Welcome

Windsor-Essex:
TAKING CHARGE OF CHANGE

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WindsorEssex
ECONOMIC DEVELOPMENT CORPORATION

About the Facilitator: David Campbell

- Over 20 years in the economic development field
- Over a decade as an economic development consultant
- Has worked with over 40 regional economic development agencies in five provinces and two U.S. states:
  - Strategic planning
  - Investment attraction/community marketing
  - BR&E program development
  - Business case development
  - Other research
- Also has worked with Invest in Canada, Industry Canada, Agriculture & Agrifood Canada, etc.
- Authors an online blog and a twice weekly column on economic development topics in New Brunswick's top newspaper.

Agenda

Activity:	Time:
Introductions	8:30 - 8:45 AM
Setting the context for updating the strategic plan	8:45 - 9:00 AM
Strategic plan review	9:00 - 9:30 AM
Break	9:30 - 9:45 AM
Roundtable discussions	9:45 - 10:45 AM
Roundtable findings and general discussion	10:45 - 11:45 AM
Lunch	11:45 - 12:30 AM
Integration: Roadmap elements - group discussion	12:30 PM - 1:30 PM
Wrap up and timeline	1:30 - 2:00 PM

Objectives for Today

- To introduce the new leadership team at the WEEDC and re-engage business and community stakeholders.
- To begin to develop the concept of a broader, regional roadmap for the region's economic development.
- To consult with subject-matter experts and garner input into specific opportunities or roadblocks to economic development in the region.
- To build community support for any new direction coming out of plan.

The Need for a Regional Economic Development Roadmap

- Significant economic upheaval in past 2+ years.
- Good time to revisit the strategic plan.
- Recalibrate targeted industry growth sectors.
- Expand the focus to a *broader roadmap* for the economic development for the Windsor-Essex Region.

- There is an important distinction between an internal strategic plan for the WEEDC and a broader economic development roadmap for the Windsor-Essex Region.

The Need for a Regional Economic Development Roadmap

- WEEDC is mandated to animate economic development efforts in the Windsor-Essex Region.
- Successful and sustained economic growth over time is enhanced greatly by cooperative efforts between a much broader group of community, regional, provincial and even national stakeholders.
- Many of these stakeholders are already grappling with how they will respond to the changing economic landscape in the Windsor-Essex Region.
- The WEEDC to play a more direct and catalytic role in bringing a more coordinated approach to economic development in the region.

Outcome of the Process

- Additional stakeholder consultations
- Full data/statistics review
- Development of a new economic development roadmap for Windsor-Essex

- We expect this process to be completed by the end of April or early May 2010.

WINDSOR CMA STATISTICAL REVIEW

Employment Intensity by Occupation (2006 Census)

Minimum 10 Workers per 10,000 in the Labour Force

3 Digit NOC:	CAN	ONT	WIN	vs. ONT	vs. CAN
	Per 10,000 in the Labour Force				
Foundry workers	3.6	5.3	34.8	560%	870%
Tool and die makers	10.0	21.1	107.3	408%	968%
Motor vehicle assemblers, inspectors & testers	49.0	116.6	587.8	404%	1100%
Supervisors, motor vehicle assembling	4.6	10.4	39.2	277%	749%
Plastics processing machine operators	15.2	27.5	77.0	180%	407%
Mechanical assemblers and inspectors	7.6	10.1	28.2	178%	272%
Machinists and machining & tooling inspectors	30.4	32.1	77.6	141%	155%
Metalworking machine operators	11.8	20.2	48.2	139%	310%
Machining tool operators	14.4	30.2	71.9	138%	398%
Supervisors, plastic & rubber products manufacturing	3.9	5.0	11.7	135%	200%
Plastic products assemblers, finishers & inspectors	8.1	10.1	23.7	134%	193%
Other assemblers & inspectors	11.7	18.9	36.5	93%	211%
Supervisors, machinists & related occupations	4.5	6.1	18.9	210%	318%

Employment Intensity by Occupation (2006 Census)

Minimum 10 Workers per 10,000 in the Labour Force

3 Digit NOC:	CAN	ONT	WIN	vs. ONT	vs. CAN
	Per 10,000 in the Labour Force				
Indu. engineering & manufacturing technologists	10.0	13.5	21.0	55%	111%
Mechanical engineers	21.0	27.4	80.3	193%	282%
Mechanical engineering technologists/technicians	7.7	9.2	27.0	193%	250%
Industrial electricians	17.5	19.5	52.4	169%	200%
Industrial and manufacturing engineers	11.3	14.8	34.5	133%	206%
Steamfitters, pipefitters and sprinkler system installers	12.9	10.2	23.4	130%	81%
Industrial designers	6.0	7.0	15.6	122%	161%
Construction millwrights & industrial mechanics	44.3	44.3	69.2	56%	56%

Employment Intensity by Occupation (2006 Census)

Minimum 10 Workers per 10,000 in the Labour Force

3 Digit NOC:	CAN	ONT	WIN	vs. ONT	vs. CAN
	Per 10,000 in the Labour Force				
Pharmacists	15.3	13.7	26.7	95%	75%
Medical laboratory technologists & pathologists' assistants	11.4	11.8	19.8	67%	73%
Bartenders	24.5	22.4	37.4	67%	53%
Storekeepers and parts clerks	22.6	15.5	23.7	53%	5%
Casino occupations	11.6	14.2	99.8	600%	762%
Customs, ship and other brokers	2.9	3.8	12.3	220%	319%
Immigration, employment insurance & revenue officers	15.4	16.5	42.5	158%	176%

Employment Intensity by Occupation (2006 Census)

Minimum 10 Workers per 10,000 in the Labour Force

3 Digit NOC:	Per 10,000 in the Labour Force CAN	ONT	WIN	vs. ONT	vs. CAN
Senior mgrs - Financial, comm. & other business	32.6	37.5	16.2	-57%	-50%
Insurance adjusters and claims examiners	14.7	15.4	7.5	-51%	-49%
Financial and investment analysts	24.2	35.2	15.0	-57%	-38%
Insurance underwriters	8.6	11.0	1.5	-86%	-83%
Collectors	11.1	14.0	1.5	-89%	-87%
Information systems analysts and consultants	83.1	106.4	50.9	-52%	-39%
Computer and information systems managers	26.3	34.8	13.8	-60%	-48%
Database analysts and data administrators	7.9	10.8	3.9	-64%	-51%
Supervisors, library related information clerks	11.7	12.6	5.1	-60%	-57%
Customer service, information and related clerks	119.6	135.5	62.3	-54%	-48%
Survey interviewers and statistical clerks	12.9	11.6	3.9	-67%	-70%
User support technicians	38.3	46.1	14.7	-68%	-62%

Employment Intensity by Occupation (2006 Census)

Minimum 10 Workers per 10,000 in the Labour Force

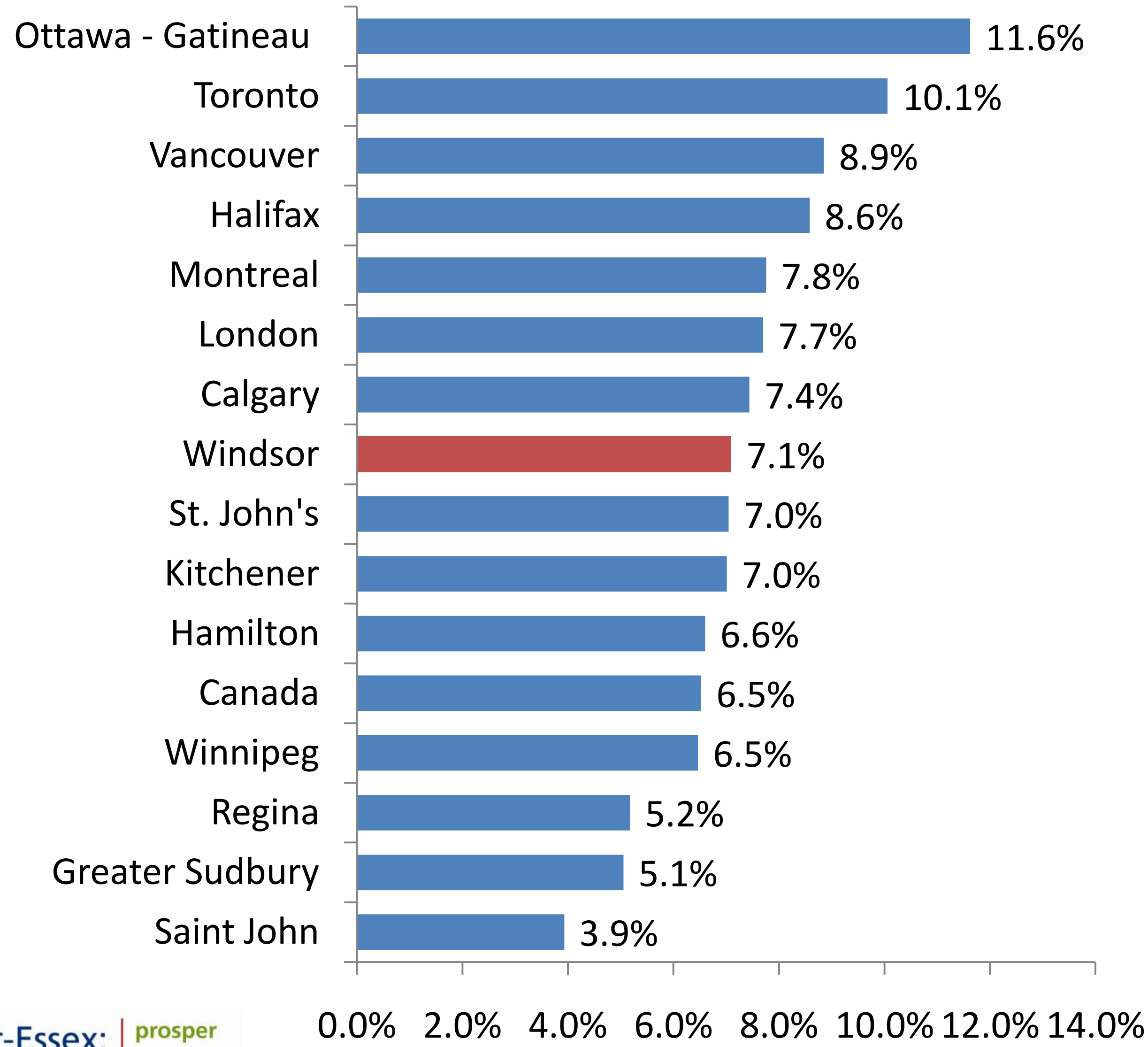
3 Digit NOC:	CAN	ONT	WIN	vs. ONT	vs. CAN
	Per 10,000 in the Labour Force				
Social policy researchers, consultants & program officers	12.8	13.2	4.2	-68%	-67%
Health policy researchers, consultants & program officers	12.0	14.8	3.9	-74%	-68%
Assemblers & inspectors, electrical equipment mfg.	8.1	10.5	2.7	-74%	-67%
Commissioned officers, armed forces	10.0	10.5	2.7	-74%	-73%
Other ranks, armed forces	26.9	21.8	9.6	-56%	-64%
Chemists	10.3	12.3	5.4	-56%	-48%
Nursery and greenhouse workers	12.8	13.2	5.7	-57%	-56%
Farmers and farm managers	116.3	71.4	30.3	-58%	-74%
Telecommunications installation and repair workers	13.3	12.7	5.4	-58%	-60%
Professional occupations in business services	36.1	45.7	19.2	-58%	-47%
Accommodation service managers	16.9	13.7	4.8	-65%	-72%
Senior government managers and officials	12.5	10.3	3.9	-62%	-69%
Business development officers and related	**30.3**	**38.3**	**13.8**	**-64%**	**-54%**

Employment Intensity by Occupation (2006 Census)

Minimum 10 Workers per 10,000 in the Labour Force

	Per 10,000 in the Labour Force				
3 Digit NOC:	CAN	ONT	WIN	vs. ONT	vs. CAN
Producers, directors, choreographers and related	13.2	13.9	6.0	-57%	-55%
Professional occupations in PR & communications	21.5	22.7	9.0	-60%	-58%
Conference and event planners	9.8	11.6	4.5	-61%	-54%
Editors	9.5	11.5	3.9	-66%	-59%
Authors and writers	14.6	16.8	3.6	-79%	-75%

% of Population with higher than a Bachelor's degree education (2006 Census)



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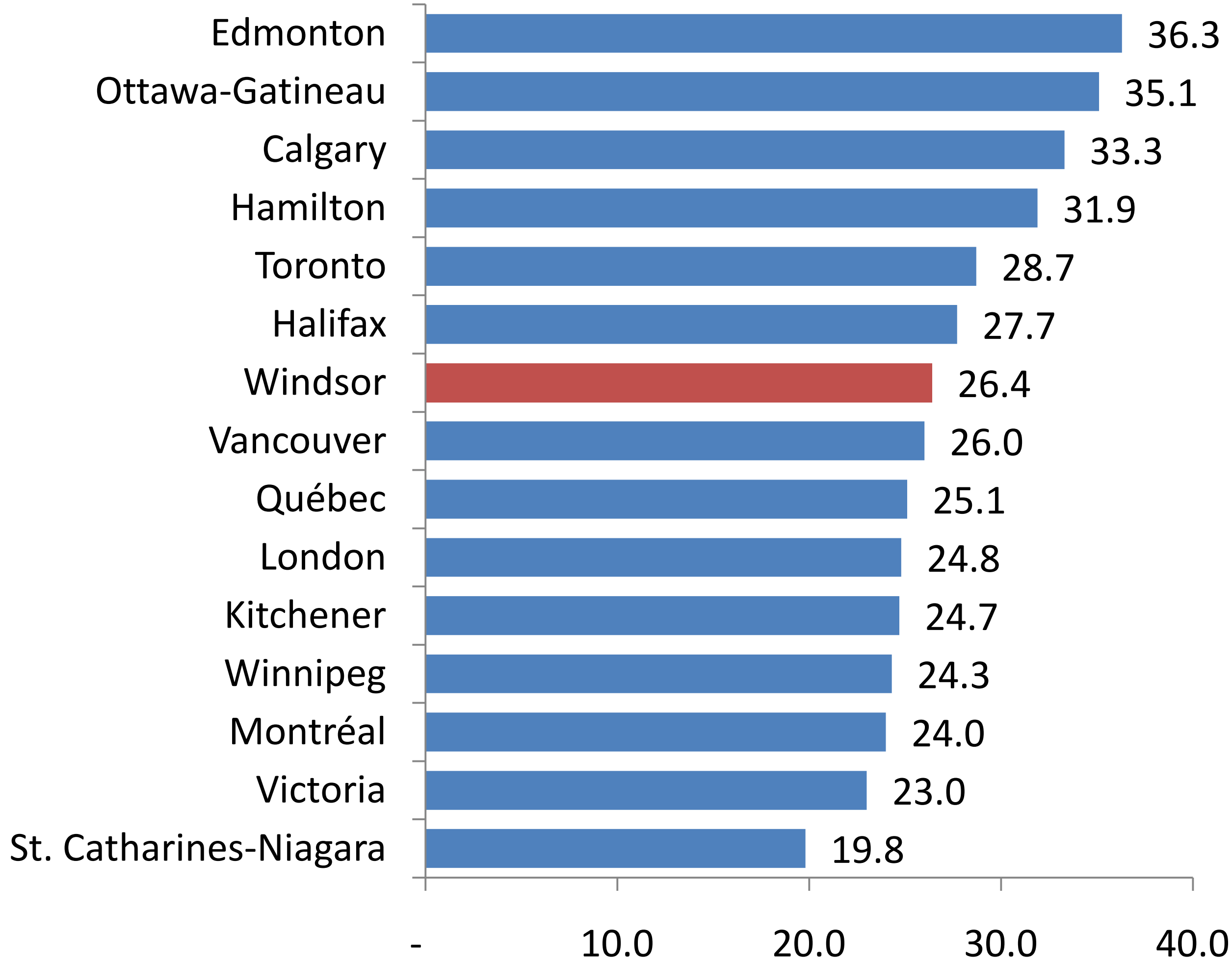
Employment Income Review (2007)

Percentage of persons earning over $50,000 per year



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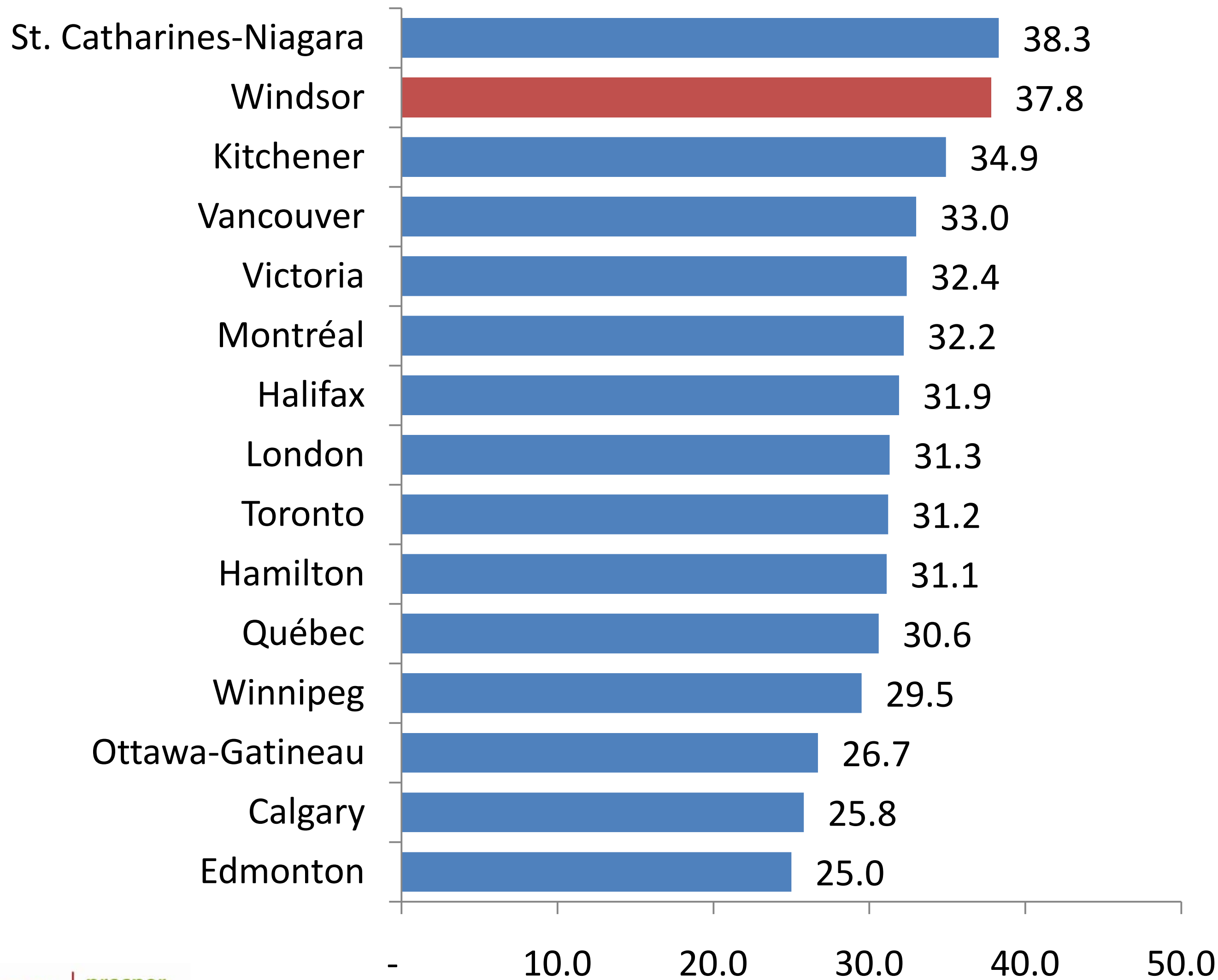
Employment Income Review (2007)

Percentage of persons earning under $15,000 per year



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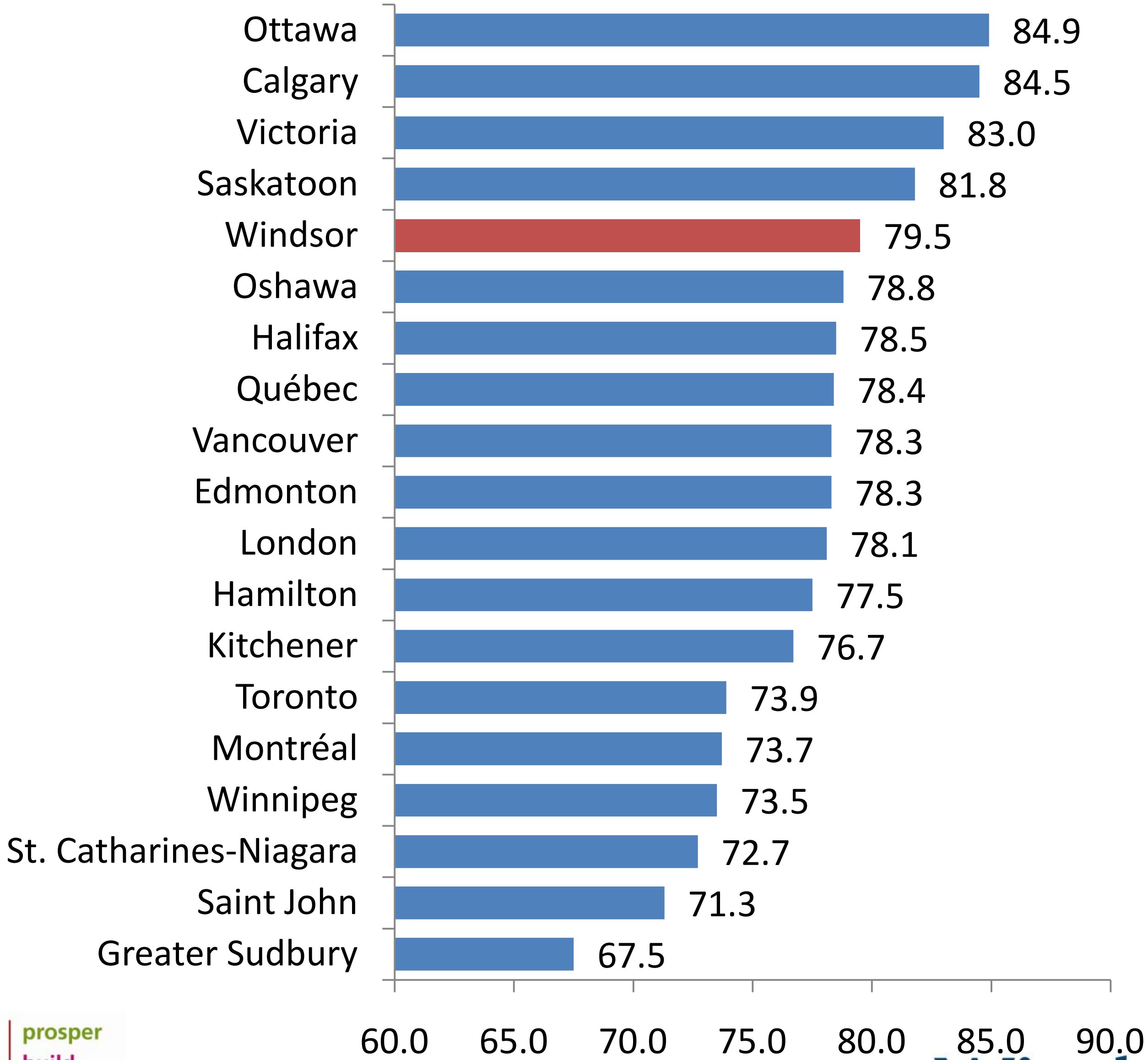
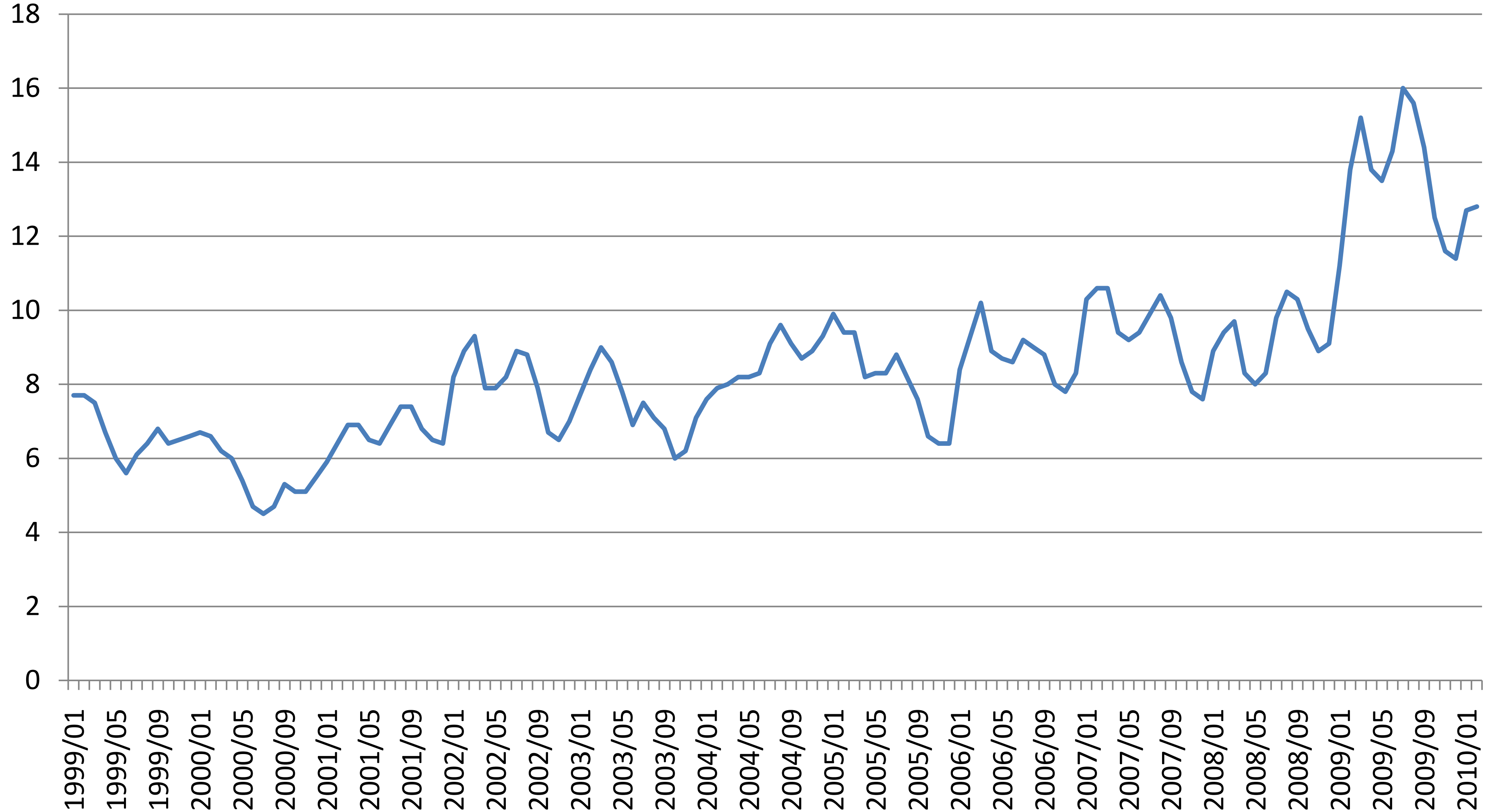
Households with Regular Internet Access (2007)

Percentage of Total



Windsor CMA Unemployment Rate (%)

3-month moving average, unadjusted for seasonality



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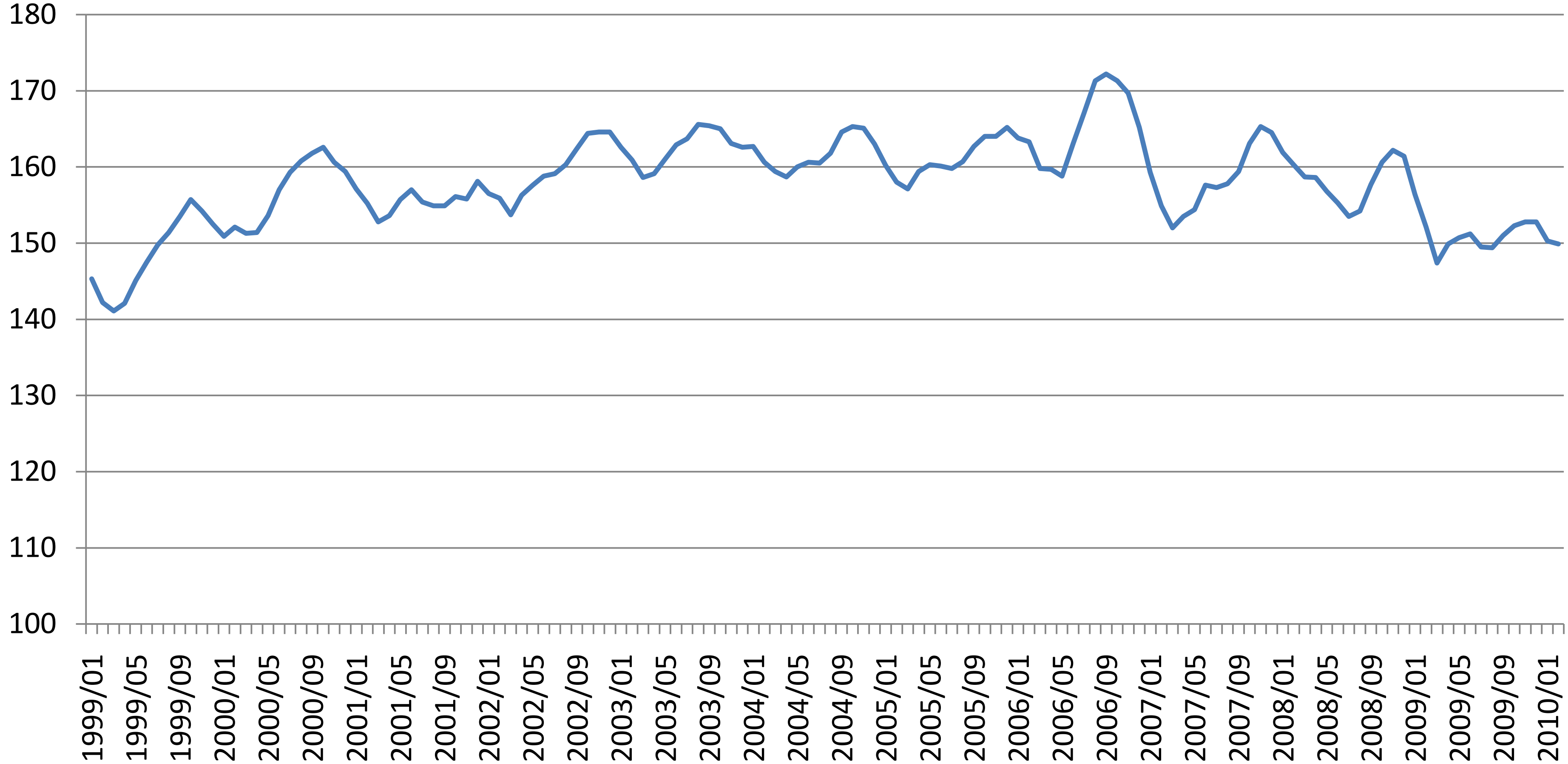
Windsor CMA Total Employment (000s)

3-month moving average, unadjusted for seasonality



of Business Establishments
June 2003 – June 2009

	2003	2009	# Change
621510 - Medical and Diagnostic Laboratories	21	24	3
541330 - Engineering Services	181	199	18
541380 - Testing Laboratories	20	17	-3
541420 - Industrial Design Services	20	24	4
541620 - Environmental Consulting Services	4	9	5
541690 - Other Scientific and Technical Consulting Services	40	64	24
541710 - Research and Development in the Physical, Engineering and Life Sciences	18	20	2
541720 - Research and Development in the Social Sciences and Humanities	1	5	4
Total R&D and Related	284	338	54

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of Business Establishments
June 2003 – June 2009

	2003	2009	# Change
511210 - Software Publishers	5	12	7
518210 - Data Processing, Hosting and Related Services	5	7	2
519130 - Internet Publishing and Broadcasting and Web Search Portals	8	5	-3
541490 - Other Specialized Design Services	4	11	7
541510 - Computer Systems Design and Related Services	221	222	1
Total Information Technology Firms	243	257	14
Post-Secondary Education Institutions	**116**	**129**	**13**

of Business Establishments
June 2003 – June 2009

	2003	2009	# Change
481110 - Scheduled Air Transportation	1	3	2
481214 - Non-Scheduled Chartered Air Transportation	0	2	2
481215 - Non-Scheduled Specialty Flying Services	1	3	2
482112 - Short-Haul Freight Rail Transportation	1	1	0
483214 - Inland Water Transportation by Ferries	2	1	-1
484110 - General Freight Trucking, Local	160	207	47
484121 - General Freight Trucking, Long Distance, Truck-Load	122	351	229
484122 - General Freight Trucking, Long Distance, LTL	10	21	11
484210 - Used Household and Office Goods Moving	13	13	0
484221 - Bulk Liquids Trucking, Local	4	5	1
484222 - Dry Bulk Materials Trucking, Local	23	23	0
484223 - Forest Products Trucking, Local	3	2	-1
484229 - Other Specialized Freight Trucking, Local	13	27	14
484232 - Dry Bulk Materials Trucking, Long Distance	1	8	7
484233 - Forest Products Trucking, Long Distance	7	6	-1
484239 - Other Specialized Freight Trucking, Long Distance	24	59	35
Total Transportation	388	734	346

of Business Establishments
June 2003 – June 2009

	2003	2009	# Change
All Manufacturing	1030	851	-179
333511 - Industrial Mould Manufacturing	82	61	-21
332710 - Machine Shops	89	69	-20
326198 - All Other Plastic Product Manufacturing	52	37	-15
339950 - Sign Manufacturing	20	9	-11
323119 - Other Printing	36	28	-8
332210 - Cutlery and Hand Tool Manufacturing	18	10	-8
337123 - Other Wood Household Furniture Manufacturing	14	6	-8
333920 - Material Handling Equipment Manufacturing	12	7	-5
332118 - Stamping	10	5	-5
339910 - Jewellery and Silverware Manufacturing	7	2	-5
332810 - Coating, Engraving, Heat Treating and Allied Activities	22	18	-4
334512 - Measuring, Medical and Controlling Devices Manufacturing	18	14	-4
332329 - Other Ornamental and Architectural Metal Products	14	10	-4
327215 - Glass Product Manufacturing from Purchased Glass	8	4	-4
314990 - All Other Textile Product Mills	6	2	-4
334110 - Computer and Peripheral Equipment Manufacturing	5	1	-4

of Business Establishments
June 2003 – June 2009

	2003	2009	# Change
333990 - All Other General-Purpose Machinery Manufacturing	22	24	2
332319 - Other Plate Work and Fabricated Structural Product Manufacturing	14	16	2
327390 - Other Concrete Product Manufacturing	6	8	2
327990 - All Other Non-Metallic Mineral Product Manufacturing	2	4	2
336211 - Motor Vehicle Body Manufacturing	2	4	2
336330 - Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing	1	3	2
311990 - All Other Food Manufacturing	0	3	3
315299 - All Other Cut and Sew Clothing Manufacturing	0	3	3
312130 - Wineries	4	8	4
333310 - Commercial and Service Industry Machinery Manufacturing	5	10	5

Average Weekly Wage (2008)

Selected Industries in Ontario

Industry:	
Accommodation and food services [72]	$ 320
Retail trade [44-45]	472
Arts, entertainment and recreation [71]	510
Business support services [5614]	603
Social assistance [624]	666
Administrative and support services [561]	679
Other services (except public administration) [81]	694
Warehousing and storage [493,4931]	754

Average Weekly Wage (2008)
Selected Industries in Ontario

Industry:	
Support activities for air transportation [4881]	$ 1,684
Software publishers [5112]	1,502
Computer systems design and related services [5415]	1,370
Scientific research and development services [5417]	1,292
Data processing, hosting, and related services [518,5182]	1,243
Aerospace product and parts manufacturing [3364]	1,199
Pharmaceutical and medicine manufacturing [3254]	1,175
Transportation equipment manufacturing [336]	1,173
Architectural, engineering and related services [5413]	1,160
Foundries [3315]	1,093
Public administration [91]	1,087
Utility system construction [2371]	1,063
Finance and insurance [52]	1,048
Specialized design services [5414]	1,046

Fastest Growing International Exports
From Ontario
10 Year Growth Rate

	$$2009	10 Yr Growth
32541 - Pharmaceutical and Medicine Manufacturing	5,799	463.3%
33991 - Jewellery and Silverware Manufacturing	1,761	357.3%
21222 - Gold and Silver Ore Mining	8,238	295.5%
33422 - Radio/TV/Wireless Communications Equip. Manufacturing	2,343	148.7%
33329 - Other Industrial Machinery Manufacturing	1,404	59.2%
33451 - Navigational, Measuring, Medical and Control Instruments Manufacturing	2,308	43.9%
32411 - Petroleum Refineries	2,050	33.6%
33111 - Iron and Steel Mills and Ferro-Alloy Manufacturing	2,759	26.2%
32518 - Other Basic Inorganic Chemical Manufacturing	1,268	26.1%
33141 - Non-Ferrous Metal (except Aluminum) Smelting and Refining	3,521	24.0%
33641 - Aerospace Product and Parts Manufacturing	3,541	16.5%

Fastest Declining International Exports
From Ontario
10 Year Growth Rate

	$$2009	10 Yr Decline
All International Exports from Ontario	147,662	-28.7%
33411 - Computer and Peripheral Equipment Manufacturing	2,114	-65.6%
33639 - Other Motor Vehicle Parts Manufacturing	1,307	-56.3%
33611 - Automobile and Light-Duty Motor Vehicle Manufacturing	26,653	-55.9%
32212 - Paper Mills	1,548	-55.8%
33631 - Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	2,548	-53.1%
32521 - Resin and Synthetic Rubber Manufacturing	1,792	-52.6%
33721 - Office Furniture (including Fixtures) Manufacturing	1,521	-50.9%
33635 - Motor Vehicle Transmission and Power Train Parts Manufacturing	1,605	-49.9%
33331 - Commercial and Service Industry Machinery Manufacturing	1,460	-40.9%
32619 - Other Plastic Product Manufacturing	2,261	-40.7%
33361 - Engine, Turbine and Power Transmission Equipment Manufacturing	2,273	-34.6%
33421 - Telephone Apparatus Manufacturing	1,906	-18.7%
33441 - Semiconductor and Other Electronic Component Manufacturing	1,616	-12.8%
33531 - Electrical Equipment Manufacturing	1,651	-11.1%

The Current WEEDC Strategic Plan

WEEDC Strategic Plan

- Vision
  - WEDC will be the business-driven, business-led organization focused on creating prosperity and recognized for generating economic value and a high quality of life throughout the Windsor-Essex Region

WEEDC Strategic Plan

- Mission
  - Maximize economic diversity, growth and prosperity in the Windsor-Essex Region

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WEEDC Strategic Plan

- Sector Committees
    1. Agri-Business
    2. Education
    3. Life Sciences
    4. Manufacturing

- Expand WEDC community outreach and networking
- Tap into regional sectoral expertise
- Focus on project activity
- Become financially self-sustaining

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WEEDC Strategic Plan

- Business Environment Challenges
  - Pressures against “freer” trade
  - Homeland security – logistics issues
  - Economic trend to medium and smaller enterprises
  - Structural shift in automotive manufacturing
  - Impact of globalization on manufacturing
  - Financial turmoil & dollar parity
  - Rising energy costs

WEEDC Strategic Plan

- Strategic Objectives
  - Develop WEDC as a well-resourced, agile, flexible and proactive organization
  - Initiate strategic partnerships and networks
  - Target and capitalize on growth sectors
  - Identify and promote emerging markets to existing economic base
  - Expand investor outreach (Europe and Asia)

WEEDC Strategic Plan

- Strategic Objectives
  - Target high-value, high-margin manufacturing growth sector
  - Advance innovation and commercialization
  - Embrace regional advocacy leadership role
  - Target agri-business opportunities and research
  - Enhance communication and competitive positioning of the region

WEEDC Strategic Plan

Key Industry Growth Sectors

Priority Focus

- Manufacturing
- Energy & Power Technology
- Agri-Business
- Life Sciences
- Professional Services/Back-Office Operations
- Education

WEEDC Strategic Plan

Key Industry Growth Sectors

Additional Focus

- Logistic/Warehousing
- Public Administration
- Construction
- Retail
- Tourism

Roundtable Discussion