

**2011
2012**

**Local Labour
Market Plan
UPDATE**



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**Local Labour Market Plan Update
And Action Plan 2011 – 2012**

Released April 2011



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We would like to recognize and thank everyone who contributed their time, ideas and expertise to our Local Labour Market Plan Update (LLMPU) and Action Plan. Our action plan represents the collaborative efforts of the Windsor-Essex community. We now have a better understanding of what needs to be achieved over the short and long term to position Windsor-Essex for success in an ever-changing and increasingly competitive global economy.

Workforce WindsorEssex would also like to thank Diane Soucie for her work in developing and authoring this document. Her passion for our local workforce can clearly be seen in the depth of this document and her contributions towards our organization are truly appreciated.

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Executive Summary

The economy in WindsorEssex is undergoing a structural transformation. Throughout 2009 and 2010, WindsorEssex struggled with company closures, downsizing and bankruptcies producing a double digit rate of unemployment and the unwelcome distinction of the highest rate of unemployment in Canada. However, this community has worked hard at taking advantage of opportunities presented by change and there are strong indicators of an economy on the rebound.

Consider the following local, national and international accomplishments and acknowledgements earned in January 2011:

- The Conference Board of Canada, in their Winter 2011 Metropolitan Outlook, predicted that the Gross Domestic Product (GDP) of the Windsor Census Metropolitan Area (CMA) would reach 3.9 percent in 2011, demonstrating the fastest growth of the 27 CMA's in Canada.¹
- After experiencing a double-digit rate of inflation since January 2009, Windsor's rate of unemployment dipped to 9.7 percent. This is 3.2 percent less than one year ago (January 2010), when the unemployment rate hit 12.9 percent. "And the good news is, there's more to come", stated Ron Gaudet, CEO of the Windsor Essex Economic Development Corporation, citing the aerospace hangar announced for Windsor Airport, the Siliken Group's plan for a solar panel plant, C.S. Wind's turbine plant and the thousands of jobs created as a result of construction on the new bridge and the WindsorEssex Parkway.²
- The CIBC Metro Monitor showcased Windsor as a "prime example of the manufacturing-led recovery. Employment in the city has been rising for three consecutive quarters – a performance not seen since 2006."³
- WindsorEssex was recognized by the Intelligent Community Forum (ICF), a U.S.-based think tank, as one of the seven most intelligent regions in the world. Using a set of prescribed benchmarks, the ICF credited WindsorEssex with "crafting a new, more robust economy"⁴ in the wake of the downturn in the automotive industry.

These are very positive indicators of economic growth; however, optimism is cautious and there have been changes in the workplace. The Conference Board of Canada cautioned that employment levels are not expected to return to pre-recession levels, projecting an employment

¹ Economic Insights into 27 Canadian Metropolitan Economies, Metropolitan Outlook 2 – Winter 2011, conference Board of Canada, p. 4

² Absolutely thrilled, Brian Cross, *Windsor Star*, Feb 3, 2011, p. A1

³ Improving Manufacturing Activity Re-Shaping Canada's Urban Centres, *CIBC Metro Monitor*, January 12, 2011, Benjamin Tal, p. 3

⁴ https://www.intelligentcommunity.org/index.php?src=gendocs&ref=Smart21_2010&category=Events&link=Smart21_2010

increase in automotive assembly to 68,000 in 2015, well below the 2001 to 2007 average of 83,000. The return to profitability is credited to “major restructuring efforts, rising consumer demand in Canada and the United States, and significant improvements in productivity.”⁵ Rick LaPorte, President of the Canadian Auto Workers Local 444, concurred that the number of workers will remain depressed as the companies “continue to look for efficiencies.”⁶

Against this landscape of a changing economy and workplace and with the recent release of the WindsorEssex Economic Development Corporation’s Regional Economic Roadmap identifying “building the talent pipeline” as one of 8 building blocks for the regional economy, it seems like a particularly appropriate time to update the Integrated Local Labour Market Plan released by Workforce WindsorEssex in August 2009. This update looks at statistical data, national research, local reports, surveys and key informant interviews to highlight the challenges and opportunities presented to both those in the workforce and those looking ahead to their future.

Two changes to the local labour market supply and demand have occurred since the Integrated Local Labour Market Plan WindsorEssex was released in August 2009:

1. Great inroads have been made in diversifying the economy; and
2. A documented net out-migration of workers from WindsorEssex between 2003 and 2008 and projected out-migration from 2009 to 2010

Strategies to support our diversifying economy and address youth retention are encompassed within the five priorities identified by the community eighteen months ago:

1. To ensure that the workforce of WindsorEssex has the knowledge and skills required to meet the needs of the changing local economy
2. Ensuring access to relevant and timely labour market information
3. The importance of Attitude, Skills and Knowledge (ASK) in the workplace
4. Support of entrepreneurship, research & development and the growth of small and medium-sized business
5. Integrating immigrants into the WindsorEssex labour force leveraging their knowledge, skills and experience

The Action Plan at the conclusion of the report identifies measures that have been taken since 2009 to address these priorities, activities that are underway and actions that are planned in 2011-2012. Workforce WindsorEssex would like to once again acknowledge the ongoing dedication of our partners throughout the community of WindsorEssex as we continue to build a strong local economy and robust future.

⁵ Future brighter for auto industry, Grace Macaluso, *Windsor Star*, Dec 8, 2010

⁶ Ibid

Introduction

In 2008, Windsor Essex was selected by the Ministry of Training, Colleges and Universities as one of seven communities across Ontario to pilot the Integrated Local Labour Market Plan (ILLMP). Building on the Trends, Opportunities and Priorities report published annually since 2004, Workforce WindsorEssex analyzed statistical data, current labour market research, results of key informant interviews with a wide-variety of community and business leaders as well as a survey of the WindsorEssex public to identify five priorities for workforce development:

1. To ensure that the workforce of WindsorEssex has the knowledge and skills required to meet the needs of the changing local economy
2. Ensuring access to relevant and timely labour market information
3. The importance of Attitude, Skills and Knowledge (ASK) in the workplace
4. Support of entrepreneurship, research & development and the growth of small and medium-sized business
5. Integrating immigrants into the WindsorEssex labour force leveraging their knowledge, skills and experience

The purpose of this report is to provide an update to labour market supply and demand indicators in WindsorEssex as well as our progress in addressing these workforce development priorities. What has changed in our local economy since the ILLMP was released in August 2009? What measures have been taken during the past year? What additional actions are required to support and develop the local labour market and our economy?

To answer these questions, this report will review updated statistical analysis, local news releases and reports and the results of dialogue with industry and business associations, labour and educators to highlight the changing status of our local labour market. We will then provide an update on what has been done to address our five workforce development priorities showcasing the efforts of community partners. Finally, we will articulate our Action Plan for 2011-2012.

Overview of the Consultation Process

The consultation process for this update began immediately after the release of the Integrated Local Labour Market Plan in August 2009.

Formal and informal consultations have taken place with organizations including the WindsorEssex Economic Development Corporation, Community Futures Development Corporation, Leamington Economic Development Office, Tourism Windsor Essex Pelee Island, Windsor Construction Association, Building Trades Council (Construction Trades), Tri-County Labour Adjustment Committee Chairs, Amherstburg and Leamington Chambers of Commerce, Windsor Essex Regional Chamber of Commerce, Small Business Enterprise Centre, Le Réseau de développement économique et d'employabilité (RDEE), Senior Operating Group and all Academic Chairs at St. Clair College, and the Centre for Career Education at the University of Windsor.

A partnership was launched with the Human Resources Professionals Association of Windsor and District (HRPAW) leading to a monthly survey conducted in conjunction with the Statistics Canada release of monthly employment indicators asking local businesses to identify occupations affected by hiring or lay-off over the past month. The results of this survey are posted monthly on the Workforce WindsorEssex website, www.workforcewindsoressex.com.

WEtech Alliance (formerly Softech Alliance) surveyed their members on behalf of Workforce WindsorEssex asking for specific feedback on labour force and skills requirements within the Information, Communication and Technology (ICT) sector.

Over 100 interviews were conducted with representatives of the Hospitality and Tourism, Construction, Renewable Energy, and Agri-Business sectors. The members of the Manufacturing Sector Council for the WindsorEssex Economic Development Corporation were consulted. Finally, the draft report was circulated widely throughout the community seeking input, collaboration and partnership to establish our Action Plan 2011-2012.

Labour Market Supply

The Windsor Essex Economic Development Corporation' Strategic Plan, Discover our Region's GPS Growth. Prosperity. Sustainability. Windsor-Essex Regional Economic Roadmap, released in February 2011 identifies "building the talent pipeline" as one of their key building blocks and objectives, stating that "the battle for business investment and economic development across North America is increasingly focused on the talent pipeline."⁷ They further identify that, "Communities with a demonstrated ability to provide a skilled labour pool are far better positioned for growth. The talent pipeline comes from two sources: the post-secondary education system and through workforce migration into the community."⁸

An understanding of both in-migration and educational attainment of our local labour force can be gained through the review of statistical evidence. The most comprehensive collection of demographic information related to local demographics and labour market supply is collected via the national census conducted every five years. The 2006 Statistics Canada Census offered a multi-faceted examination of the demographics of WindsorEssex including population, age of the population, educational attainment and immigration. Much of this information is now dated and, wherever possible, updated data will be provided.

Our Population

The population of WindsorEssex at the time of the Statistic Canada Census 2006 was 393,402, an increase of 4.9% from 2001. Ontario's population had grown by 6.6% during the same time period. Ministry of Finance (Ontario) projections estimate the population of WindsorEssex at 405,040 in 2011, an increase of 3.0%. Ontario's population was projected to grow 10% during the same timeframe.

However, recent Statistics Canada Taxfiler data, released every 18 months provides insight into current information on in-and-out-migration from WindsorEssex. Taxfiler Data is provided to Statistics Canada by Canada Revenue Agency and, using the community identified by people submitting their annual income tax return as their place of residence, accurately measures the numbers of people moving in and out of a community. It does not, however, necessarily include those individuals who may be working away from home for extended periods of time.

From 2003 to 2008, WindsorEssex experienced a net out-migration at each age level except those over age 65. The net in-migration of individuals over the age of 65 may be an indicator of the success of the "Retire Here" 100 Mile Peninsula campaign.

⁷ *Discover our Region's GPS – Growth. Prosperity. Sustainability., Windsor-Essex Regional Economic Roadmap, WindsorEssex Economic Development Corporation, February 2011, p. 22*

⁸ *Ibid, p. 22*

Figure One: In-and-Out-Migration from Windsor Essex 2003 to 2008

Age Group	In-migrants	Out-migrants	Net-migrants
1 – 17	10,733	11,459	- 726
18 – 24	7,139	8,820	- 1,681
25 – 44	17,728	22,733	- 5,005
45 – 64	6,252	7,002	- 750
65+	2,366	2,034	+ 332
Total	44,218	52,048	- 7,830

Source: Statistics Canada Taxfiler data 2008

The documented out-migration of 6,756 people from the labour force age 18 to 64 or 86.3 percent of the total documented net out-migration of 7,830 between 2003 and 2008 is of great concern. Compounding this is the latest projection by Statistics Canada that the Windsor Census Metropolitan Area (CMA) experienced an out-migration of 3,400 between July 1, 2009 and July 1 2010, the largest estimated out-migration of any CMA in Canada.⁹ Combined, the region appears to have experienced the loss of up to 11,000 people since 2003.

The Conference Board of Canada, in their Winter 2011 Metropolitan Outlook, did project that this trend will reverse in 2012 when a positive net-migration flow is forecast.¹⁰

In August 2004, the Conference Board of Canada declared, “the single most important factor in the location decision of firms is the availability of a pool of skilled technical workers.”¹¹ Not only is it important that a skilled workforce is available in order to attract and grow the local economy, it is the employed labour force that feeds the local economy both through consumption and by generating a significant portion of the tax base through property ownership.

International immigrants are an equally important contributor to our local labour force. At the time of the 2006 Census, WindsorEssex was the fourth most ethnically diverse region in Canada¹² and the third largest centre for immigrants in Ontario with 23.3 percent or almost one in four residents born outside of Canada. The Local Immigration Partnership Council’s report, “*A Community Plan to Promote the Settlement and Integration of Immigrants in Windsor and Essex County*” released in February 2010 states that, based on Statistics Canada Census 2006 data, 46.4 percent of immigrants to WindsorEssex possess a university certificate, diploma or

⁹ Annual Demographic Estimates: Subprovincial areas 2005-2010, Statistics Canada, January 2011

¹⁰ Economic Insights into 27 Canadian Metropolitan Economies, Metropolitan Outlook 2 – Winter 2011, conference Board of Canada, p. 4

¹¹ Do Clusters Contribute to Regional Economic Growth?, *Clusters of Opportunity, Clusters of Risk, Innovation and Knowledge Management*, Conference Board of Canada, August 2004, p. 12

¹² http://www.ontarioimmigration.ca/en/living/OI_HOW_LIVE_WINDSOR.html

degree and 18.1 percent possess a College diploma.¹³ Seventy-one percent of immigrants to WindsorEssex are in the prime workforce years of 18 to 64.¹⁴

Statistics Canada estimated international immigration to the Windsor CMA between 2005 and 2010 at 2,454 or 0.22 percent of the total estimated immigration to CMA's across Canada during the same time period.¹⁵

Educational Attainment

The 2006 Census highlighted our local educational attainment in comparison to the rest of Ontario.

Figure Two: Level of Educational Attainment in Windsor Essex - Age 15 to 65

Level of Educational Attainment	WindsorEssex	Ontario
University Certificate, Diploma or Degree	19.4%	24.6%
College Diploma / Non-University Certificate/Diploma	18.1%	18.4%
Apprenticeship or Trades Certificate	8.3%	8.0%
High School Certificate or Diploma	30.0%	26.8%
No Certificate or Degree	24.2%	22.2%

Source: Statistics Canada Census 2006

While this data dates back to 2006, education changes relatively little year over year so this information still continues to be an important indicator in 2011.

To compare the level of education in Windsor Essex with the provincial average we can apply the provincial average to the population of WindsorEssex between the age of 15 and 65 (314,630). By subtracting the actual number in WindsorEssex within any of the educational categories from the provincial average, we can determine what action would have to be taken in Windsor Essex to equal the provincial average.

For example, 19.4% of those living in WindsorEssex have a university certificate, diploma or degree or 61,038 people between the ages of 15 and 65. If we were to match the province, 24.6% would have the credential or 77,399 (24.6% of 314,630). Therefore, 16,361 (77,399 – 61,038) would need to earn a university certificate, diploma or degree to equal the provincial average. Performing this same calculation for each of the other levels of education we find that:

- 944 of those living in Windsor Essex would require a College diploma/non-university certificate or diploma to equal the provincial average

¹³ *Local Immigration Partnership – A Community Plan to Promote the Settlement and Integration of Immigrants in Windsor and Essex County*, February 2010, Page 20

¹⁴ CIC, Statistics Canada, 2006 Census, Windsor Regional Demographic Profile

¹⁵ Ibid

- 944 additional people in Ontario would require an Apprenticeship or Trade Certificate to equal WindsorEssex

WindsorEssex does have a greater percentage of people with an Ontario Secondary School Diploma than in the rest of the province. However, this also means that more people in WindsorEssex concluded their formal education at the completion of Grade 12 without proceeding to post-secondary. Therefore,

- 10,068 people in WindsorEssex would have to go on to post-secondary education after earning a secondary school diploma to equal the provincial average

And finally,

- 6,292 people in WindsorEssex would need to obtain a Secondary School diploma to equal the provincial average

While every economy is different with differing educational requirements, there is no denying the importance of higher education as an “absolute necessity to fill the skill needs of future jobs.”¹⁶ In Dr. Rick Miner’s report, “People without Jobs - Jobs Without People”, the author uses a number of Canadian and U.S. projections to estimate that by 2031, 77 percent of all jobs will require a post secondary credential, summarizing that “unless we take effective action to increase the proportion of skilled labour in our economy, we will face a future with large numbers of unskilled workers looking for jobs that require skills they do not possess.”¹⁷

This Local Labour Market Plan Update 2011-2012 will explore the evolving economy of WindsorEssex and the resulting impact on both educators and our current and future labour force as we strive to ensure we have the talent to grow existing enterprise and attract business investment to WindsorEssex. The need for higher education observed throughout this updated plan is reflected in both local reports and comments obtained directly from industry representatives. Across each sector, business operators consistently identified the imperative to grow their business through applied innovation, creating the value-added products and services their customers demand. Business acumen was identified as necessary to access new export markets and competitive advantage mandates the integration of technology and streamlined processes to generate increased productivity.

¹⁶ The Changing Canadian Workplace, *TD Economics*, March 8 2010, p. 1

¹⁷ *People without Jobs/Jobs Without People – Ontario’s Labour Market Future*, Rick Miner, Ph.D., Feb 2010, p. 3

Labour Market Demand

The economy in WindsorEssex is undergoing a structural transformation. Through 2009 and 2010, WindsorEssex struggled with a double digit rate of unemployment and the unwelcome distinction of having the highest rate of unemployment in Canada. However, this is beginning to turn around and there are strong indicators of a rebounding economy.

Most recently, the Conference Board of Canada predicted that the Windsor Census Metropolitan Area (CMA) would achieve a Gross Domestic Product (GDP) of 3.9 percent, the highest of any Canadian CMA. It is projected that this level of economic growth will create about 5,000 new jobs in the region this year, with the unemployment rate hovering around 10 percent as more people return to the workforce. By 2015, the average annual unemployment rate is expected to be down to 7.8 percent.¹⁸ Job creation is expected to take place in construction as a result of the WindsorEssex Parkway project as well as wholesale and retail trade and the industrial sector.¹⁹

After experiencing a double-digit rate of inflation since January 2009, Windsor's rate of unemployment dipped to 9.7 percent. This is 3.2 percent less than one year ago (January 2010), when the unemployment rate hit 12.9 percent. "And the good news is, there's more to come", stated Ron Gaudet, CEO of the Windsor Essex Economic Development Corporation, citing the aerospace hangar announced for Windsor Airport, the Siliken Group's plan for a solar panel plant, C.S. Wind's turbine plant and the 1000's of jobs created as a result of construction on the new bridge and the WindsorEssex Parkway.²⁰

Early in January 2011, WindsorEssex was recognized by the Intelligent Community Forum (ICF), a U.S.-based think tank, as one of the seven most intelligent regions in the world. Using a set of prescribed benchmarks, the ICF credited WindsorEssex with "crafting a new, more robust economy"²¹ in the wake the downturn in the automotive industry. The ICF also cited the strong tourism and agriculture industries, the university's new innovation centre for engineering research, virtual incubator, accelerated MBA-level education, the connection of research and government facilities through broadband now being extended to rural areas, and the launch of WEtech Alliance (formerly Softech Alliance Network).²² Also cited was the application of high-speed connectivity to health care education and service delivery.²³

¹⁸ Economic Insights into 27 Canadian Metropolitan Economies, Metropolitan Outlook 2 – Winter 2011, conference Board of Canada, p. ix

¹⁹ Region's economy expected to lead all Canadian cities, Ellen VanWageningen, Windsor Star, Feb 23 2011, p. A1

²⁰ Absolutely thrilled, Brian Cross, Windsor Star, Feb 3, 2011, p. A1

²¹ https://www.intelligentcommunity.org/index.php?src=gendocs&ref=Smart21_2010&category=Events&link=Smart21_2010

²² Ibid

²³ Take a bow, Windsor, we're among world's smartest, Dave Hall, Windsor Star, Jan 21 2011

This international award led the Globe and Mail to acknowledge progress, stating “for the past few years, the region [WindsorEssex] has been quietly transforming itself, transitioning from automotive to aerospace, embracing new technologies and a future fuelled by solar power rather than gasoline.”²⁴

In January 2011, the CIBC Metro Monitor showcased Windsor as a “prime example of the manufacturing-led recovery. Employment in the city has been rising for three consecutive quarters – a performance not seen since 2006. Same goes for the housing market with housing starts being in positive territory for almost a year – the best performance since 2004.”²⁵

In addition to advanced automotive manufacturing, economic development efforts of the entire WindsorEssex region have resulted in diversification into new areas of economic activity including renewable energy, aerospace, and maintenance, repair and overhaul.

The following statistical data, interviews with key informants from a number of sectors and ongoing literature review help to provide further insight into the economy of WindsorEssex and our related workforce requirements.

Labour Market Indicators

Canadian Business Pattern (CBP) data continues to be an important source of statistical data reflecting our local economy. This data is provided to Statistics Canada by Canada Revenue Agency and is based on the employee payroll remittances submitted by companies on behalf of their employees. Statistics Canada then organizes and releases the information every six months to provide insight into economic activity within different sectors of the economy.

The following Tables summarize local economic activity. Tables One and Two utilize Canadian Business Pattern data to summarize the number of business establishments by employee size range operating in WindsorEssex from Dec 2008 to June 2010 and from Dec 2003 to June 2010. Table Three looks at the change in the number of business establishments operating in each sector between 2008, 2009 and 2010. Table Four uses average provincial employment for business establishments with up to 100 employees to estimate employment in WindsorEssex within each sector. Table Five looks at the concentration of the sector within the WindsorEssex economy as compared to Ontario. Table Six points to the importance of small business to our economy, highlighting how many business establishments in WindsorEssex are employing less than 100 people. Finally, Table Seven and Eight examine the occupational composition of WindsorEssex as compared to Ontario.

²⁴ Siri Agrell, A city’s resurrection: From lunch buckets to laser beams; No longer dependent on building cars, Windsor Ont., is winning global praise by transforming itself with cutting-edge technologies, *Globe and Mail*, Feb 1, 2011

²⁵ Improving Manufacturing Activity Re-Shaping Canada’s Urban Centres, *CIBC Metro Monitor*, January 12, 2011, Benjamin Tal, p. 3

Table One: Difference in Total Business Establishments (T.B.E.) by size range operating in WindsorEssex between Dec 2008 and June 2010

Employee Size Range	Number of T.B.E. Dec 2008	Number of T.B.E. June 2010	Absolute Change	Percentage Change
0	10,542	10,492	- 50	- 1.005%
1 - 4	5,062	5,031	71	0.99%
5 - 9	2,352	2,302	- 25	- 1.07%
10 – 19	1,460	1,478	18	1.23%
20 – 49	1,038	1,032	- 6	- 0.58
50 – 99	330	315	- 15	- 4.55%
100 – 199	156	162	6	3.85%
200 – 499	78	76	- 2	- 2.56%
500 +	31	30	- 1	- 3.23%
Total	20,922	20,918	- 4	- 0.02%

Table One looks at the change in the number business establishments by employee size range operating in WindsorEssex in Dec 2008 as compared to June 2010. A decrease in the number of business establishments in any category of employee size range does not necessarily mean that the business is no longer operating. It may simply mean that the enterprise has increased or decreased the number of their employees and appears in a different category.

The drop in self-employment may be a positive indicator of economic activity as many individuals enter self-employment when unable to find work and then will return to the workforce when a job becomes available. It is also important to monitor activity in the employee size range of 5 to 49 as this can be an indicator of economic renewal as a new generation of business establishments takes place.

To take a longer view of economic activity, Table Two looks at the total number of business establishments operating in Windsor Essex prior to the 2008 recession comparing the number of business establishments by size range operating in WindsorEssex in December 2003 to December 2010.

Table Two: Difference in Total Business Establishments (T.B.E.) by size range operating in WindsorEssex between Dec 2003 and June 2010

Employee Size Range	Number of T.B.E. Dec 2003	Number of T.B.E. June 2010	Absolute Change	Percentage Change
0	10,550	10,492	- 58	- 0.6%
1 - 4	5,532	5,031	- 501	- 9.96%
5 - 9	1,837	2,302	465	25.3%
10 – 19	1,396	1,478	82	5.87%
20 – 49	1,107	1,032	- 75	- 7.27%
50 – 99	393	315	- 78	- 24.76%
100 – 199	183	162	- 21	- 12.96%
200 – 499	84	76	- 8	- 1.32%
500 +	35	30	- 5	- 16.67%
Total	21,117	20,916	- 201	- 0.96%

The total number of enterprises in June 2010 is coming increasingly close to the December 2003 level, however, the percentage of companies employing over 100 has decreased from 302 or 1.43 percent in December 2003 to 268 or 1.28 percent in June 2010.

Finally, Table Three highlights the changes in number of business establishments on a sector-by-sector basis from December 2008 to June 2010.

Table Three: Total Business Establishments (T.B.E.) Operating in WindsorEssex by Sector– Dec 2008 to Jun 2010

	T.B.E. Dec 08	T.B.E. Jun 09	Absolute Change Dec 08 to Jun 09	T.B.E. Jun 10	Absolute Change Jun 09 to Jun 10	Absolute Change Dec 08 to Jun 10	Percent Change Dec 08 to Jun 10
Agri-Business	1,096	1,094	- 2	1,221	127	125	11.41
Oil, Gas, Heavy Construction	2,439	2,402	- 37	2,374	- 28	- 65	- 2.67
Manufacturing	1,068	1,050	- 18	1,011	- 39	- 57	- 5.34
Wholesale/Retail Sales & Transportation	4,800	4,755	- 45	4,732	- 23	- 68	- 1.42
Finance, Insurance, Real Estate (FIRE) & Scientific/Professional	7,225	7,069	- 156	7,166	97	-59	- 0.82
Education, Healthcare & Social Assistance	1,334	1,320	- 14	1,448	128	114	8.55
Tourism, Culture & Recreation	1,312	1,295	- 17	1,276	- 19	- 36	- 2.74
Personal Services	1,631	1,630	- 1	1,669	39	35	2.33
Government Services	17	17	0	21	4	4	23.53
Total	20,922	20,632	- 290	20,918	286	- 4	- 0.02

Source: Canadian Business Pattern Data, Statistics Canada

There has been noticeable variation within sectors like the Heavy Construction; Wholesale/Retail/Transportation; F.I.R.E. and Scientific and Professional. This often takes place because there are high degrees of self-employment in these fields making the fluctuations appear more significant than they may be.

For example, 10 percent of business establishments classified as Specialty Trade Contractors within the construction sector and 26 percent of Truck Transportation business establishments within the transportation sector are business establishments owned by one person with no employees. Similarly, over 20 percent of business establishments in the Scientific and Professional sector and over 50 percent of real estate business establishments are individuals with no employees.

Table Four: Estimated employment for companies employing less than 100 in WindsorEssex - Dec 2008 to Jun 2010

Industry Sector	Dec 2008	Jun 2010	Absolute Change	Percent Change
Agri-Business	5,734	6,052	318	5.54
Oil, Gas, Heavy Construction	9,380	9,287	- 92	- 0.98
Manufacturing	12,480	10,810	- 1,670	- 13.38
Wholesale/Retail Sales / Transportation	25,812	26,277	465	1.80
F.I.R.E. / Professional & Scientific	23,038	22,236	- 802	- 3.48
Education, Health Care, Social Assistance	9,013	10,258	1,245	13.81
Tourism, Culture & Recreation	15,860	15,605	- 256	- 1.61
Personal Services	7,068	6,875	- 193	- 2.72
Government Services	175	184	9	5.27
Total	108,560	107,584	- 976	- 0.90

Source: Canadian Business Pattern Data, Statistics Canada

To calculate estimated employment, the actual numbers of business establishments in Windsor Essex operating in an industry is first categorized by a range of employees, i.e. 1 to 4 employees, 5 to 9 employees, etc. This actual number of business establishments is multiplied by the average number of people working in Ontario within that industry and employee size range. For example, there are 66 business establishments operating in WindsorEssex categorized as Machinery Manufacturing (NAIC 333) that employ 1 to 4 people. On average in Ontario, for companies in the Machinery Manufacturing sector employing 1 to 4 people, there are 2.27 people employed. The actual number of Machinery Manufacturing business establishments in WindsorEssex, 66, is multiplied by the provincial average for employment, 2.27 people in companies employing 1 to 4 people, to get an estimate of 149.82 people. This calculation has been done for companies employing up to 100 people as reliable projections could not be generated for companies employing more than 100 people.

Table Five highlights the concentration of the various industries when compared to Ontario. You can see that our local economy is more dependent on Agri-Business, Manufacturing, Retail/Wholesale Trade and Transportation than the rest of Ontario.

Table Five: Concentration of Economic Activity Compared to Ontario

Industry Sector	W/Essex Total	Local Distribution	Ontario Total	Ontario Distribution
Agri-Business	1,221	5.84	33,772	3.70
Oil/Gas & Construction	2,374	11.35	101,530	11.17
Manufacturing	1,011	4.83	33,570	3.67
Retail/Wholesale & Transportation	4,732	22.62	172,001	19.54
F.I.R.E. / Professional & Scientific	7,166	34.26	357,090	40.56
Education, Health Care, Social Ass.	1,448	6.92	53,879	6.12
Arts, Culture and Recreation	1,276	6.10	49,890	5.67
Personal Services	1,669	7.98	77,279	8.78
Government	21	0.10	1,347	0.15
Total	20,918	100.00	1,759,369	99.36

Source: Canadian Business Pattern Data, Statistics Canada

Table Six highlights the importance of Small and Medium-sized (SME) business to the Windsor Essex economy. In every sector except Manufacturing, Education and Health Care over 99% of companies employ less than 100 people.

Table Six: SMEs (less than 100 employees) as a percentage of the economy

Industry Sectors in Windsor Essex	Number of Business Establishments Employing Less than 100	Total Number of Business Establishments in Windsor Essex	SMEs as a % of the Local Economy
Agri-Business	1,213	1,221	99.34%
Utilities and Construction	2,366	2,374	99.66%
Manufacturing	929	1,011	91.89%
Retail, Wholesale Trade & Transportation	4,670	4,732	98.69%
FIRE, Telecommunications, Professional & Scientific	7,124	7,166	99.41%
Education, Health, Social Assistance	1,410	1,448	97.38%
Arts, Culture, Accommodation and Food Services	1,263	1,276	98.98%
Personal Services	1,665	1,669	99.76%

Source: Canadian Business Pattern Data, Statistics Canada

Finally Table Seven and Eight illustrate the percentage of the total labour force in WindsorEssex employed in various occupational categories. This local percentage is then compared to the Ontario percentages. Table Eight takes a closer look at where the region's strengths are in terms of occupational representation.

While the source of this data is Statistics Canada census 2006, it should be noted that the occupational skills people have developed through education and work experience are retained over years. Taking an occupational approach to define the work people do and the skills they have, rather than just the industries they work in allows a more detailed analysis of the specific tasks and skills utilized by the workforce and how these skills can be transferred and transitioned to new opportunities.

Table Seven: Distribution of Occupations in WindsorEssex as compared to Ontario 2006

Occupations	Windsor Essex Labour Force	Local Distribution	Ontario Labour Force	Ontario Distribution
A. Managerial	15,425	7.57	666,485	10.12
B. Finance, Administrative, and Clerical	27,475	13.48	1,204,490	18.28
C. Natural and Applied Science	10,430	5.12	451,930	6.86
D. Health Care	12,370	6.07	340,680	5.17
E. Legal, Social Assistance and Teaching	14,650	7.19	546,390	8.29
F. Art, Culture Recreation and Sport	3,510	1.72	200,980	3.05
G. Wholesale/Retail Sales, Real Estate, Food Service	50,060	24.57	1,522,815	23.12
H. Construction and Manufacturing Trades	31,550	15.48	911,260	13.83
I. Agriculture and Primary Production Labourers	7,960	3.91	165,085	2.51
J. Manufacturing Supervisors, Labourers and Machine Operators	25,590	12.56	463,600	7.04

Source: Statistics Canada Census 2006

Table Eight: Concentration of occupations in WindsorEssex as compared to Ontario

Occupations in higher concentration in WindsorEssex than in Ontario		
Occupational Cluster	Examples of Occupations	Percent higher
Manufacturing	Machine operators, assemblers and processing labourers	5.52%
Construction and manufacturing trades	Construction, machinists, mechanics, heavy equipment operators, stationery engineers and trades helpers	1.65%
Sales and Service	Retail sales, cashiers, chefs/cooks, food and beverage servers, insurance and real estate, child care workers	1.45%
Agriculture and primary industries	Occupations unique to agriculture including primary production labourers	1.40%
Health Care	Nurses and technical and assisting occupations related to health care	1.09%
Occupations in lower concentration in WindsorEssex than in Ontario		
Occupational Cluster	Examples of Occupations	Percent lower
Business, Finance and Administrative	Finance and insurance administrative occupations, regulatory occupations, Secretaries and clerical occupations	4.80%
Senior Management	Senior management, specialist managers and managers in retail trade, food and accommodation services	2.55%
Natural and Applied Sciences	Professional and technical occupations	1.74%
Arts and Culture	Professional and technical occupations in art and culture. Technical occupations in recreation and sport	1.33%
Legal, Education and Social Services	Lawyers, teachers, social workers, and paralegals	1.10

While statistical data can provide excellent background information about what has happened locally over the past year, it is in speaking with community partners, business and industry, labour, educators and service providers that valuable information is gathered about the changing economy and the current and future needs of the local labour market.

In their strategic roadmap, “*Discover our Region’s GPS: Growth. Prosperity. Sustainability. – Windsor-Essex Regional Economic Roadmap February 2011*”, the Windsor Essex Economic Development Corporation has targeted eleven “key industries for their growth potential for the Windsor Essex region”²⁶:

²⁶ *Discover our Region’s GPS – Growth. Prosperity. Sustainability., Windsor-Essex Regional Economic Roadmap*, WindsorEssex Economic Development Corporation, February 2011, p. 16

Established Industries: Industries that have been established within the local economy for twenty or more years:

- Automotive
- Agri-Business
- Education & Training
- Tourism & Travel Services
- Logistics / Warehousing & Cross Border Activities

Growth Industries: Industries growing at a rate faster than the overall local economy:

- Advanced Product Design & Development
- Health & Life Sciences

Emerging Industries: Entirely new or restructured industries growing at a rate faster than the overall local economy:

- Aerospace Manufacturing
- Renewable Energy and Green or Clean Related Technologies
- Creative Industries / Digital Media
- Professional Services/Back-Office Operations

The roadmap provides evidence supporting the growth potential for each of these industries examining economic activity and concentration of employment at the occupational level as per the Statistics Canada Census 2006.

The following section examines industries identified by the WindsorEssex Economic Development Corporation as established, growing or emerging and provides a summary of those discussions with professionals from many of these key industries along with additional information garnered from local and regional newspapers, publications, sectoral reports, etc.

Established Industries

Automotive Manufacturing

There are clear indicators that manufacturing nationally and locally is improving. Kenrick Jordan, Senior Economist for the Bank of Montreal Capital Markets reported in January that “we expect [automotive] sales to rise further to 1.62 million, which would be a return to levels more typical of the five years prior to the recession”.²⁷ In their *Metro Monitor* released January 12, 2011, CIBC reported that “Recent data on manufacturing production and shipments reveal a sector that is on the mend”²⁸ and “the most significant impact of the awakening manufacturing sector can be felt in small manufacturing-based cities such as Windsor”.²⁹

The increase in automobile production has led to increased activity in the auto parts manufacturing sector. The Conference Board of Canada predicted that, after losing \$674 million in 2009, the parts sectors would return to profitability in 2011 with gradual increases over the next three years until profits hit \$894 million by 2014.³⁰

While this increase in activity has been reflected in job creation and hiring, manufacturers are proceeding with caution and an emphasis on increased productivity through lean processes and technology integration. In December 2010, General Motors announced that it would be hiring 1,000 engineers and researchers over the next two years to develop more electric and hybrid cars.³¹ At the same time, Chrysler announced that, for the first time in ten years, they would be hiring new employees at the Windsor Assembly Plant indicating that these positions were created “primarily from requirements under the Fiat SpA’s World Class Manufacturing process.”³² In addition, the company was also looking for 1,000 engineers and high-tech employees to work on future small and medium-sized vehicle platforms.³³ Ford announced that it would be adding 7,000 jobs in the United States including an addition of almost 750 positions in design and engineering of hybrid and electrical vehicles at its headquarters in Dearborn Michigan.³⁴

Despite the job creation generated by new product development and returning sales, the Conference Board of Canada cautioned that employment levels are not expected to return to pre-recession levels, projecting an employment increase in automotive assembly to 68,000 in 2015, well below the 2001 to 2007 average of 83,000. The return to profitability is credited to

²⁷ BMO: Canadian Auto Sales Bounce Back, News Release, Jan 6 2011, <http://www2.bmo.com>

²⁸ *Metro Monitor*, Benjamin Tal, CIBC, January 11, 2011, p. 1

²⁹ *Ibid*, p. 3

³⁰ Future brighter for auto parts, Dave Hall, *Windsor Star*, August 25, 2010

³¹ Volt prompts GM hiring spree, David Bailey and Bernie Woodall (Reuters), *Windsor Star*, Dec 1, 2010

³² Chrysler poised to hire at minivan plant, Grace Macaluso, *Windsor Star*, Dec 1 2010

³³ *Ibid*, p A1

³⁴ Ford creates 7,000 U.S. jobs, Craig Peason, *Windsor Star*, January 11, 2011

“major restructuring efforts, rising consumer demand in Canada and the United States, and significant improvements in productivity”.³⁵ Rick LaPorte, President of the Canadian Auto Workers Local 444, concurred that the number of workers will remain depressed as the companies “continue to look for efficiencies.”³⁶

The same cautious optimism and emphasis on quality, innovation and increased productivity through lean processes and technology integration is demonstrated by automotive parts makers. Nationally, parts employment grew to 61,235 in 2010 from 60,469 a year earlier. Employment in the sector was above 87,000 as late as 2007. Greg Keenan, auto industry reporter for the *Globe and Mail* identified that “for every 10 jobs in Canadian parts factories [in 2007] only seven still exist today.”³⁷ Original Equipment Manufacturers (OEMs) are putting more pressure than ever on their supply chain partners insisting that they meet high operational, technological and quality standards. A review conducted by giant auto parts manufacturer Magna Corp. resulted in only 60 percent of Ontario suppliers meeting their supplier criteria compared to 58 percent in Mexico, 35 percent in Michigan and Ohio, 38 percent in the Southern United States.³⁸

WindsorEssex continues to demonstrate an impressive presence in the marketplace. In terms of estimated annual sales, trade publication *Plastics News* reported that of North America’s top 25 mouldmakers, ten (40%) were located in Ontario and seven (28%) in WindsorEssex. The top three performers are Canadian.³⁹

³⁵ Future brighter for auto industry, Grace Macaluso, *Windsor Star*, Dec 8, 2010

³⁶ Ibid

³⁷ Parts makers rebound, but jobs are slow to return, Greg Keenan, *The Globe and Mail*, Jan 15, 2011, p. B9

³⁸ Magna alters supplier criteria, Dave Hall, *Windsor Star*, Jun 11, 2011

³⁹ Tool, mould shops help resurrect region, Chris Vander Doelen, *Windsor Star*, Oct 30 2010

Statistically, the predominance of manufacturing in the economy of WindsorEssex is clear. Table Five illustrates the number of business establishments operating locally in key industries as of June 2010 as compared to the rest of Ontario.

Table Five: Concentration of Manufacturing Business establishments in WindsorEssex compared to Ontario

Manufacturing Industry (NAICS)	Total No. of Enterprises in Windsor Essex	Local Distribution %	Ontario Total	Ontario Distribution %
326 – Plastics/Rubber Products	67	0.32	1,386	0.16
331 - Primary Metal	18	0.09	401	0.05
332 - Fabricated Metal Product	194	0.93	5,134	0.58
333 - Machinery	220	1.05	3,651	0.41
336 - Transportation Equipment	84	0.40	1,465	0.17
339 - Miscellaneous	84	0.40	3,827	0.43
Total	667	3.20	15,864	1.80

Source: Canadian Business Pattern data, June 2010, Statistics Canada

In their Regional Economic Roadmap, the WindsorEssex Economic Development Corporation recognizes automotive manufacturing as a critical driver of the region's economy with structural changes leading to new opportunities in high-value, high-performance areas of the globalized auto sector. Next generation automotive manufacturing is foreseen in tooling, robotics, and integration to comply with upcoming fuel economy standards and green initiatives.⁴⁰ WEEDC also confirms the increased reliance on engineering talent locally over the past ten years, identifying that the number of industrial and manufacturing engineers in WindsorEssex is up 58 percent and an increase of 112 percent in the number of manufacturing technologists and technicians.⁴¹

Agri-Business

The WindsorEssex Economic Development Corporation has identified Agri-Business as a targeted industry to support economic growth in the region on the basis of the length of our growing season, the significance of our greenhouse industry, wineries, food processors and packagers with national and international distribution. Averaging 212 days per year, WindsorEssex has the longest growing season in Canada. The region boasts 325,000 acres of farmland and with 1,500 acres "under glass", the largest greenhouse industry in North America producing vegetables and exotic flowers for an international market. The entire industry is supported by the Greenhouse and Processing Crops Research Centre located in Harrow, viewed as a centre of excellence for the development and transfer of new technologies, crop

⁴⁰ Tool, mould shops help resurrect region, Chris Vander Doelen, *Windsor Star*, Oct 30 2010

⁴¹ *Discover our Region's GPS – Growth. Prosperity. Sustainability.*, Windsor-Essex Regional Economic Roadmap, WindsorEssex Economic Development Corporation, February 2011, p. 39

management and environmental control.⁴² Canadian Business Pattern data indicates that the number of business establishments operating in the Agriculture sector in WindsorEssex grew by 127 or 11.4 percent from December 2008 to June 2010. As of June 2010, there were 1,221 business establishments operating in crop, animal production and fisheries, 89 in Food and Beverage Manufacturing and 127 Farm Product Distributors and Food and Beverage Wholesalers. The economy of Windsor Essex is highly reliant on the sector with 5.5 percent of all local business establishments focused on Agri-business compared to 3.7 provincially. Employment in Agriculture has increased 13% from 3,000 in the first quarter of 2008 to 3,400 in the first quarter of 2010.⁴³

Farmers in Southwestern Ontario enjoyed record high yields of soybeans, corn, dry beans and canola in 2010. Soybean production increased 8.1% over 2009, with grain yields up 6% over 2009. Wheat was the only crop to experience a decrease in production.⁴⁴

A series of interviews with representatives from the Agri-Business sector locally ranging from growers, animal producers, food processors, wineries and agricultural product suppliers revealed a similar trend as manufacturing in terms of increasing skill requirements due to the incorporation of technology. Growers continue to seek literacy, numeracy and computer skills and individuals willing to perform the often physically demanding work over long hours during the growing season.

Food processors and greenhouse operators cite the same educational requirements for front line staff as well as increased skills related to the installation, operation, repair and maintenance of automated food processing equipment. Greenhouse operators are looking for those skilled in maintenance and energy efficiency. Several business establishments indicated the belief that their best opportunities exist with a more highly skilled workforce as equipment grows increasingly more complex and automated.

The southern part of Essex County, where much of the agricultural activity is located, will face particular challenges meeting these increasing knowledge and skill requirements. In the census agglomeration of Leamington, for example, the total workforce population age 15 and over numbers 39,025. Of this, 14,585 or 37.4 percent do not have a secondary school diploma. Another 10,675 or 27.4 percent earned an Ontario Secondary School Graduation diploma, but did not continue to post-secondary. Again, similar to the manufacturing sector, those involved in education indicate that, despite cooperative education options and specialty programming, it is difficult to attract youth to the sector.

⁴² *Ibid*, p. 17

⁴³ *Discover our Region's GPS – Growth. Prosperity. Sustainability., Windsor-Essex Regional Economic Roadmap*, WindsorEssex Economic Development Corporation, February 2011, p. 8

⁴⁴ Windsor-Sarnia Labour Market Monitor, Service Canada, Oct 2010

There was also the recognition of the need for increased management and business skills amongst senior managers to take advantage of global markets while meeting increased legislated quality and traceability requirements. One grower recognized the entrepreneurial opportunities within the industry indicating that the majority of innovation within the sector is imported from outside of Canada.

The University of Guelph is taking a leadership role in determining if there is interest in Southwestern Ontario in developing an Agri-Food economic cluster. Identifying that Agri-food makes up 13 percent of Ontario's Gross Domestic Product (GDP) and 40 percent of the GDP in rural Ontario, individuals leading this initiative are working to capitalize, strengthen and showcase the assets of the Southwestern Ontario Agri-food industry internationally while strengthening the internal capacity of the cluster. "It will represent the region under a single brand and connect all facets of the sector – from primary producers to processors and from industries to research entities."⁴⁵

More than 1,200 acres in Essex County are devoted to grape production and, for the first time in 30 years, grapes have become the most valuable fruit in Ontario in terms of farm-gate value. As of March 2011, there are 17 area wineries, up from 14 in 2010 or a 17.6 percent growth. Establishments range from family businesses to large corporate business establishments such as Colio Estate Wines and Pelee Island Winery, both ranking among Ontario's top five wineries by volume. Together, Pelee and Colio Wines have combined annual sales of more than \$20-million helping to create an industry that rivals other area agri-businesses. Estimates are that area wineries employ more than 400 people with an economic impact that continues to grow. The industry creates jobs in manufacturing, education and tourism. Colio Wineries estimates upward of 100,000 visitors each year and Pelee Island Winery in Kingsville and Pelee Island receive 150,000 visitors a year from all over the world.⁴⁶

In addition to contributing to the tourism sector, there is potential for agriculture-related innovation in bio-mass and bio-materials. The Ontario BioAuto Council identified the WindsorEssex region, with its expertise in agriculture and automotive manufacturing, as having the potential to take a leadership role in the development of the emerging field of bioauto technology. The Automotive Parts Manufacturers' Association confirmed that as the United States toughens environmental standards and attempts to reduce its reliance on petroleum, the global auto industry is considering the development and use of natural materials as they reduce the weight of a vehicle. Debra Mielewski, an engineer at Ford Motor Company confirmed that the automaker is currently using wheat straw grown in southern Ontario farms in the reinforcement of plastic products such as bins inside the Ford Flex. Mielewski stated that, "Companies like Ford are seeking partnerships in the auto and agricultural sector to enhance its position in the production of bio-materials. We actively seek out small companies to scale up

⁴⁵ Ontario's Food Cluster – a proposed Agri-Food Cluster, presentation conducted Dec 2010

⁴⁶ Canada's hidden treasure, *Windsor Star*, August 20, 2010

these technologies ... I can see fibre processors, injection moulding companies that are good at mixing natural fibres into plastics and injection mould components."⁴⁷

Tourism and Travel Services

In April 2010, the Ministry of Tourism issued a report on the projected economic impact that tourism jobs in Essex County in 2010 will have on the Ontario economy in terms of Gross Domestic Product (GDP), employment and taxes generated. The report estimates that visitors to Essex County will spend over \$1.6 billion dollars. The industry will contribute over \$1 billion to the local GDP and create over 18,400 direct, indirect and induced jobs generating a labour income of over \$686 million. In this case, direct jobs refers to jobs generated in businesses or sectors that produce or provide goods and services directly to travelers, e.g. accommodations, restaurants, transportation, retail business establishments, etc. Indirect jobs refers to jobs resulting from the expansion of demand from businesses or sectors that directly produce or provide goods and services to travelers, to other businesses or sectors. Induced impact refers to the impact associated with the re-spending of labour income and/or profits by those who work in the hospitality and tourism sector.⁴⁸

As of December 2010, there are 1,276 business establishments operating in industries including performing arts, spectator sports, heritage institutions, amusement and gambling, accommodation and food services or 6.1% of the 20,918 business establishments operating in WindsorEssex as of December 2010. Almost 99 percent of these companies employ less than 100 people. Caesar's Windsor, one of WindsorEssex's largest business establishments currently employs 2,600 full-time employees and an additional 785 part-time. The Essex Community Futures Development Corporation has recently completed a Cultural Asset Map for Essex County to serve as a resource for marketing and development of the sector.

Tourism Windsor Essex Pelee Island (TWEPI), www.visitwindsor-essex.com, represents operators throughout the local region. In their Strategic Plan 2010 to 2014, TWEPI articulated their vision to become [by 2014] a top-of-mind destination in Ontario by capitalizing on our regional assets and by presenting authentic experiences."⁴⁹ To achieve this vision, TWEPI has identified their core functions in building a united tourism industry through marketing and communications; visitor services; and research and product development. They have highlighted seven pillars of local tourism: meetings and conventions; arts and entertainment; heritage; gaming and nightlife; outdoor experiences; sports tourism; and wineries/agri-tourism.

At the same time as Tourism Windsor Essex Pelee Island is focusing on developing and marketing the tourism assets of WindsorEssex and Pelee Island, the Province of Ontario has

⁴⁷ Region touted as poised to lead bioauto industry, Grace Macaluso, *Windsor Star*, Sep 24 2010

⁴⁸ The Economic Impact of Tourism Jobs in Essex County in Essex in 2010, a report generated by the Ontario Ministry of Tourism's TREIM model, April 19 2010

⁴⁹ *Tourism Windsor Essex Pelee Island Strategic Plan 2010 to 2014*, F.J. Galloway Associates Inc., Mar 1 2010, p. 2

established 13 new tourism regions across Ontario to encourage collaborative efforts to build the provincial tourism industry at a regional level. WindsorEssex is located in Region One, an area encompassing WindsorEssex, Chatham-Kent, Sarnia-Lambton, London and Haldiman, Norfolk, Middlesex, Oxford and Elgin Counties. Each Regional Tourism Organization is an independent, industry-led non-profit organization responsible for building and supporting competitive and sustainable tourism regions. Although still in an organizational phase, the leadership “Transition Network Team” has identified seven areas of focus for Southwestern Ontario:

1. Agri-Tourism Development Strategy & Marketing Plan
2. Market Development Strategy
3. Motorcycle Tourism Marketing Campaign
4. Port, Coastal & Riverfront Community Development Plan and Investment Attraction Strategy
5. Regional Birding Initiative & Assessment
6. Regional Culinary Guide
7. Regional Recreation Experience & Assessment

Chris Ryan, then Chief Executive Officer of Tourism Windsor Essex Pelee Island, indicated that “this regional effort will differ from what’s been done locally by promoting tourism initiatives that cross several municipal boundaries in Southwestern Ontario such as black history destinations, upcoming War of 1812 anniversary celebrations and a Lake Erie scenic route.”⁵⁰ More information about the Regional Tourism Organizations in Ontario is available at www.mtc.gov.on.ca/en/regions/regions.shtml.

In July 2010, Workforce WindsorEssex interviewed over 65 leaders from the Hospitality and Tourism industry in WindsorEssex to gather their input into challenges and opportunities within the sector. A broad cross-section of the sector was interviewed including accommodations (hotel, motel, campgrounds); restaurants, taverns, retirement residences, travel services, indoor recreation (arcades, cinemas, bowling), gaming (casino, raceway, bingo), cultural (art gallery, symphony), festival, heritage, outdoor recreation and natural attraction, adult entertainment, conference and banquet venues, wineries, spirits, and transportation business establishments.

Interview participants reported an industry currently challenged by a slow global economy, passport regulations and a highly valued Canadian dollar. However, despite the challenges those in the industry are optimistic about their opportunities for growth with the strongest potential currently appearing to be retirement living, followed by natural resources and wineries. All agreed that labour market shortages will take place in the short and long-term and that they are looking for individuals who demonstrate a positive attitude and a keen sense of dedication to customer service.

Detailed results of this study are available online at www.workforcewindsorsex.com.

⁵⁰ *Ibid*, p. A3

Logistics / Warehousing and Cross Border Activities

Another opportunity related to transportation and the movement of goods and people identified by the WindsorEssex Economic Development Corporation is the Logistics, Warehousing and Cross Border Activities sector. WEEDC recognizes the sector as historically important with more than double the percentage of persons employed as customs, ship and other brokers compared to all other urban centres in Canada. The Windsor-Detroit corridor is already the busiest cargo corridor in Canada and with the new focus on developing the Windsor International Airport, there is opportunity for growth.⁵¹

Another way to refer to the sector is “Supply Chain Management”. The Canadian Supply Chain Sector Council defines Canada’s supply chain as “the planning, procuring, handling, managing, engineering and enabling of the movement of goods and services across Canada and around the world.”⁵² Supply chain *management* encompasses “the planning and management of all activities involved in sourcing and procurement, conversion and all logistics management activities. This also includes coordination and collaboration with channel partners including suppliers, intermediaries, third-party services providers and customers.”⁵³

Industry Canada, in their report, “Logistics and Supply Chain Management (SCM) Key Performance Indicators (KPI) Analysis”, reports that “as competition becomes more global, innovation is moving from a firm-to-firm level to a supply chain versus supply chain perspective. In order to compete against low cost countries (such as China), Canadian firms must develop supply chain agility in a JIT [Just in Time] and mass customization mode.”⁵⁴ Again, technology has an impact as “the adoption of logistics and SCM technology across supply chains is a key component for developing efficient collaboration networks”. However, SCM technology adoption is still at an infancy stage in Canada. Close to 54 percent of Canadian firms still have no SCM solutions in place.⁵⁵

Employment in the Transportation and Warehousing sector in WindsorEssex declined significantly between the first quarter of 2007 and 2010 from 8,200 to 7,400 or 22%.⁵⁶ This decrease was likely due to the decreased activity in sectors like manufacturing that generate activity within secondary services like the transportation and warehousing sector.

⁵¹ *Discover our Region’s GPS – Growth. Prosperity. Sustainability., Windsor-Essex Regional Economic Roadmap*, WindsorEssex Economic Development Corporation, February 2011, p. 18

⁵² Linking people, processes, products and services to the needs of Canada and the world, Canadian Supply Chain Sector Council, www.supplychaincanada.org

⁵³ Linking people, processes, products and services to the needs of Canada and the world, Canadian Supply Chain Sector Council, www.supplychaincanada.org

⁵⁴ Logistics and Supply Chain Management (SCM) Key Performance Indicators (KPI) analysis, A Canada/United States Perspective, Industry Canada, Oct 2006, p. 2

⁵⁵ *Ibid*, p. 3

⁵⁶ *Discover our Region’s GPS – Growth. Prosperity. Sustainability., Windsor-Essex Regional Economic Roadmap*, WindsorEssex Economic Development Corporation, February 2011

Closely tied to Logistics, Transportation and the movement of goods is the construction of the WindsorEssex Parkway and the Detroit River International Crossing (DRIC). The Windsor Essex Mobility Group (WEMG) was selected to design, build, finance and maintain the WindsorEssex Parkway. Construction of the Parkway is scheduled to begin in the summer 2011 and open to traffic in fall 2014. Beginning in January 2011, WEMG will start design work on the Parkway, engineering survey work and soil investigations. WEMG will continue to reach out to local contractors, businesses, unions and educational institutions. It is expected that the design and construction of the Parkway will provide a sizeable boost to regional and Ontario economies by directly and indirectly supporting and creating 12,000 project-related person years of employment, with the majority in the WindsorEssex region. At the peak of construction, WEMG estimates between 1,200 and 1,300 workers on the construction site daily.⁵⁷ Dr. Bill Anderson, Ontario Research Chair in Cross-Border Transportation Studies, at the University of Windsor and Workforce WindsorEssex Board member has received a three-year commitment from the Ontario Ministry of Transportation to study the economic and employment impact of the Windsor-Essex Parkway project.⁵⁸

With the construction of the WindsorEssex Parkway to begin in 2011, officials were pleased to hear newly-elected Michigan governor Rick Snyder supports the construction of a new bridge, the Detroit River International Crossing (DRIC). Canadian federal Transport and Infrastructure Minister, Chuck Strahl, indicated that “We are eager to work with Governor Snyder and the Michigan legislature to approve the authorizing legislation and to proceed with building the new crossing that will generate thousands of much-needed jobs and ensure the viability of this region’s economy long into the future”.⁵⁹

In order to assist those interested in employment opportunities created by the WindsorEssex Parkway project, Workforce WindsorEssex published a manual identifying primary and secondary occupations related to the project, the types of responsibilities associated with the occupations, educational pathways, related websites and examples of local employers. Workforce WindsorEssex surveyed the proponents bidding on the project. Two of the bidders responded anonymously indicating that there will be a demand for labourers, carpenters, form workers, machine operators, and other trades and that they are committed to hiring as many people from the local municipalities as possible.⁶⁰

⁵⁷ Financial close reached on the Windsor-Essex Parkway, News Release, Infrastructure Ontario, Dec 17 2010

⁵⁸ <http://web4.uwindsor.ca/units/pac/nvdailynews/nvdm.nsf/fulltoday/66DFB0DFBB129DB585257788002680B7>

⁵⁹ Gov. backs new bridge, Frances Willick, *Windsor Star*, Jan 20 2011

⁶⁰ Manual aids job seekers, Ellen VanWageningen, *Windsor Star*, Nov 3 2010

Growth Industries

Advanced Product Design and Development

Changing and emerging products combined with an emphasis on productivity gained through lean processes and technology integration is creating a demand for engineers and engineering technicians and technologists and the WindsorEssex Economic Development Corporation has identified economic opportunity in this sector. The integration of Advanced Product Design and Development with advanced manufacturing and diversification into new markets presents economic opportunity for the region. High-value opportunities are recognized in Computerized Numerical Control (CNC) methodologies, Computer-Integrated Manufacturing (CIM), robotics, automation, vision systems, and lean manufacturing processes applied within manufacturing areas ranging from automotive, aerospace, medical devices, defense, construction, mining, forestry equipment, nuclear energy, and water-related technologies and systems. Opportunity exists in global engineering and design systems, new market sectors and export to new geographic markets.⁶¹

In a study conducted by the Business Development Bank of Canada in October 2010, survey respondents indicated that “research and development is a priority and gives them a decided competitive edge with 81 percent indicating that they invest to improve productivity and keep up with the competition.”⁶² The importance of research and development and product design was cited by two local companies as a key to their success. Both Miceli Technologies, a producer of high-efficiency computerized numerical control machines, and Radix Controls specializing in custom software solutions for process control, cite innovation as allowing them to offer the product differentiation, cost-effective solutions for customers and client service that is “absolutely paramount to continuing success.”⁶³

The Ford Centre of Excellence in Manufacturing at St. Clair College and the University of Windsor’s Centre for Engineering Innovation are both well-positioned to graduate talent ready to transition from the classroom to industry. In January 2011, the University of Windsor was the recipient of a grant from the Canada Foundation for Innovation to create a manufacturing design studio. The facility will allow faculty and students to “develop product ideas, make prototypes, design virtual systems and develop their products.”⁶⁴

Members of the Manufacturing Sector Council for the Windsor Essex Economic Development Corporation demonstrated cautious optimism with regard to job creation during their meeting in late January 2011. Diversification measures are underway, but these are long-term strategies.

⁶¹ *Discover our Region’s GPS – Growth. Prosperity. Sustainability., Windsor-Essex Regional Economic Roadmap,*

WindsorEssex Economic Development Corporation, February 2011, p. 19

⁶² R & D a top priority, survey finds, Dave Hall, *Windsor Star*, Oct 21 2010

⁶³ R & D a top priority, survey finds, Dave Hall, *Windsor Star*, Oct 21 2010

⁶⁴ U of W funded for design studio, *Windsor Star*, Jan 24 2011

Opportunities are being pursued in sectors including aerospace, defense, renewable energy and composite materials. Companies are hiring for positions ranging from welding and machining for fabrication to engineering, management and sales. Regardless of the position, there was an overarching emphasis on the importance of employee attitude and adaptability.

In order to meet the realities of Original Equipment Manufacturer (OEM) and customer expectations combined with the need for competitiveness, employees are being trained and cross-trained to integrate new technologies and processes as they are introduced. Obtaining and retaining employment as well as career advancement is highly dependent on demonstrating flexibility and enthusiasm for new challenges.

Health and Life Sciences

The Canadian Institute for Health Information reports that 75 percent of the Canadian nursing workforce is comprised of registered nurses (RNs) followed by licensed practical nurses (LPNs). Over the past five years growth in the RN and LPN workforce has exceeded the rate of growth of the Canadian population. The number of registered nurses as a percentage of the health care workforce has decreased since 2005 while LPNs has experienced the highest growth rate, more than 18 percent. The number of nursing practitioners (NPs) in Canada has more than doubled between 2005 and 2009 increasing 22 percent between 2008 and 2009. Nursing practitioners make up only 0.7 percent of the total registered nursing workforce.⁶⁵

However, the longer-term data available for Registered Nurses demonstrates that there are fewer registered nurses today relative to the size of the population than there was 20 years ago.⁶⁶ As the percentage of our population over the age of 45 continues to grow, this is a matter for concern. The Canadian Nurses Association predicts a national shortfall of almost 60,000 full-time registered nurses within 12 years with a particular need for nurses in senior roles such as critical nurse specialists, clinical nurse educators, program managers and other management roles.⁶⁷

The number of physicians in Canada increased by 4.1 percent in Canada, more than triple the rate of growth of the Canadian population. In southern Canada, one doctor cares for an average of 438 people.⁶⁸ As of 2009, 79 physicians and 119 specialists have been attracted to the WindsorEssex region.⁶⁹

⁶⁵ Canada's nursing workforce grows 9 percent in five years, *Canadian Institute for Health Information*, Dec 09 2010, www.cihi.ca

⁶⁶ Ibid

⁶⁷ Recruiters bracing for shortage, *Windsor Star*, Nov 1, 2010

⁶⁸ More physicians than ever; greatest percentage increase in physicians in 20 years, *Canadian Institute for Health Information*, Dec 2, 2010, www.cihi.ca

⁶⁹ <http://www.hdgh.org/uploads/NewsEvents/newsarchive/ThisJustIn/2009/2009.02.10ThisJustIn.pdf>

In September 2012, St. Clair College will open the 100,000 square foot, 32 million dollar Centre for Applied Health Sciences, a state of the art teaching and learning centre. Currently, St. Clair College is teaching 1,780 students in 11 different Health Science areas. The new Centre will add 6 new programs including Sonography Technology, Respiratory Technology, Cardiovascular Technology, Sterile Processing Technician, Biomedical Instrumentation and Forensic Technology increasing enrollment in Health Sciences to 2,000 students.

The Windsor Essex Economic Development Corporation cites Health and Life Sciences as an area of opportunity for development of an integrated medical community leveraging our manufacturing and health expertise and research capacity for the development of advanced medical devices, systems and technology to assist in patient treatment.⁷⁰ St. Clair College's membership in the Colleges Ontario Network for Industry Innovation (CONII) focused on health and life sciences applied research, the St. Clair College Centre for Applied Health Sciences and the University of Windsor Schulich School of Medicine and Centre for Engineering Innovation create an important infrastructure for advancing opportunities in this sector.⁷¹

Emerging Industries

Aerospace and Maintenance, Repair and Overhaul (MRO)

The Windsor Essex Economic Development Corporation has also singled out aerospace manufacturing along with Maintenance, Repair and Overhaul (MRO) as another area for targeted focus. The Canadian aerospace industry has been affected by the softening of the global economy, but is picking up speed. In their Industry Outlook issued in late November 2010, the Conference Board of Canada predicted gains in 2011 that will depend heavily on demand from airlines and emerging markets noting that the industry won't reach full recovery from the 2008-09 global recession until 2014.⁷²

Northstar Aerospace Inc., Valiant Corp. recognized as Boeing Supplier of the year, TechniCut Tool Inc. and Platinum Aerospace are examples of companies currently meeting the manufacturing requirements of the industry including segregated manufacturing (aerospace parts must be separate from automotive or other sector parts), lean methods of manufacturing, posted metrics and accreditation to the AS9100 quality management standard for aerospace.⁷³ Ironically, TechniCut Tool Inc. reported one of their challenges was in finding skilled employees and apprentices interested in skilled trades.⁷⁴

⁷⁰ *Discover our Region's GPS – Growth. Prosperity. Sustainability., Windsor-Essex Regional Economic Roadmap*, WindsorEssex Economic Development Corporation, February 2011, p. 18

⁷¹ *Ibid*, p. 35

⁷² *Aerospace recovery slow*, Business Briefs Postmedia News, *Windsor Star*, Dec 01 2010

⁷³ *Aerospace Industry soars in Windsor*, Lindsey Rivait, *In Business*, June 2010, p. 7

⁷⁴ *Ibid*, p. 9

In an article published by *In Business Magazine* in June 2010, Airport General Manager, Federica Nazzani confirmed that “You’ve got a number of companies that are working in the automotive sector that have a very high-skilled labour force, certain equipment and tools and capacity in their plants to look at how they can use their expertise for other sectors like aerospace”.⁷⁵

In addition to aerospace manufacturing, significant opportunity exists within aerospace maintenance, or what is referred to as Maintenance, Repair and Overhaul (MRO). On January 15, 2011, it was announced that a 143,000 square foot hangar will be built at Windsor Airport by 2012, creating a maintenance-repair-overhaul (MRO) industry locally. The facility, run by Premier Aviation, will create 200 skilled jobs within the first two years and up to 500 jobs within the first seven years.⁷⁶

When interviewed by *In Business Magazine* in June 2010, Federica Nazzani reported that constrained financial markets had lead to airlines putting their efforts into maintaining their fleet instead of buying new aircraft. MRO is, however, highly labour intensive and one of the challenges is recruiting talent. Nazzani explained that, “Because we aren’t known for aerospace, much of the talent has had to come from outside and it’s always more expensive and more difficult to recruit from outside. There is a demand right now for aircraft engineers and for maintenance technicians.”⁷⁷

Both the University of Windsor and St. Clair College have committed to meeting the human resource requirements of the industry. St. Clair College is currently in discussions with Premier Aviation to develop customized training for potential employees when the plant opens in the next fifteen months. In addition, St. Clair College is developing two new programs to be launched in September, 2012, Avionics Maintenance Technician and Aircraft Maintenance Technician. This will increase College enrollment by an additional 60 students with potential growth to 200 students in the first 3 years of program delivery.

The University of Windsor is preparing to launch its first aerospace engineering program through its mechanical engineering program. Robert Gaspar, acting dean at the faculty of engineering, indicated that “the course could go hand-in-hand with aerospace mechanical courses to be offered at St. Clair College”, stating, “It’s the perfect combination. They’d [students] have the hands-on expertise and the theory to go along with it.... We are looking at offering an honours certificate program to support college-trained graduates”.⁷⁸ Classes could also begin by September 2012.

⁷⁵ Aerospace Industry soars in Windsor, Lindsey Rivait, *In Business*, June 2010, p. 6

⁷⁶ Airport jobs could grow to 500 – New industry is born, Craig Pearson, *Windsor Star*, Jan 15 2011

⁷⁷ Aerospace industry soars in Windsor, Lindsey Rivait, *In Business*, June 2010, p. 6

⁷⁸ U of W to launch aerospace program, *Windsor Star*, Jan 20 2011

Renewable Energy

In targeting Renewable Energy as a key sector for economic development in WindsorEssex, the WindsorEssex Economic Development Corporation points to Ontario's Green Energy Act as one of the most aggressive in North America focused on building the province's renewable energy industry with 60 percent local content mandated for new projects. This, along with the advantage of our geographic location, creates potential for the manufacturing of components and development of composite materials, construction, maintenance and commercialization of engineering and technology enhancements to existing systems.⁷⁹ Local entrepreneurs embraced the opportunity establishing a number of local business establishments including Green Sun Rising, WindTronics, Schletter Inc. and Unconquered Sun Solar Technologies.

In November 2010, the Windsor Star reported that the WindsorEssex Economic Development Corporation had begun to track direct and indirect jobs created as a result of renewable energy activity. At that time, it was revealed that as many as 600 jobs had been created in the region's growing wind and solar renewable energy sector in 2010 or between five and ten percent of the 6,000 new jobs created in WindsorEssex.⁸⁰

Since then, International Power Canada has begun installation of a 49 megawatt wind farm project in Pointe-aux Roches near St. Joachim, the first to be built exclusively from Ontario-made steel. The project, expected to be operating in mid-2011, will create 126 new jobs in Essex County.⁸¹ Company officials indicated that they will hire people in Ontario to maintain operating turbines and would require people with heavy electrical and mechanical skills. The lubrication of parts and replacement of hoses were cited as examples of the type of work done by those maintaining the turbines.⁸²

Recognizing the highly skilled workforce available in WindsorEssex and access to North American markets through available road, rail and short-sea shipping, Samsung and partner C.S. Wind announced in December 2010, that they would open a wind turbine plant in Windsor, creating 300 direct and numerous spin-off jobs. The agreement struck between Samsung and the province of Ontario mandates four major manufacturing plants in operation by 2015, creating 16,000 direct and indirect jobs. Samsung has also committed to using Ontario-made steel to build the wind turbines. The manufacturing site to be located in WindsorEssex will build large turbine tower structures up to 200 feet long and expects to begin operations in 2012.⁸³

In October 2010, Workforce WindsorEssex released an online study on the wind and solar sector examining business and employment opportunities as well as education and skills

⁷⁹ *Discover our Region's GPS – Growth. Prosperity. Sustainability., Windsor-Essex Regional Economic Roadmap*, WindsorEssex Economic Development Corporation, February 2011, p. 20

⁸⁰ Energy sector creating jobs, *Windsor Star*, Nov 22 2010

⁸¹ Wind farm rises near St. Joachim, Sonja Puzic, *Windsor Star*, Dec 01 2010

⁸² AM800 CKLW radio report, Dec 01 2010

⁸³ Deal done on Samsung plant here, Dave Battagello, *Windsor Star*, Dec 01 2010

requirements. In both solar and wind energy, employment opportunities were identified in Planning and Design; Construction and Installation; and Operations and Maintenance as well as Manufacturing. In the case of both solar and wind energy, employment opportunities could be created for someone currently working in an existing occupation or through a newly created position within an existing occupation or new occupations.

Planning and Design - (Renewable Energy)

Examples of impacted occupations involved in planning and design of wind turbine operations include mechanical, electrical and civil engineers; project managers; surveyors, environmental technicians, geographic information system (GIS) specialists, lawyers, public relations specialists, sales, administration and financial analysts.

Solar energy systems will require a similar range of support services along with solar designers, system designers, structural engineers, engineering technologists or technicians.

Construction and Installation – (Renewable Energy)

At the construction and installation phase of wind turbine development, those working in the construction sector as concrete/cement workers, crane operators, electricians, heavy equipment operators, ironworkers, truck drivers, safety as well as supervisors, project managers and contract administrators could see opportunity.

Solar installations will also require supervisors, electricians, solar thermal installers, plumbers, HVAC technicians, roofers and quality assurance personnel.

Operations and maintenance – (Renewable Energy)

Finally, during operations and maintenance, those working as operators, wind turbine technicians, electrical engineers, financial analysts and operations managers will be impacted. In solar, just like the operations and maintenance of producing electricity, limited employment opportunities will be generated in comparison to planning and design and installation depending on the size and complexity of the installation.

Manufacturing – (Renewable Energy)

The types of occupations found in manufacturing of large wind turbines or components would be traditional manufacturing occupations including mechanical engineers, mechanical technologists and technicians, mechanical trades, electrical engineers, electrical and electronic trades, welders, labourers, sales, and supervision.

In the solar sector, photovoltaic inverters and mounting systems were identified as the equipment most likely to be manufactured in Ontario. While no specific occupation or employment directly related to the solar sector would be required to manufacture these components, it would impact mechanical engineers and technologists for design, quality control

personnel and those in the metal working sector performing computerized numerical control (CNC) machining, welding, drilling and milling.⁸⁴

In a series of videos further showcasing business and employment opportunities in the sector, Rakesh Naidu of the WindsorEssex Economic Development Corporation explains, “People shouldn’t think the [job] requirements are totally different than what they are used to. We’ll still need mechanical engineers, electrical assemblers and welders. Their core skills can be used but adapted to this [renewable energy] sector. One doesn’t have to relearn, but they have to adapt.”⁸⁵

Creative Industries / Digital Media / Information Communication and Technology

Numerous studies including Richard Florida’s groundbreaking work, *Rise of the Creative Class* (2004) have showcased the important connection between creativity, innovation, and arts and economic development. Ross Devol, Director of Regional Economics at the Milken Institute, in his 2009 report “*North America’s High-Tech Economy: The Geography of Knowledge-Based Industries*” states, “High tech industries are an important and sustaining anchor for regions to survive the slump and to rebuild their economies around high-wage jobs. Every sector has been impacted by the current economic downturn, but high-tech centres will come out on top.”⁸⁶

Building Creative Talent in WindsorEssex, a report developed collaboratively by the Windsor Essex Economic Development Corporation, WEtech Alliance and Workforce WindsorEssex, examines opportunities within creative industries and cites economists including Robert Solow, Robert Lucas and Paul Romer as having shown that technology is key to economic growth, stating “Technology improves communication between people and enhances both physical and cognitive productivity. Regions that develop innovations and turn them into marketable products are able to reap significant local benefits.”⁸⁷

The WindsorEssex Economic Development Corporation has identified Creative Industries/Digital Media as an area where numerous opportunities exist. Not only do the Arts attract and retain knowledge workers, but they contribute to the tourism sector. The Digital

⁸⁴ Additional written information and local video about the wind and solar sectors including employment opportunities, education and skills and available training are available at <http://www.workforcewindsorEssex.com/featured/renewable-energy/>

⁸⁵ Energy sector creating jobs, *Windsor Star*, Nov 22 2010

⁸⁶ Silicon Valley continues to lead North American metros in strength of its high-tech industry, but growth in other regions shows integration across continent, says Milken Institute study, <http://www.milkeninstitute.org/newsroom/newsroom.taf?cat=press&function=detail&level1=new&ID=160>, Jun 2 2009

⁸⁷ Building creative talent in WindsorEssex, WindsorEssex Economic Development Corporation, WEtech Alliance and Workforce WindsorEssex, July 2010, p. 5

Media sector involves a wide-variety of professions including technicians and software developers. Digital signage, entertainment and AV equipment are also cited for their potential.⁸⁸

The 2006 Statistics Canada Census reported that WindsorEssex had one of the lowest concentrations of people working in the Computer and Information Technology sector with only 161.8 people per 10,000 in the WindsorEssex workforce. There are currently 250 firms in the WindsorEssex region involved in the software and computer services industry with the majority in computer systems design and related services.⁸⁹

However, there has been some positive momentum in the sector recently. In addition to being named one of the seven smartest communities by the Intelligent Community Forum, the WEtech Alliance (formerly Softech Alliance Network) announced a new format focused on “driving the growth of Windsor Essex’s technology-centric companies and entrepreneurs through leadership, connections and promotion.”⁹⁰ As a member of the Ontario Network of Excellence, the industry-led organization is developing and deploying a wide range of programs and services to support the Information and Communication Technology sector.

A survey of WEtech Alliance members conducted by WEtech Alliance and Workforce WindsorEssex in January 2011 indicated existing labour market shortages. Almost 50 percent of business establishments operating in the Information and Communication Technology sector locally indicated that they currently have positions unfilled with programmers, help desk and sales professionals in short supply. Over 70 percent of respondents expect to hire in the next two years and indicate that the lack of available talent has constrained business growth.

Finally, the Digital Media and ICT sector have spawned significant entrepreneurial activity over the past year. Spry Agency co-owner, Kevin Gervais, envisions downtown Windsor as a high-tech centre of innovation with the company focusing on web design, web applications development, social media marketing, automated messaging, and search engine optimization.⁹¹ Another local digital media company, Red Piston, is making inroads in the competitive field of gaming applications. Partners Jakub Koter, Andy Kale and Ali AIAasm introduced a game, Banzai Blowfish, which was approved by Apple Corp. for use of iPhones, iPads and iPods days after its release. In addition to gaming apps, the company has developed applications for recording artists.⁹²

⁸⁸ *Discover our Region’s GPS – Growth. Prosperity. Sustainability., Windsor-Essex Regional Economic Roadmap*, WindsorEssex Economic Development Corporation, February 2011, p. 17

⁸⁹ *Discover our Region’s GPS – Growth. Prosperity. Sustainability., Windsor-Essex Regional Economic Roadmap*, WindsorEssex Economic Development Corporation, February 2011, p. 32

⁹⁰ <http://www.softechalliance.ca/meet-wetech/>

⁹¹ Banking on innovation, Dave Hall, *Windsor Star*, Nov 26 2010

⁹² Local company develops game app, Dave Hall, *Windsor Star*, Jan 20 2011

Changes in the Local Labour Market

In reviewing labour market supply and demand as well as activities that have taken place within a cross-section of sectors since the Integrated Local Labour Market Plan was released in August 2009, it is clear that two significant changes have taken place.

1. Great inroads have been made in diversification of the local economy.

The manufacturing sector, the hallmark of our economic prosperity for decades, is rapidly diversifying into new markets, creating new innovative products, and using streamlined processes and emerging technology in order to establish and retain a competitive position within the global supply chain. WindsorEssex is one of the leading areas for renewable energy investment creating and altering jobs not only in manufacturing, but also the planning, design, construction and installation of wind and solar structures. The WindsorEssex Parkway and Detroit River International Crossing will bring 1000's of direct and in-direct jobs to the local economy and activity in the Aerospace sector impacts not only manufacturing, but maintenance, repair and overhaul of aircraft.

The caliber of our highly-skilled workforce was one of the leading factors that attracted economic activity to our region. However, there continues to be a need to ensure that our workforce has the knowledge and skills required to meet the needs of the changing economy. Meeting these ongoing and changing knowledge and skills requirements illustrate the vital contribution that our educators continue to make as well as the important connection between industry, education and the workforce.

2. A net out-migration of workers from WindsorEssex between 2003 and 2008

The Integrated Local Labour Market Plan identified that during the period from 2002 to 2007 there was a net in-migration of 2,614, with an increase at all age levels. Current Taxfiler data released in December 2010 showed that for the period of 2003 to 2008 a net out-migration of 7,830 occurred with the largest decline of over 5,000 people in the primary working years ages 25 to 44. The second greatest out-migration took place amongst those between the ages of 18 and 24 with 1,681 individuals leaving the region.⁹³ Annual demographic estimates released by Statistics Canada project a decline in the population of the Windsor Census Metropolitan (CMA) of 3,400 between Jul 1 2009 and Jul 1 2010.⁹⁴

“Building Creative Talent in WindsorEssex” was authored in July 2010 by the WindsorEssex Economic Development Corporation, WEtech Alliance and Workforce WindsorEssex, as a business case for developing and retaining creative talent in WindsorEssex. The report identified the importance of post-secondary institutions as a driver of success in the knowledge

⁹³ Taxfiler data 2010, Statistics Canada

⁹⁴ Annual Demographic Estimates: Subprovincial Areas 2005 to 2010, January 2011

economy; however, the ability to retain students after they completed their education was seen as equally important.

The report draws attention to the Brain Drain/Gain Index (BD/GI) developed by the University of Toronto's Martin Prosperity Institute (MPI) as an attempt to gauge "brain drain" at a metropolitan level. The index divides the percentage of the population age 25 and older with at least a bachelor's degree by the percentage of the population age 18 to 34 currently attending university. According to this index, WindsorEssex is losing more talent than it is gaining. It's BD/GI score is less than 1, meaning its university population is larger than its population of recent graduates. While other mid-sized regions find themselves in a similar position, a focus on retaining human capital generated by the university is necessary to ensure opportunities for economic growth.⁹⁵

The WindsorEssex Economic Development Corporation, WEtech Alliance and Workforce WindsorEssex have formed WindsorEssex After 5, to help raise the profile of young entrepreneurs, professionals and post-secondary students linking them into local business networks.

WindsorEssex After 5 is collaborating with Young Professionals Windsor (YPW) also launched in 2010. This non-profit organization was established to "create a vibrant and connected community of young leaders in WindsorEssex through business networking and social events that foster professional development."⁹⁶ They have established a vision of youth retention in WindsorEssex by:

- Providing networking and other professional development opportunities for young leaders
- Informing young professionals of local employment opportunities
- Provide programming and resources that prepares or advances the careers of young professionals
- Promoting local events and programs of interest to young professionals⁹⁷

It can be argued that much of the future success and growth of our community depends on our youth. They provide the community's vitality and it is this group that has the greatest stake in the continued economic success of Windsor and Essex County.

⁹⁵ Building creative talent in WindsorEssex, WindsorEssex Economic Development Corporation, WEtech Alliance and Workforce WindsorEssex, July 2010, p. 6

⁹⁶ www.ypnetwork.com/aboutus

⁹⁷ Ibid

Action Plan 2011 - 2012

Despite the changes that have taken place in the local labour market since the Integrated Local Labour Market Plan was released in 2009, the workforce development priorities established by the community at that time remain valid today.

The Action Plan contained within the Integrated Local Labour Market Plan identified actions to be taken over a three-year period to address each of the five priorities. The following section provides an update to the plan, identifying actions taken over the past year and strategies for 2011-2012.

Please note that a Glossary of Acronyms for community partners is included at the conclusion of the plan.

Priority # 1

To ensure the workforce has the knowledge and skills required to support the changing economy.

The examination of our changing economy clearly demonstrates ongoing diversification within established industries; new knowledge and skills necessary to promote the expansion of growth industries; and to take advantage of the exciting potential of emerging industries. Strategic actions that ensure the ongoing availability of a workforce that has the knowledge and skills required to support and sustain economic growth continues to be a foundational priority for Workforce WindsorEssex.

Priority # 1:			
To ensure the workforce has the knowledge and skills required to support the changing economy.			
Key Strategies:			
<ul style="list-style-type: none"> • Analyze indicators to identify sectors where job creation is taking place or predicted • Get Specific - Talk to employers about what the opportunities are in these sectors and what skills are required to access these jobs • Communicate study results to our existing and future workforce 			
Actions Completed – 2009 - 2010			
Action	Partners	Timeline	Outcome
Research into career and business opportunities as well as knowledge and skills requirements within wind and solar energy	WEEDC GECDSB	Oct 2010	An online print and video industry resource
Research into direct and indirect career opportunities as a result of the Windsor Essex Parkway	WCA BTC	Oct 2010	A print and online occupational resource
Research into career opportunities and knowledge and skill requirements within Hospitality and Tourism	TWEPI SWOIEC SCC	Dec 2010	A print and online occupational resource
Engaging education providers to ensure training programs/courses are available to meet immediate and longer-term knowledge/skill requirements	SCC U of W GECDSB WECDSEB CSDECSO CSDCSO PCC's	Dec 2010 and ongoing	Meetings/presentations with St. Clair College, University of Windsor; Private Career Colleges, Greater Essex County District and Windsor Essex Catholic District School Boards

Priority # 1 continued...

Actions In Progress – 2011 - 2012			
Action	Partners	Timeline	Outcome
Development of a skill inventory database to 1. Quantify the skills of the available workforce and 2. Create a skill baseline for future training development	City of Windsor LACs WEEDC	Apr 2010 to Mar 2011	<ul style="list-style-type: none"> • Skill Inventory Database with over 500 resumes from manufacturing and food processing • Liaison with WEEDC to promote skilled workforce
Renewable Energy Skills Initiative. Working with renewable energy employers in WindsorEssex to identify knowledge and skill requirements. Compare requirements with skills inventory contained in database	Renewable Energy Employers WEEDC ECFDC Educators	Jan 2011 to Jan 2012	<ul style="list-style-type: none"> • Gap analysis between skills required by industry and those of available workforce • Available training identified by educators • Discussions re training to meet specialized needs
Promising Sectors and Occupations in WindsorEssex Manual	Employers Emp. Org's. WEEDC ECFDC Educators ESP	Jan 2011 to Jan 2012	A print and online manual in English and French identifying and describing specific occupations predicted to experience labour market shortages in the next 3 years
Monthly Survey of local employers identifying occupations where hiring and lay-offs are taking place in all sectors of the economy in WindsorEssex	CofC's HRPAW WEEDC WEtech	Ongoing	Monthly survey results released online in conjunction with Statistics Canada monthly labour force data
Economic Roadmap	WEEDC	Jan 2011	Plan launched Feb 2011
Proposed Strategic Action 2011-2012			
Action	Partners	Timeline	Outcome
Rising Stars Conference to recognize high achieving youth and link graduating students with employers	WFWE U of W SCC	Apr 2011 to Mar 2012	Demonstrate local opportunity for youth by linking minimum of 50 graduating students with a minimum of twenty employers
Continue to support initiatives with WindsorEssex After 5 and Young Professionals Windsor	WFWE WEEDC WEtech	Apr 2011 to Mar 2012	Linkages established youth to-youth and youth-to-business mentors
Implementation of Economic Development Strategic Roadmap	WEEDC	Ongoing	Building the 'talent pipeline' as a strategic building block for regional economic development
Retention of Young Talent in WindsorEssex	WEtech WEEDC WFWE After 5 YPW	Ongoing	Increase retention and attraction of talent in WindsorEssex

Priority # 2

Ensure the availability of relevant and current labour market information.

One of the most important mandates of any workforce development body is to facilitate and encourage the critical connection between the current and future workforce, employers and educators. Members of the labour force need to know what knowledge and skills are required by employers. Educators have the vital responsibility of ensuring the availability of educational pathways. The second priority established by Workforce WindsorEssex focuses not only on forming and sustaining these connections, but ensuring that meaningful information is conveyed to those who need to receive it.

Priority # 2:			
Ensure the availability of relevant and current labour market information			
Key Strategies:			
<ul style="list-style-type: none"> • Communicate the “so what” information on the changing economy and workforce requirements to: <ul style="list-style-type: none"> • Business owners competing locally and globally to grow their business • Workers making continuous learning or re-employment decisions • Young people making career decisions • Educators ensuring leading edge training and education • Counsellors providing meaningful advice • Communicate information through medium relevant to various audiences 			
Actions Completed – 2009 - 2010			
Action	Partners	Timeline	Outcome
Creation of newsfeed website ensuring information is posted promptly and meeting needs of key audiences: Youth & Parents; Educators & Services Providers; In the Workplace	WFWE	Jun 2010 and Ongoing	<ul style="list-style-type: none"> • Website viewed as the ‘go to’ place for accurate and timely labour market information • Data analysis showing website usage increasing monthly
Communicate information through mediums relevant to all audiences	WFWE Social media users	Jun 2010 and Ongoing	<ul style="list-style-type: none"> • Social media used daily
Development of a Strategic Plan to ensure youth have access to labour market information	Educators Youth Service Providers	Aug 2010	Plan available online

Priority # 2 continued...

Actions In Progress – 2011 - 2012			
Action	Partners	Timeline	Outcome
Ongoing update of website and social media outreach.	WFWE	Ongoing	Accurate and timely data with monthly usage rates climbing
Update Local Labour Market Plan	WFWE	Mar 2011	Updated plan available in print and online
Plan and implement a youth led career conference	Youth service providers U of W	Sep 2010 to Apr 2011	Event planned by university and secondary students attended by 120 youth and teachers
Promising Sectors/ Occupations Report developed into presentation	WFWE Educators ESP	Jan 2011 to Dec 2011	Material available to community presenters Train-the-Trainers conducted
Proposed Strategic Action 2011-2012			
Action	Partners	Timeline	Outcome
Ongoing connection between employers, educators and those providing career advice	WFWE	Ongoing	A minimum of 5 presentations by WFWE to educators or business community A minimum of 12 interviews or meetings connecting educators and business
Ongoing update of website and social media outreach. Increase French content.	WFWE	Ongoing	Accurate and timely data with monthly usage rates climbing by 25%

Priority # 3

Emphasize the importance of Attitude, Skills and Knowledge (ASK) in the workplace. Creating and supporting the “entrepreneurial employee”.

Whenever we speak to employers, they consistently comment on the importance of employee attitude. They are looking for a high degree of flexibility, creativity and problem-solving in their employees – from front line to management. In the past year, we increasingly hear of these types of characteristics described as the “entrepreneurial employee”. Entrepreneurial employees are results-oriented, risk-taking, multi-tasking teamplayers.⁹⁸ However, developing, managing and retaining this type of employee takes skill on the part of employers who must establish a work environment that supports this type of high-energy employee.

Priority # 3:			
Emphasize the importance of Attitude, Skills and Knowledge (ASK) in the workplace. Creating and supporting the “entrepreneurial employee”.			
Key Strategies:			
<ul style="list-style-type: none"> • Support individuals in understanding the importance of attitude in the workplace • Assist employers to establish workplaces that promote, recognize and reward teamwork, adaptability and creative problem-solving 			
Actions Completed – 2009 - 2010			
Action	Partners	Timeline	Outcome
Implementation of an award to the business community recognizing employers who best demonstrate an understanding of the importance of workforce development	C of Cs WFWE	Jan 2011 to Mar 2012	<ul style="list-style-type: none"> • “Invested in a World-class Workforce” Awards presented to Southland Insurance and Diageo Canada
Actions In Progress – 2011 - 2012			
Action	Partners	Timeline	Outcome
Building the Entrepreneurial Workforce – A Toolbox for Employers and Employees	HRPAW WEEDC ECFDC C of Cs	Jan 2011 to Dec 2011	<p>A toolbox for:</p> <ul style="list-style-type: none"> • Employers assisting them to establish a workplace that develops and rewards entrepreneurial workers • Employees assisting them to recognize, develop and promote entrepreneurial behaviours

⁹⁸ Seven characteristics of highly effective entrepreneurial employees, Joe Hadzima Jr., Boston Business Journal, 2005

Priority # 3 continued...

Proposed Strategic Action 2011-2012			
Action	Partners	Timeline	Outcome
Develop and implement “Human Library” series recognizing “Spirit of Innovation”	WFWE City of Windsor Library Employer Educators	Apr 2011 to Mar 2012	Three human library events showcasing community leaders for perseverance, innovation and leadership
Growth of the “Invested in a World Class Workforce” Employer Awards	C of Cs WFWE	Jan 2011 and Ongoing	A minimum of two awards presented annually in Essex County recognizing employers practicing work-force development strategies

Priority # 4

Support of entrepreneurship, research & development and the growth of small and medium-sized business.

When identifying this as a priority for workforce development, the community recognized that the workforce has a role to play in encouraging entrepreneurialism and innovation.

Priority # 4:			
Support of entrepreneurship, research & development and the growth of small and medium-sized business			
Key Strategies:			
<ul style="list-style-type: none"> • Promote and nurture entrepreneurs in the community • Facilitate collaboration that encourages commercialization of innovation in WindsorEssex • Support small business retention and growth 			
Actions Completed – 2009 - 2010			
Action	Partners	Timeline	Outcome
Human Resource Peer to Peer group addressing common issues within the ICT sector	WEtech WFWE	May 2010 to Dec 2010	Guest speakers addressing topics like behavior-based interviews and workplace violence legislation
Catalogue and communicate programs and services that support business	MTCU MEDT WEEDC WFWE	Jun 2010 and Dec 2010 Ongoing	A matrix of programs and services updated semi-annually. Distributed in print and online.
Proposed Strategic Action 2011-2012			
Action	Partners	Timeline	Outcome
Good to Great Teams	WEtech WFWE	Apr 2011 and Ongoing	Peer to Peer group to address workforce development issues of small and medium-size businesses
Human Resource Manual for Small and Medium-sized Businesses (SME)	WFWE HRPAW U of W	Apr 2011 to Mar 2012	Development of a human resource manual as a resource for SMEs without dedicated human resource professional on staff

Priority # 5

Integrating immigrants into the WindsorEssex labour force leveraging knowledge, skills and experience.

The City of Windsor led community partners through a process entitled the “Local Immigration Partnership”, combining extensive research with input gained through focus groups and key informant interviews to identify challenges and opportunities faced by newcomers into WindsorEssex. Challenges at the community level included accessing information and services, coordination within settlement services, culturally-competent mental health services and the need to increase community awareness of key issues faced by newcomers. At the individual level, newcomers identified language, social and employment barriers. As a result of the study, community partners have formed a Local Immigration Partnership Council to identify and implement strategic actions.

Priority # 5:			
Integrate immigrants and newcomers into our labour force leveraging their knowledge, skills and experience.			
Key Strategies:			
<ul style="list-style-type: none"> • Support the implementation of the Local Immigration Partnership (LIP) for WindsorEssex • Work with LIP developers to identify the possible contribution of Workforce WindsorEssex 			
Actions Completed – 2009 - 2010			
Action	Partners	Timeline	Outcome
Completion of the Local Immigration Partnership Plan and member of the Local Immigration Partnership Council	C of W MCC NCCE SECC WEST YMCA CBoréal WFWE WWWIWW	Jan 2009 to April 2010	Publication of the Local Immigration Partnership Recommended Strategies and Action Plan

Priority # 5 continued...

Actions in Progress – 2011 - 2012			
Action	Partners	Timeline	Outcome
Action plans for three strategic areas of concentration under development: <ol style="list-style-type: none"> 1. Coordination of immigrant services 2. Strengthen local awareness and capacity to integrate immigrants 3. Increasing labour market access for immigrants 	C of W Immigrant Service Providers Windsor Library	Jan 2011 to Dec 2012	Action plans created and implemented for each of three areas of focus
Proposed Strategic Action 2011-2012			
Add resumes of immigrants to Resume Skills Database inventorying knowledge and skills available in Windsor Essex and identifying common training and service requirements	C of W MCC NCCE SECC WEST YMCA CBoréal WFWE WWWWIW Windsor Public Library ESP	Apr 2011 to Feb 2012	<ul style="list-style-type: none"> • Integrate 400 resumes of immigrants to WindsorEssex within the Resume Skills Database • Identify and implement a minimum of one common training or employment service intervention

Glossary of Acronyms

BTC	Building Trades Council, WindsorEssex
CBoreal	College Boréal
C of Cs	Chambers of Commerce
C of W	City of Windsor
CSDCSO	Conseil scolaire de district du Centre Sud-Ouest
CSDECSO	Conseil scolaire de district des écoles catholiques du Sud-Ouest
ECFDC	Essex Community Futures Development Corporation
ESP	Employment Services Providers
GECDSB	Greater Essex County District School Board
HRPAW	Human Resources Professional Association Windsor District
LACs	Labour Adjustment Committees
MCC	MultiCultural Council of Windsor Essex
MEDT	Ministry of Economic Development and Trade (Ontario)
MTCU	Ministry of Training, Colleges and Universities (Ontario)
NCCE	New Canadian Centre of Excellence
SCC	St. Clair College of Applied Arts and Technology
SECC	South Essex Community Council
SWOIEC	South Western Ontario Industry Education Council
TWEPI	Tourism Windsor Essex Pelee Island
U of W	University of Windsor
WCA	Windsor Construction Association
WECDSB	Windsor Essex Catholic District School Board
WEEDC	WindsorEssex Economic Development Corporation
WEST	Windsor Enterprise Skills Training of Windsor Inc.
WEtech	WindsorEssex Technology Alliance
WFWE	Workforce WindsorEssex
WWWIWW	Windsor Women Working with Immigration Women
YMCA	YMCA of Windsor and Essex County
YPW	Young Professionals Windsor

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