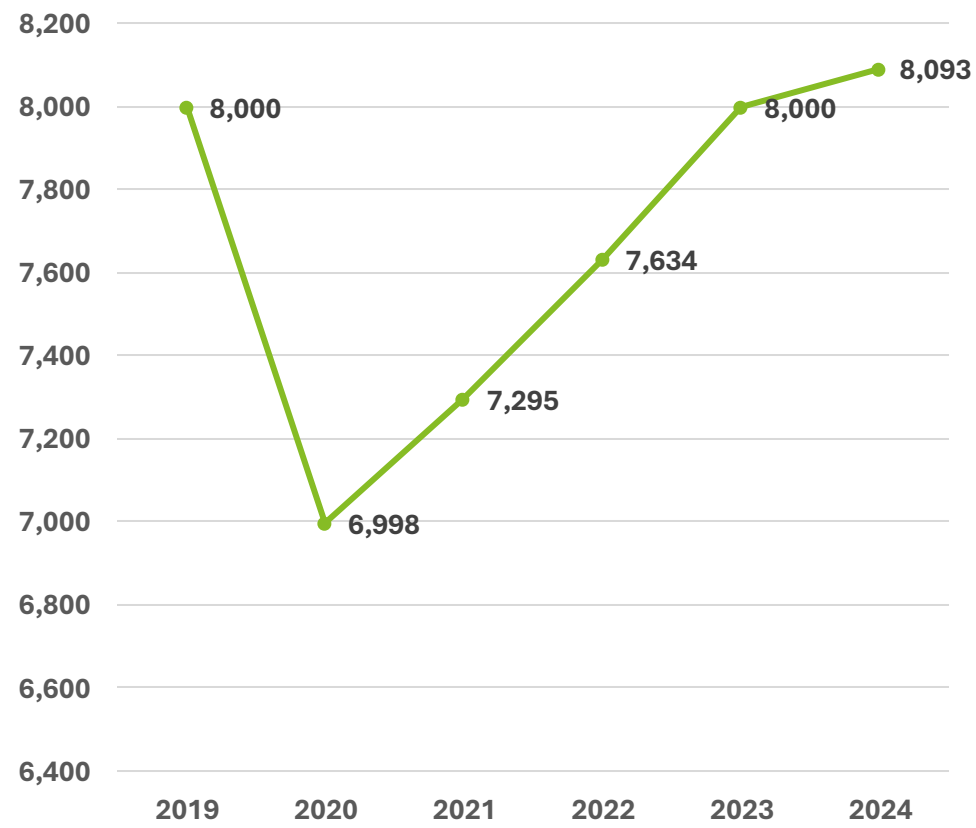
[Building a Thriving Future for Ontario's Arts, Culture, and Creative Workforce](#)

Emerging opportunities

- **AI and emerging tech integration:** By 2024, 24% of Ontario's information and cultural industry businesses were already using generative AI. AI, data analytics, and immersive tech (AR/VR) drive opportunities for new business models, increased productivity, and creative content generation, backed by nearly \$9.8 billion in AI venture capital investment since 2019.
- **Upskilling and talent development:** There is strong growth in upskilling, retraining, and digital literacy programs at Ontario universities and colleges to meet sector demand for creative tech professionals and adapt to technological change.

Sector overview: Digital, Tech and Creative Economy

London's employment trends



Source: Lightcast, datarun, 2025.8

London's employment concentration

NAICS	Description	2024 Jobs (London)	2025 Jobs (Ontario)	LQ
7113	Promoters (presenters) of performing arts, sports and similar events	294	7,868	1.22
5191	Other information services	563	18,149	1.01
7115	Independent artists, writers and performers	42	1,367	1.00
5415	Computer systems design and related services	3,932	179,309	0.71
5112	Software publishers	595	29,363	0.66
5151	Radio and television broadcasting	204	10,241	0.65
5416	Management, scientific and technical consulting services	1,038	60,165	0.56
5173	Wired and wireless telecommunications carriers (except satellite)	331	20,203	0.53
5418	Advertising, public relations, and related services	531	34,720	0.50
5182	Data processing, hosting, and related services	276	19,672	0.46
5414	Specialized design services	95	7,217	0.43
5121	Motion picture and video industries	191	29,072	0.21
5122	Sound recording industries	0	1,406	0.00

Source: Lightcast, datarun, 2025.8

Sector overview: Education, Nonprofit and Public Service

National and provincial trends

- There is a major focus on curriculum modernization, skills development (especially in STEM and financial literacy), and classroom innovation. Post-secondary sectors are challenged by funding freezes and restrictions on international student enrolment, but demand for post-secondary education and skilled workers remains high. Enrolment across Canada is projected to rise by 11.2% between 2022 and 2031, particularly in fields requiring advanced qualifications.
- The nonprofit sector employs about 2.5 million people, making it Canada's largest employer group. The sector is experiencing moderate growth but is challenged by rising operational costs, funding instability, and increasing demand for services. Staff shortages and competition for talent persist, along with an increase in digital transformation and advocacy efforts.

Emerging opportunities

- **Nonprofit sector growth and collaboration:** There is potential for nonprofits to strengthen alliances with public service bodies and educational institutions to deliver training, promote diversity, and meet rising social needs through advocacy and service innovation.
- **Industry partnerships and innovation:** Universities and colleges can foster innovation by partnering with businesses and nonprofits, leveraging government funding for joint research and development (e.g., “superclusters” for technology and renewable energy).

[Educational Services: Ontario 2024-2026 - Job Bank](#)

[Canada School of Public Service 2025–26 Departmental Plan – CSPS](#)

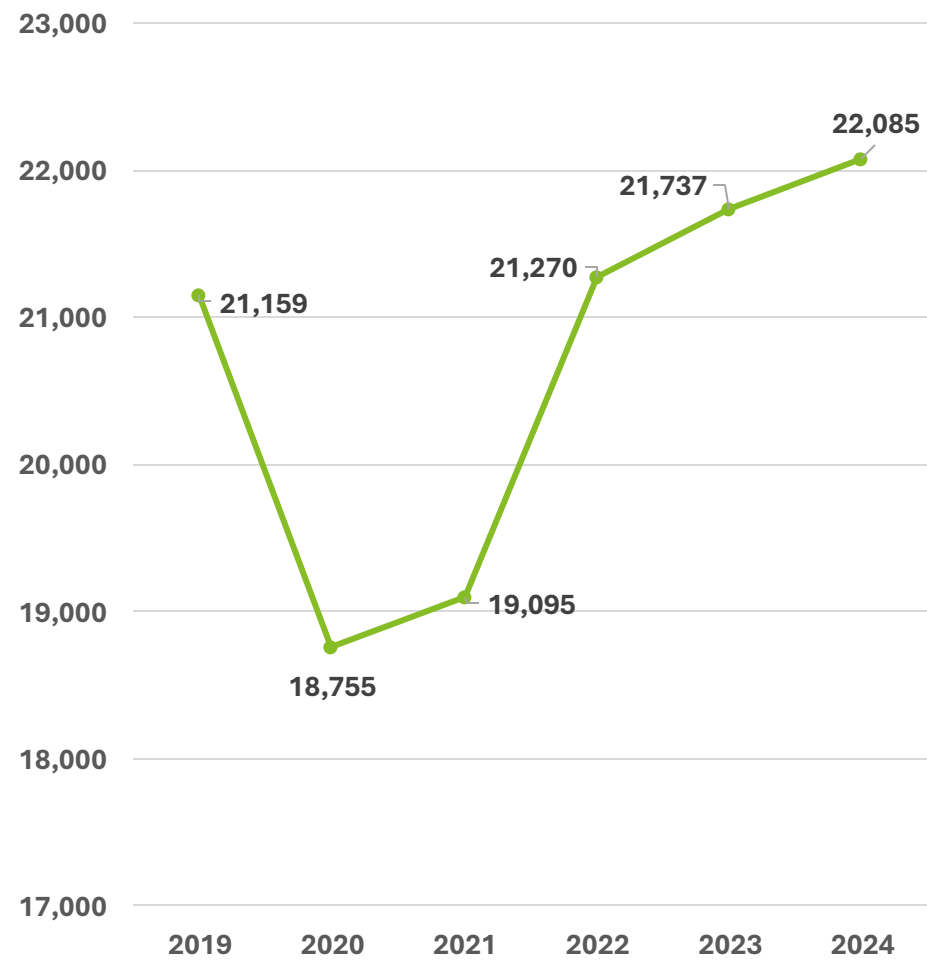
[People First: A Portrait of Canada's Nonprofit Workforce](#)

[Statistics Canada releases crucial new data on many aspects of the nonprofit sector | Imagine Canada](#)

[A Smarter Path: The Case for Post-secondary Education Reform](#)

Sector overview: Education, Nonprofit and Public Service

London’s employment trends



Source: Lightcast, datarun, 2025.8
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London’s employment concentration

NAICS Description	2024 Jobs (London)	2024 Jobs (Ontario)	LQ
6114 Business schools and computer and management training	454	4,088	3.61
6115 Technical and trade schools	432	4,057	3.46
6113 Universities	9,254	136,967	2.20
6243 Vocational rehabilitation services	586	10,140	1.88
6112 Community colleges and C.E.G.E.P.s	3,227	57,179	1.84
8132 Grant-making and giving services	558	13,849	1.31
6241 Individual and family services	2,844	74,332	1.24
6242 Community food and housing, and emergency and other relief services	269	7,242	1.21
6244 Child day-care services	2,160	61,067	1.15
6116 Other schools and instruction	942	35,044	0.87
6117 Educational support services	185	7,770	0.77
8133 Social advocacy organizations	167	9,185	0.59
8134 Civic and social organizations	374	21,475	0.57
8139 Business, professional, labour and other membership organizations	634	40,205	0.51

Source: Lightcast, datarun, 2025.8

Sector overview: Health, Life Sciences and Bio-Innovation

National and provincial trends

- **Canada is a “super-aged” society**, facing increased demand for advanced healthcare, digital solutions, and personalized medicine, fueled by demographic shifts and policy modernization.
- There’s an emphasis on securing supply chains, expanding commercial activities, and enabling world-class regulation to **attract more investment and international partnerships**.
- **Strategic investments** in health innovation centers and coordination between government, academia, and industry strengthen Ontario’s global competitiveness, especially in infectious disease, oncology, and neurology research.

[5 trends shaping the future of Canadian healthcare](#)

[Canada’s Biotech Reboot: How to keep the vital life sciences sector strong](#)

[2025 life sciences outlook | Deloitte Insights](#)

[Canada's Biomanufacturing and Life Sciences Strategy](#)

[MaRS Impact Health 2025: Canada’s premier health innovation conference returns](#)

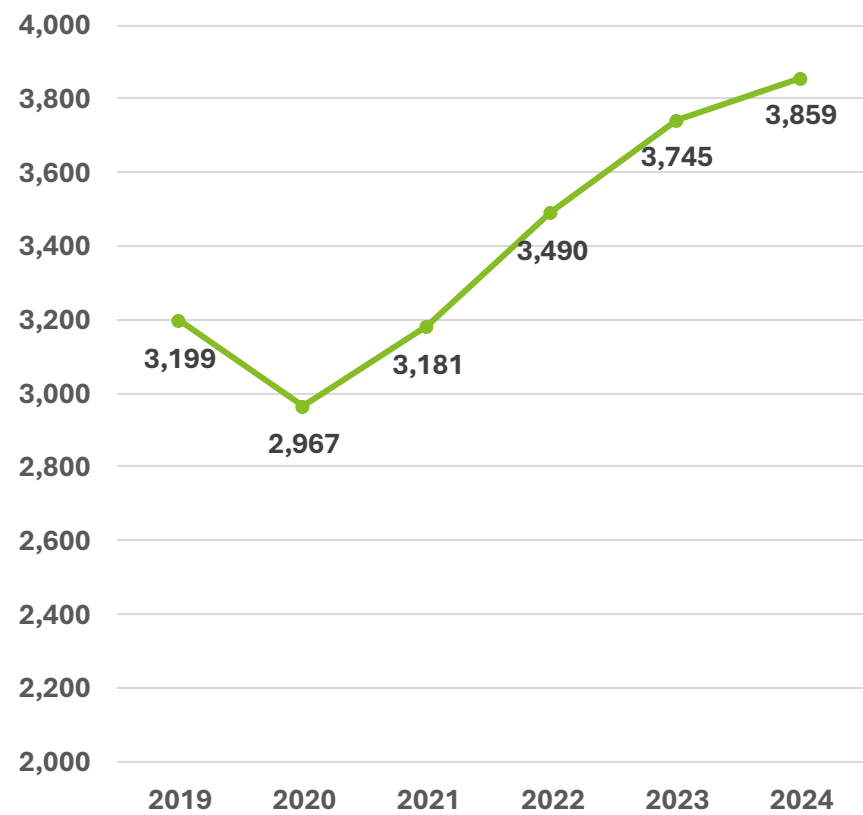
[Generative AI in healthcare: Current trends and future outlook](#)

Emerging opportunities

- **Public-private partnerships and global leadership** among public health agencies, academic research centers, and private industry are accelerating innovation and commercialization, supporting globally competitive product development. Opportunities exist for Canadian companies to participate in international consortia, clinical trials, and strategic supply chain alliances, driving export growth.
- **Digital health innovation, including** growth in AI-driven diagnostics, telehealth, remote patient monitoring, and data analytics is creating new opportunities for software, device manufacturers, and healthcare providers

Sector overview: Health, Life Sciences and Bio-Innovation

London's employment trends



Source: Lightcast, datarun, 2025.8

London's employment concentration

NAICS	Description	2024 Jobs (London)	2024 Jobs (Ontario)	LQ
3391	Medical equipment and supplies manufacturing	580	9,964	1.89
6215	Medical and diagnostic laboratories	556	13,916	1.30
5417	Scientific research and development services	1,353	36,860	1.19
3345	Navigational, measuring, medical and control instruments manufacturing	222	9,618	0.75
5416	Management, scientific and technical consulting services	1,038	60,165	0.56
3254	Pharmaceutical and medicine manufacturing	110	18,050	0.20

Source: Lightcast, datarun, 2025.8

Sector overview: Real Estate, Infrastructure, and Business Services

National and provincial trends

- **Industry sentiment remains mixed** as Canadian real estate companies navigate issues such as uncertainty around dealmaking, capital constraints, housing affordability, sustainability and ensuring resilience to climate change.
- **Housing affordability remains a critical issue** across Canada. Governments and developers are exploring innovative solutions, including modular construction, co-living spaces, and public-private partnerships, to address the housing crisis.

Emerging opportunities

- **Alternative investment areas** like multi-family residential, anchored retail, student housing, data centers, and cold-storage facilities are in high demand due to changing consumer and business needs.
- **Technology in business services, such as** AI-powered business tools, digital transformation, and IT outsourcing remain growth areas throughout 2025, especially for professional services supporting property management, valuation, and logistics for large portfolios.

[Emerging Trends in Canadian Real Estate 2025 | PwC Canada](#))

[OPINION: It's not an affordability crisis, it's a cost-of-delivery crisis](#)

[Housing Market Outlook 2025 | CMHC](#)

[Real Estate Investing in Canada in 2025: A Complete Guide | Parvis Invest | Parvis Invest](#)

[Emerging Trends in Canadian Real Estate 2025 | PwC Canada](#)

[Five Canadian CRE trends to watch in 2025](#)

[Emerging Trends in Canadian Real Estate 2025 | PwC Canada](#)

Sector overview: Real Estate, Infrastructure, and Business Services

London's employment trends



Source: Lightcast, datarun, 2025.8

London's employment concentration

NAICS Industry	2024 Jobs (London)	2024 Jobs (Ontario)	LQ
5321 Automotive equipment rental and leasing	366	7,678	1.55
5611 Office administrative services	1,119	25,337	1.44
2372 Land subdivision	227	5,619	1.31
5311 Lessors of real estate	1,788	47,331	1.23
5614 Business support services	1,421	38,716	1.19
5419 Other professional, scientific and technical services	1,185	37,949	1.02
2362 Non-residential building construction	1,257	41,447	0.99
2361 Residential building construction	1,732	60,647	0.93
5313 Activities related to real estate	864	31,173	0.90
5413 Architectural, engineering and related services	2,374	87,814	0.88
5613 Employment services	2,290	106,112	0.70
2373 Highway, street and bridge construction	373	17,381	0.70
5619 Other support services	446	20,944	0.69
2379 Other heavy and civil engineering construction	120	6,604	0.59
5416 Management, scientific and technical consulting services	1,038	60,165	0.56
5312 Offices of real estate agents and brokers	265	16,820	0.51
5612 Facilities support services	113	7,291	0.50
5324 Commercial and industrial machinery and equipment rental and leasing	148	10,522	0.46
2371 Utility system construction	269	19,304	0.45

Source: Lightcast, datarun, 2025.8

Sources

Sources

1. Statistics Canada. Table 17-10-0155-01.
2. Ontario Ministry of Finance | Statistics Canada, Table: 17-10-0057-01.
3. Ontario Ministry of Finance | Statistics Canada, Table: 17-10-0057-01.
4. The age of population is derived from the Ontario Ministry of Finance population projections. These projections are only available at the Census Division level. This means that data includes Western Ontario and separated cities.
5. Lightcast, datarun, 2025.5
6. [London Ontario Office Figures Q2 2025, July 11, 2025, CBRE.](#)
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12. [Global disruption in 4D: Exploring intersecting forces impacting Canada's future](#), 2024. Deloitte.
13. [2025 Engineering and Construction Industry Outlook](#), November 2024, Deloitte.
14. [2025 Gen Z and Millennial Survey](#), Deloitte Global.
15. [Labour market participation in the London Economic Region](#), August 2021. City of London.
16. [2025 – 2026 Local Labour Market Plan](#), LEDC. 17.
18. [An in-depth look at the discrimination experienced by immigrants and racialized individuals in London and Middlesex, and strategies for combatting this discrimination](#), 2023, Network for Economic and Social Trends, Western University, Co-led by the City of London.
19. [Labour market participation in the London Economic Region](#), August 2021. City of London.

Notes

LOCATION QUOTIENT ANALYSIS

As part of the sector trends analysis, the Location Quotient (LQ) Analysis was completed to determine the concentration of industries (businesses) in the City of London (Census Subdivision) relative to the Province of Ontario. It reveals what makes a region unique. The LQ's Classifications are as follows:



While the LQ is a valuable tool for benchmarking London's industry mix against the broader provincial context, it is important to recognize its interpretive limits. Specifically, the LQ indicates the current relative concentration of industries in London but does not prescribe "what ought to be" in terms of ideal sector composition. Each city has a unique economic history, demographic profile, and set of strategic priorities, meaning there is no universally optimal industry mix.

Instead, the LQ should be viewed as a starting point for deeper analysis and strategic discussion. High LQ values may point to sectors where London has competitive advantages, while low LQ values may reveal opportunities for diversification or targeted growth. Ultimately, the LQ provides a factual basis for comparing London's industry strengths and weaknesses to the provincial average, supporting evidence-based decision-making in the development of economic strategies tailored to the city's unique context.

LIGHTCAST DATA

Deloitte leverages data from Lightcast for sector trends analysis. Lightcast provides a comprehensive dataset on Canadian industries, occupations, and demographics by integrating multiple data sources into a single, consistent platform, updated biannually. This combined dataset, which includes Canadian Business Counts, enables us to assess the most current and relevant information on local and regional economic performance. For detailed information on Lightcast's data collection methodologies and assumptions, please refer to: [CA - Canada Methodology | Lightcast Knowledge Base](#)



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