

# Automotive Labour Market Project Windsor – Sarnia Economic Region Initial Consultation

June 25, 2019

**CSTEC**

Canadian Skills Training and Employment Coalition



**PRISM**  
ECONOMICS AND ANALYSIS

# Agenda

8 – 8:30 am Coffee, refreshments, and introductions

8:30 – 9 am Project overview

9 – 10 am Group discussion on the project's main research topics

## Automotive Labour Market Project:

Three-year project funded by the Government of Canada to provide the broader automotive sector, educators, policy makers, job seekers and other stakeholders with current labour market information related to the sector including the examination of trends and the forecasting of supply and demand for key occupations.

The project will produce profiles, research findings and forecasts in order to help:

1. Industry make more informed decisions related to workforce planning and skills development;
2. Job seekers, students and young people have a better sense of where employment opportunities will be in the sector;
3. Educators and policy makers better understand the sector's employment trends.

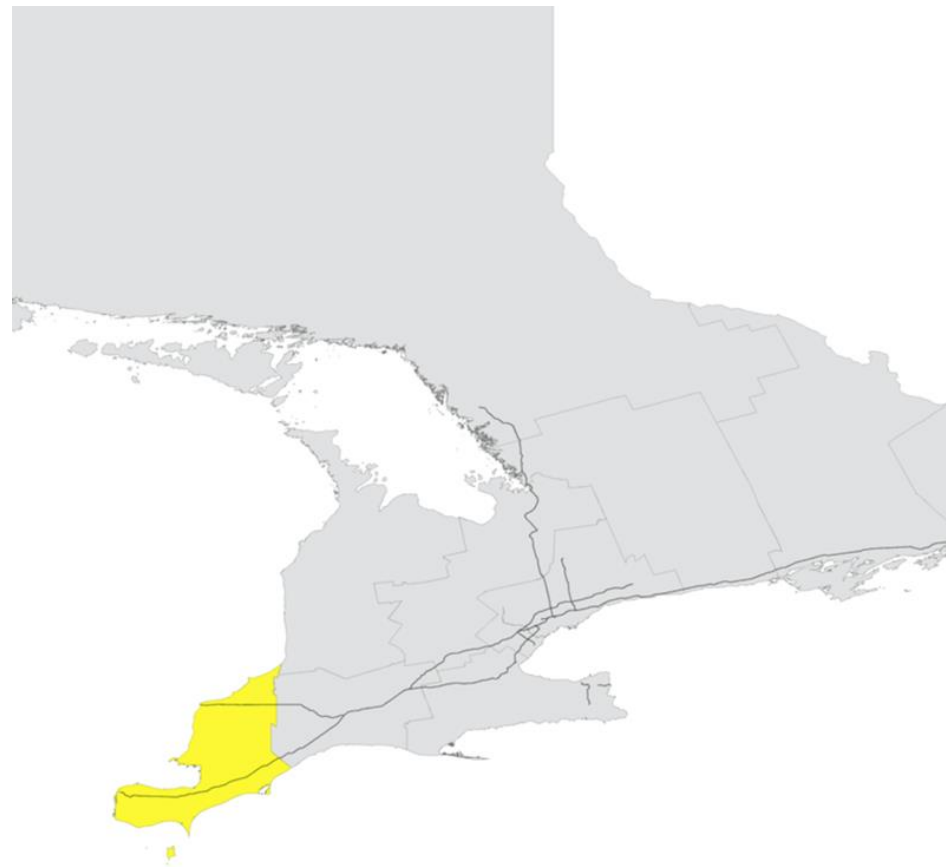
# Project Partners

**CSTEC:** The Canadian Skills Training and Employment Coalition is an enabler of innovative, multi-stakeholder solutions to training related problems faced by employers within the broader manufacturing sector. We focus on a broad range of training issues related to workplace training, apprenticeship, labour market information, adjustment and career enhancement. <https://cstec.ca>

**APRC:** The Automotive Policy Research Centre (APRC) is non-profit organization that conducts research and disseminates knowledge about how public policy supports Canada's globally competitive automotive industry in an increasingly challenging global environment. <https://automotivepolicy.ca/>

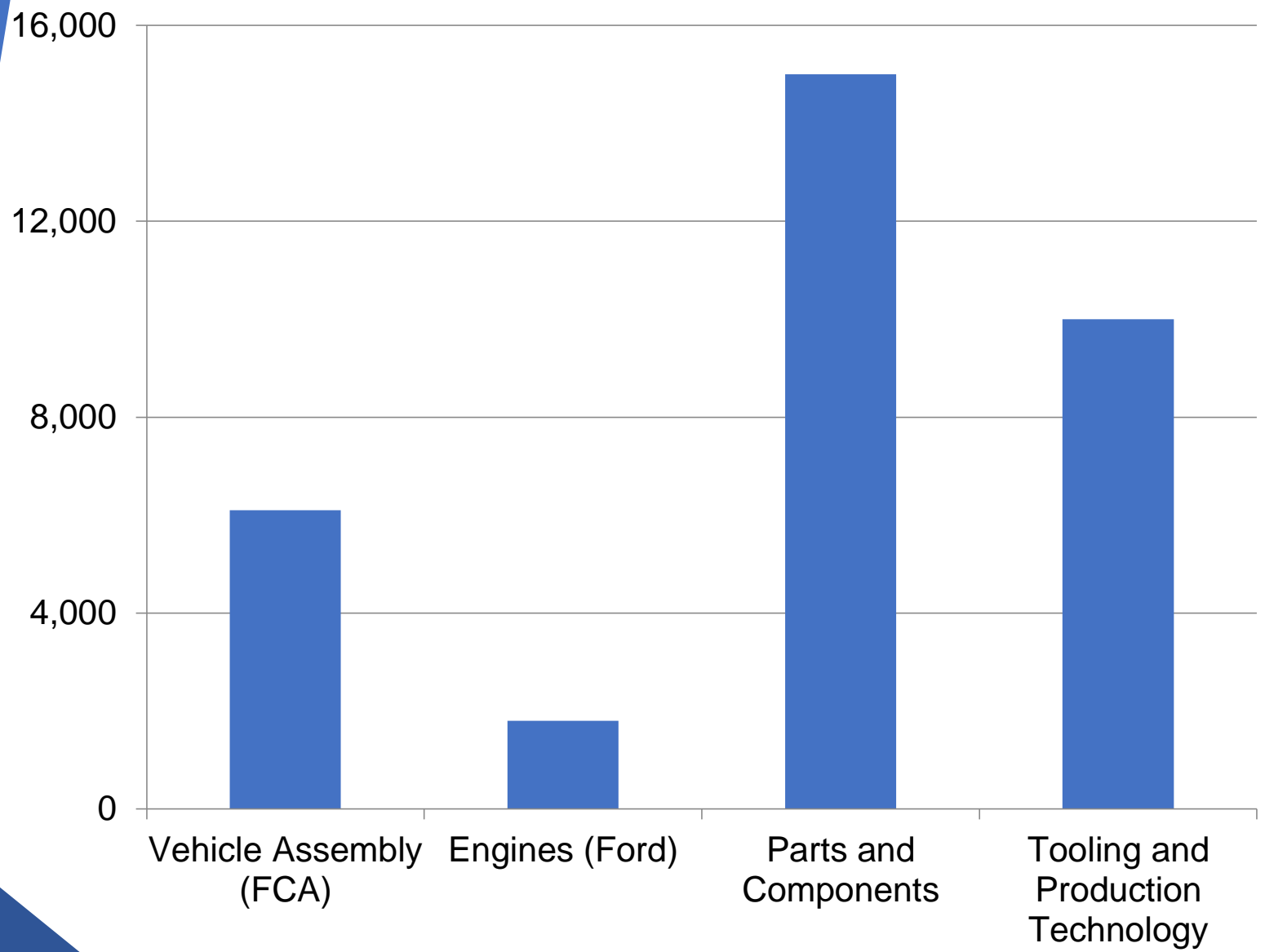
**Prism Economics:** For two decades, Prism has extended a variety of analytical and management-related services to clients in government, non-profit, post secondary, and labour sectors. Prism's in-depth knowledge of labour market structures, issues, sources, people, institutions, regulations, and policies leads to credible and practical research. <https://www.prismeconomics.com/>

Windsor –  
Sarnia  
Automotive  
Manufacturing  
Region

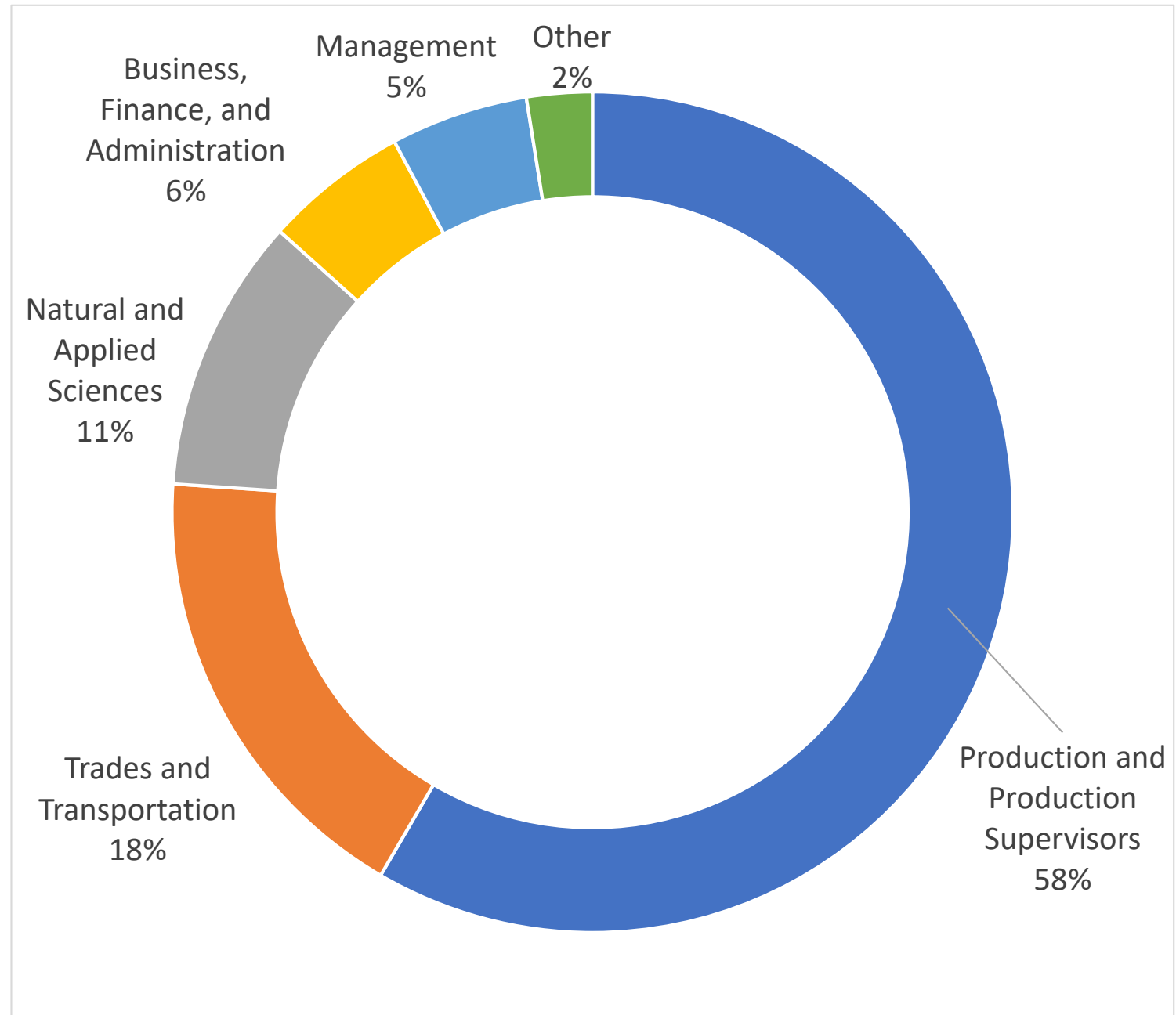


- The Economic Region of Windsor-Sarnia is comprised of Chatham-Kent, Essex, and Lambton
- The region's automotive manufacturing industry employed over 23,000 people across over 100 establishments in 2018
- The region is also home to a large network of automotive tool, die, mold, and production equipment suppliers that employ over 10,000 people

# Automotive Manufacturing Employment by Activity in Windsor-Sarnia, 2018



# Automotive Manufacturing Workforce by Occupation in Windsor-Sarnia, 2016



# Key Regional Automotive Manufacturing Occupations and Trades. 2016

Occupation	Automotive Manufacturing Labour Force	Share of Automotive Manufacturing Labour Force
Motor vehicle assemblers, inspectors and testers (NOC 9522)	8225	45.5%
Material handlers (NOC 7452)	960	5.3%
Supervisors, motor vehicle assembling (NOC 9221)	865	4.8%
Mechanical engineers (NOC 2132)	775	4.3%
Manufacturing managers (NOC 0911)	475	2.6%
Industrial electricians (NOC 7242)	405	2.2%
Industrial and manufacturing engineers (NOC 2141)	295	1.6%
Construction millwrights and industrial mechanics (NOC 7311)	280	1.5%
Other labourers in processing, manufacturing, and utilities (NOC 9619)	260	1.4%
Automotive service technicians, truck and bus mechanics and mechanical repairers (NOC 7321)	245	1.4%
Tool and die makers (NOC 7232)	235	1.3%
Mechanical assemblers and inspectors (NOC 9526)	225	1.2%
Metalworking and forging machine operators (NOC 9416)	215	1.2%
Industrial painters, coaters, and metal finishing process operators (NOC 9536)	180	1.0%
Welders and related machine operators (NOC 7237)	165	0.9%
Shippers and receivers (NOC 1521)	110	0.6%

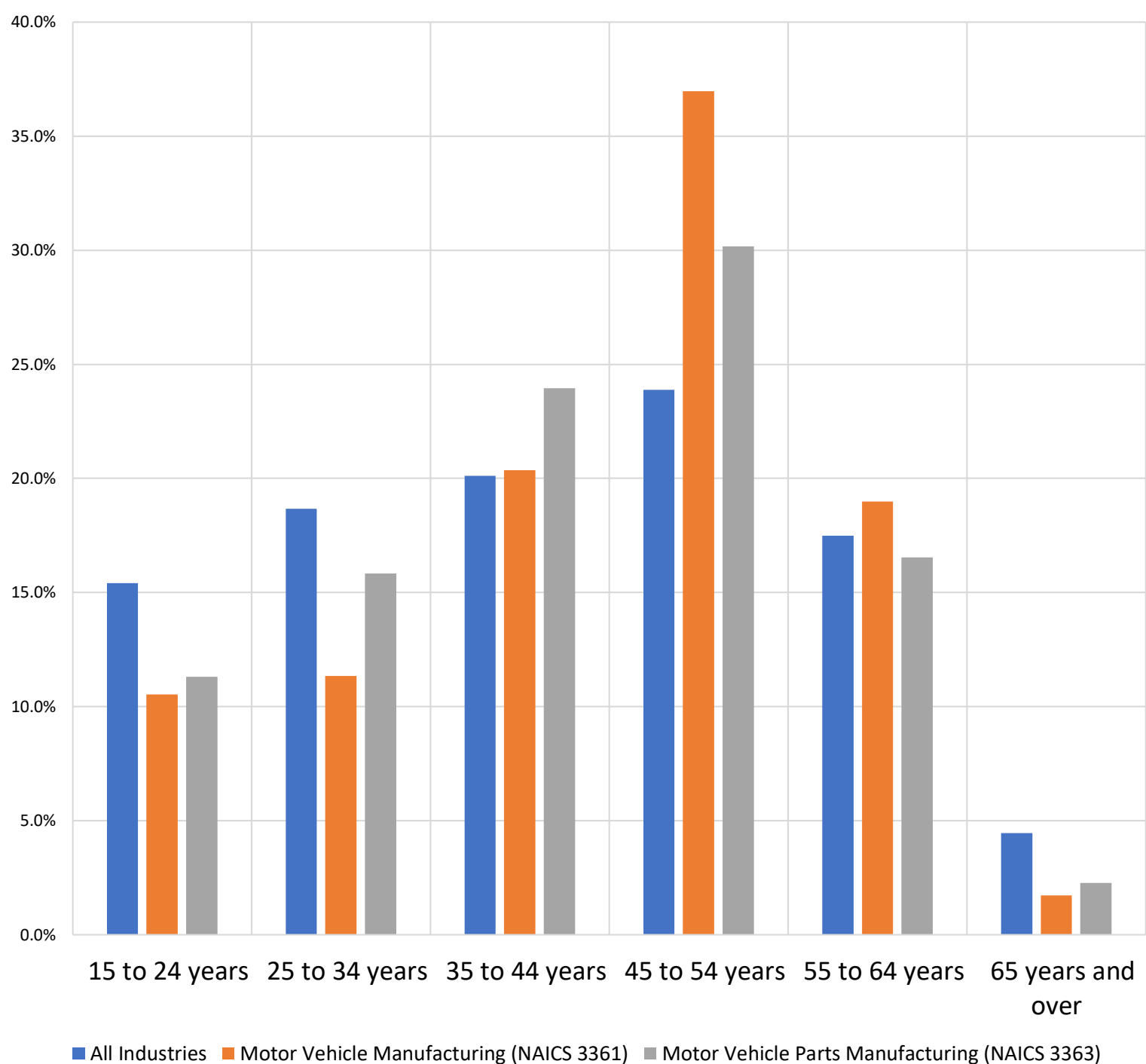


# Vehicle Assembly and Automotive Parts Manufacturing Establishments by Size in Windsor-Sarnia, 2018

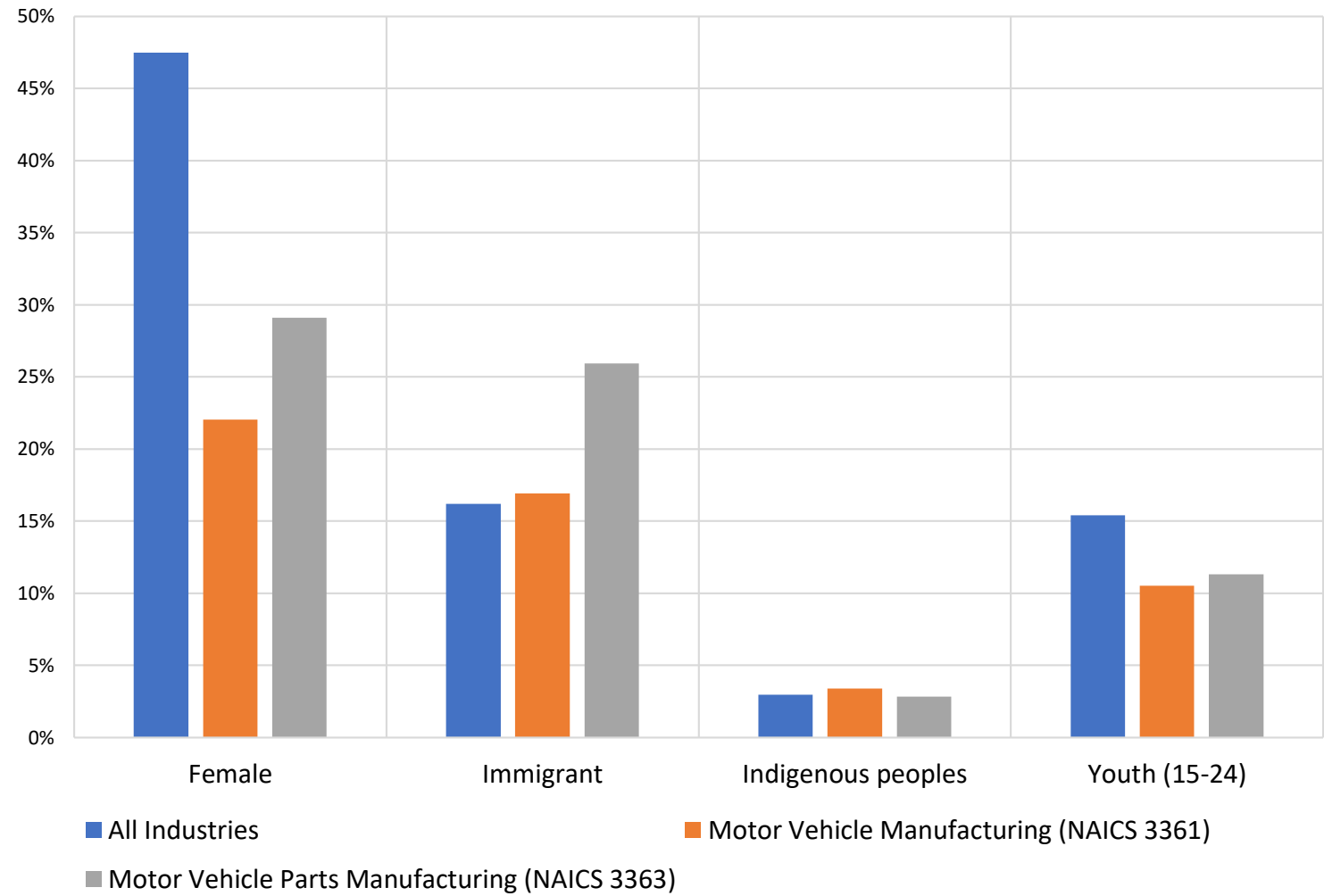
	Number of Employees < 100	Number of Employees 100-249	Number of Employees 250-499	Number of Employees 500+
Manufacturing Establishments	57	27	14	9

# Age Composition of Automotive Manufacturing Workforce in Windsor-Sarnia

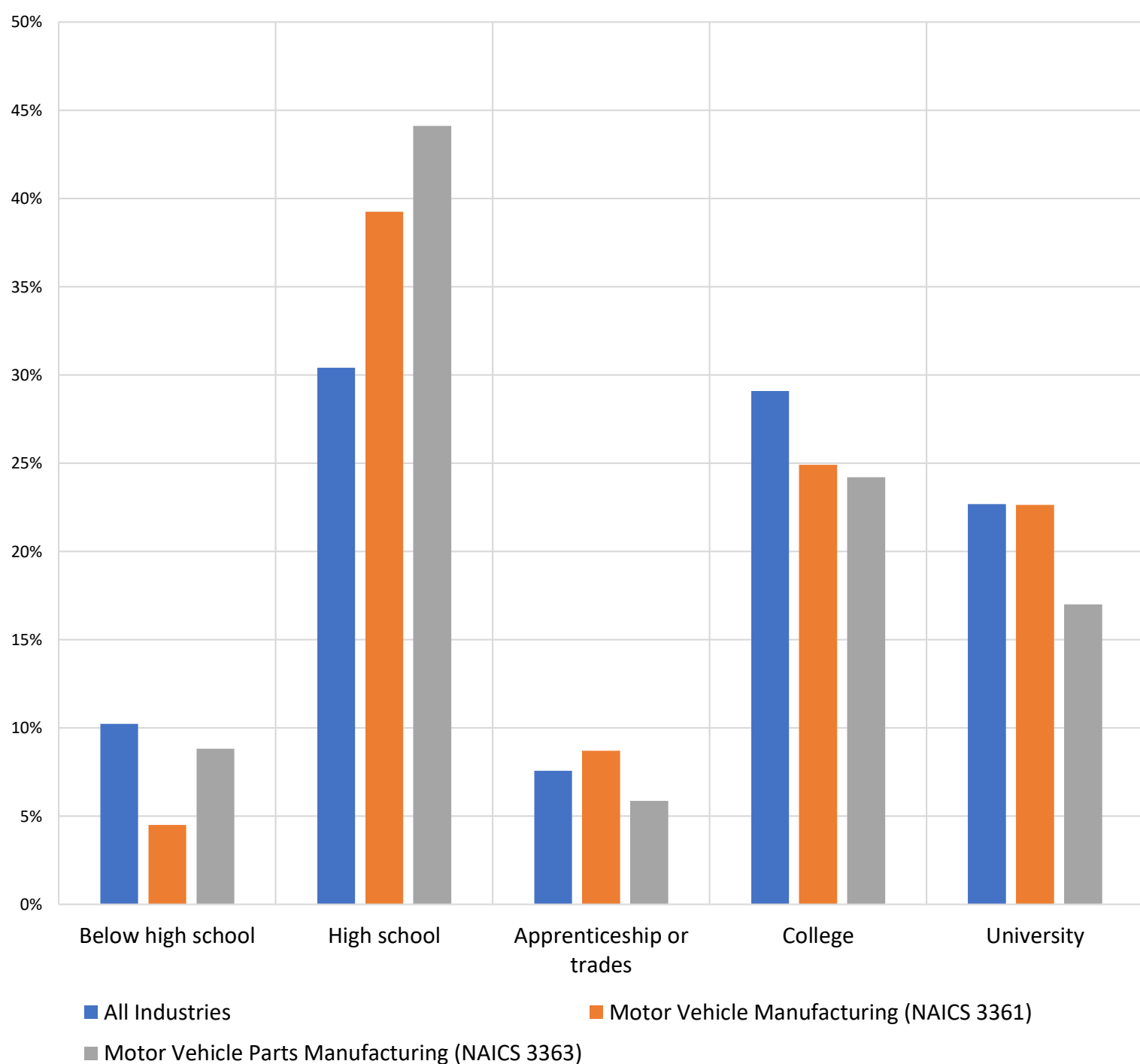
## Traditional Definition of Sector, 2016



Diversity of  
Automotive  
Manufacturing  
Workforce in  
Windsor-Sarnia,  
Traditional Definition  
of Sector, 2016

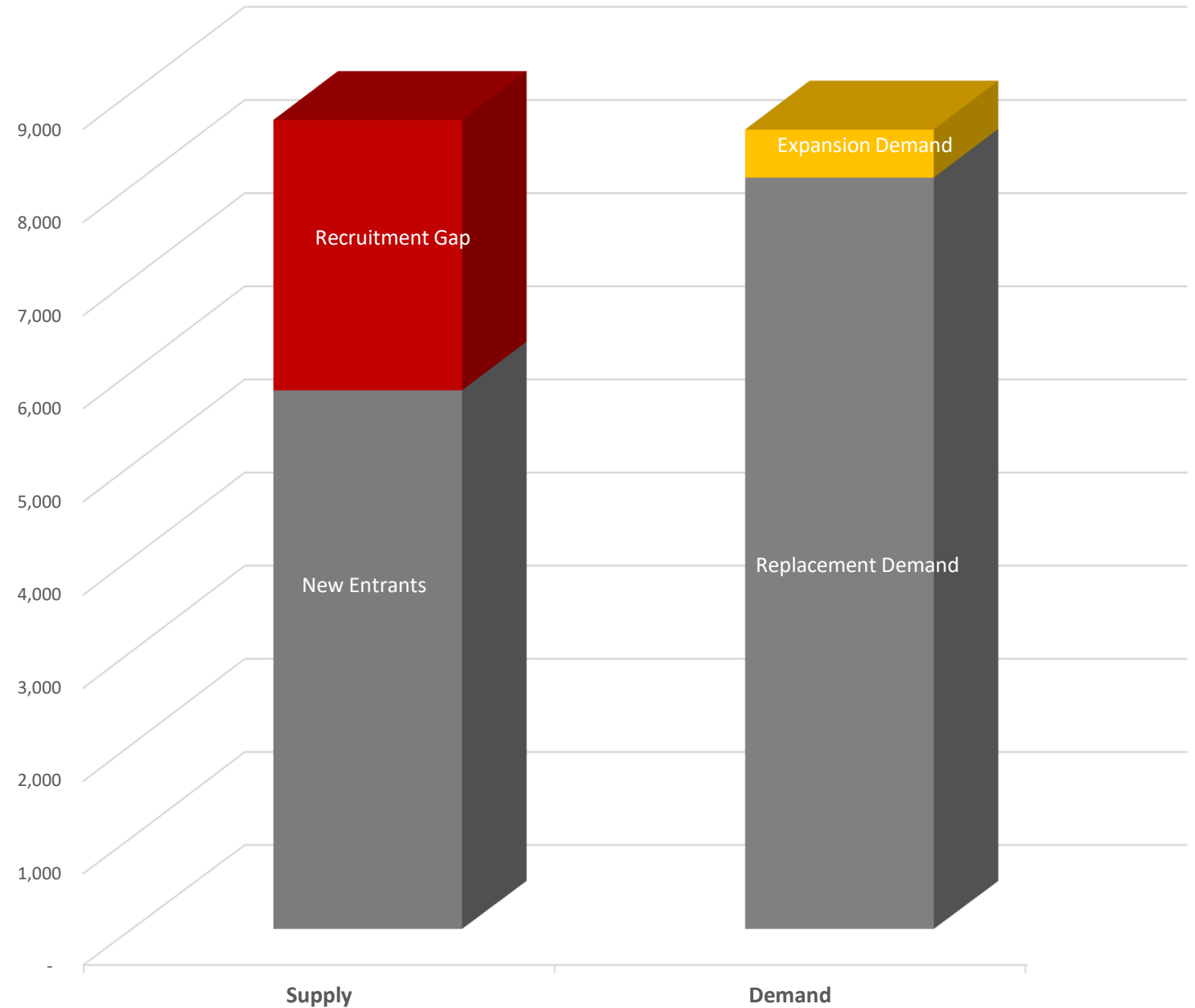


# Highest Educational Attainment of Automotive Manufacturing Workforce in Windsor-Sarnia Traditional Definition of Sector, 2016



# Manufacturing Workforce Hiring Forecast of Hiring Requirements: Windsor - Sarnia 2016 – 2025

Regional Manufacturing Profile. Windsor Sarnia. CSTEC and Prism Economics. 2017



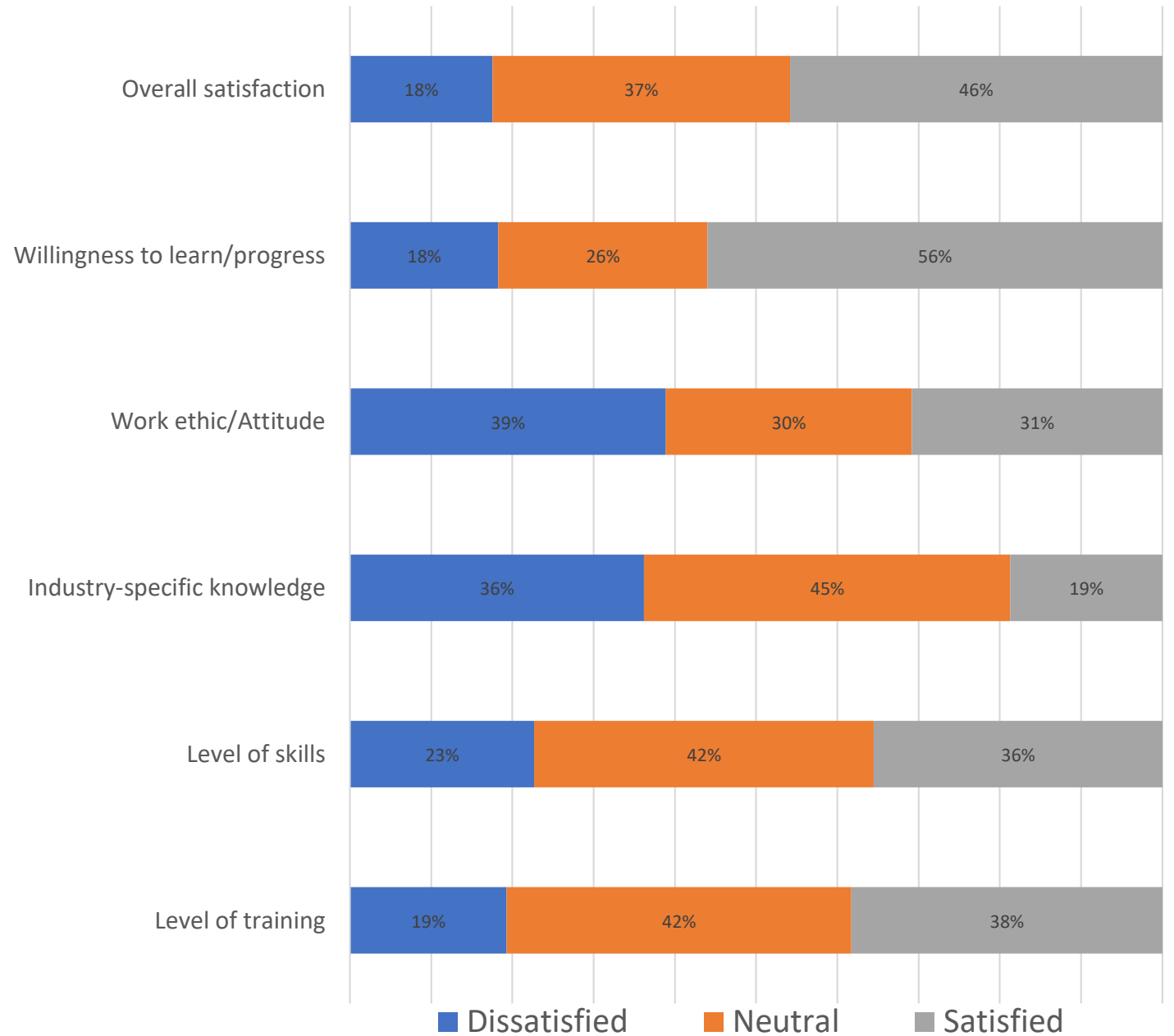
# Hiring Forecast by Occupation in Manufacturing; Windsor- Sarnia 2016-2025

Regional Manufacturing Profile. Windsor  
Sarnia. CSTEC and Prism Economics. 2017

<b>Occupations</b>	<b>Total Hiring Requirement 2016 - 2025</b>
<b>All Occupations in Manufacturing</b>	<b>8,703</b>
Labourers in food, beverage and associated products processing	1,223
Process control and machine operators, food, beverage and associated products processing	839
Manufacturing managers	811
Motor vehicle assemblers, inspectors and testers	502
Transport truck drivers	472
Material handlers	378
Plastics processing machine operators	336
Construction millwrights and industrial mechanics	298
Shippers and receivers	218
Other labourers in processing, manufacturing and utilities	116
Machinists and machining and tooling inspectors	85
Mechanical engineers	64
Industrial and manufacturing engineers	48
Industrial electricians	47
Senior managers - construction, transportation, production and utilities	24
Mechanical engineering technologists and technicians	23
Welders and related machine operators	20
Industrial engineering and manufacturing technologists and technicians	17
Contractors and supervisors, machining, metal forming, shaping and erecting trades	12
Chemical technologists and technicians	9
Electrical and electronics engineers	8
Electrical and electronics engineering technologists and technicians	6
Sheet metal workers	5
Furniture and fixture assemblers and inspectors	5
Industrial sewing machine operators	5
Structural metal and platework fabricators and fitters	4
Labourers in wood, pulp and paper processing	2

# Employer Satisfaction with Youth Employees in Manufacturing, Canada, 2016

Regional Manufacturing Profile. Windsor Sarnia. CSTEC and Prism Economics. 2017



## Auto LMI Project Objectives

A comprehensive labour market analysis of the Canadian automotive industry and its supply chain for the purpose of:



Documenting the importance and size of Canada's automotive sector and helping job seekers and students understand the type of employment opportunities available.



Provide rigorous, forward-looking labour data to employers to support informed strategic decisions around recruitment and retention



Support informed discussions between the industry, government and policy-makers



# A Different Approach to LMI:

---

Takes a broad definition of the automotive industry that includes vehicle assemblers, automotive parts and components manufacturers, materials suppliers, companies supplying tooling and production technology (including dies and molds), and connected and autonomous vehicle technology suppliers. Broader definition raises number of individuals working in automotive sector in Canada to 176,000 to 188,000 range or more.

---

Forecasts will be variable, with multiple demand side scenarios based on assumptions about economic growth rates, sectoral investment levels and productivity enhancements.

---

Robust input and consultations with employers and industry associations on important labour market issues, recruitment and retention issues and other important industry trends.

# Key Outputs



AUTOMOTIVE  
LABOUR MARKET  
FORECASTING  
MODEL



PROVINCIAL  
FORECASTS FOR  
ONTARIO AND  
QUÉBEC



DETAILED FORECASTS  
FOR WINDSOR-SARNIA,  
LONDON/STRATFORD-  
BRUCE, KITCHENER-  
WATERLOO-BARRIE, THE  
GOLDEN HORSESHOE,  
EASTERN ONTARIO,  
MONTRÉAL, WINNIPEG,  
AND VANCOUVER

# Additional Outputs

Forecast supply and demand for 49 important automotive sector occupations, including engineers, technicians, and skilled trades such as millwrights, electricians, and tool and die makers.

A sectoral wage overview based on StatsCan's various reports and data collected from collective agreements and electronic job postings.

Eight or more trend reports on important topics including industry wages, diversity and demographics of workforce, emergent technology, labour mobility, supply trends, work-integrated learning, etc.

Final report with recommendations from employers on how to solve labour market challenges in the automotive sector.

# The Automotive Trend Reports

## To be Produced in 2019

Labour market mobility

How industry and other stakeholders define competitiveness

Rationale for defining automotive sector more broadly

Catalogue of training programs relevant to industry

## Possible Future Reports

Key labour market challenges and industry led solutions

Review of technological trends and impact on workforce

Apprenticeship and work integrated learning

Examination of diversity in automotive workforce

Other topics as suggested by industry



# Questions and Discussion

## Recruitment and Hiring

Are you experiencing any recruitment and hiring challenges?

How serious are the challenges and why do they exist?

## Skills and Occupations

Do you think there are shortages of workers in your region?

If so, for what occupations is there a shortage?

## Workforce Demographics

Are you concerned about the age of your workforce?

Women currently only comprise 25% of the sector's workforce. Do you have a program or approach to encourage the hiring of women or other underrepresented groups?



## Competition

Do you compete with any other companies/industries/regions for workers?

What industries seem to be getting the best talent?

## Technology

Have you made any major upgrades in new production technologies?

Are there any skills or training challenges related to the adoption of new technology?

## Education and Training

Are you partnering with any colleges/universities/high schools/trade schools?

How beneficial are these partnerships?  
Could they be improved?

# Infrastructure

Are there any infrastructure advantages and/or challenges in your plant/region?

Electricity, traffic/mobility, communications, etc.

## Policy Supports and Government Programs

Are there any Federal or Provincial programs that you use to help you train, recruit, and modernize production?

Are there any new programs or improvements to existing programs that would help you recruit and retain people with the right skills?

Is there a government funded program or policy we should examine?

## Final Thoughts

As we move forward with our work, do you have any suggestions about the type of information we should collect and analyze?

When the reports are completed, what type of information would you find useful?

# Thank You

Contact: [general@cstec.ca](mailto:general@cstec.ca)

**CSTEC**

Canadian Skills Training and Employment Coalition

