



ENVIRONMENTAL SCAN

**WINDSOR/ESSEX COUNTY
CHATHAM-KENT**

JUNE 2002

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**Windsor, Essex County and Chatham-Kent
Environmental Scan Update 2001**

Table of Contents

1.0	The Purpose of the Environmental Scan 2001.....	1
2.0	Methodology	1
3.0	Highlights	1
4.0	Changes in Labour Market Supply	2
5.0	Changes in Labour Market Demand	5
	Manufacturing	6
	Construction	8
	Agriculture	9
	Tourism	10
	(Accommodation and Food Services / Information Culture and Recreation)	
	Retail (Trade)	12
	Health Care and Social Assistance	12
	Education	12
	Public Administration	13
6.0	Issues and Conclusions from Previous E-Scans	14
7.0	New and Emerging Issues and Conclusions	16
	Bibliography	19

Appendices

- Appendix 1 Focus Group Notes:
 - Agriculture
 - Small Business
 - Francophone
 - Tourism
- Appendix 2 Emerging Occupations
- Appendix 3 Plant Closures and Expansions

1.0 The Purpose of the Environmental Scan 2001

This Environmental Scan Update is an update of the original Environmental Scan for Windsor, Essex County and Chatham-Kent prepared in October, 1999 and updated in September, 2000. The purpose of this report is to review and update the issues and conclusions drawn in the previous reports as well as identify emerging issues and trends currently influencing the labour market in this Southwestern Ontario area.

2.0 Methodology

To construct this environmental scan focus groups were conducted with representatives from tourism, agriculture and small business. A fourth focus group was conducted with Francophones. Results of these focus groups are found in Appendix 1. A number of organizations and individuals were contacted to obtain information on the status of their industry, the local economy as well as current service, skills and training needs of local residents and employers.

To augment the information gathered through the interview process, a number of newspaper reports, articles, results of a survey of Precision Metalcutting Apprentices and other materials were reviewed to gain information on the current employment picture in Southwestern Ontario. A bibliography has been included to identify these sources.

Previously authored environmental scans were reviewed to determine trends and issues that had been identified and any changes that have arisen. New issues have been identified through interview and material review.

3.0 Highlights

After a 10-year period of economic growth and expansion, Southern Ontario showed little growth between 2000 and 2001. The unemployment rate rose from a seasonally adjusted record low of 4.4% in August 2000 to 7.1% in August 2001. The size of the labour force rose by nearly three times as much as employment. This left more people unemployed than were a year ago raising the annual unemployment rate by half a percentage point to 6.0% from 5.5% in 2000.¹

¹ Labour Market Annual Review 2001, Windsor Human Resource Centre, Human Resources Development Canada

The hardest hit sector was the goods-producing sector especially manufacturing as production was cut back, plant closures were announced and layoffs became commonplace. Bonuses and overtime disappeared. This sluggish economy was then hit hard by the tragic events of September 11, 2001. Slow car sales stalled even further, tourism ground to a halt and border tie-ups played havoc with just-in-time delivery systems and a retail environment increasingly reliant on U.S. customers.

The economic slump experienced in the goods-producing sectors has been buoyed somewhat by the service-producing sectors which generated most of the job growth during 2001 led by gains in wholesale and retail. The service-producing sector now account for more than 64% of our local workforce. Along with retail and trade, health care and social assistance, accommodation and food services, and other services were the major sources of the year-to-year job gains.

We have now begun a slow ascent to recovery with unemployment rates at a seasonally adjusted level of 8.4% in May 2002. Federal tax cuts implemented in the fall of 2000 budget along with interest rate reductions helped to stimulate growth in the medium term. This upward trend is further demonstrated by the creation of 3,000 new jobs in Spring 2002.²

Aside from 1997 when Casino Windsor was built, 2001 was the best year in Windsor-Essex County's history for commercial construction. Non-residential construction continued at a steady pace throughout 2001 and the many projects in the planning stages are expected to make 2002 another healthy year.

THE SOUTHWESTERN ONTARIO ECONOMY

4.0 Changes in Labour Market Supply

The following chart provides an overview of population demographics, projections, average earnings and education levels within Windsor, Essex County and Chatham-Kent:

² The Windsor Star, Jobs Surge Stunning, May 11, 2002.

	Windsor/ Essex County	Chatham- Kent
Population Estimates and Projections		
Population (July 01 2002)	311,141	69,066
Male	153,880	33,608
Female	157,261	35,458
Average Annual Growth Rate	1.33%	0.04%
2004 Projected Population	316,983	68,258
2007 Projected Population	319,079	67,037
Earnings		
Per Capita Income \$	24,379.	24,469.
Avg. Household Income \$	61,949.	51,873.
Avg. Employment Income Male (Full Time) \$	54,494.	46,264.
Avg. Employment Income Female (Full Time) \$	35,774.	30,573.

Source: *The Financial Post – Canadian Demographics 2002*

The report Ontario Job Futures 2000 states “educational requirements have increased over the last decade. The proportion of workers in Ontario with post-secondary qualifications increased in all occupational groups between 1990 and 1999 .. While there is still a large number of low skill, entry-level occupations, many of them now have higher basic skill requirements. As skill needs continue to increase, learning will not stop after leaving school but will continue during a person’s whole career. The notion of lifelong learning as an integral part of one’s life is gaining momentum.”³

The following chart provides an overview of the educational levels within Southwestern Ontario:

	Windsor/ Essex County	Chatham- Kent
Education Levels		
Population 15 years +	252,538	55,898
Less than Grade 9	24,720	6,581
Grades 9 – 13 without Certificate	59,176	15,677
Grade 9 – 13 with Certificate	41,392	9,158
Trade Certificate / Diploma	7,900	2,126
Non-University without Certificate / Diploma	17,362	3,438
Non-University with Certificate / Diploma	44,085	11,051
University without Degree	26,018	3,268
University without Degree / Certificate	14,812	1,580
University with Certificate	11,206	1,688
University with Degree	31,885	4,599

Source: *The Financial Post – Canadian Demographics 2002*

³ Ontario Job Futures 2000, Ontario Ministry of Training, Colleges and Universities and Human Resources Development Canada, Ontario Region

This chart depicts labour force trends in Windsor for 2000 and 2001.

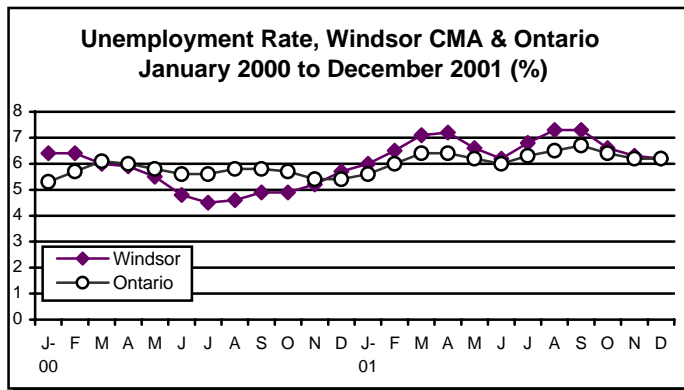
<i>Annual Averages</i> Labour Force	First Half	Second Half	2001	2000	Change 2000-2001	
	2001	2001			Actual	%
Population 15 + ('000)	248.1	250.8	249.5	244.2	5.3	2.2
Labour Force ('000)	163.5	166.9	165.2	162.5	2.7	1.7
Employed ('000)	152.7	155.7	154.2	153.7	0.5	0.3
Unemployed ('000)	10.8	11.2	11	8.8	2.2	25.0
Not in Labour Force ('000)	84.6	83.9	84.3	81.8	2.5	3.1
Participation Rate (%)	65.9	66.5	66.2	66.5	-0.3	
Unemployment Rate (%)	6.6	6.8	6.7	5.4	1.3	
Employment Rate (%)	61.5	62.1	61.8	62.9	-1.1	

*Note: Data may not add to totals due to rounding.
 Source: Statistics Canada, Labour Force Survey.*

Southwestern Ontario showed little growth in 2001 after above-average gains in 2000. The size of the labour force rose by nearly three times as much as employment in the area. This resulted in an increase in the number of unemployed people compared with the previous year and raising the annual unemployment rate from 5.5% in 2000 to 6.0% in 2001.

Windsor's average employment level showed little change between 2000 and 2001. An increase in part-time workers offset a decline in full-time employment. There was slow but positive growth in the first half of 2001 that offset year-to-year declines between July and November.

Despite the weaker employment prospects in 2001, new and returning job seekers raised the labour force by an average of 2,800 over its 2000 level. This pushed the unemployment level up by 26% raising the annual unemployment rate to 6.7% from 5.4% in 2000. A 2% increase in the working age population caused the employment rate to fall to 61.9% from 63% in 2000.⁴



⁴ Labour Market Annual Review 2001, Windsor Human Resource Centre, Human Resources Development Canada

Windsor's fourth quarter gains brought welcome relief from an 18-month slowdown in the area labour market. Employment growth slowed steadily from its peak in March 2000 until June 2001. The area then saw employment fall below its previous year level over the next five months before recovering in December. Despite the slower economy, the labour force continued to grow year-to-year throughout 2001.⁵

4.0 Changes in Demand

The following table depicts the level of employment within each industry and the rate of either decline or growth occurring between 2000 and 2001.

Table 2: Windsor Employment by Industry ('000), 2000 and 2001

<i>Annual Averages</i> Industry	First Half 2001	Second Half 2001	2001	2000	Change 2000-2001	
					Absolute	%
Total	152.7	155.7	154.2	153.7	0.5	0.3
Goods-Producing Sector	55.9	54.3	55.1	57.2	-2.1	-3.7
Agriculture	0.5	...	0.3	...	0.3	...
Forestry, Fishing, Mining, Oil and Gas
Utilities	0.3	...	0.1	...	0.1	...
Construction	6.4	7.1	6.8	6.6	0.2	3.0
Manufacturing	46.9	45.4	46.1	48.9	-2.8	-5.7
Services-Producing Sector	96.8	101.5	99.1	96.5	2.6	2.7
Trade	18.6	21.5	20.1	21.5	-1.4	-6.5
Transportation and Warehousing	6	6	6	7.9	-1.9	-24.1
Finance, Insurance, Real Estate and Leasing	5	3.8	4.4	5.7	-1.3	-22.8
Professional, Scientific and Technical Services	6.6	6.8	6.7	6.7	0	0.0
Management, Administrative and Other Support	5	5.2	5.1	6	-0.9	-15.0
Educational Services	11.3	9	10.1	7.6	2.5	32.9
Health Care and Social Assistance	14.2	16.4	15.3	11.7	3.6	30.8
Information, Culture and Recreation	10	10.9	10.4	9.8	0.6	6.1
Accommodation and Food Services	10.7	11.3	11	9.3	1.7	18.3
Other Services	4.3	7	5.7	5.5	0.2	3.6
Public Administration	5	3.8	4.4	4.7	-0.3	-6.4

Note: "..." indicates that data are too small to be expressed and are not appropriate for release. Totals may not add due to rounding. Source: Statistics Canada. Labour Force Survey

The following provides an analysis of key occupations within the goods and service-producing sectors as well as activities within Chatham-Kent:

Goods-Producing Sector

Manufacturing

Factors like the fall of the high-tech equities market, volatile world equity markets and oil prices have lead to reduced U.S. market demand and economic downturn. This has resulted in uncertainty within the Canadian

⁵ Ibid.

auto industry during 2001. Production at General Motors, Ford Motor Company and Daimler-Chrysler fell by approximately 15%, producing 1.5 million fewer vehicles.

As is typically the case, our manufacturing sector was the first sector to experience the affect of economic downturn and is the first to experience the current signs of economic turnaround. However, the current upswing is precarious. Increased auto sales have been spurred on as the Big Three enticed buyers with zero financing. This leads to concerns that a secondary economic downturn will occur based on an inevitable drop in sales once incentives are removed and any pent-up demand exhausted.

While the "Big 3" domestic automakers are competing more than ever with the "new North American manufacturers" (NNAM's include Toyota, Honda, Hyundai, Nissan, Renault) for their share of a stagnant market, the Canadian auto sector is expected to fare better than the United States. According to a senior Toronto Dominion Bank economist, the automotive sector lost 4% share of sales in 2002, but should regain nearly the same in 2003. U.S. forecasts an 8% sales loss in 2002 and only 3.6% gain in 2003.⁶ According to industry analysis Dennis DesRosiers of DesRosiers Automotive Consultants, lower sales are likely for the next 2 to 3 years. Diminishing profits have caused financial losses to mount and domestic automakers to cut costs by abandoning unprofitable product lines and consolidating production capacity.⁷

Manufacturing activity in Southwestern Ontario has been built on an international exchange of goods. Trade between Canada and the United States totals almost \$2 billion per day and between Ontario and Michigan trade exceeds \$60 billion per year. More than half these goods are transported across the Ambassador Bridge or the Windsor-Detroit Tunnel where truck volume exceeds one million trips per year.⁸ Truck traffic snarls compounded by lengthened customs clearance times continue to challenge just-in-time delivery processes.⁹ Steps have been taken by Canadian Customs and Revenue Agency (CCRA) in July 2001 to streamline screening processes for commercial vehicles entering Canada. A feasibility and environmental study related to traffic flow assessment and recommendations for long-term solutions was implemented July 2001 but these studies are expected to take between 2 to 5 years to complete.¹⁰

⁶ Labour Market Annual Review 2001, Windsor Human Resource Centre, Human Resources Development Canada

⁷ DesRosiers Automotive Consultants, www.desrosiers.ca

⁸ Ambassador Bridge, www.ambassadorbridge.com

⁹ Windsor Star, April 17, 2002

¹⁰ Labour Market Annual Review 2001, Windsor Human Resource Centre, Human Resources Development Canada

This year has also been challenging for the automotive parts sector in southwestern Ontario. Weakened automotive production negatively impacted the auto parts suppliers. Consolidated vehicle platforms and lower prices paid to suppliers by carmakers make the marketplace increasingly competitive. Ever improving technology, communication and transportation infrastructure continue to make the “global marketplace” a reality, posing both an opportunity and a threat to this sector.

Of some concern for our metalcutting industry locally is the announcement that Canada, along with Taiwan, Japan, China, Mexico and EU countries, is being investigated by the United States International Trade Commission into conditions of competition facing United States producers in the tool, die and industrial mould industries. Windsor, being the tool, die, and mould capital of Canada, stands to lose the most. Recognizing that a contingency protection suit filed in the United States could put a “huge chill” on relations with U.S. customers, Canadian companies are being advised to “examine its pricing and practices to be sure that it is not open to allegations of dumping or subsidization.”¹¹ Local chapters of the Canadian Tooling and Machine Association and the Canadian Association of Mouldmakers are working together to gather information and examine opinions and options.

While no new automotive parts plants have located in Chatham-Kent over the past year, there has been expansion of the current industrial base including Source One Plastics, Crucible Steel, and Supreme Finishes in Blenheim. The most significant expansion took place at KSR in Ridgetown where 150 jobs were added. This company has traditionally focused on steel stamping, however this expansion was in plastics, an area of increased importance throughout Southwestern Ontario. The most significant plant closure in the past year occurred at Ventra Plastics and U3 Aluminum (Accu-Cast) in Wallaceburg is now operating in receivership affecting 150 workers. A very bitter labour dispute took place at Navistar (international Truck Corporation), one of the area’s most important employers, where the ratified labour contract assured continued plant operation for one more year.

Currently there are approximately 20,000 workers temporarily laid off from their job in the manufacturing sector within Southwestern Ontario. An estimated 2,000 people lost their job indefinitely due to plant closure or permanent downsizing.¹² Uncertainly continues around the status of Daimler-Chrysler’s Pillette Road Van plant and the Canadian Auto Workers (CAW) has indicated that the long-term viability of this plant will be a major component of its contract negotiations in the fall of 2002.

¹¹ Windsor Star, April 1, 2002.

¹² Labour Market Annual Review 2001, Windsor Human Resource Centre, Human Resources Development Canada

On a more positive note, the unprecedented number of announced model changes by the Big Three translates into great opportunity for our local precision metalcutting industry as plant retooling takes place.¹³

Equally positive is the announcement by DaimlerChrysler Canada that \$460 million will be invested in the Windsor Assembly Plan to enable the plant to produce the Pacifica, the company's new car-SUV combination.

Construction

Industrial construction declined in 2001 with building permits totalling \$65.4 million issued in Windsor, Essex County and Tilbury. However, the value of projects by companies other than Ford and DaimlerChrysler actually rose from \$51.3 million in 2000 to 62.4 million in 2001.¹⁴ Leamington topped county municipalities, excluding Windsor, with industrial growth worth almost \$8.8 million including new facilities for auto-parts manufacturer Elring-Klinger, mushroom seed supplier Sylvan Spawnline and an addition to the Leamington pollution control plan. Lakeshore attracted \$3.2 million in new industrial buildings last year.¹⁵

Commercial construction continues to thrive in 2001 with construction values reaching their highest point since Casino Windsor was built in 1997. At \$148. million, commercial building permits almost doubled the 2000 total for Windsor and Essex County.¹⁶ A new nursing home helped Essex boast the highest dollar value for new commercial buildings in Essex County at \$8.7 million. Lakeshore had the second highest at \$7.4 million. Leamington's commercial development included an A & P store, the expansion of the Canadian Tire and added retail space at the WalMart development.¹⁷

Agricultural construction slowed in the face of ongoing water concerns, high gas prices, and a tomato trade dispute with the United States. Leamington saw its agricultural construction, mostly greenhouses, drop from \$29 million in 2000 to almost \$9 million in 2001. A decline also took place in Kingsville.¹⁸

In residential construction, starts on single family homes had declined by the fourth quarter of 2001, indicative of a slowing local economy.

¹³ Rise in factory orders suggests slump may end, Globe and Mail, Jan 03, 2001

¹⁴ Windsor Essex Ontario Development Commission 2001 Annual report, page 6.

¹⁵ Windsor Star, March 15, 2002

¹⁶ Windsor Star, Dec 29 2001

¹⁷ Windsor Star, March 15, 2002

¹⁸ Ibid.

Agriculture

The agricultural industry in Essex, Kent and Lambton counties continues to evolve. In addition to greenhouse crops of tomatoes, cucumbers and flowers, the area is known for field crops such as corn, soybeans, fruits and vegetables. Work in greenhouses is not as labour intensive as field crops and provides more year-round employment. The greenhouse industry creates approximately 3 jobs per acre and has a \$1 billion local economic impact annually.

A slowdown in greenhouse construction was put into place until ongoing water concerns could be resolved. Also affecting the industry were trade investigations by the International Trade Commission after complaints of tomato dumping were raised by the United States. The dumping allegations had been called the biggest threat to this area's industry, which faced the possibility of duties that would have cost millions of dollars. In April, 2002, the Commission ruled the sale of Canadian greenhouse tomatoes had not hurt the smaller U.S. industry. However the US may elect to appeal and a Canadian dumping investigation against US field tomato growers is underway. The Canada Customs and Revenue Agency recently ordered US growers to pay up to 71% provisional duties at the border. This case is expected to wrap up in July, 2002.¹⁹

In Chatham-Kent agriculture continues to be a primary economic focus supported by a University of Guelph campus and Ridgetown College. The sugar beet crop is particularly noteworthy, doubling in size. The area is well positioned to increase its greenhouse operations as the water and natural gas infrastructure within Essex County becomes increasingly burdened.

Southwestern Ontario mirrors the finding that the number of small farms is decreasing as announced in the 2001 Census of Agriculture. Farmers are moving toward greenhouses, new crops or livestock to increase profitability. The Census found that greenhouse acreage increased 55% with most of the expansion in Essex County. Others are experimenting with alternative crops like chick peas, mung beans, and peanuts hoping to tap into the market for ethnic foods.²⁰ However, there is concern that not every farmer can afford to buy more land, add livestock or start a greenhouse.²¹

Many of these food products are processed locally, however, similarly to the situation on the family farm, there has been a significant decrease in food processing jobs as multi-national corporations restructure and

¹⁹ Tomato Growers Win Trade Decision, The Windsor Star, April 3, 2002

²⁰ Farm fields Reflect Multicultural Trend, The Windsor Star, Dec 26, 2001

²¹ "I'll Get Out Before I lose It", The Windsor Star, May 16, 2002

consolidate the industry. Women, many with lower education levels and poor communication skills were most adversely affected by the reduction of jobs in food processing.²²

The wine industry has become increasingly important to South Essex County. Five new wineries are scheduled to open within the next three years. This expansion is seen as the industry's single biggest development since the area's largest winemakers, Pelee Island Winery and Colio Estate wines planted vineyards 20 years ago. This will position Essex County near the top of a rapidly expanding Ontario wine market that did \$388 million in sales last year. Together, Pelee and Colio produce 50% of Ontario's domestic VQA quality wines. Essex County wineries are renowned for sweet ice wines, much of which is exported to South Asia and Italy. Winemaking is labour-intensive, requires farm skills, business savvy and marketing know-how. About 250 people including off-shore farm labour work in this area's wine industry. The winemaking industry is seen as an important contributor to the Agri-tourism niche.²³

Windsor is also the North American home of Allied Domecq-Hiram Walker and Sons Ltd., a producer of liquor and spirits. New products are planned for 2002 bringing the largest capital investing to the Windsor plant in years and creating 16 new jobs.²⁴

Services-Producing Sector

Tourism (Accommodation and Food Services / Information Culture and Recreation)

The Windsor area normally has up to 9 million visitor trips per year with US visitors comprising 87% of this total. Most of these visits are day trips from Michigan, Ohio and Illinois. The tourism sector enjoyed employment gains of almost 20% in the third quarter of 2001, prior to September 11, 2001.²⁵

Tourism to Windsor may never return to what it was before the terrorist attacks on the United States, though emerging trends may ultimately help the city, according to the Canadian Tourism Commission. U.S. business travellers to Canada was down about 9% since 2000, and the Commission's Director of Research is predicting that levels may continue

²² South Essex Economic Development Corp., Business Plan 2000-2001

²³ Handful of New Wineries May Give Tourism Boost to Essex County, The Windsor Star, June 15, 2002

²⁴ Windsor Star, June 13 2002

²⁵ Labour Market Annual Review 2001, Windsor Human Resource Centre, Human Resources Development Canada

to fall a bit. Travellers from nearby states and communities who elect to vacation within driving distance may reduce this decline.²⁶

The terrorist attacks are also being blamed for a 25% drop in Windsor-Detroit tunnel and Ambassador Bridge non-commercial traffic this year. While weekday commuter traffic seems to have returned to pre-September levels, there is considerable less weekend usage indicated a continuing lag in tourist traffic. The report showed traffic volumes on Fridays, Saturdays and Sundays are down a full 30% over 2001. Despite the drop in traffic, there are still regular tie-ups because of increased security.²⁷

A slow return to freer flowing border traffic combined with increased promotions is being earmarked as the reason for the gradual increase in attendance levels at Casino Windsor. Casino Windsor has launched several aggressive marketing campaigns further afield than normal, advertising in southern Ohio, Illinois and Toronto aimed at luring new customers. These campaigns moved gross revenue from 80% down to between 10 and 15% down, however this has not translated to increased net revenue due to the cost of regenerating business.²⁸

Rapidly growing eco-tourism activities such as birdwatching is very important to Essex County. Participants in rural tourism destinations are exploring other niche markets such as agri-tourism. Rural tourism destinations within Essex County have recently identified the need to market themselves as a regional destination.

There has been considerable renewed interest in tourism as an economic focus in Chatham-Kent over the past year. Chatham-Kent tourism promoters are conducting an area analysis in order to determine the assets of each community.

Retail (Trade)

The retail trade sector in Southwestern Ontario is "expected to achieve greater penetration into the U.S. markets as American consumers and Canadian retailers develop a better understanding of deregulation and exchange rates between the two countries."²⁹

This expansion is reflected in the many large projects in 2001. Many existing retail locations were expanded or renovated including Devonshire, Parkway and Tecumseh Malls in Windsor, the Windsor Crossing outlet

²⁶ Area Tourism slowly gaining ground, The Windsor Star, May 2, 2002

²⁷ Windsor Star, April 17, 2002

²⁸ Casino Regaining Lost Patrons, The Windsor Star, June 12, 2002

²⁹ Windsor Chamber of Commerce, "2001 Economic Forecast"

mall in LaSalle and the Canadian Tire in Leamington. A significant “big box” shopping area has been established in Oldcastle. Malden Road in LaSalle and Manning Road in Lakeshore have also experienced strong growth. Similar expansion has taken place in Chatham-Kent particularly in the food service industry with new Kelsey’s Restaurant and McDonald’s franchises.

Downtown areas, however, progressively lost retailers while the entertainment and food services establishments flourished, where, in Windsor, they occupy almost 50% of the commercial space.³⁰

Health Care and Social Assistance

Employment has risen in this sector over the past year. After a period of funding constraints, the provincial government is now positioned to invest in strategic health care initiative such as the creation of new nursing positions and expanded certification programs to license foreign-trained physicians. Hotel Dieu Grace Hospital will open 11 new operating rooms in January 2002 and Leamington District Memorial Hospital is expanding their emergency department. Windsor is the second highest user of professional home care services in Ontario.³¹

Education

Twin graduating high school classes, referred to as the “double cohort” is expected to reach its peak impact in 2005 with 78,000 additional students considering post-secondary education. This will place further stress on the education system reported by Statistics Canada to be short 20,000 teachers across Canada. Ontario’s colleges and universities will receive additional funding, based on graduate employment as well as graduate and employer satisfaction with training outcomes.

Despite tuition fees that rose 126% during the 1990’s, record numbers of students enrolled at the University of Windsor, St. Clair College and Ridgetown College’s agricultural program in 2001. St. Clair College is progressing in construction of the Ford Centre of Excellence in Manufacturing and the University of Windsor will receive funding to host an automotive research project as part of the Network of Centres of Excellence.³²

³⁰ Labour Market Annual Review 2001, Windsor Human Resource Centre, Human Resources Development Canada

³¹ Ibid.

³² Labour Market Annual Review 2001, Windsor Human Resource Centre, Human Resources Development Canada

Public Administration

While employment within public administration decreased over the past year, security measures for cross border travel was one of the main concerns of the federal government in the later months of 2001. In the next five years, \$1.2 billion will be spent to ease trade concerns while improving security. Locally that could translate into additional scanning equipment and an Integrated Border Enforcement Team using technology to share intelligence and policing. The Provincial government has only recruited half of the 165 additional probation officers required to ease current caseloads.³³

In August 2002, the Labour Market Unit of Human Resources Development Canada will release their annual Labour Market Information report including a summary of Occupations with Above Average Rates of Projected Job Growth (Windsor-Sarnia Corridor). This report has been included as Appendix 2.

A synopsis of plant openings, expansions, closures and downsizing is attached as Appendix 3.

³³ Ibid.

6.0 Issues and Conclusions from Previous E-Scans

The five issues and conclusions identified in the September 2000 Environmental Scan Update are provided below along with updates of any changes made since that time.

Key Issues/Conclusions identified in Previous Environmental Scan	Current Status of Key Issues/Conclusions (show any shifts and include any action taken through local area planning)
<p>Need for literacy training for unemployed and employed workers and immigrants.</p>	<p>The Tri-County Literacy Network is placing a greater focus on identifying the specific needs of occupational sectors and employers and then developing curriculum and student learning materials based on these employer requirements.</p> <p>The Invest Lab provides tutorial assistance to students preparing to challenge post-secondary admissions testing.</p> <p>Additional emphasis is being placed on assisting individuals with learning disabilities.</p>
<p>Grade 12 is a minimum level of academic achievement accepted by employers. There is a need for access for adult students to credit secondary school instruction up to grade 12.</p>	<p>Literacy providers are now working more directly with employers to identify their specific needs. In some cases, Grade 12 may not be a requirement if the candidates for employment demonstrates required motivation to succeed.</p>
<p>Foreign trained professionals have difficulty obtaining credential recognition and securing appropriate employment in their field of expertise.</p>	<p>Observable career paths and supporting instruction facilitating foreign trained professionals return to work within their field of study continues to be a workforce development issue.</p> <p>The New Canadian Centre of Excellence is providing one-on-one instruction with customized curriculum to meet the requirements of individual foreign</p>

	<p>trained professions bridging into their specific career. Increased volume of individuals served is planned.</p>
<p>Access to easy to read and apply labour market information.</p>	<p>Human Resources Development Canada Labour Market Information Units within Southwestern Ontario have recognized this as a need and are ensuring that information provided is meaningful to employed and unemployed individuals as well as employment counsellors. An emphasis has also been placed on ensuring that a consistent set of products, information and services are available throughout the region.</p> <p>An increasing amount of valuable information is available on the HRDC website. The City of Windsor Libraries are providing free instruction on how to use the Internet making this an increasingly viable source of information for all citizens.</p>
<p>Observable career paths from high school entry-level to university level with identifiable entry and exit points.</p>	<p>Articulation agreements continue to be developed between educators, particularly between college and universities.</p> <p>St. Clair College is conducting feasibility studies on offering applied degree programs.</p>

7.0 New and/or Emerging Issues and Conclusions

In preparing this environmental scan, a number of new and/or emerging issues have been identified and are summarized in the following chart:

New and/or Emerging Issues/Conclusions Identified in the Environmental Scan Update	Data Sources for New and/or Emerging Issues/Conclusions
<p>The lack of individuals entering skilled trades continues to be an issue within the local labour force and will hamper growth if not addressed. The aging workforce within many skilled trades and the need to replace workers who will retire within the next five years heightens this need.</p> <p>Attracting skilled professionals is a challenge also faced in Chatham-Kent although they report some success in attracted engineers from Korea.</p> <p>A Trade Symposium featuring interactive displays promoting a variety of careers is planned for the Spring 2003.</p>	<p>Windsor Essex County Development Commission Chatham-Kent Development Commission Metalcutting Industry Coordination Committee Canadian Association of Mouldmakers Canadian Tooling and Machine Association Windsor Transportation Club Agriculture and Tourism Focus groups</p>
<p>Along with promotion of skilled trades, employee retention is an area of growing concern. A survey of Metalcutting apprentices showed that approximately 30% did not see themselves as working in the trade in five years, yet at the same time they placed a high degree of importance on things like being valued and appreciated.</p> <p>A 4-hour workshop sponsored by the Metalcutting Industry Coordination Committee and the Southwestern Ontario Industry Education Council will be offered in conjunction with the Canadian Association of Mouldmakers Trade Show in November 2002 entitled "Keys to Keeping Your Key Employees" featuring Wayne Phibbs.</p>	<p>Metalcutting Industry Coordination Committee Metalcutting Industry Apprentice Survey 2001 Southwestern Ontario Industry Education Council</p>
<p>Many employers report that they do not participate in apprenticeship programs or promote employee training because of expense of training and their belief that employees will be attracted to larger employers who can offer higher wages. The CTMA and CAMM are lobbying</p>	<p>Metalcutting Industry Coordination Committee Canadian Association of Mouldmakers Canadian Tooling and Machine Association Windsor/Essex</p>

<p>government for tax credits to provide financial assistance to support training. The Employee Retention workshop identified above will address training and other measures employers can use to build employee loyalty.</p>	<p>Development Corporation Metalcutting industry Apprentice Survey</p>
<p>The survey of Metalcutting Apprentices showed that over 95% intend to obtain the Certificate of Qualification designation by challenging the provincial examination, yet statistics show that significantly fewer do challenge this exam and obtain journeyman status. They also do not believe that their employer values this credential. St. Clair College offers exam preparation courses and will make greater efforts in marketing this course availability.</p>	<p>Metalcutting Industry Apprentice Survey Metalcutting Industry Coordination Committee St. Clair College Ministry of Training, Colleges and Universities</p>
<p>There is a concern that the new provincial curriculum may be difficult for some students resulting in higher number of young people who do not complete high school. There is a need to develop programs and supports for students experiencing difficulty and to encourage lifelong learning.</p>	<p>Greater Essex County School Board Windsor Catholic District School Board</p>
<p>Individuals who are affected by employer downsizing or closure who are not unionized lack an organizing body who will act on their behalf in accessing labour adjustment services available to them through the provincial and federal governments. In unionized environments, the union often takes on this responsibility as well as negotiating support from the employer.</p>	<p>Human Resources Development Canada Ministry of Training Colleges and Universities</p>
<p>The MTCU has identified the goal to significantly increase the number of individuals entering apprenticeships and have instituted a number of pre-apprenticeship initiatives. Providing pre-apprenticeship instruction on a part time basis may make the training more accessible for employed and unemployed individuals although worker shift requirements present a challenge</p>	<p>MTCU St. Clair College</p>

<p>The municipality of Chatham-Kent is conducting a skill inventory of members of its emergency services teams as a means to promote employee development and client service</p>	<p>St. Clair College Municipality of Chatham-Kent website</p>
<p>The area of Windsor, Essex County and Chatham-Kent are no longer served by a local training board.</p> <p>Preliminary discussions are underway within the community to determine if industry, labour, educators and government can come together as one committee to support workforce development.</p>	<p>Metalcutting Industry Coordination Committee Southwestern Ontario Industry Education Committee</p>

Windsor, Essex County and Chatham-Kent

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APPENDIX 1

Agriculture Focus Group

**Monday, March 25, 2002 – 8:30 am to 11:00 am –
Pelee Island Winery**

Participants:

Joe Colasanti
Nick Ingratta
Larry Verbeke

Dave Dick
John Newland

Carolyn Fuerth
Liz O'Neil

Denton Hoffman
Steve Posthumus

Q. When you think of economic development and the agriculture sector in Southwestern Ontario, what picture comes to mind?

- ◆ Clusters serving units at the centre with the centre being the greenhouse industry. This supporting industry will continue to grow.

Q. Lots of imports from Holland?

- ◆ Becoming less. Some specialty items are being imported, but private sector will supply when return on investment is evident.
- ◆ Trickle down theory of economic development. As business grows, hire, they spend money. Government intervention and funding should be limited. Some struggling businesses need help, but good economic sense of this investment should always be evaluated. Should not just assess by ability to write a good proposal or on basis of personal relationships.
- ◆ Walmarts bring people to the town. Job of small county businesses is to identify niche and fill it. Small business needs expertise and tools to refine what they do to attract more people. Economic development is drawing people into our community.

Q Is labour supply an issue?

- ◆ Obligated to look at Canadians first, although offshore labour is more reliable. There is also a shortage in management area, especially because the industry has grown so fast.
- ◆ In areas like flower growing, business must do their own training.
- ◆ Sometimes push for educated worker leads to an over-education for particular occupational groups.
- ◆ Economic development on north shore more related to industry. In south it is related to agriculture, viniculture and greenhouse industry. Also becoming a distribution centre for the agriculture sector which helps to supplement seasonal work. Grains and oil seed expanding agriculture to look at niche markets. Potential for diversity like ethanol. Agri-tourism is an opportunity.
- ◆ Perhaps some role for research in areas of business development. For example is pursuing opportunity of raising mice and rats. Need research into areas of innovation. New application for crops and existing infrastructure.
- ◆ Innovation must be supported within the county. Must read the market (eg new Canadian product needs), look at infrastructure and resources and use what exists to diversify.

Q Innovation is risky – perhaps this is a viable use of government funds?

- ◆ Make sure you do your homework to know if the business concept is legitimate.

- ◆ Important to note that person seeking funds must put up 25% of their own funds at risk.
- ◆ Innovation. Look at what is going on elsewhere in the world and bring it here. What technology is being imported that can be produced locally?
- ◆ Immigration is a barrier. Wish is that we could import people to work.

Q. What positive or negative development has taken place in Southwestern Ontario?

- ◆ A negative is people's misinformation about the industry. That it is causing environmental damage. Need to make public aware that this is not the case and that our food supply is one of the safest in the world. This negative perception impacts our economic development.
- ◆ Need freer trade. Need a national agriculture policy reflecting societal support for agriculture. If we are to implement things like ISO and HACCP within the industry, it comes at a cost that can't be borne by the individual farmer. Must be supported by legislature.
- ◆ Taxation. Fewer barriers for companies to grow. Province does its part. Action needs to come at the national level. Bring agriculture groups under one umbrella so that they have a louder voice. Need freer trade between provinces. Some provinces get more support than others, eg Quebec. Globalization is making barriers between provinces and different legislation within provinces less of an issue.

Q Is there more industry or less? Heinz is expanding.

- ◆ Very competitive in growing in this area. Should be able to access other markets. Markets must be developed first, then supply grown.
- ◆ Water. Greenhouse operators being innovative in using less water. Town is adding to infrastructure that will help.
- ◆ Future economic development. Lack of water is a limiting issue. We have water, but need better distribution. Part of consumer/government expectation. Agriculture will face stiff nutrient management, especially since Walkerton. Ability is there. Bill is forthcoming and will be required.
- ◆ Should not just sell our agriculture as a primary resource, but add more processing value added. This will promote economic development. Must ensure use of Canadian raw materials if a project has been government funded. e.g. ethanol plant does not have to purchase Canadian corn, can get raw materials from anywhere.

Q. What sector offers greatest growth potential?

- ◆ Greenhouse, viniculture. Viniculture gets support even though they are relatively small, because they are organized and speak with one voice. They know how to lobby.

Q Agri-tourism?

- ◆ Possibility, but liability insurance is an issue. Also bio-security and disease control. Public cannot go into greenhouses without this being an issue.
- ◆ Public exposure vs. need to educate the public that could be accomplished by greater visibility.

Q. Does Harrow Research Centre / ERCA have a role to play in creating a demonstration farm?

- ◆ There is a need for a destination point for tourists.
- ◆ There is a need for organizing of tours into county from city. No spouse program from convention attendees into county.

Entrepreneur/Small Business/Client Focus Group

**Monday, April 2, 2002 – 7:00 pm to 8:45 pm –
Leamington, ON**

Participants:

Roger Barrett	Paul Baskovsky	Dave Denmore	Heather Epp
John Ferber	Keith Fudge	Deb Garant	Ray Garant
Antonio Gomez	Carol Holland	Ruguo Huang	Vickie McVeigh
Brent Mensch	Gina Mucci	Sil Papulin	Cathy Proulx
Tasha Swinhoe	Cheryl Vigh	Peter Wiebe	

Q. When you think of economic development, what picture comes to mind?

- ◆ More value-added commodities, rather than raw production of agriculture as the price of land increases. Agriculture no longer has the voice it used to. More manufacturing industry.
- ◆ More large-scale business than small. Promoted by banks and organizations like the ECFDC where you need assets to qualify. If you don't have a lot of equity, it's hard to succeed. More to promote big business. Small business needs to be heard.
- ◆ Tourism is growing, but it needs to be promoted. Southwestern Ontario has lots to offer, but is not marketed. Attractions are not marketed when people do get out to the county.
- ◆ Lakefront resources are not being properly utilized. A facility like Metro Beach in Michigan would be great for this area. (Family oriented beach entertainment recognizing Leamington's desire to avoid a "Grand Bend" situation). Seacliffe area is dirty. Town is not taking care of its beachfront. Many small businesses are impacted by tourism.
- ◆ History, black history and unique communities are an asset.
- ◆ 180 boater slips bringing in 500+ people/week wanting to spend in the local economy. Only town info is on a kiosk where it is expensive to advertise and town website. Leamington promotes restaurants, but not retail. Restaurants offer a shuttle, but most boaters use taxis. Some marinas in the US supply bikes and even cars.
- ◆ Culture, arts, theatre are all limited. Not much to do in Leamington.
- ◆ Difficult to get economic development information. Information required to start business is not readily provided.

Q. What positive or negative development has taken place in Southwestern Ontario?

- ◆ Water supply is a negative affecting greenhouse industry and sewage in LaSalle.
- ◆ Migrant workers are a positive in supporting local economy, but the town does little for them. Mexicans will have their own club soon.
- ◆ Need more resources for small business. Small business to small business relationships. Need business consulting, small business support groups and business mentoring programs. There is a small one at the Chamber, plus women's forum for female entrepreneurs based in Leamington.
- ◆ There is nothing for youth in the community. Promoted as a retirement area, with little for youth. Hospital makes it attractive for seniors, but still not enough GPs.
- ◆ Automotive sector promises growth, but it's cyclical. New cars are in development and that's good news for this area. What is good for city is good for county. Suppliers of building materials for houses, greenhouses and other service industries for seniors are busy, but must be price sensitive.
- ◆ Strengths include weather, accessibility e.g. marina, land availability, low valued dollar, water (asset and limitation), central location, cheap labour via immigrants, new idea generation as people move into the area, airport, fishing industry (commercial and sport), bridge and tunnel

to US. Essex and Chatham-Kent Counties must be open for business and encourage variety.

Proximity of Detroit, but need attractions. Cultural bus tours of art galleries. Winery tours marketing themselves as a package. Not enough emphasis on linking rural community attractions. Birding and other natural tourism resources are not promoted as much as they should be. US influence is stronger here than in London or Toronto. Low dollar promotes the automotive industry.

Francophone Focus Group

March 20, 2002
Place Concorde
7:00 – 9:00 P.M.

A focus group was held on March 20, 2002 with key stakeholders representing the Francophones residing in Essex County. The invitation to the focus group meeting was sent to the various francophone organizations, associations and representatives of key stakeholders in the community through the *Canadian Francophone Association of Ontario, l'Association canadienne française de l'Ontario (ACFO)- Essex-Kent -Windsor Chapter*.

Focus Group Attendance

Although the attendance at the focus group meeting was small, the various participants represented major Francophone organizations with interest in the economic development of the community. Attending were the following

Raymond Pelland, La Place Concorde
Nicole Germain, ACFO Régional
Lynne Sirois, RDEE
Micheline Boisvert, C.R.E.W.
Ciromai Corren
Jose Luis Botia
Daniel Osorio

The facilitator was Thérèse Dignard-Scratch

Focus Group Results/ Stakeholder Input

The opinions sought were consistent with themes developed by the researcher and respected the orientations established by the guide questionnaire. For the purpose of the Focus Group - Francophone Sector's report, this report is prepared in English, while the fact gathering session was held in French.

Q. When you think of community economic development in Southwestern Ontario what comes to mind?

The participants were invited to brainstorm ideas and topics on this subject. The group's response was spontaneous and quick to identify various topics linked with economic issues. This report submits the essence of ideas put forward by the participants.

Through their response to the brainstorming of "what comes to mind", the participants demonstrated a high degree of creativity, an ability to reflect on the present situation, an understanding of the issues at hand, a vision of the future, a very high degree of enthusiasm and a desire to participate positively to the process in place.

Ideas put forward as to "what comes to mind" are:

- ◆ Small business development: job and training opportunities, self help and community programs, partnerships and leadership, funding and education;
- ◆ Conference Board of Canada and various publications identifying some needs in new skills requirements;
- ◆ Occupational and professional redefinition of needs and skills Futures Job Ontario presents an outlook relevant to Essex County. There is a need for all to make informed career choices and to use the valuable resources available;
- ◆ New business opportunities: seminars, training, information sharing;

- ◆ Multi cultural communities and one point access information centres;
- ◆ Cooperative projects and collaboration among the stakeholders: it is of utmost importance that the communities work together and that they share information and resources;
- ◆ Job creation for all age group: overview of market trends, outlines information on work requirement, knowledge of emerging sectors and occupations;
- ◆ Diversity of working conditions: new guidelines for working conditions and information on employability skills;
- ◆ Reorganization and closure of many companies: job displacement affecting long term and loyal employees;
- ◆ Training to meet the needs of a new economy: computer skills and in depth knowledge of the reality facing the labour force;
- ◆ Survival in a new world: new arrivals in the community and needs of equity groups (handicapped, women, racial and ethno cultural groups);
- ◆ Information technology and its impact on the economy;
- ◆ Retirement planning and consequences to career reorientation;
- ◆ Strategic planning, direction, vision, goals and new initiatives;
- ◆ Vision of unlimited business opportunities;

Q. As you look over the last few years what significant developments have you seen in this area?

The Francophone community has been deeply affected by the last few years. A new awareness and militancy exists among the older members of the francophone community. This renewed spirit and militancy seems to exist among a limited number of community members. For many years the Francophone battled for survival, linguistic survival as well human rights at the work place and in society. The community members struggling to help their community became exhausted with the dual role of personal survival and the responsibility to help others understand the needs facing their community. Many are retiring, tired, and some bitter and others exhausted and a few, refusing to see all their efforts wasted, are there to rekindle the flame. A focus on the younger generation has to take place. The young generation, recipient of the efforts of an older generation, is often unaware of the sacrifices and actions that brought about the present changes. A gap exists which has to be filled in order for this generation to take over the role of leaders in the new economy.

Some of the many changes perceived as very positive are:

- ◆ The creation of the new French Boards across the province. The message of the educational community being responsible for their own education and future was a strong message "Our destiny is our own". This positive change followed years of lobbying and community efforts;
- ◆ The acquisition by the Francophone community of a community based Centre, "La Place Concorde". The establishment of this centre allows for a one-point access to services. La Place Concorde is the one location where a variety of services are available to the Francophone community. Ten major services are available to the community of Windsor and Essex.

This is recognized across the region as a model of cooperation and collaboration and facilitates the implementation of multiple projects. The services accessible at the *La Place Concorde* identified are:

- ◆ Life Plus-Counselling Services
- ◆ Regional newspaper - Le Rampart;
- ◆ Better Way Chiropractic Services;
- ◆ The Conseil scolaire de district des écoles catholiques du Sud-Ouest;
- ◆ The Association Canadienne Française de l'Ontario;
- ◆ Local Training Centre for Students;
- ◆ A Community Futures Development Corporation for the Francophone - Le regroupement francophone de développement économique et d'employabilité;
- ◆ CREW- Centre de Ressources emploi Windsor;
- ◆ Multi-media services;
- ◆ Kinetics and Mediation Services

- ◆ There is no limit to opportunities;
- ◆ Acceptance and support of French language services by the communities;
- ◆ New programs are in place to help with the economic development of the various sectors;
- ◆ An active role in Ontario by the National Committee For Canadian Francophonie Human Ressources Development (RDÉE): this organization is not too well known at this time.

Q. If you were able to picture the ideal future for Windsor/Essex, Chatham-Kent what do you see?

Ideally, this area could develop a bright future by being proactive and dynamics in implementing and supporting a variety of community initiatives and projects. Models of partnerships between the various services providers would be developed. The needs, once identified, will be addressed in collaboration with concerned partners. In the group's opinion the areas which would be addressed in an ideal future are:

- ◆ Employability skills projects would be in place: partnerships with college, university and school boards could be explored, developed and implemented;
- ◆ Programs for equity groups: programs are needed to raise an awareness among employers and to encourage human resources planners to include diversity strategies and creative new projects;
- ◆ Apprenticeships would be available to both linguistic groups: if the younger generation is to carry the flame, there has to be some incentives to keep them in the area, thus the community would benefit from their creativity, enthusiasm and youth;
- ◆ Literacy programs would be in place: there is an urgent need to help the new arrivals in the community to navigate the system;
- ◆ Publicity of programs and services would be first class;
- ◆ Programs, seminars, courses would be available for formal assessment of skills, career and retirement planning;
- ◆ Career information, employability skills guidance and counselling services for youth would be in place: the issues of retraining, career opportunities, literacy and apprenticeship and evaluation/ assessment of qualifications would be addressed;
- ◆ Sound programs would be in place in all educational facilities and accessible through community facilities;
- ◆ Special upgrading programs addressing the needs of older workers: the older workers, displaced workers, new workers would be in place;
- ◆ Health services would be in place and accessible: there is shortage of some very basic health care and services in any language. A model of service delivery which would use the modern technology and benefit the community would be in place;
- ◆ The four sectors that are the focus for economic development by the National Committees For Francophonie Human Resources would be recognized and major changes would take place. The four sectors are tourism, the knowledge-based economy, rural development and integration of youth in economic development.
- ◆ Exciting, creative strategies for the implementation of Information Technology would be the envy of the region. Economic and strategic monitoring, the creation of databases, advice on e-commerce and interactive on line training are examples of the possibilities.
- ◆ An electronic network linking the communities within the region, the provinces would facilitate coordinating groups (volunteers) concerned with economic development and employability issues. This is envisioned by the National Committee for Francophonie Human Resources (RDÉEs)

Q. Is there any one sector that you believe offers an outstanding opportunity for economic development within Southwestern Ontario?

Outstanding opportunities exist in the health, education, tourism (ecotourism), and communication sectors. The participants, representing the Francophone community, identified in their vision of the Future areas where opportunities exist. One area which touches every sector and which cannot be ignored is the *Communication -Information Technology* sector. This sector has a potential to grow and thrive in the southern part of Ontario. The knowledge of this sector's needs, business links and labour force emerging is practically unknown, thus presents itself as a new challenge. This sector has to be explored for its potential benefits. A needs assessment in this area would be a great asset. The infrastructures are not well known by all concerned, but the participants to the focus group saw potential for outstanding development.

The telecommunications infrastructures, the innovative entrepreneurs, the networking events and information sharing among the various stakeholders are doors to be opened.

An interesting flow of ideas created an enthusiastic view of a dynamic economic vision for the future. All participants were hopeful that through sharing of ideas, solutions to present challenges could be found. The group was optimistic with reference to the possibility for growth and expansion over the next few years.

Tourism Focus Group

**Tuesday, April 2, 2002
9:00 am to 11:00 am
Colasanti's Greenhouse**

Present:

Danielle Breault, Essex Region Conservation Authority
Joe Colasanti, Colasanti's Greenhouse
Penny Gil, Sun Parlour Community Players
Eva Guthrie Fort Malden Museum
Audrian Huchthinson, Sun Parlour Community Players
Joan Kettle, Leamington Marina
Graham Sheppard, St. Clair College, Hospitality
Liz Gow, Southwestern Ontario Heritage Village

Q. When you think of economic development, what picture comes to mind?

- ◆ More industry, jobs, needed businesses to flourish, strengthen the economic base of the town.
- ◆ In Amherstburg, there is less business in the past 10 years. Economic development seen as a real challenge and priority. There is a focus on tourism, but need more. Need to bring people to the area.
- ◆ Image is a challenge. Not seen as a clean, healthy community. Is not attractive to business thinking of locating here.
- ◆ Attracting business and new industry has lots to do with quality of life and self-image.
- ◆ People are looking for work, but many are unwilling to work. It is difficult to find good workers. Hard to attract business to this area, because of the "union mentality" and skewing of wage, benefit and work expectations by the Big 3.

Q. What positive or negative development impacting tourism has taken place in Southwestern Ontario?

- ◆ Positives: Greenhouses, new museums, more liaising amongst organizations, Internet, Convention and Visitors Bureau special projects (but these are a one time thing), growth in eco-tourism, natural resources and sites.
- ◆ Negative: plant closures
- ◆ Need for tourism coordinator.
- ◆ Can private sector take this on? Is there a marketing plan? Needs more marketing to make it work.
- ◆ Was a south shore group at one time, but it dissolved because the same people had to do the work all the time.

Q. Shape of Essex and Kent County in the future?

- ◆ Develop heritage tours bringing people from the city to the county
- ◆ Coordinator that focuses the county, making things happen, conducts follow up
- ◆ A central planning entity
- ◆ Product differentiation city vs. county
- ◆ Who will take this role? Money is required.

- ◆ Better coverage required from the media. Don't often cover – and when they do, information is wrong.
- ◆ Canada South Festival Network promotes festivals, however more and more there is a Windsor focus. Need a County Festival Network.
- ◆ Ministry of Tourism is involved through the Convention and Visitors Bureau.
- ◆ Coupon book did help to attract American tourists.
- ◆ Few motels - more B & B's
- ◆ Graham Shepherd discussed the college's proposal for a Centre of Excellence for Hospitality and its role in preparing people for the industry. Second role is to prepare for the community for service. Programs available in Hotel and Restaurant Management and Hospitality Entrepreneurship. Objective is to instil the required work ethic that will develop the tourism industry. Accommodations, facilities with industry investment. Have not yet addressed collective marketing, entrepreneurship, and community services as an umbrella piece. Are working with wine groups.
- ◆ ERCA has done some work in organizing one and multi-day trips. Did a bit of work with a tour wholesaler, but this did not take off. Was not actively promoted. There must be a central base to organize from with various county tours. Opportunity for educational tours, greenhouse tours, private sector company. Who pays? Will tour destinations pay?
- ◆ ERCA has a demonstration farm by Holiday Beach that they will be developing for visitors.
- ◆ Deb Bass of the Southwestern Ontario Heritage Village did a study. Liz will see if we can access.
- ◆ Town of Leamington did a phone survey re the need for a cultural centre but this was not very successful. Wrong means of gathering input.
- ◆ Satellite location of the Windsor, Essex County and Pelee Island Convention and Visitors Bureau (CVB) could be a positive. All municipalities are putting money into it and should have more representation.
- ◆ Need to make it easy for the CVB. Make it as easy as possible for people to come out to the county.

APPENDIX 2

Occupations with Above Average Rates of Projected Job Growth
(Windsor-Sarnia Corridor)

Provided by the Labour Market Unit, Windsor,
 Human Resources Development Canada
 June 2002

Through to 2005, the following occupations in the Windsor - Sarnia corridor are expected to grow at a faster than the average rate.

(Source: Occupational projections were taken from the Ontario Job Futures 2000 publication while wage data was drawn from the Ontario Wage Survey at <http://www.on.hrdc-drhc.gc.ca/english/lmi/ea/id/OWS99/>)

More information about these and other types of work can be found at <http://www.hrdc-drhc.gc.ca/JobFutures/>

Job Title	What They Do?	Why It's Growing at an Above Average Rate?	Estimated Average Hourly Pay
Mechanical Engineers	Primarily focused on manufacturing; mechanical engineers research, design, develop and repair machinery and systems for power generation, transportation, processing and manufacturing.	Employers are currently reporting difficulties in finding qualified workers and are hiring from outside of Canada. Demand is linked to a growing use of electronics and process control.	\$23.20*
Professional Engineers Ontario (www.peo.on.ca), Canadian Council of Professional Engineers (www.ccpe.ca)			
Electrical and Electronic Engineers	Electrical engineers plan, research and design electrical and electronic equipment. They may perform installation, inspection and maintenance activities.	A growing demand for setting up and maintaining computerized production. Many job openings will be created each year to replace retiring workers.	\$29.78
Professional Engineers Ontario (www.peo.on.ca), Canadian Council of Professional Engineers (www.ccpe.ca)			
Chemical Engineers	Chemical engineers research, design and develop chemical processes. They oversee the operation and maintenance of many industrial plants and perform duties related to quality control.	Employers are currently reporting difficulty in finding qualified workers. Most new job opportunities will be concentrated in the growing fields of specialty chemicals, pharmaceuticals and plastics.	\$29.94
Association of Consulting Engineers of Canada (www.acec.ca), Canadian Society for Chemical Engineering (www.chemeng.ca)			

Job Title	What They Do?	Why It's Growing at an Above Average Rate?	Estimated Average Hourly Pay
Industrial and Manufacturing Engineer	Manufacturing engineers conduct studies to achieve efficient utilization of machinery, materials and human resources.	<p>Increased emphasis on product quality to meet international standards.</p> <p>Southwestern Ontario has seen significant industrial growth related to motor vehicle parts manufacturing and an increased use of automation in factories.</p> <p>Opportunities due to age related retirements should also be high.</p>	\$26.65
Society of Manufacturing Engineers (www.sme-toronto-26.org)			
Mechanical Engineering Technologists/ Technicians	Mechanical engineering technologists provide technical support and services in mechanical engineering fields. They may design, maintain, test, and trouble shoot machines and equipment.	<p>Ongoing workplace modernization through advanced technologies and computer simulation will continue to impact on the demand for this occupation.</p> <p>Worker shortages have been reported and some employers are recruiting outside of Canada.</p>	\$22.73
Software Human resource Council (www.shrc.ca), Information Technology Association of Canada (www.itac.ca)			
Applied Chemical Technologist/ Technician	Applied chemical technicians provide technical support in chemical engineering, quality control and environmental monitoring.	<p>The need for technologists and technicians should remain strong as the chemical companies continue to research and develop new chemicals.</p> <p>The need for replacement workers due to age related retirements will be high.</p>	\$20.19
Canadian Council of Technicians and Technologists (www.cctt.ca)			

Job Title	What They Do?	Why It's Growing at an Above Average Rate?	Estimated Average Hourly Pay
Industrial Instrument Technician/Mechanic	Industrial instrument mechanics repair, maintain, calibrate, adjust and install industrial measuring and controlling instrumentation.	As more firms introduce automated production equipment, industrial mechanics are needed to ensure these machines are well maintained.	\$18.18
Ontario Association of Certified Engineering Technicians and Technologists (www.oacett.org)			
Computer Systems Analyst	Computer systems analysts analyze information processing and computing needs.	The demand for computer analysts will continue to remain strong across the province as businesses expand their computerized operations to integrate new technologies like e-business and the growing demand to facilitate information sharing through computer networking.	\$27.68
Canadian Technology Human Resources Board (www.cthrb.ca) or (www.cctt.ca)			
Optometrists	Optometrists examine eyes, prescribe and fit eyeglasses and contact lenses and recommend treatments to correct vision problems.	As the baby boom ages, the percentage of the population needing the services of optometrists will increase. Rapid development of new diagnosing and treating technologies.	\$37.00
Canadian Association of Optometrists (www.opto.ca)			
Registered Nurse	Registered nurses provide direct nursing care to patients, deliver health education programs and provide consultative services. Areas of specialization include surgery, geriatrics, obstetrics, pediatrics, emergency care or rehabilitation.	An aging population combined with the need to replace workers who will retire will result in above average replacement needs. New technologies and the shift from institutional to home care will also affect demand. Provincial requirements for a registered nurse have recently been increased to the university level.	\$21.73
Registered Nurses Association of Ontario (www.rnao.org)			

Job Title	What They Do?	Why It's Growing at an Above Average Rate?	Estimated Average Hourly Pay
Registered Practical Nurse	Registered practical nurses provide nursing care for patients under the direction of registered nurses, physicians and other health team members. (Formerly called registered nursing assistant)	<p>Long term care needs of an aging population combined with a substantial number of job openings due to worker retirements means an above rate of job growth.</p> <p>The role of RPN will continue to change as more technology is introduced at the bedside.</p>	\$16.13
Registered Practical Nurses Association of Ontario (www.rpnao.org/home.asp)			
Visiting Homemakers and Personal Support Workers	Visiting homemakers provide ongoing or short-term support services for individuals and families during periods of incapacitation, convalescence or family disruption.	<p>An aging population, economic growth and the need for replacements will increase the demand for home-care workers.</p> <p>Southwestern Ontario is home to more individuals over the age of 60 than the provincial average thus ensuring an on-going need for individualized attention.</p>	\$12.29
VHA Home Healthcare (www.vha.on.ca) or Canadian Palliative Care Association (www.cPCA.net)			
Chef	Chefs plan and direct food preparation and cooking activities to prepare meals and specialty foods.	<p>Employers are currently reporting difficulties finding qualified workers.</p> <p>An increase in disposable earnings combined with more travel by Ontarians has resulted in a corresponding demand in dining out.</p> <p>Computerized inventory control systems have added to the complexity of the job.</p>	\$12.90
Canadian Federation of Chefs and Cooks (www.cfcc.ca) Ministry of Training, Colleges and Universities (www.edu.gov.on.ca/eng/training/apprenticeship/service.html)			

Job Title	What They Do?	Why It's Growing at an Above Average Rate?	Estimated Average Hourly Pay
Machinist	Machinists set up and operate a variety of machine tools to cut or grind metal into parts with precise dimensions.	<p>Employers across Ontario have reported difficulties in finding qualified workers. Some are recruiting outside of Canada.</p> <p>The bulk of machinists are employed in the manufacturing industries and the use of numerical controlled systems has placed a new emphasis on math and reading skills than traditionally required.</p>	\$17.90
Machinery and Equipment Manufacturers Assoc. of Canada (www.memac.org) Ministry of Training, Colleges and Universities (www.edu.gov.on.ca/eng/training/apprenticeship/manufac.html)			
Tool and Die Makers	Tool and die makers make repair and modify custom-made, prototype or special tools, dies, jigs, fixtures and gauges that require precise dimensions. The work involves lathes, grinders, milling and boring machines and computerized numerical control (CNC) machines.	<p>Due to the large size of this occupational group, many new openings will be created each year by tool and die makers who retire.</p> <p>Over 95% of tool and die makers are employed in the manufacturing sector. CNC machine tools have made workers more productive.</p>	\$20.97
International Special Tooling and Machining Association (www.istmaworld.org) or Canadian Association of Mould Makers Inc. (www.cdnmolds.com)			
Refrigeration and Air Conditioning Mechanics	Refrigeration and air conditioning mechanics install, maintain, repair and overhaul residential air conditioning systems, commercial and industrial refrigeration and heating and cooling systems.	<p>Employers in Ontario are reporting difficulty in finding qualified workers.</p> <p>As the population and the economy grows, the demand for this occupational group will increase due to the installation of new, more efficient air conditioning and refrigeration systems.</p>	\$21.63
Heating, Refrigeration and Air Conditioning Institute of Canada (www.hrai.ca)			

Job Title	What They Do?	Why It's Growing at an Above Average Rate?	Estimated Average Hourly Pay
Metalworking Machine Operators	Light metalworking machine operators operate metalworking machines that shape and form sheet or other light metal into parts or products.	<p>Growth of motor vehicle parts manufacturers in Southwestern Ontario has contributed to the demand.</p> <p>Increased use of computerized machinery and quality control standards have added to the knowledge requirements of this occupation.</p>	\$15.09
Metal World (www.metalworld.com)			
Truck Drivers	Truck drivers operate heavy trucks to transport goods and materials over urban, provincial and international routes	<p>About 70 percent of the goods manufactured in Ontario are exported to other provinces and countries. New technologies like on-board electronics and computer-controlled equipment are changing the nature of the driver's job and the amount of computer literacy required.</p> <p>The need for replacement workers due to age related retirements will be high.</p>	\$14.96
Canadian Trucking Human Resource Council (www.cthrc.com) or Ontario Trucking Association (www.ontruck.org)			

* Information on average salaries for the above occupations was taken from a comprehensive survey of 15,316 different businesses in Ontario.

Results of the Ontario Wage Survey regarding 215 different occupations can be seen at <http://www.on.hrdc-drhc.gc.ca/english/lmi/eaid/OWS99/>

Appendix 3

New Industries/Plant Closures

New Industries/Expansions/Employee Recalls

Windsor

Exkor, a division of Linamar Corp. built a 138,000 square foot plant in the Twin Oaks Business Park employing 50 people in the production of cylinder heads. Linamar, headquartered in Guelph specializes in precision-machined components, assemblies and castings, primarily for the automotive industry.

Veltri Stamping Ltd. underwent expansion as a result of corporate restructuring after four plants operated by Veltri's parent company, Talon Automotive Group, were closed in the United States.

Forty-five nurses were recalled to the Victorian Order of Nurses after the Windsor/Essex County Community Care Access Centre (CCAC) decided to reinstate this group as a contracted supply of nursing services.

Lear Corporation added 200 jobs at their seating plant bringing the facility back to one-third of its original employment levels. Approximately 120 laid off employees were eligible to return to work.

Green Shield is constructing a new headquarters in the Twin Oaks Industrial Park that, at 72,000 square feet, will be 60% larger than its current building. About 260 of the company's 300 Canadian employees will continue to be based in Windsor.

Sobey's Grocery Store constructed two 48,000 square foot stores in the east Windsor and Tecumseh.

A new and larger WalMart replaced the existing store in South Windsor.

G & K Work Wear will construct a 52,000 square foot facility in Twin Oaks Industrial Park providing uniforms and related services to over 2200 businesses.

Riverview Steel expanded its facility in Twin Oaks Industrial Park.

Outback Steakhouse opened a \$1.5 million restaurant employing 85 full and part-time staff.

Amherstburg

A \$10-million Loblaw Grocery Store was initiated employing 100 full and part-time employees.

Essex

The Bargain! Shop opened a store.

Kingsville

L.M. International Inc. Food Safety and Quality Systems opened in Kingsville, advising farmers and companies on ways to prevent outbreaks of foodborne diseases.

LaSalle

The Bargain! Shop opened a store.

Leamington

KUS Canada Inc., formerly known as Zollner Canada, increased their workforce by 120 employees after winning a major outsourcing contract from General Motors manufacturing a 4.3 litre V6 engine piston.

Chatham-Kent

Source One Plastics expanded

Crucible Steel expanded

Supreme Finishes, Blenheim, expanded

KSR, Ridgetown expanded adding 150 jobs.

Plant Closures/Downsizing

Windsor

Daimler-Chrysler issued an indefinite layoff to 852 employees.

W.E.T. Automotive issued a permanent layoff to 69 hourly employees. This site has eliminated its production facilities, but retained 108 salaried employees who will concentrate on research and development.

Lauren Tool and Plastics closed laying off 35 people.

Tregaskiss Ltd. Issued a permanent layoff to 40 employees.

Dura Automotive closed their Plant 2 operation due to a contract loss, affecting 16 employees.

Acadia Polymers closed their Windsor plant as a result of a merger and move to the United States, affecting 79 employees.

The Windsor Essex Goodwill of Windsor closed after 45 years of providing vocational training due to financial shortfalls caused by reductions in government funding. Twenty-five employees were affected.

Tepperman's Furniture Store laid off delivery workers deciding to contract this service.

BiWay Stores closed through the training board area.

Canadian Blending issued an indefinite layoff to 33 employees due to difficulties in shipping product to the United States.

Krupp Fabco issued an indefinite layoff to 93 employees.

Casino Windsor issued permanent layoffs to 68 supervisors and managers in areas including gaming and security with no chance of recall. Indefinite layoffs were issued to 580 cashiers, dealers, clerks and attendants. Layoffs were attributed to border delays causing lost revenue and customers.

The Southwood Hotel laid off 13 employees indefinitely due to a fire at the restaurant.

General Motors Transmission plant laid off 90 employees after their jobs were eliminated. The layoffs were the result of an anticipated reduction in the number of transmissions expected to be needed in 2002.

Amherstburg

General Chemical closed its soda ash operation permanently laying off 254 hourly and salaried employees.

Leamington

LDM Technologies, Leamington's second largest employer, closed laying off more than 400 employees. LDM Technologies, a producer of plastic automotive parts, lost two major contracts with General Motors.

Wheatley

LEF McLean Brothers became insolvent affecting 110 employees.

Chatham-Kent

Ventra Plastics closed affecting 50 workers