



The Sarnia Lambton Workforce Development Board (SLWDB) is a community- directed not-for-profit corporation funded by Employment Ontario through the Ontario Ministry of Training, Colleges and Universities.

SLWDB was incorporated in 1997. The Board works with community stakeholders to identify trends and opportunities in the labour market that impact the local workforce. The Board's 15 members serve voluntarily and represent community interests in business, education and training; labour; women; diversity groups including francophones and youth; and the community at large. The Board collaborates with community stakeholders and establishes local partnerships to work on initiatives that address labour market concerns in various areas throughout Sarnia Lambton.

The Board carries out its mission to identify needs and facilitate solutions to attract, train and retain a viable workforce through community partnerships by:

Engaging the community in locally driven processes to identify and respond to key issues in the local labour market;

Facilitating the local planning process by bringing together stakeholders to discuss and develop strategies addressing local labour market issues;

Creating opportunities for local partnerships among stakeholders to deal with the most complex and/or pressing labour market issues; and

Organizing events and undertaking activities promoting the importance of education, training and skills development to youth, parents, employers, special needs groups, employed and unemployed workers, and the public in general.

EMPLOYMENT ONTARIO

This Employment Ontario Project is funded by the Government of Ontario.

The views expressed in this document do not necessarily reflect those of Employment Ontario.

The material contained in this report has been prepared by Tom McCormack, C4SE (Centre for Spatial Economics) and Vicky Ducharme, Executive Director, SLWDB. The material is drawn from a variety of sources considered to be reliable, however, we make no representation or warranty, express or implied, as to its accuracy or completeness, in providing this material. SLWDB does not assume any responsibility or liability.

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EXECUTIVE SUMMARY

In early 2009-amidst the most severe recession in Canada in more than a decade and against a backdrop of gradual erosion of the community's petrochemical employment base-SWLDB engaged a consulting team to carry out an extensive process of evaluation of the labour market situation in Sarnia Lambton. This project was funded by Employment Ontario through the Ministry of Training, Colleges and Universities.

The Ministry of Training, Colleges and Universities also provided statistical data to help us understand the challenges and opportunities to:

- Identify emerging labour market needs and gaps that require attention
- Align workforce development needs with economic development strategies
- Provide direction where opportunities exist within the labour market
- Identify skills sets needed within the employment sectors

Labour market indicator data was provided on:

- Total employment and sector employment
- Employment in Small and Medium Sized Enterprises (SME's)
- Total number of employers
- Industrial structure of employers
- Population dynamics
- Migration
- Occupational data, and
- Education

SLWDB was also provided with Ontario Labour Market Adjustment Data, which documents the rate of job generation and job loss-two factors that deter-

mine both the nature and degree of labour market adjustment. Job-generation Rate (JGR) is the rate at which jobs are being created in an industry and Job Loss Rate (JLR) is the rate at which jobs are being lost within an industry.

With the labour market information provided and hired consultants we were able to provide an assessment of the Sarnia Lambton labour market. The analysis examined both the characteristics of the labour supply and the opportunities being created though labour demand in the following industrial groupings:

- Agriculture and the Bio-Economy
- Travel and Tourism
- Higher Education
- Automotive-Related Manufacturing
- Data Processing and Call Centres
- Health Care
- Petrochemical Industry
- Construction and Heavy Industrial Equipment Industry
- Creative Industries
- Energy Industry

This report provides an overview of the sectors analyzed, number of businesses, workforce trends, and what the industry told us.

For a more in-depth analysis of the Sarnia Lambton area please refer to the Labour Market Report posted on our website at www.slwdb.org or call 519-332-0000 for a hard copy.

THE COMMUNITY CONSULTATION AND ACTION PLANNING PROCESS

In early 2009 the Board set in motion a 14 month Labour Market Partnership Project aimed at identifying the current and anticipated critical training and talent gaps in Sarnia Lambton and at developing a locally-driven, forward-thinking workforce development strategy to address those gaps.

The three phases of the project are briefly described below.

Phase I: An up-to-date in-depth detailed profile of the Sarnia Lambton community was developed based on existing secondary data (the census, the labour force survey, post-censal demographic estimates, preliminary projections by the consultants, etc.) in order to provide stakeholders with a locally-relevant snapshot of the area's labour market.

Phase II: In-depth research was conducted through surveys, one-on-one interviews and focus groups involving key employers throughout Sarnia Lambton. The purpose of this consultation was to determine the extent to which local employers perceived or anticipated skill gaps in the community; to examine the opportunities and challenges they face regarding skill shortages and requirements; and to gain insights from educators and trainers about how they could respond most effectively to employer and employee training needs.

Phase III: Through the spring of 2010 a series of strategy development decision sessions with Sarnia Lambton leaders was held. These sessions guided leaders through a progression of key issues and choices culminating in a final "roll out" event designed to engage a broader group of community leaders in implementation of a strategic labour market plan for the area.

NEW RESEARCH



Sarnia Lambton Labour Market: Where our talent works today and where it will work tomorrow-published by SLWDB. This report contains an in-depth analysis of the Sarnia Lambton's labour market.

2009-2010 ACTION PLAN UPDATE

In 2009-2010, actions plans were put in place for five labour force trends. The summary below identifies the action plans that were completed and the actions that remain outstanding.

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TREND 1: Aging Workforce

ISSUE: The older workforce's knowledge bank is not being transferred to new hires as a result of inter-generational communication barriers.

ACTION: A generational sensitivity workshop "Meeting in the Middle" was held to assist employers in improving communication and knowledge transfer between workers.

ACTION: A Mentoring Program that partners new entrepreneurs with seasoned business people has been developed in partnership with Young Professionals and the Sarnia Lambton Chamber of Commerce.

TREND 2: Lack of Essential Skills

ISSUE: Employers require certain basic skills, both soft skills such as interpersonal relationships and flexibility and core skills such as basic communication, computer skills, etc. The lack of essential math and language literacy skills in the workplace results in lower productivity and means businesses are not able to recruit suitable candidates.

UPDATE: An event designed for Lambton educators to gain an insight into local employers' wants and needs when hiring a high school graduate was postponed.

ISSUE: A lack of essential skills in the workforce among the unemployed and underemployed leads to lower prospects for jobs and often means that they remain in low paying jobs or require income assistance.

ACTION: "The Power of Learning in the Workplace" conference was held to educate employers on the impact low literacy levels have on business productivity and their bottom line.

ISSUE: The demand by employers for better "soft skills" – being on time, attitude and customer services limits many workers from obtaining and retaining employment.

ACTION: Sarnia Lambton Chamber of Commerce and Express Personal provided affordable and accessible customer relations training.

TREND 3: Economic Diversification

ISSUE: A shift from dependence on the primary or peripheral petrochemical industry in the past decade through worker layoffs and closures has often resulted in lower salaries as workers move to other sectors. The result is a negative impact on the local economy. Current small businesses are at risk from the economic uncertainties of diminished demand and lack of consumer confidence.

ACTION: A data-driven report was released April 29th, assessing existing job needs and forecasting future needs.

ISSUE: Small-to-medium entrepreneurial businesses which employ 97% of the workforce require support to sustain and grow.

ACTION: Sarnia Lambton Chamber of Commerce provided workshops to small business owners at an affordable cost on Employment Issues that Could Impact Your Business; Termination of Employment and Wrongful Dismissal; Maximum Profit-Developing a Good Sales Plan; Engaging and Retaining Today's Employees; HST Seminars; and Blackberry Tips & Tricks.

ISSUE: The shift to the alternative energy industry has resulted in more demand for specific skills which limits business expansion in the sector.

UPDATE: A "Sustainable Smart Home" will be built at Lambton College on the northwest side of the campus. The house will be a working lab for several college programs, including alternative energy and construction students. It will incorporate geothermal heating, solar panels, a grass or moss roof and will be continually updated. The house is being built with materials donated by several industries, a \$150,000 cash donation from Suncor Energy and a \$550,660 from the Federal Government. Total cost toward the construction of the home is \$1.2 million.

TREND 4: The Rural-Urban Disparity

ISSUE: High speed internet is not available throughout all rural areas of the community. The lack of post-secondary educational institutions in rural areas puts employers at a disadvantage when training is needed to upgrade the skills of their workforce or co-operative placements are being considered.

UPDATE: Gaps in high speed internet access have been identified throughout the County.

ISSUE: The lack of employment training programs in rural areas puts rural residents at a disadvantage when competing for employment.

ACTION: A professional development event for women in the rural area was held at Podolinsky Farm Equipment.

ISSUE: The lack of transportation in rural areas puts rural residents at a disadvantage when competing for employment and businesses at a disadvantage when recruiting skilled workers.

UPDATE: At this time a transportation committee to address transportation needs within the rural area has not been struck.

TREND 5: Workforce Shortages

ISSUE: The health sector is experiencing workforce shortages because not enough people are being trained, recruited and retained in that sector; the workforce is aging and the aging population is increasing demand for health care services.

ACTION: Lambton College is implementing a set of strategies to establish the necessary conditions to offer all four years of the BScN program on Campus. The College is working towards the development of post-graduate specialty nursing offerings; has expanded the enrolment into the Practical Nursing program in response to increased community demand; is marketing the Pharmacy Technician program to international applicants to ensure sustained access to this program for the local market; is exploring the possibility of creating a pathway within the PSW program to allow students to enter the Practical Nursing program upon graduation.


ACTION: The Erie St. Clair LHIN has begun a process whereby a Primary Health Care Task Force is assisting the LHIN in determining the key core services that are required for a comprehensive primary health care system. The core services that are to be determined will form the roadmap of the key programs that are required for sustainable health care services. This roadmap will also form the basis for future health system alignment and the health human resources required to implement the service. It was determined that this strategy was a key requirement for the beginning of a health human resource strategy. Recommendations for core services are anticipated for the fall of 2010.

UPDATE: Offering a Personal Support Worker (PSW) program at Lambton Central Collegiate Vocational Institute was put on hold.



SECTORAL ANALYSIS

This section provides in-depth profiles of the sectors identified by our Leadership Committee established for our Labour Market project. Each profile gives an overview of the sector, Number of Businesses within the Sector, Workforce Trends and What the Industry is telling us.



AGRICULTURE AND THE BIO-ECONOMY

The agricultural and bio-economy industrial grouping includes 11 industries representing three major areas: (1) traditional farming activities, (2) agricultural biotechnologies and (3) the value-added agricultural sector. Agricultural biotechnology companies are involved in the production of pesticides, fertilizers and other agricultural chemicals. The value-added agricultural sector includes those companies that produce the entire array of food for human and animal consumption.

Overall, the region had about 3,100 people working in this group in 2006. Employment in these activities declined between 2001 and 2006 and further declines are anticipated in the future. Production continues to grow but productivity is growing faster resulting in declines in the number of workers required.

Traditional farming accounted for about 2,750 workers in 2006, agricultural biotechnologies for 175 and the value added agricultural sector for the remaining 180.

Number of Businesses

In December 2006 there were 651 crop producing businesses and 691 animal producing businesses for a total of 1,342 farms in Sarnia Lambton. In June 2006 the respective numbers were 613, 741 and 1,354. The number of crop producers fell between 2006 and 2009 while the number of animal producers increased. The total number of farm businesses declined by 12. No farms employed large numbers of workers and therefore all are considered to be small to medium sized enterprises (SMEs).

There were 29 food manufacturers – the value added agricultural sector – in the area in 2006, the same as in 2001. Only 3 employed more than 20 people and none more than 50, so they are all SMEs.

Data regarding the number of businesses in the agricultural biotechnologies group are not available.

Workforce Trends

14 occupations accounted for 2,770 of the 3,100 jobs in this sector in Sarnia Lambton in 2006, or 89 percent of the total. There were at least 25 people in each of these occupations employed in the agriculture and bio-economy group. The 14 are profiled in the table below. The largest occupational group was that of farmers and farm managers (1,890, NOC 8251) followed by general farm workers (465, 8431) and nursery and greenhouse workers (65, 8432). These 3 occupations alone accounted for 78 percent of all the jobs in this industry group in 2006.

As a group workers in these 14 occupations earned lower than economy wide wages and salaries. The average employment income of these occupations was only about \$39,900, well below the \$53,027 earned across all occupations in the area in 2006. Across all 14 occupations the agricultural and bio-economy industry group employed 30.8 percent of all such workers in the area. The share was 90 percent and more for the top 4 occupations, however, all of which are farm related, whereas it was very low for most of the rest of the occupations in this group with the exceptions of process control and machine operators, food and beverage processing (75.0 percent, NOC 9461) and labourers in food, beverage and tobacco processing (62.5 percent, 9617).

Across the 14 occupations the share of workers accounted for persons 55 and over – potential retirees over the next decade – was 25.4 percent, well above the economy wide share of 18.7 percent. Potential attrition rates are greatest in this group among farmers and farm managers (52.6 percent, 8251) and truck drivers (27.4 percent, 7411).

		Agriculture Bio-Economy Industries	All Industries	Agriculture BioEconomy Industries Share	Average Income	Percent Share 55+
8251	Farmers and farm managers	1,890	1,930	97.9	24,357	52.6
8431	General farm workers	465	510	91.2	27,796	15.7
8432	Nursery and greenhouse workers	65	70	92.9	27,920	0.0
8253	Farm supervisors and specialized livestock workers	40	40	100.0	25,229	0.0
8612	Landscaping and grounds maintenance labourers	40	525	7.6	33,034	8.6
1231	Bookkeepers	35	515	6.8	29,349	25.2
1411	General office clerks	35	720	4.9	39,554	25.7
6421	Retail salespersons and sales clerks	35	2,425	1.4	30,082	18.1
9232	Petroleum, gas and chemical process operators	35	790	4.4	97,396	9.5
9461	Process control and machine operators, food and beverage processing	30	40	75.0	42,543	25.0
7351	Stationary engineers and auxiliary equipment operators	25	165	15.2	105,306	18.2
7411	Truck drivers	25	840	3.0	44,873	27.4
7452	Material handlers	25	395	6.3	66,856	12.7
9617	Labourers in food, beverage and tobacco processing	25	40	62.5	31,138	0.0
Sub-total		2,770	9,005	30.8	39,911	25.4

What the Industry is Telling Us

Several factors pose threats to this industrial group's future competitiveness. The rise in value of the Canadian dollar undermines the exportability of Canadian agricultural products. Also, increased world agricultural commodity supplies as well as rapid consolidation of food ordering and distribution processes create barriers to growth for many farmers.

To compete in this increasingly competitive global marketplace many farm businesses need to diversify by bringing value-added activities into their commodities and business operations. Integrating the development of biotechnology and bio-processing into traditional farming practices has the potential to provide opportunities. The recent opening of the Bio-Industrial Innovation Centre at the University of Western Ontario Research Park's Sarnia campus will

help facilitate the commercialization of chemical and energy production from biomass. The development of new industries such as ethanol creates potential new customers for Sarnia Lambton's farmers.

Many traditional family farms have become part-time activities as farmers turn to employment off the farm to earn income. Additionally, the median incomes for farm workers are well below the regional average earnings.

While traditional farming and value-added farming are likely to continue to shed jobs in the area in the future potential opportunities could arise from specialty farming and from the growing demand for farm products to create bio-fuels.

AUTOMOTIVE-RELATED MANUFACTURING

The automotive-related sector in Sarnia Lambton employed about 1,450 people in 2006, up from 575 in 2001. Due to the recent recession which hit auto production especially hard the total number employed in this group in the area has no doubt dropped though reliable estimates by industry are not available.

The sector can be divided into three major groups including auto assembly; electrical and mechanical components; and rubber, plastic and related components. The major sub-industry employers in the area in 2006 were rubber product manufacturers (NAICS 3262) employing 530, motor vehicle parts manufacturers (3363) employing 460, and plastic product manufacturers (3261) employing 300. These three industries accounted for 1,290 or 89 percent of the industry group total.

The growth in the industry between 2001 and 2006 in the area can be attributed to the establishment of four major companies in the area between 1999 and 2000 – Autolube Limited, UBE Automotive North American Sarnia Plant, Waterville TG Inc., and Woodbridge Foam group – that created among them 1,000 new jobs in the area producing automotive tubing, wheels, polyurethane foam, etc. Due to the recession, however, UBE and Woodbridge have both recently closed.

Number of Businesses

Canadian business patterns data indicate that there were 8 businesses involved in rubber and plastic products manufacturing in late 2009, the same as in 2006 and that there were 9 businesses involved in transportation equipment manufacturing in 2009, also the same as in 2006. The data indicate that only 1 business in each industry employed 200 or more people.

The no-change results between 2006 and 2009 revealed by this data source appear to be at odds with local information regarding the recession-induced closing of two major facilities. The data suggest that most of the operators in the automotive-related industry group in Sarnia Lambton are small to medium sized enterprises (SMEs).

Workforce Trends

The 11 largest occupations in this group accounted for a total of 930 jobs in 2006, or for two thirds of the total (see the table below). Automotive-related production accounted for about one-third of all the positions held by people in these 11 occupations in the area in 2006. The major occupations were motor vehicle assemblers, inspectors and testers (NOC 9482) who accounted for 265 positions; plastics processing machine operators (9422, 125 positions); labourers in rubber and plastic products manufacturing (9615, 110 positions); and rubber processing machine operators and related workers (9423, 110 positions). These 4 occupations alone accounted for 605 positions, or more than 40 percent of the automotive-related industry group's total employment.

Collectively the 11 occupations averaged incomes of more than \$61,000 per year. That is well ahead of the local area economy-wide average of just over \$53,000 in 2006. The range of incomes among the 11, however, was wide, reaching as high as more than \$95,000 among construction millwrights and industrial mechanics (except textile) (NOC 7311) to as low as about \$29,000 among other labourers in processing, manufacturing and utilities (9619).

For the 11 occupations as a group the future rate of attrition is likely to be lower than that of the Sarnia

Lambton workforce overall. Only 17.2 percent of the occupants of these positions in 2006 were 55 years of age or older, lower than the average rate in the area of 18.7 percent. The share of 55

and over is greatest among administrative officers (1221, 28.6 percent), other labourers in processing, manufacturing and utilities (9619, 26.8 percent) and manufacturing managers (0911, 26.7 percent).

		Auto Related Industries	All Industries	Auto Related Industries Share	Average Income	Percent Share 55+
9482	Motor vehicle assemblers, inspectors and testers	265	275	96.4	43,616	0.0
9422	Plastics processing machine operators	125	220	56.8	79,724	9.1
9615	Labourers in rubber and plastic products manufacturing	110	150	73.3	59,997	13.3
9423	Rubber processing machine operators and related workers	105	190	55.3	54,268	15.8
9619	Other labourers in processing, manufacturing and utilities	70	205	34.1	28,923	26.8
0911	Manufacturing managers	60	300	20.0	95,232	26.7
7311	Construction millwrights and industrial mechanics (except textile)	55	435	12.6	79,661	14.9
7452	Material handlers	50	395	12.7	66,856	12.7
9221	Supervisors, motor vehicle assembling	40	35	114.3	56,705	0.0
1221	Administrative officers	25	525	4.8	41,196	28.6
9514	Metalworking machine operators	25	55	45.5	35,619	18.2
Sub-total		930	2,785	33.4	61,032	17.2

What the Industry is Telling Us

In the past, the Sarnia Lambton region attracted auto parts assembly and production plants as part of the overall industry's broad-based growth. The region expects to face future challenges, however, resulting from the increasingly globalized auto supply-chain and production system, increased competition from low-cost countries, and a less than complete recovery of employment in the North American auto industry. However, if Sarnia Lambton were able to fully leverage its regional advantages (such as the ability of rubber product manufacturing plants to utilize excess heat from refineries in their production processes), the region could better compete for certain activities within the automotive production value chain.

Different occupations within the automotive industry require different skill sets. For entry-level workers,

work ethic, positive attitude and consistent attendance are important attributes to employers who tend to conduct most of their training on the job. Other occupations within the automotive industry require more specialized technical, maintenance and production skills. For these positions, companies appear to be turning to Lambton College's Chemical Production and Power Engineering Technology Program (CPET), the IEC's safety training courses and related apprenticeship programs for appropriate education and training. Additionally, the demand for improved leadership and management skills is expected to increase in the upcoming years as more employees retire and must be replaced through promotions of existing staff.

DATA PROCESSING AND CALL CENTRES

The data processing and call centre (DP-CC) industry group consists of 9 individual industries that can be grouped into three major components. The DP-CC industry group as a whole employed a total of 1,820 workers in the Sarnia Lambton area in 2006, up from 1,305 in 2001. Call centres accounted for 1,195 of the 1,820 workers in total in 2006; data processing, hosting and related services for 145; and suppliers to the group for 495.

Virtually all of the recent employment in call centres (1,195 jobs in 2006) is concentrated in three companies: StarTek, NCO Customer Management Ltd. and the Marriott Worldwide Reservation Centre (note that StarTek announced in April 2010 that it will be moving its Sarnia operations to California). The data processing and hosting sub-grouping is considerably smaller (145 jobs) and includes industries such as manufacturing and reproducing magnetic and optical media, electrical equipment manufacturing, internet service providers/web search portals data processing, hosting and related services, and computer systems design and related services. The two industries included in the suppliers sub-grouping are newspaper, periodical, book, and directory publishers and employment services (480 jobs).

Number of Businesses

Canadian business patterns data are not sufficiently detailed to allow for the identification of the number of businesses operating within the data processing and call centre industry group in the Sarnia Lambton area. As noted above, there are three call centres in the area and each employs about 500 people.

Workforce Trends

The 15 occupations found in greatest number within the DP-CC industry group accounted for two thirds of all the jobs in the group. Customer service, information and related clerks (NOC 1453) accounted for 525, positions; other elemental sales occupations (6623) for 185, receptionists and switchboard operators (1414) for 80; and supervisors, library, correspondence and related information clerks (1213) for 55. The top 4 occupations collectively accounted for 845 positions in total, or almost half the DP-CC industry group's total.

This industry group is known for its relatively low rates of pay. The 15 occupations in greatest number in the group collectively averaged annual rates of pay of only about \$33,000, well below the area's economy wide average across all occupations of just over \$53,000. Among the 15 occupations two pay very well – most notably computer programmers and interactive media developers (NOC 2174) at \$77,836 and user support technicians (2282) at \$61,176 in 2006.

The industry group is populated mainly by relatively young people. Only 14.4 percent of those holding positions among the 15 major occupations were over the age of 55 in 2006 and among the 15 the largest 55 and over shares occurred among security guards and related occupations (6651, at 35.7 percent), other labourers in processing, manufacturing and utilities (9619, 26.8 percent) and accounting and related clerks (1431, 25.0 percent).

		DP Call Centres Industries	All Industries	DP Call Centres Industries Share	Average Income	Percent Share 55+
1453	Customer service, information and related clerks	525	860	61.0	28,210	4.1
6623	Other elemental sales occupations	185	255	72.5	28,215	3.9
1414	Receptionists and switchboard operators	80	425	18.8	23,807	16.5
1213	Supervisors, library, correspondence and related information clerks	55	60	91.7	39,958	16.7
1424	Telephone operators	50	160	31.3	23,253	21.9
5123	Journalists	50	70	71.4	32,136	0.0
6651	Security guards and related occupations	45	490	9.2	35,339	35.7
1431	Accounting and related clerks	40	380	10.5	39,712	25.0
2282	User support technicians	40	150	26.7	61,176	0.0
6431	Travel counsellors	35	40	87.5	26,492	0.0
1463	Couriers, messengers and door-to-door distributors	30	55	54.5	31,239	18.2
2174	Computer programmers and interactive media developers	30	80	37.5	77,836	0.0
6221	Technical sales specialists, wholesale trade	30	90	33.3	50,806	0.0
9619	Other labourers in processing, manufacturing and utilities	30	205	14.6	28,923	26.8
1422	Data entry clerks	25	110	22.7	26,796	0.0
Sub-total		1,250	3,430	36.4	33,230	14.4

What the Industry is Telling Us

With the exception of Marriott, Sarnia's call centres work on a contract basis with other firms in industries such as telecommunications or insurance. The trend within these industries has been to consolidate the number of contracts at a smaller number of business support services firms.

Sarnia's call and reservation centres remain competitive due in part to the continued demand from North American customers to speak with North American representatives. It should be noted, however, that call centre customer communication is increasingly shifting to interactive computer-related communication, such as instant messaging. This trend reduces the likelihood that customers would be able to discern the location of the call centre operators.

Another trend is that companies are centralizing ancillary functions – such as IT support and accounting – which require a different set of skills within the company. As a result, call centres tend to have a small, high-earning IT support staff, since most of this work is performed remotely, at other corporate locations.

Companies reported that their workers need to have an aptitude for both customer service and computing. They see customer service as an aptitude that people either have or do not. Basic computing skills are also important.

The workforce of these business support services companies is composed of a greater number of

women than men. Workers span a wide array of ages, with a greater proportion of younger workers tending to work the later shifts. Almost all of the industry's workers come from Sarnia Lambton, especially the urbanized area of Sarnia. While employees have a wide range of education backgrounds, the educational requirements are relatively low. One company required workers to have at least a high school diploma, but others preferred workers with a diploma and some college experience.

Companies in this industry identified wage demands as a key hiring and retention issue, indicating that most turnovers occur within the first 90 days of employment. It is during that period that workers receive the bulk of their training (often a four-to-six week training program) and gain their initial experience.

HEALTH CARE

The health care sector in Sarnia Lambton employed 4,510 people in 2006, up slightly from 4,425 in 2001. Growth in health care employment is expected to be strong throughout this decade as the oldest members of the Baby Boom generation turn 65 years of age in 2011 setting off a two-decade long rapid rate of growth in the population of those aged 65 and over.

The people working in the health sector are about evenly employed in ambulatory care industries (1,520 in 2006) – including offices of physicians (NAICS 6211, 320 employed), offices of dentists (6212, 280), offices of other practitioners (6213, 325); out-patient centres (6214, 270) and medical and diagnostic laboratories (6215, 55) – at hospitals (1,400) (NAICS 6221 to 6223) – or by nursing and residential care facilities (1,590) (NAICS 6231 to 6239).

Number of Businesses

Canadian business patterns data indicated that in Sarnia Lambton in 2006 there were 274 ambulatory health care enterprises, 3 hospitals and 18 nursing and residential care facilities. None of the ambulatory health care enterprises employed more than 200 people. However, all 3 hospitals and 3 of the 18 nursing and residential care facilities employed 200 or more. By late 2009 that data source suggested the number of enterprises in total had changed to 275, 3 and 56 respectively while the number employing 200 or more had changed to 0, 3 and 0 respectively. The large increase in the number of nursing and residential care facilities (from 18 to 56) but the reduction in the number in this group employing 200 or more (from 3 to 0) suggests some sort of downsizing-outsourcing-breakup of enterprises in this group occurred over that period.

Workforce Trends

There were at least 100 people in each of the 10 largest occupational groups within the health sector in 2006. These 10 collectively account for 2,630 employees, or 58 percent, of all the workers in the health care sector. Registered nurses (NOC 3152, 865 employed), nurse aides, orderlies and patient service associates (3413, 710) and licensed practical nurses (3233, 215), the three biggest occupational groups in health care, accounted for 40 percent of all health care workers. Almost one-half of these 10 occupational groups (49.7 percent) are employed in the health care industry. Over 90 percent of those in the top three occupations are employed by the health care industry, whereas health care accounts for only a small share of those in other major occupation categories. For example, health care accounts for only 11.0 percent of all those employed in the area as food counter attendants, kitchen helpers and related occupations (6641).

The people in the top 10 occupational categories as a group earned an average of just \$33,115 in 2006, well below the economy-wide average of just over \$53,000. The only two categories in the top 10 to earn more than \$53,000 in 2006 were registered nurses (\$60,013 on average) and medical laboratory technologists and pathologists' assistants (\$54,606). Only 13.6 percent of the occupants of the top 10 occupations in health care were 55 years of age or older in 2006, well below the 18.7 percent share across all occupations in the Sarnia Lambton area. The highest 55 and over shares are among licensed practical nurses (26.7 percent) and light duty cleaners (23.9 percent).

		Health Industries	All Industries	Health Industries Share	Average Income	Percent Share 55+
3152	Registered nurses	865	960	90.1	60,013	19.3
3413	Nurse aides, orderlies and patient service associates	710	755	94.0	28,588	13.2
3233	Licensed practical nurses	215	225	95.6	40,267	26.7
6641	Food counter attendants, kitchen helpers and related occupations	160	1,450	11.0	21,083	7.2
1414	Receptionists and switchboard operators	135	425	31.8	23,807	16.5
3414	Other assisting occupations in support of health services	120	220	54.5	30,314	15.9
6661	Light duty cleaners	115	440	26.1	22,423	23.9
6471	Visiting homemakers, housekeepers and related occupations	110	250	44.0	26,877	4.0
3211	Medical laboratory technologists and pathologists' assistants	100	115	87.0	54,606	13.0
4212	Community and social service workers	100	455	22.0	37,063	11.0
Sub-total		2,630	5,295	49.7	33,115	13.9

What the Industry is Telling Us

The number of specialty clinics operated by groups of physicians is increasing in the Sarnia area. This trend is causing employment growth for ambulatory care and contributing to employment declines at hospitals.

While Sarnia Lambton's aging population is increasing the demand for health care services, the industry's own aging workforce is perhaps its greatest challenge, especially affecting the key positions of doctors and nurses.

The demand for workers is most pressing in community and residential health care. The key in-demand

occupations identified by community health professionals include dieticians in assisted living facilities and nurse practitioners. Nurse practitioners, who are able to do much of the work that physicians can perform, are particularly important. Working in community and residential health requires a different skill set than is required for hospitals. For instance, mental health workers require a strong personalities and a robust set of interpersonal skills to effectively communicate with their patients. Community health care practitioners must be able to work on their own with minimal supervision and must have a personality capable of successful, in-depth patient-provider communication.

HIGHER EDUCATION

Higher education in Lambton County employed a total of 465 people in Sarnia Lambton in 2006, up from 390 in 2001. Higher education consists of five industries, including colleges and CEGEPS (NAICS 6112) which employed 400 people in the area in 2006, universities (6113, 0 employed), business schools and computer and management training (6114, 0), technical and trade schools (6115, 55) and educational support services (6117, 10).

Lambton College dominates employment in this group. The College currently has an enrolment of 3,900 students, with an increase of nearly 17 percent in 2009 alone, with about 1,000 students from outside the area. The College also has nearly 4,500 students enrolled at the four campuses it operates in China, an important source for foreign students enrolled at Lambton College. In Sarnia, the College currently employs 450 workers, including faculty and administrative staff. It has developed a variety of programs to meet the economic and social needs of the community, including a large and growing health program; technical programs that petrochemical and refining companies demand; as well as business and management-related programs. In addition, the College partnered with several institutions (including Laurentian University, Windsor University and The University of Western Ontario, as well as Northwood College in the U.S.) to offer three- and four-year bachelor's degree programs.

The Sarnia Lambton Industrial Education Co-operative (IEC), formed in the 1990s by the region's major industrial businesses (especially those in the petrochemical area) to provide customized safety training for area companies is the other major higher education provider in the area. Over the last two decades, chemical plants, contractors and labour unions have

worked together to focus their efforts toward ensuring safe working conditions and teaching safe worker practices and procedures, and the IEC is the delivery mechanism for that co-operative effort. The IEC has recently become involved, as well, in management training, paying attention to issues such as record keeping, accreditation and auditing.

Number of Businesses

Canadian business patterns data suggest there were 60 organizations involved in the education sector as a whole in June 2006 (including elementary and secondary schools; this data source does not provide separate data regarding post-secondary education organizations), 1 of which employed between 200 and 499 people and 1 of which employed more than 500. The same data source indicates there were 59 education facilities in December 2009 but that by that time the number employing 500 or more had grown to 2.

Workforce Trends

Not surprisingly, college and other vocational instructors (NOC 4131) account for the majority of employees in the higher education industry. There were 225 instructors in 2006. The next most important occupations in the sector are general office clerks (1411, 50 employed) and administrators, post-secondary education and vocational training (0312, 30 employed). There were 15 people employed in 2006 in each of information systems and analysts (2171) and post-secondary teaching and research assistants (4122). These 5 occupations together accounted for 335 of the 465 jobs in higher education, or for 72 percent of the total.

With the exception of office clerks and teaching and research assistants the average income for these

occupations is well above the average of just over \$53,000 for Lambton County workers in general. Instructors in 2006 earned an average of almost \$57,000, information systems analysts and consultants almost \$71,000 and post-secondary education administrators just over \$82,700.

Future attrition rates will be high among administrators, instructors and clerks as the 55 years of age and older share for these three occupational groups in 2006 was 75.0 percent, 36.1 percent and 25.7 percent respectively.

		Higher Education Industries	All Industries	Higher Education Share	Average Income	Percent Share 55+
4131	College and other vocational instructors	225	305	73.8	56,799	36.1
1411	General office clerks	50	720	6.9	39,554	25.7
312	Administrators, post-secondary education and vocational training	30	40	75.0	82,717	75.0
2171	Information systems analysts and consultants	15	130	11.5	70,992	7.7
4122	Post-secondary teaching and research assistants	15	15	100.0	31,355	0.0
	Sub-total	335	1,210	27.7	48,604	27.7

What the Industry is Telling Us

Between 2001 and 2006 the higher education sector added 90 net new workers. This growth reflects a 125-person increase in the workforce of career and technical college institutions (primarily Lambton College). Within career and technical colleges, the community college sector accounted for most of the growth, with employment rising from 290 jobs in 2001 to 410 jobs in 2006, an increase of 41 percent.

The number of business schools and computer and management training jobs declined by 15 between 2001 and 2006, while the number of technical and trade schools workers and educational support services employees each increased by 10.

Higher education employment is expected to increase slightly in the short-term in response to

growing enrolments. Career and technical colleges typically grow during a recession, as unemployed or underemployed workers return to school to learn new skills. The province's Second Career program, which helps underwrite tuition costs for mid-career workers, also fuels this trend. At the same time, recent high school graduates are increasingly opting to attend two-year colleges instead of four-year universities to take advantage of lower costs. As a result, the Lambton College staff increased to approximately 450 people, and it is expected to maintain this level through 2011.

Other training providers are also expecting modest expansions of employment and offerings.

TRAVEL AND TOURISM

In Sarnia-Lambton the travel and tourism group is defined by three industries: gambling or gaming industries (NAICS 7132), traveller accommodation (7211) and recreational vehicles parks and recreational camps (7212). These three employed a total of almost 1,500 people in 2006, down from 1,740 in 2001 due primarily to the relative strengthening of the Canadian dollar over the period 2001 to 2010 and to the lingering negative impacts on foreign travel by US residents of the 9/11 terrorist attacks.

Number of Businesses

Canadian business patterns data indicate that in December 2009 there were 61 amusement, gambling and recreation enterprises in the area and 37 accommodation services. None employed more than 200 people so all can be considered small to medium sized enterprises (SMEs). The comparable figures in June 2006 were 81 and 64. Thus the number of enterprises involved in travel and tourism declined in both major categories over the 2006 to 2009 period.

Workforce Trends

The top 13 occupations in travel and tourism accounted for 1,160 in 2006, or 78 percent, of all the jobs in this industry group. The most important employment positions were casino occupations (NOC 6443, employing 315 people), hotel front desk clerks (6435, 170), light duty cleaners (6661, 130), cashiers (6611, 105) and security guards and related occupations (6651, also 105). The top 13 occupations as a group paid annual incomes averaging just over \$30,000 in 2006, well below the area's economy-wide average of just over \$53,000. Across the top 13 occupations incomes varied widely. The best paid were senior managers (more than

\$121,000), financial auditors and accountants (just over \$61,300) and casino occupations (just over \$48,800).

It is often pointed out that travel and tourism pays relatively low wages, employs many people only on a part-time basis and is often seasonal in nature. In view of this it is no replacement for high paying jobs in manufacturing. All of this is obviously true. However, given the pending retirement – or at least semi-retirement – of the Baby Boomer Generation over the next two decades, tourism offers a range of jobs consistent with the gradual departure of the Boomers from the workforce. Equally importantly, tourism jobs are generally on the increase whereas manufacturing jobs are generally in decline.

The 13 major occupations in tourism were primarily filled with people under the age of 55 in 2006. A few categories, however – accommodation service managers, security guards, senior managers and accountants – all faced 55 and over shares in the 25 plus percent category.

Travel and tourism accounted for 80 percent or more of all the hotel front desk clerks, casino occupations and accommodation service managers in the Sarnia Lambton area, no surprise there. It also accounted for almost 30 percent of all the senior managers in trade, broadcasting and other services, a group earning average incomes in the order of \$121,000 plus.

		Travel Tourism Industries	All Industries	Travel Tourism Share	Average Income	Percent Share 55+
6443	Casino occupations	315	320	98.4	40,838	3.1
6435	Hotel front desk clerks	170	170	100.0	16,704	0.0
6661	Light duty cleaners	130	440	29.5	22,423	23.9
6611	Cashiers	105	1,425	7.4	20,342	10.5
6651	Security guards and related occupations	105	490	21.4	32,393	35.7
632	Accommodation service managers	80	100	80.0	37,511	55.0
6663	Janitors, caretakers and building superintendents	60	910	6.6	38,113	22.0
1453	Customer service, information and related clerks	50	860	5.8	28,210	4.1
6453	Food and beverage servers	40	725	5.5	16,128	5.5
8612	Landscaping and grounds maintenance labourers	30	525	5.7	33,034	8.6
15	Senior managers - trade, broadcasting and other services, n.e.c.	25	85	29.4	121,367	29.4
1111	Financial auditors and accountants	25	290	8.6	61,317	27.6
6421	Retail salespersons and sales clerks	25	2,425	1.0	30,082	18.1
Sub-total		1,160	8,765	13.2	30,053	15.5

What the Industry is Telling Us

The OLG Casino in Point Edward and the Hiawatha Horse Park and Entertainment Centre accounted for the majority of the area's jobs in gaming. Traveller accommodation, which includes large hotels such as the Best Western and Holiday Inn in Point Edward, represented the other large source of employment in travel and tourism in the area.

As with so many industries in the Sarnia Lambton area, the accommodations business is heavily influenced by the petrochemical industry. Leisure travel, in contrast, often surges in response to specific local music festival, hockey tournament and other events.

The general local sentiment is that Sarnia Lambton is a pass-through location, more than a destination, with the exception of the OLG facilities in the area. Since its introduction in 1998, gaming has had a big impact on Sarnia Lambton's economy. In 2000, the number of visitors to the region's gaming establishments numbered well over one and a half million. If patrons of local bingo halls are included, that number rises to almost three million visitors. This trend remained strong throughout the early part

of this decade. However, as the Canadian dollar strengthened against the U.S. dollar in recent years, the number of visits dropped off.

Within the accommodation industry, occupations related to operations (for example, desk clerks, housekeepers and maintenance workers) often have low turnover rates. These jobs tend to be filled by relatively older workers who have been in those jobs for long periods. By contrast, employees in food service tend to be younger, with relatively high turnover rates. Several managers in travel and tourism-related companies noted a generational difference in terms of work ethic and other soft skills. Most of the training associated with these industries occurs on the job and often relates to health and safety issues, especially for those in food service. Even though most training occurs on the job, several hotels reported that they worked with Lambton College students in areas such as the culinary arts and hospitality and tourism management. These programs provided workers with the foundational skills necessary to work in these industries.

PETROCHEMICAL INDUSTRY

The petrochemical industry is comprised of establishments primarily engaged in the production of petroleum (NAICS¹ 3241) and chemical products (3251).

This industry has been the main driver of the Sarnia Lambton economy for more than 50 years, and it remains so today. Petrochemical production levels have not changed much in the area since the 1980s, but employment levels have been steadily declining driven primarily by technological advances that have automated many processes and greatly increased productivity. In addition, functions that were once performed internally have increasingly been contracted out to other firms.

Number of Businesses

In December of 2009 there were 8 petroleum and 34 chemical manufacturing businesses in Sarnia Lambton compared to 8 petroleum and 36 chemical businesses in June 2006.

4 of the area's petroleum businesses are considered to be small to medium sized enterprises (SMEs, those employing from 1 to 99 people) while the remaining 4 are large (employing 200 or more people). There are three large oil refineries in the area: Imperial Oil, Shell Canada, and Suncor Energy (which recently merged with Petro-Canada).

22 of the chemical businesses are SMEs and 8 are large while the remaining 4 chemical businesses are not classified by size. Chemical production in the area covers a wide range of products: basic chemical manufacturing; resin, synthetic rubber, artificial and synthetic fibres and filaments manufacturing; pesticides, fertilizer, and other agricultural chemical

manufacturing; and other chemical manufacturing. Companies such as LANXESS, NOVA Chemicals, Terra International Inc. and Ethyl Canada Inc. serve North American and global markets by manufacturing a wide range of chemical products such as ethylene, propylene, benzene, cetane, ammonia, nitrate and urea.

Workforce Trends

Petroleum producers provided a total of 1,330 jobs in the area in 2006, down from a total of 1,535 in 2001.

Chemical producers provided a total of 2,620 jobs in the area in 2006, down from 3,360 in 2001. Almost 60 percent (1,525) of those employed in chemical production are involved in resin, synthetic rubber, artificial and synthetic fibres and filaments manufacturing and almost one-third (855) are involved in basic chemical production. Most of the rest produce pesticides, fertilizers and other agricultural chemicals.

Thus the petrochemical industry employed a total of 3,950 people in 2006, down from 4,895 in 2001.

Employment in the petrochemical industry is expected to continue to decline in the future.

The petrochemical industry employs 100 or more people from each of 7 individual occupational categories. The key characteristics of these 7 occupations are summarized in the table below.

The industry employed 1,710 people in these 7 occupations in 2006. Thus these 7 accounted for 43 percent of the 3,950 people employed in total

¹ NAIS—North American Industry Classification System

by the industry that year. In the Sarnia Lambton area a total of 2,645 people in these occupations were employed. Thus the petrochemical industry alone accounted for the employment of almost two-thirds of those employed overall in the area in these 7 occupations.

The average earnings of the people in these occupational categories ranged from \$79,315 (industrial instrument technicians and mechanics) to \$110,618 (chemical engineers) and the 7 as a group earned an average of \$83,434 in the area in 2006. These occupations are all paid well in excess of the \$53,027 earned across all occupations in the area in 2006.

18.7 percent of all those employed in the Sarnia Lambton area in 2006 were 55 years of age or older and thus could be expected to retire by 2016. For this group of 7 occupations the share accounted for by persons 55 and over is only 16.8 percent. However, 5 of these 7 occupations – supervisors (NOC² number 9212), manufacturing managers (0911), industrial instrument technicians and mechanics (2243), chemical technologists and technicians (2211) and chemical engineers (2134) – faced 55 and over shares greater than the average in 2006. As a result the potential replacement of a significant share of each of these 5 occupations poses a challenge for the petrochemical industry over the near term.

NOC	Occupation	Petro Chemical Industry	All Industries	Petro Chemical Share	Average Income	Share 55+
9232	Petroleum, gas and chemical process operators	680	790	86.1	97,396	9.5
2134	Chemical engineers	225	310	72.6	110,618	17.7
2211	Chemical technologists and technicians	210	420	50.0	85,839	19.0
7311	Construction millwrights and industrial mechanics (except textile)	195	435	44.8	79,661	14.9
9212	Supervisors, petroleum, gas and chemical processing and utilities	150	190	78.9	109,266	23.7
0911	Manufacturing managers	135	300	45.0	95,232	26.7
2243	Industrial instrument technicians and mechanics	115	200	57.5	79,315	22.5
Sub-Total		1,710	2,645	64.7	93,434	16.8

What the Industry is Telling Us

Extensive public consultation in the area over the last year led to a number of important revelations about the prospects for growth in the petrochemical industry in the decade ahead.

The people employed directly by the petrochemical industry described above are not the only workers needed to operate and maintain their plants. Many petrochemical firms outsource significant amounts of work to contractors in areas such as engineering and the trades. Thus the industry's economic importance to the area reaches into other industry segments throughout the community.

Even though Sarnia Lambton's petrochemical complex does not operate at the scale of the U.S. Gulf Coast, it has the advantage of not being subject to the hurricanes which can stop production for unpredictable periods of time.

Many of the petrochemical companies are taking advantage of their sunken capital investment in their current facilities. Much of this new investment activity is designed to modernize existing facilities, maintain equipment and troubleshoot problems.

² NOC- National Occupational Classification

The departure of many research and corporate-decision making functions has the potential to hurt Sarnia Lambton's future competitiveness in the petrochemical industry.

Companies are using the inevitable turnover stemming from an aging workforce as an opportunity to significantly increase the capacity of their workforce. While the workers who are planning to retire have a great deal of experiential knowledge, the workers who are being hired have a greater amount of formal training and technical education. New workers are likely to have diplomas in engineering technology, which are three-year applied, technical diplomas.

Lambton College has been instrumental in training the petrochemical industry's next generation workforce. There is a possibility that these programs may produce more certified students than there are available jobs locally. The specialized nature of these programs attracts students from outside of Sarnia Lambton and not all of the students will elect to remain in the area after they complete their coursework. A proportion will opt to pursue jobs in Alberta, the American Gulf Coast or elsewhere. Though this means fewer jobs locally in the petrochemical industry it means more local jobs in post-secondary education.

CONSTRUCTION AND HEAVY INDUSTRIAL EQUIPMENT INDUSTRY

Sarnia Lambton is home to a unique construction and heavy industrial equipment industry. In most regions, these two industries are quite distinct, with construction focusing on building residential or commercial facilities while the heavy industrial equipment sector would be accounted for by the production of capital equipment (such as tractors or construction equipment). However, in Sarnia Lambton, the petrochemical industry strongly influences these two industries. Only a small part of the area's workers depend on employment opportunities in the traditional construction industry. Instead, routine and specialized maintenance at the region's large refineries and chemical production facilities accounts for the bulk of the local work in construction and heavy industrial equipment.

In view of the above this industry group in the Sarnia Lambton area is defined to include the following construction components:

- heavy and civil engineering construction (or infrastructure), including NAICS 2371 (utility system construction), 2372 (land sub-division), 2373 (highway, street and bridge construction) and 2379 (other infrastructure);
- specialty trade contractors, including 2381 (foundation, structure, and building exterior contractors), 2382 (building equipment contractors), (2383) building finishing contractors and 2389 (other specialty trade contractors);
- residential construction (2361);
- non-residential construction (2362);

and the following heavy equipment manufacturers:

- primary metal manufacturers which, in this area, are accounted for mostly by non-ferrous metal producers (3314) and foundries (3315);
- fabricated metal product manufacturers which are accounted for primarily by machine shops, turned product, and screw, nut and bolt manufacturing (3327), boiler, tank and shipping container manufacturing (3324) and architectural and structural metals manufacturing (3323);
- machinery manufacturers which are accounted for primarily by ventilation, heating, air-conditioning and commercial refrigeration equipment manufacturing (3334), agricultural, construction and mining machinery manufacturing (3331) and metalworking machinery manufacturing (3335).

Number of Businesses

There were 838 construction businesses in Sarnia Lambton in December 2009 of which 490 represented specialty trade contractors, 253 constructors of buildings and 95 constructors of infrastructure. The related figures in June 2006 were 544, 294 and 85 respectively, for a total of 923. In other words the total number of such businesses has declined by almost 10 percent since 2006.

In 2009 only 1 of these construction businesses employed more than 200 people, and that business was in the infrastructure construction area. Thus virtually all of these businesses are small to medium sized enterprises.

There were 88 businesses in the heavy metal manufacturing sector in Sarnia Lambton in late 2009, up 1 from 87 in 2006. Most in 2009 (61) manufactured fabricated metals with the remainder mostly accounted for by manufacturers of machinery (23). Manufacturers of primary metals accounted for only 5 of the businesses in this group.

Only 1 of these businesses in 2009 (a manufacturer of fabricated metals) employed more than 200 people. Thus virtually all of these businesses, too, are small to medium sized enterprises.

Workforce Trends

The construction industry in Sarnia Lambton employed a total of 2,740 people in 2006, up from 2,460 in 2001 while heavy equipment manufacturers employed 1,280, down from 1,430 in 2001.

Specialty trade contractors employed 1,705 people in 2006 thus accounting for 62 percent of those employed in construction. Residential and non-residential construction accounted for 630 employees (23 percent) while infrastructure construction accounted for the remaining 405 (15 percent).

The 1,280 employed in heavy equipment manufacturing were accounted for by 1,015 (79 percent) in fabricated metals manufacturing, 175 (14 percent) in machinery manufacturing and 90 (7 percent) in primary metals manufacturing.

Construction and heavy equipment employed at least 100 or more people in each of the 9 occupations listed in the table below. These 9 industries account for a total of 1,785 people and thus they represent 40 percent of the 4,445 people employed in total by these industries in 2006. The construction and heavy equipment industry employed 54.6 percent of all of those in these 9 occupations in the area in 2006.

Two of these occupations – steamfitters and insulators – earn well above average incomes compared to the \$53,027 earned across all occupations in the area in 2006, while two – painters and decorators and secretaries – earned well below the average across all occupations in the area.

People 55 years of age or older accounted for above average shares of the total number employed in 4 of the occupations in 2006. The 55 and over share was 39.4 percent among electricians, 32.9 percent among secretaries, 26.1 percent among steamfitters and 25.8 percent among painters and decorators. These occupations, therefore, face higher rates of attrition than most others in this group.

NOC	Occupation	Construction & Heavy Equipment Industry	All Industries	Construction & Heavy Equipment Share	Average Income	Percent Share 55+
7611	Construction trades helpers and labourers	355	485	73.2	47,591	9.3
7252	Steamfitters, pipefitters and sprinkler system installers	290	460	63.0	75,787	26.1
7271	Carpenters	240	380	63.2	46,030	7.9
7265	Welders and related machine operators	230	445	51.7	58,478	13.5
7293	Insulators	150	190	78.9	66,642	13.2
7231	Machinists and machining and tooling inspectors	145	215	67.4	54,979	18.6
7241	Electricians (except industrial and power system)	145	165	87.9	57,144	39.4
7294	Painters and decorators	125	155	80.6	29,911	25.8
1241	Secretaries (except legal and medical)	105	775	13.5	36,039	32.9
Sub-total		1,785	3,270	54.6	51,356	20.8

What the Industry is Telling Us

Local employers in these industries rely heavily on the trades, largely a unionized workforce. The trades play such an important role in Sarnia Lambton's economy that the community boasts the largest concentration of trade workers in Ontario outside of Toronto.

The Sarnia Construction Association reported registration for the trades in May 2009 at about 5,300 workers, including slightly more than 1,000 apprentices. This number rose sharply in recent years in response to an anticipated demand for workers expected to occur if the planned new Shell refinery had gone forward, but it did not.

The skills of many of Sarnia Lambton's trades workers are distinctive, adapted to the unique needs of the petrochemical industry. Not all of these workers are employed in the traditional construction, heavy equipment, petrochemical, and energy industries, but these industry groupings represent a relatively large component of the local trades workers.

An industry survey completed for this project during the fall of 2009 found that 63 percent of the 19 construction and heavy equipment manufacturer respondents reported laying off workers during the past year. Jobs have declined in the short term but are expected to recover to some extent over the longer term.

The construction and heavy industrial equipment industries are likely to be affected by changes in the petrochemical industry. For example, as the petrochemical industry and the economy as a whole focuses on green technology, the procedures and requirements that construction and heavy industrial equipment companies follow may also change. While it is still too early to know exactly what these changes will entail, these industries will continue to be on the forefront of any changes that occur.

CREATIVE INDUSTRIES

Popularized as an economic activity of growing importance by urban geographer, Richard Florida (University of Toronto), the creative industries are typically those identified as fostering and promoting new ideas. Florida asserts that economic growth will increasingly depend on the success of the “creative class” – a group of workers involved in a variety of intellectual pursuits or those who rely on ideas as the source of their economic gain. Few clear definitions exist regarding which industries can be considered creative. One recent study for the Colorado Arts Council defines the creative economy as a variety of commercial businesses and non-profit organizations that produce and distribute products or services in which “creative content defines their market position.”³

Using the definition provided in that study, 33 different industries comprise the “creative economy.” These 33 industries can be grouped into five broad “sub-clusters”: cultural goods distribution, cultural goods production, educational services, entertainment and leisure, and technical design services. These industries, which include manufacturing, retailing, education, engineering and many information-related services industries, employed about 4,200 people in Sarnia Lambton in 2006, a 19 percent increase from 2001.

Number of Businesses

The 33 industries that are considered to make up the creative economy are defined at the four-digit NAICS industry level. The data used throughout this report to identify the number of businesses in each industry focus section are available only at

the three-digit level. Thus it is not possible to estimate the number of businesses operating in Sarnia Lambton’s creative economy.

Workforce Trends

The table below identifies the 20 most frequently found occupations found among the 33 industries that define the creative economy of the Sarnia Lambton area. These 20 occupations in this table collectively account for almost half of all those working in the creative sector (1,870 out of the total of about 4,200), and as a group the occupants of these 20 occupations account for about 20 percent of all those employed in these occupations in the area. Within selected occupations, however – including among musicians and singers, graphic designers and illustrators, journalists and drafting technologists and technicians – people working in these occupations in the creative sector account for at least 75 percent of all those working in these occupations in the Sarnia Lambton area, while within several other occupations – including among electrical and electronics engineers, mechanical engineers and telephone operators – people working in these occupations in the creative sector account for between 50 and 60 percent of all those working in those occupations in the area.

As a group the occupants of these 20 occupations earned on average about \$42,000 per year in 2006, well below the \$53,027 earned across all occupations in the area in 2006. However, the earnings of those in about one-third of these 20 occupations earned well in excess of that amount, with mechanical engineers (\$94,424), electrical and electronics

³ Regional Technology Strategies and Mt Auburn Associates, Inc., The State of Colorado’s Creative Economy, prepared for Alliance for Creative Advantage, December 2008.

engineers (\$88,441), civil engineers (\$86,272) and chemical technologists and technicians (\$85,839) well ahead of the rest.

These earnings patterns illustrate an important point: that Sarnia Lambton's creative industries are, not surprisingly, tied directly to the petrochemical sector. This connection affects the engineering consulting industry both positively and negatively. For instance, reduced investment in expansions or in new plants forces some companies to lay off workers or make use of work share agreements, reduced hours or unpaid vacation. By contrast, increased oil sands extraction activity in the Fort McMurray area creates additional work for Sarnia area companies, since some of that oil is shipped to this area for

refining and as refineries in Alberta tap the technical expertise Sarnia Lambton companies. Furthermore, downsizing within local petrochemical companies in efforts to focus on their core competencies creates numerous opportunities for outsourced procurements to local engineering consulting firms.

The occupants of the 20 occupations most frequently found working in the creative sector are relatively young. Only 21.1 percent of the group as a whole was 55 years of age or older in 2006, a share only slightly above the 18.7 percent share across all occupations in the area. Among the 20 occupations the highest 55 and over shares are found among electrical and electronics engineers (37.0 percent) and among secretaries (32.9 percent).

NOC	Occupation	Creative Industries	All Industries	Creative Industries Share	Average Income	Percent Share 55+
6421	Retail salespersons and sales clerks	315	2,425	13.0	30,082	18.1
621	Retail trade managers	245	1,190	20.6	39,939	20.2
2132	Mechanical engineers	115	225	51.1	94,424	20.0
6411	Sales representatives, wholesale trade (non-technical)	115	385	29.9	74,013	10.4
2253	Drafting technologists and technicians	110	145	75.9	53,645	20.7
5241	Graphic designers and illustrators	90	105	85.7	30,426	0.0
1424	Telephone operators	80	160	50.0	23,253	21.9
5133	Musicians and singers	80	90	88.9	18,785	22.2
2133	Electrical and electronics engineers	75	135	55.6	88,441	37.0
1411	General office clerks	70	720	9.7	39,554	25.7
2131	Civil engineers	70	150	46.7	86,278	23.3
8612	Landscaping and grounds maintenance labourers	70	525	13.3	33,034	8.6
1231	Bookkeepers	65	515	12.6	29,349	25.2
5123	Journalists	60	70	85.7	32,136	0.0
9619	Other labourers in processing, manufacturing and utilities	60	205	29.3	28,923	26.8
1122	Professional occupations in business services to management	50	135	37.0	68,375	22.2
1221	Administrative officers	50	525	9.5	41,196	28.6
1241	Secretaries (except legal and medical)	50	775	6.5	36,039	32.9
1431	Accounting and related clerks	50	380	13.2	39,712	25.0
2211	Chemical technologists and technicians	50	420	11.9	85,839	19.0
Sub-total		1,870	9,280	20.2	42,083	21.1

What the Industry is Telling Us

Many of the area's largest engineering services firms are part of corporations with a global presence. If they require additional expertise, they are able to reach back into the corporation to find the relevant expertise. Several people interviewed noted that, much like the region as a whole, Sarnia Lambton's engineering services industry must diversify from the petrochemical industry. Potential opportunities exist in hydrogen, solar, ethanol and other energy-related fields. In addition, there may exist opportunities to connect to developments in the fuel cell industry, occurring in places like Ohio and Michigan. However, in order to move into these relatively new fields and develop new capabilities, engineering firms need their clients to move in this direction first.

Many occupations in the creative industries pay relatively low wages and involve significant retailing activities, both in-person and online. Sales representatives as well as retail clerks and managers represent nearly one of every six jobs in the creative industries. Most of these jobs pay well below the regional average wage. More prototypical "creative talent" – such as musicians and singers, and graphics design specialists – can also expect increased numbers of employment opportunities. These jobs pay lower than the regional average, but offer a creative outlet and often provide part-time supplementary income to workers in other fields.

Several rapidly growing occupations exceed the regional average wage, most notably engineers and drafters. Sarnia Lambton is expected to need more engineers and drafting specialists in the decade ahead with engineers with university degrees representing the bulk of the demand. For these engineering positions, median income is expected to range from

nearly \$79,000 per year for civil engineers to more than \$91,000 per year for electrical and electronics engineers.

Area companies reported that finding people for these occupations – professional engineers, technologists and project managers – is a critical challenge when the economy grows. Several indicated that their workforces contain two large age cohorts: experienced employees and new hires. Among the experienced workers, many have been employed in the major petrochemical plants. Smaller companies indicated that, in some instances, experienced workers making the transition from the large plants often have unrealistic wage expectations. Regardless, people leaving petrochemical companies remain a key source of potential engineering, technical and managerial employees, and occasionally these workers are brought on to fill part-time or temporary needs.

Among the younger workforce, many companies had success using co-op programs to attract new workers. Few companies reported any recent recruiting difficulties. When difficulties arose, they tended to reflect the commonly held perception that Sarnia Lambton is a comparatively unattractive place to live for young professionals. Several firms noted that it was quite common for younger workers to have wage expectations that are more in line with the Greater Toronto Area than Sarnia Lambton. In order to overcome these issues, firms often look for people who have some kind of personal connection to the Sarnia Lambton area.

ENERGY INDUSTRY

The production and distribution of traditional forms of energy – electricity and natural gas – are an important component of the Sarnia Lambton area's economic base. These two forms of energy and related construction activities supplied a total of about 1,355 jobs to area residents in 2006.

Electric power generation in the area is expected to decline in the near future. The Province of Ontario plans to close all of its coal-fired electric power generating facilities by 2014. If Ontario Power Generation closes its existing facility in the area almost 400 jobs in total will be lost (100 are already slated for elimination in 2010).

Oil and gas extraction and distribution is moving in the opposite direction, but it is not at all clear to what extent the Sarnia Lambton area can share in the world-wide gains.

Energy production and distribution is in a world-wide state of flux, with renewable energy sources at the forefront of much of the research currently underway. Sarnia Lambton has already captured some of this new activity – in the form of Suncor's new ethanol facility that employs about 50 people and the anticipated Sarnia First Solar Farm which will employ few people – and renewable energy production and the production of products for the renewable energy sector is a focus for local area growth of the Sarnia Lambton Economic Partnership.

Since most of these new industries do not yet exist, and many that emerge in the future will be in the manufacturing and construction sectors and not energy producers per se, it is not possible to develop useful business or employment profiles for them at this time. This section, therefore, profiles

the traditional energy sector as it exists today in the Sarnia Lambton area.

Number of Businesses

As of December 2009 there were 19 businesses involved in oil and gas extraction (NAICS in Sarnia Lambton, and none employed 200 or more people. Thus all the businesses in this industry in the area can be categorized as small to medium sized enterprises. In 2006 the number of businesses in this industry totalled 18, so the industry gained 1 business over that period.

As of December 2009 there were 10 businesses in the utilities industry, down from 19 in 2006. Only 1 business in this industry in 2009 employed 200 or more people. In connection with this information it should be noted that the utilities industry includes three four-digit industries: electric power generation, transmission and distribution (NAICS 2211), natural gas distribution (2212) and water, sewage and other systems (2213). The latter obviously has little to do with energy. It is not clear whether the decline in the number of utility companies in the area between 2006 and 2009 occurred in the energy or waste segments.

Workforce Trends

It was noted above in the introduction to this industrial profile that the traditional energy sector in 2006 provided a total of 1,355 jobs to people in the area. This figure includes employment in oil and gas extraction of 340, in electric power generation, transmission and distribution of 655, in natural gas distribution of 110, and in utility industry construction 250.

In 2006 the top 13 occupations employed by these 4 industries accounted for a total of 690 jobs, or

just over one half of all the jobs in the traditional energy sector. The 13 are listed in the table below along with other information about the number of such positions found throughout the community, not just in energy, and the average income and share of each occupation held by a person 55 years of age or older.

The most frequently found occupations in energy collectively accounted for just 13.6 percent of the jobs in these occupations throughout the community. The petrochemical industry itself employs many of these occupations in large numbers as does the creative economy in the area. The energy sector's share of total community employment among these occupations was very high – greater than half – among power systems and power station operators (100.0 percent) and utilities managers (54.5 percent).

These top 13 occupations as a group earned an average income in 2006 in excess of \$70,000, well above

the average in the community across all occupations of \$53,027. A total of 9 of the 13 occupations in this group earned incomes well above \$70,000 in 2006.

20.0 percent of the occupants of these positions throughout the community were aged 55 and over in 2006. Those occupations in this group with the highest 55 and over shares – and thus the occupations most likely to see significant attrition rates in the decade ahead – include financial auditors and accountants (27.6 percent), steamfitters (26.1 percent), general office clerks (25.7 percent), and contractors and supervisors, heavy construction equipment crews (25.0 percent).

Steamfitters account for 1 in 10 of all the people employed in the energy sector. They enjoy a much higher than average income (almost \$76,000). Persons 55 and over account for a high share (26.1 percent) of the people working in this occupation.

NOC	Occupation	Energy Industries	All Industries	Energy Industries Share	Average Income	Percent Share 55+
7252	Steamfitters, pipefitters and sprinkler system installers	135	460	29.3	75,787	26.1
7352	Power systems and power station operators	85	85	100.0	89,836	11.8
7351	Stationary engineers and auxiliary equipment operators	70	165	42.4	105,306	18.2
7421	Heavy equipment operators (except crane)	50	185	27.0	53,985	18.9
9232	Petroleum, gas and chemical process operators	45	790	5.7	97,396	9.5
1411	General office clerks	35	720	4.9	39,554	25.7
6663	Janitors, caretakers and building superintendents	35	910	3.8	38,113	22.0
7311	Construction millwrights and industrial mechanics (except textile)	35	435	8.0	79,661	14.9
912	Utilities managers	30	55	54.5	91,152	18.2
2132	Mechanical engineers	30	225	13.3	94,424	20.0
2211	Chemical technologists and technicians	30	420	7.1	85,839	19.0
2241	Electrical and electronics engineering technologists and technicians	30	90	33.3	67,345	22.2
9212	Supervisors, petroleum, gas and chemical processing and utilities	30	190	15.8	109,266	23.7
1111	Financial auditors and accountants	25	290	8.6	61,317	27.6
7217	Contractors and supervisors, heavy construction equipment crews	25	60	41.7	69,447	25.0
Sub-total		690	5,080	13.6	70,020	20.0

What the Industry is Telling Us about Traditional Energy Industries

The trades are an important part of the energy generation industry, especially steamfitters. The higher than average portion of this group accounted for by persons 55 and over is a concern.

One key trend identified in these industries is the demand for workers who are skilled across multiple trades, in part because the companies want to maintain a core staff, but they may not have enough work to keep any given type of worker employed full time. A multi-skilled employee can command premium wages and remain competitive for available jobs as the companies reduce the size of their overall workforce. Traditionally it might require multiple skill-sets to complete a given task, but managers have found that workers who are cross-trained in different trades are often able to complete a task more quickly and efficiently. While having specialized tradespersons who are experts in a particular trade is still important for completing difficult tasks, companies are increasingly turning over more routine tasks to their workers who have up-graded their basic knowledge in more than one trade. Additionally, companies have also found that cross-trained workers with experience make much more effective first-line supervisors, managing multiple aspects of complex projects. This strategy helps companies to reduce the number of supervisors, avoiding the need for a supervisor for each trade discipline.

One source for workers trained to perform work in multiple trades is Lambton College's mechanical technologist program. Similar to a traditional apprenticeship, the program offers both classroom and on-the-job training. Companies note that graduates from this program have a good understanding of multiple trades and are among the best hires for new talent.

Within the traditional energy generation industry, waterworks and gas maintenance workers, also referred to as pipeline maintenance workers, are in increasing demand. Welding is one of the key skill-sets required among these workers, but specialized welding knowledge and experience is also necessary, so on-the-job experience is needed for this occupation.

What the Industry is Telling Us about New Energy Industries

The only source of information about new energy in the area is that provided by the Suncor ethanol facility. Within the local ethanol industry, jobs tend to pay less than the larger, established chemical and petroleum refining because of its start-up industry nature. This start-up mentality is evident in the way Suncor Ethanol approaches the organization of its workforce. Outside of a handful of management positions, the plant has three main jobs areas: (1) cooking and fermentation (which requires the least skill), (2) energy generation and distillation and (3) board operators (which requires the most skill). Even though Suncor Ethanol is unique in the Sarnia Lambton area, there is some transferability of skills between it and some of the other petrochemical plants in the region.

Suncor Ethanol is also seeking workers that are capable of multi-tasking and thinking entrepreneurially. To that end, they are attempting to develop a labour force where the company's workers are increasingly capable of performing all three of the functions mentioned above. Achieving this kind of flexibility benefits both the company and the employee, as workers are paid for their knowledge more than for their seniority. The company encourages workers to act like entrepreneurs in their jobs and rewards them for ideas that improve the product or the production process. On-the-job training accounts for most of the training that workers receive in the Suncor Ethanol plant.



COMMUNITY ACTION PLAN



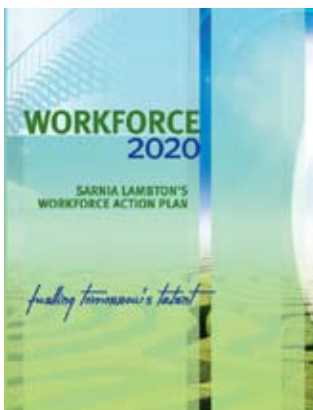
COMMUNITY ACTION PLAN

Through the consultation process of our in-depth Labour Market project three key themes were identified:

- Entrepreneurship
- Quality workforce
- Economic diversity

To address these themes, the project steering committee decided to focus on the following strategic priorities:

Key theme	Strategy
Entrepreneurship	1. Create a culture of entrepreneurship in Sarnia Lambton companies
	2. Develop a pipeline of students who can become Sarnia Lambton's next generation of entrepreneurs and entrepreneurial workers
Quality workforce	3. Promote career opportunities to Sarnia Lambton's current and future workforce
	4. Expand participation of students and incumbent workers in education or training in the Science, Technology, Engineering and Mathematics (STEM) disciplines
	5. Find opportunities for small and medium-sized businesses, and trade unions to access more customized education and training
Economic diversity	6. Expand national and international awareness of Sarnia Lambton's specialized training and education resources
	7. Increase Sarnia Lambton's capacity to conduct continuous economic and market research and analysis to monitor changing labour market needs and opportunities.



Note: Information on additional action plans for each strategy is available in the Workforce Strategy document available as of the end of June on our website at www.slwdb.org

Action 1			
Develop an entrepreneurial mindset among area talent that pervades all aspects of the economy. This mindset will make workers more capable of exploring new innovations, developing new products and identifying new markets.			
Lead	Potential Partners	Timelines	Expected Results
The UWO Research Park – Sarnia Campus	Industrial Educational Co-operative Lambton College Local businesses Business Enterprise Centre Chamber of Commerce Labour unions Sarnia Lambton Workforce Development Board	May 2010 – March 2011	Inventory of existing and planned entrepreneurship-related initiatives Opportunities identified to incorporate entrepreneurial concepts into Lambton College business courses

Action 2			
Develop pipeline of students who can become Sarnia Lambton's next generation innovators and entrepreneurial workers			
Potential Lead	Potential Partners	Timelines	Expected Results
Lambton College	School boards Sarnia Lambton Business Development Corporation Chamber of Commerce Junior Achievement Young professionals groups Labour unions Goodwill Sarnia Lambton Workforce Development Board	June 2010 – March 2011	A consistent series of messages about the importance of innovation, ingenuity and entrepreneurial skills among current and future students targeted to relevant stakeholders

Action 3

Promote career opportunities to Sarnia Lambton's current and future workforce

Lead	Potential Partners	Timelines	Expected Results
Sarnia Lambton Workforce Development Board	Industrial Educational Co-operative Local school boards Business groups and organizations Lambton College Program Advisory Councils Business Enterprise Centre Labour unions	May 2010 – March 2011	Identified curriculum requirements for key occupations in each of Sarnia Lambton's core industries to assess potential skill gaps and identify opportunities for Second Career program participants Production of short (2 to 3 minute) 'day in the life' videos for different careers within Sarnia Lambton Creation of an asset map of the tools available for people to make decisions about current and future careers.

Action 4

Expand participation of students and incumbent workers in education or training in the Science, Technology, Engineering and Mathematics (STEM) disciplines

Lead	Potential Partners	Timelines	Expected Results
Lambton College in partnership with school boards	Local school boards Local sector councils Chamber of Commerce Labour unions Sarnia Lambton Workforce Development Board	May 2010 – March 2011	Job profiles and career pathways that require STEM disciplines

Action 5			
Find opportunities for small and medium-sized businesses and trade unions to access more customized education and specialized training resources.			
Lead	Potential Partners	Timelines	Expected Results
Sarnia Lambton Workforce Development Board	Industrial Educational Co-operative Sarnia Lambton Economic Partnership Lambton College Chamber of Commerce Industrial Educational Co-operative Industry associations Labour unions Lambton College Sarnia Lambton Business Development Corporation	May 2010 – March 2011	Establishment of a Program Advisory Committee that oversees the development and delivery of SME-targeted education and training programs at Lambton College Study of successful efforts on-going elsewhere to promote lifelong learning and continuous skill improvements to identify lessons for Sarnia Lambton

Action 6			
Expand national and international awareness of Sarnia Lambton's specialized training and education resources.			
Lead	Potential Partners	Timelines	Expected Results
Lambton College	Industry leaders Labour leaders Sarnia Lambton Workforce Development Board	May 2010 – March 2011	A 'Talent Advantage' profile of Sarnia Lambton's skilled trades workforce created, printed and used as a marketing tool



APPENDICES



APPENDIX A: SARNIA LAMBTON PROFILE (PRIORITY QUESTIONS)



APPENDIX B: EMPLOYER WORKFORCE SURVEY

1. Please estimate how many people your company currently employs at your Sarnia Lambton location(s): _____

2. Your firm is best described as being part of what industry? Select all that apply

- | | |
|---|--|
| <input type="checkbox"/> Agriculture | <input type="checkbox"/> Tourism or recreation |
| <input type="checkbox"/> Power generation and/or distribution | <input type="checkbox"/> Health care |
| <input type="checkbox"/> Manufacturing Key product(s): _____ | <input type="checkbox"/> Business support services |
| <input type="checkbox"/> Consulting services Expertise: _____ | <input type="checkbox"/> Construction Key service: _____ |
| <input type="checkbox"/> Other _____ | |

3. Please provide some estimates about recent hires and current job openings at your Sarnia Lambton location(s):
Indicate 0 if you have none

- a. How many **new workers** did you **hire** (including replacements from staff turnover) in the past 12 months? _____
- b. How many **openings** (or “vacancies”) do you currently have available? _____
- c. In 2007, approximately how many workers did you hire? _____

4. Did your company have to lay off any employees at your Sarnia-Lambton location during the past year?

- Yes No If yes, how many? _____

5. What proportion of your company’s current workforce do you expect to retire in:

- less than 1 yr = ___% between 1 – 3 yrs = ___% between 3 – 5 yrs = ___%

6. Based on your current company growth plans, please estimate how many new jobs your company expects to create over the next:

- less than 1 yr = ___ new jobs between 1 – 3 yrs = ___ new jobs between 3 – 5 yrs = ___ new jobs

7a. In the table below, identify the 3 most critical occupations to your company’s future growth.

b. Based on your experience before the current recession, how difficult will it be to **hire** and **retain** workers in the critical occupations you listed below?

1 = greatest difficulty, 5 = least difficulty

OCCUPATION <i>Please insert below the 3 most critical occupations from Question #7a</i>	DIFFICULTY HIRING					DIFFICULTY RETAINING				
	Most				Least	Most				Least
1.	1	2	3	4	5	1	2	3	4	5
2.	1	2	3	4	5	1	2	3	4	5
3.	1	2	3	4	5	1	2	3	4	5

8. What factors create difficulties for **hiring** workers in the occupation(s) identified in Question #7a?:

For each factor checked, please note the occupation to which it applies

- Limited number of qualified candidates in the region Occ: _____
- Lack of awareness about the opportunities available in the industry Occ: _____
- Limited interest among jobseekers in career opportunities available in the industry Occ: _____
- Competition from other employers in the region Occ: _____

- Inability to meet demands of rapid technological innovation *Occ:* _____
- Unfavorable perception of Sarnia Lambton *Occ:* _____
- Lack of employment opportunities for spouse *Occ:* _____
- Other(s) *please specify:* _____

**9. What factors create difficulties for retaining workers in the occupation(s) identified in Question #7a?:
For each factor checked, please note the occupation to which it applies**

- Limited opportunities for career advancement in the occupation *Occ* _____
- Limited opportunities to pursue additional education and training *Occ* _____
- Wage demands from workers that are greater than the firm's ability (or willingness) to pay
Occ: _____
- Competition for workers from other area employers *Occ:* _____
- Inability of worker to meet "basic" requirements (i.e. basic job competencies, soft skills, etc.) *Occ:* _____
- Lack of services such as public transportation, childcare, etc. *Occ:* _____
- Workers having difficulty keeping pace with rapid technological innovation *Occ:* _____
- Desire to live and work outside of Sarnia Lambton *Occ:* _____
- Other(s) *please specify* _____

10. For what key occupations must your company focus its training efforts in order to remain competitive and successful?

Key Occupation	For each key occupation, please estimate...		
	# of workers	Annual training hours per worker needed for comp. workforce	% of training done through on-the-job training
1.			%
2.			%
3.			%

OTHER ISSUES

**11. If you employ foreign trained professionals, which factor(s) affect their successful integration into your workplace?:
Select all that apply**

- Technical skills and/or training
- Work ethic
- Other factors *please specify:* _____
- Language skills
- Social skills

12. Any additional comments or suggestions about workforce development in Sarnia Lambton?

Please provide your contact information below if you would like us to follow-up on any issue you raised:

Name: _____

Phone: _____ E-mail: _____

APPENDIX C: PARTICIPANT LIST

The information used in this report was informed by focus groups and one-on-one interviews with almost 90 individuals. We thank the individuals listed below who generously provided their time and insights.

Name	Organization
<i>Mike Banovsky</i>	<i>MPB Industrial Ltd.</i>
<i>John Barnfield</i>	<i>Industrial Educational Co-operative</i>
<i>Brian Black</i>	<i>Enbridge Pipelines Inc.</i>
<i>Andre Boucher</i>	<i>St. Clair Ethanol Plant (Suncor Energy)</i>
<i>Jim Bradshaw</i>	<i>A F of L Sheet Metal Workers International Association Local 539</i>
<i>Mark Braun</i>	<i>Braun Valley Associates</i>
<i>Suzanne Bresset</i>	<i>Job Connect – Forest</i>
<i>Kathy Bresset</i>	<i>North Lambton Community Health Centre</i>
<i>Connie Burrowes</i>	<i>JobStart</i>
<i>Ruth Campbell</i>	<i>Goodwill Employment Action Centre</i>
<i>Mickey Cataford</i>	<i>Electricians Local 530</i>
<i>Colleen Cook</i>	<i>Bluewater Health</i>
<i>Luciano Corbo</i>	<i>Point Edward Charity Casino – Ontario Lottery & Gaming Corp.</i>
<i>Anne Marie Cosford</i>	<i>Job Connect – Lambton College</i>
<i>Jim Crawford</i>	<i>Ontario Power Generation – Lambton Generating Station</i>
<i>Silvana Cservik</i>	<i>Imperial Oil Products & Chemicals Division, Sarnia Manufacturing Site</i>
<i>Jeff DeVlugt</i>	<i>CHEMFAB Industries Inc.</i>
<i>Spencer Dickson</i>	<i>Lambton College</i>
<i>John Dickson</i>	<i>Tourism Sarnia Lambton</i>
<i>Kelly Douglas-Nead</i>	<i>SNC Lavalin Inc.</i>
<i>Cindy Dubois</i>	<i>LCHRAS</i>
<i>Ken Dunlop</i>	<i>Lambton Federation of Agriculture</i>
<i>Geoff Eisenbraun</i>	<i>Holiday Inn</i>
<i>Dave Ferguson</i>	<i>Lambton Soil and Crop Improvement Association</i>
<i>Brian Fogg</i>	<i>AMEC Environmental</i>
<i>Lynne Anne Gallaway</i>	<i>Watford Quality Care Centre</i>
<i>Ralph Ganter</i>	<i>Erie St. Clair LHIN</i>

Name	Organization
<i>Marty Gaulin</i>	<i>WorleyParsons</i>
<i>Carolanne Gillam</i>	<i>Bayshore Home Health</i>
<i>Peter Greydanus</i>	<i>A Specialty Crop Producer</i>
<i>Frank Gustin</i>	
<i>Joyce Haneca</i>	<i>Trillium Village</i>
<i>Tony Hanlon</i>	<i>Lambton College</i>
<i>Bruce Hein</i>	<i>EXPRESS Personnel Inc.</i>
<i>Don Hewson</i>	<i>University of Western Ontario Research Park – Sarnia-Lambton Campus</i>
<i>Mike Ireland</i>	<i>Sarnia-Lambton Economic Partnership</i>
<i>Joe Kehn</i>	<i>SOS Personnel Inc.</i>
<i>Dena Kent</i>	<i>Best Western Guildwood Inn</i>
<i>Joe Kerr</i>	<i>Grain Farmers of Lambton</i>
<i>Denis Lajoie</i>	<i>PRO-MART Industrial Products Ltd.</i>
<i>Louyse LaRochelle</i>	<i>LANXESS Inc.</i>
<i>Scott Leystra</i>	<i>Lambton Pork Producers</i>
<i>Eva Lizotte</i>	<i>Erie St. Clair Community Care Access Centre</i>
<i>Corrie Lloyd</i>	<i>NCO Customer Management Ltd.</i>
<i>Robert Locke</i>	<i>Hiawatha Horse Park & Entertainment Centre</i>
<i>Maik Luiken</i>	<i>Lambton College</i>
<i>Ken Maaten</i>	<i>Maaten Construction Limited</i>
<i>Ian MacDonald</i>	<i>INEOS NOVA</i>
<i>Sandy Marshall</i>	<i>LANXESS Inc.</i>
<i>Ron May</i>	<i>Duststop Air Filters Inc.</i>
<i>Matt McClean</i>	<i>SOBIN</i>
<i>Garry McDonald</i>	<i>Sarnia Lambton Chamber of Commerce</i>
<i>Murray McLaughlin</i>	<i>Sustainable Chemistry Alliance</i>
<i>Karie Merritt</i>	<i>H. C. Starck Canada Inc.</i>
<i>Onorio Moala</i>	<i>Labourers Local 1089</i>
<i>Judy Morris</i>	<i>Lambton College</i>
<i>Alan Nixon</i>	<i>Terra International Inc.</i>

Name	Organization
<i>Fred Olar</i>	<i>Hayters Heating and Plumbing</i>
<i>Bob Pavey</i>	<i>Cabot Canada Ltd.</i>
<i>Marty Raaymaker</i>	<i>MIG Engineering</i>
<i>Andre Reif</i>	<i>Ethyl Canada Inc.</i>
<i>France Rochette</i>	<i>DuPont Canada</i>
<i>Holly Rutherford</i>	<i>Gallery Lambton</i>
<i>Linda Ryan</i>	<i>Marriott Worldwide Reservations</i>
<i>Barry Ryan</i>	<i>TECSAR Inc.</i>
<i>Vince Savo</i>	<i>Lambton Metal Service</i>
<i>Bob Schenk</i>	<i>Carpenters Local 1256</i>
<i>Peter Scott</i>	<i>StarTek</i>
<i>John Simpson</i>	<i>Grain Farmers of Lambton</i>
<i>Anthony Sjaarda</i>	
<i>Michelle Smith</i>	<i>YMCA Career & Learning Centre</i>
<i>Agnes Soulard</i>	<i>Lambton Elderly Outreach Inc.</i>
<i>Jeff Stewardson</i>	<i>Lambton Dairy Producers</i>
<i>Tracey Taylor</i>	<i>YMCA Career & Learning Centre</i>
<i>Tom Thompson</i>	<i>NOVA Chemicals (Canada) Ltd.</i>
<i>Rob Thompson</i>	<i>NOVA Chemicals (Canada) Ltd.</i>
<i>Ross Tius</i>	<i>Plumbers Local 663</i>
<i>Noeleen Tyczynski</i>	<i>The WorkPlace</i>
<i>Mark Van</i>	<i>Ministry of Training, Colleges and Universities</i>
<i>Marten Vanden Broek</i>	<i>Central Machine</i>
<i>Steve Vandenberg</i>	<i>The Vegetable Growers' Association</i>
<i>Bob Vansickle</i>	<i>Community Living</i>
<i>Peter VanTroost</i>	<i>Lambton 328 Farmers' Union</i>
<i>Charlie Webb</i>	<i>Anderson-Webb Limited</i>
<i>Tom Wilson</i>	<i>Lambton Cattlemen's Association</i>
<i>Penny Witcher</i>	<i>Canadian Mental Health Association</i>
<i>Jim Wodham</i>	<i>Millwrights Local 1592</i>

APPENDIX D: BIBLIOGRAPHY

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