



**CITY OF WINDSOR  
EMPLOYMENT PROJECTIONS &  
EMPLOYMENT LANDS NEEDS ANALYSIS**

**Prepared for the City of Windsor  
Planning Department**

**EDP Consulting**

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## EXECUTIVE SUMMARY

As part of the “Moving Forward” stage of the City of Windsor Official Plan review, the City of Windsor contracted EDP Consulting to prepare employment projections and an assessment of the land supply needed to accommodate projected employment growth on employment lands in Windsor. The scope of work for this study was to build upon employment projections work completed in 2006 as part of the *City of Windsor Annexed Area Master Plan Study*, taking into account more recent economic data and trends.

Three employment projection scenarios have been prepared in this study: Low, Base, and High Growth scenarios. The Base Case Scenario is considered to be the most likely scenario. This scenario assumes an overall employment at fixed places of work level of around 141,800 in Windsor in 2026. Under the Base Case Scenario, the number of new jobs at fixed places of work in Windsor between 2007 and 2026, after subtracting the estimated 2006 employment level, is estimated at around 21,100.

The level of employment which is expected to locate on business park/industrial employment lands in Windsor is around 9,445, which is roughly 45% of the new employment projected for Windsor between 2007 and 2026. It is estimated that roughly between 400 to 500 net hectares of employment lands are needed to support the projected employment on such lands within the planning period in Windsor. The total gross land area needed is estimated at roughly 500 to 625 hectares.

Taking into account the supply of vacant employment lands in Windsor, including the new supply of business parks and future employment lands in the Sandwich South Area of Windsor designated in OPA No. 60, it is concluded that a more than adequate supply of employment lands is available to accommodate projected employment growth for the 20 year planning period.

The economic restructuring in Windsor will bring about a change in the type of employment lands needed, with less land needed for heavy manufacturing uses than estimated in past studies and more mixed use business parks and employment lands for light industrial uses, offices, business services, logistics facilities, institutional uses such as technical schools, and ancillary uses.

It is considered unlikely that there will be the demand for new large automotive assembly facilities in Windsor within the planning period, particularly within the early part. This is based on recent restructuring trends of North American automakers; the already high market presence of North American automakers in Windsor; recent locational decisions of Asian automakers, and discussions with representatives of the Windsor Essex Development Commission. However, it is noted that should such demand occur in the latter part of the planning period, it could be accommodated on the Sandwich South Area employment lands targeted for servicing beyond 2017.

The Windsor economy is currently undergoing substantial change as it adjusts to restructuring in the automotive manufacturing sector and its ripple effect throughout other sectors and the ongoing shift toward a service economy. As such, there is significant uncertainty in projecting long term future economic conditions and employment in Windsor until the local economy stabilizes. In this context, it will be particularly important to revisit these employment projections and lands needs analysis as part of the next Official Plan Review in 2013.

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## 1.0 INTRODUCTION

### 1.1 Background

As part of the “Moving Forward” stage of the City of Windsor Official Plan review, the City of Windsor contracted EDP Consulting to prepare employment projections and an assessment of the land supply needed to accommodate projected employment growth on employment lands in Windsor. The scope of work for this study was to build upon employment projections work completed in 2006 as part of the *City of Windsor Annexed Area Master Plan Study*, taking into account more recent economic data and trends. It is intended that this present study will satisfy the Provincial Policy Statement requirements with regard to identification of the supply of employment lands that need to be designated in the City of Windsor Official Plan to accommodate expected employment growth over the 20 year planning period.

### 1.2 Approach

An employment growth approach was used to calculate the employment projections for a twenty year period. Using this approach, future employment levels were projected by applying percentage employment growth estimates to past employment levels to calculate expected employment for the planning period. Projected employment was then allocated by sector based on past and expected future trends. As a check on the reasonableness of the resulting employment projections, this approach was supplemented with a review of past absorption rates and employment-population ratios using past and projected employment and population levels for Windsor.

The employment projections provided in this report are for employment at fixed places of work which includes the portion of the Windsor labour force that work at fixed locations in Windsor, people who work at home in Windsor, and people who commute into Windsor for work at fixed places of employment. It excludes labour that do not have associated employment space needs in Windsor such as labour that commute out of Windsor to work in other locations and those with ‘no fixed location of work’ such as truck drivers, construction workers, landscapers, etc.

Employment projections are provided for the following sector groupings: 1) manufacturing and related industrial employment; 2) population and business services related employment; 3) institutional employment; and 4) primary sector employment. This is consistent with the standard approach for employment projections developed for the purpose of determining the supply of employment lands needed to accommodate projected employment growth.

As background to preparing the employment projections and land needs analysis, information and data were reviewed from a number of sources including:

- *Economic Development Strategy for Windsor-Essex;*
- Statistics Canada Census and Labour Force Survey;
- Windsor-Essex Development Commission data on business closures, downsizings, expansions and start-ups;
- Windsor-Essex Development Commission data on land consumption and absorption rates;
- City of Windsor building permit data;
- City of Windsor employment lands mapping and data;
- Lapointe Consulting Population Projections for Windsor;
- Conference Board of Canada 'Metropolitan Outlook, Windsor CMA', Autumn 2006;
- Conference Board of Canada, employment forecast data for Windsor CMA, Spring and November 2007;
- CB Richard Ellis, Windsor market data;
- Stantec Consulting, *City of Windsor Annexed Area Master Plan Study*, 2006.

Consultation was also undertaken with economic development representatives of Windsor-Essex Development Commission and City of Windsor planning officials to confirm background assumptions and employment trends.

### 1.3 Study Limitations

While the employment projections developed in this study provide a suitable basis for assessing employment land needs for industrial and business park lands in Windsor, it is recommended that these employment projections be revisited as part of the next Official Plan Review. This is particularly important given the following:

- The Windsor economy is currently undergoing substantial change as it adjusts to restructuring in the automotive manufacturing sector and its ripple effect throughout other sectors; the effect of the high Canadian dollar on manufacturing, tourism and retail sectors; and the ongoing shift toward a service economy. As such, there is significant uncertainty in projecting long term future economic conditions and employment in Windsor until the local economy stabilizes, which will be beyond the time frame of this study.
- Baseline employment data from the 2006 census will not be available until March 2008, which is beyond the time frame of this study. As such, it has been necessary to rely on 1996 and 2001 census employment data, which may not adequately reflect recent employment trends, and on more recent labour force data for the broader Windsor CMA area which is representative of labour force that lives within the Windsor CMA, however does not specifically pertain to employment at fixed places of work in Windsor. It was necessary to estimate the 2006 employment level at fixed places of work for Windsor.

## 2.0 TRENDS AND ASSUMPTIONS

### 2.1 Windsor Employment and Labour Force Trends

Data on jobs in Windsor are available from the census and pertain to employment at fixed places of work. This includes the portion of the Windsor labour force that works at fixed locations in Windsor, people who work at home in Windsor, and people who commute into Windsor for work. It excludes labour that commute out of Windsor to work in other locations and those with 'no fixed location of work' such as truck drivers, construction workers, landscapers, etc. Additionally, it excludes any labour living in the United States and commuting to work in Windsor. Place of work data pertaining to fixed places of work are available from the 1996 census and 2001 census. Place of work data from the 2006 census won't be available until March 2008 and as such can not be reported in this review.

The employment at fixed places of work in Windsor in 2001 was 114,665, compared to 105,700 in 1996, which represents a per annum growth of 1.7%. Windsor is the main employment centre in the CMA and attracts labour from the surrounding areas. The Windsor CMA is comprised of Windsor and the towns of Amherstburg, LaSalle, Lakeshore and Tecumseh. While its employment at fixed places of work level in 2001 was 114,665, its employed labour force was 97,495, resulting in an employment to labour force ratio of 1.18. For every employed person in Windsor's labour force in 2001, there were around 1.18 jobs available in Windsor at fixed places of work. The ratio is even higher when only labour with a fixed location is considered: the ratio is 1.35.

Windsor's share of labour working at fixed places of work in the Windsor CMA in 2001 was about 79.9%; this is down from 84.5% in 1996, suggesting that an increasing portion of new employment is locating in areas of the CMA outside of Windsor. This is also supported by the per annum employment growth rate at fixed places of work within the CMA, which was 3% compared to 1.7% in Windsor.

Given the unavailability of employment data from the 2006 census at the present time, employed labour force data for the Windsor CMA from Statistics Canada Labour Force Survey (LFS) was reviewed to provide an understanding of

employment trends. Employed labour force is a measure of the number of people living within a specific geographic area who are employed at a given time. The actual employment level or number of jobs in a community may be higher or lower than its labour force depending on the level of labour inflow and outflow. Data are available on the employed labour force from the census as well as from Statistics Canada Labour Force Survey (LFS) which provides monthly and yearly estimates of employed labour by sector for specific census metropolitan areas and economic regions.

Based on the census, the per annum growth rate of the Windsor CMA labour force between 1996 and 2001 was 2.9% (which is close to the per annum growth rate of its employment at fixed places of work which was 3.0%). Per annum growth levels for the employed labour force in the Windsor CMA from 1996 to 2001, based on the more extensive data from Statistics Canada LFS, averaged 2.3%. Employed labour force growth levels per annum from 2001 to 2006 averaged 1.2%. The per annum growth rate for Windsor’s labour force was 1.8% (which is also close to its per annum growth rate of its employment at fixed places of work which was 1.7%). LFS data for the city of Windsor is not available as the LFS pertains to CMA areas rather than cities. Per annum growth levels are provided in Table 1.

**Table 1: Per Annum Growth - Employed Labour Force and Employment**

<b>Time Period</b>	<b>Windsor CMA Employed Labour Force*</b>	<b>Windsor CMA Employed Labour Force**</b>	<b>Windsor Employed Labour Force**</b>	<b>Windsor CMA Employment at Fixed Locations**</b>	<b>Windsor Employment at Fixed Locations**</b>
1996 to 2001	2.3%	2.9%	1.8%	3.0%	1.7%
2001 to 2006	1.2%	NA	NA	NA	NA

\* Statistics Canada, Labour Force Survey \*\* Statistics Canada, Census, 2001, 1996

An estimate of the 2006 employment at fixed places of work for Windsor was calculated based on the following:

- The percentage growth in employment at fixed places of work within Windsor has been lower than that of the Windsor CMA. It is likely that this trend will continue as communities in the CMA attract a higher level of investment and population growth than in the past.

- In 2001, the level of employment at fixed places of work in Windsor was equivalent to 73.6% of the employed labour force number for the Windsor CMA reported in the LFS. Assuming that this relative portion has remained constant, the Windsor employment at fixed places of work level would be around 121,500 in 2006 (73.6% of the reported 165,100 labour force in the CMA).
- The per annum increase in employment at fixed places of work in Windsor between 1996 and 2001 was equivalent to around 74.0% (1.7%/2.3%) of the per annum increase for the employed labour force based on the LFS. Assuming that this has remained constant, the employment at fixed places of work in Windsor in 2006 would be in the order of 119,900 (74% of the per annum CMA growth rate of 1.2% for the Windsor CMA between 2001 and 2006 is roughly 0.9% growth per annum applied to the 2001 base number of 114,665).
- It is assumed that the 2006 employment level for fixed places of work in Windsor is somewhere between the two above estimates. For the purpose of this study, the 2006 employment at fixed places of work level is assumed to be the average of those two estimates: roughly 120,700.
- As a check on the reasonableness of this estimate, the employment at fixed places of work to population ratio was compared to the 2001 ratio. The employment to population ratio for 2006 (0.56) is close to the 2001 ratio (0.55).
- The employment at fixed places of work estimate of 120,700 for Windsor is used as the 2006 employment estimate for the employment projections developed in this report.

## 2.2 Sector Trends

### 2.2.1 Overview of Sector Trends

Key findings on employment at fixed places of work in Windsor by sector, based on the 1996 census and 2001 census are as follows:

- In 2001, manufacturing, industrial and other employment which traditionally locates on employment lands (such as wholesale trade, construction, and transportation, storage, communication and utilities) accounted for over 40% of total employment at fixed places of work in Windsor, which is consistent with the 1996 level. However, within this category, the portion accounted for by manufacturing decreased slightly, while the portion accounted for by transportation, storage, communication, and utilities increased. Windsor's portion of manufacturing, industrial and related employment in the CMA decreased from 81.4% in 1996 to 74.7% in 2001.
- Population related employment in Windsor between 1996 and 2001 increased slightly while institutional employment decreased slightly. Windsor's shares of the CMA employment decreased by about 4 percentage points while its share of institutional employment declined by less than 1 percentage point.
- Data on employment at fixed places of work by sector grouping in Windsor and the CMA from the census are provided in Table 2. The data were organized into categories to be used in projecting employment associated with the various land use categories: primary industry, industrial and related employment lands, population related employment, and institutional employment.

**Table 2: Employment at Fixed Places of Work in Windsor**

	1996	2001	1996 (%)	2001 (%)	Growth (%)
<b><u>Primary Industry Employment</u></b>					
All primary	505	550	0.5%	0.5%	8.9%
<b><u>Industrial and Other Employment Lands</u></b>					
Manufacturing	33,030	34,110	31.2%	29.7%	
Wholesale trade	2,912	2,895	2.8%	2.5%	
Construction	2,650	3,015	2.5%	2.6%	
Transportation, storage, communication, utilities	4,610	6,395	4.4%	5.6%	
Sub-total	43,202	46,415	40.9%	40.5%	7.4%
<b><u>Population and Business Services Employment</u></b>					
Retail trade	13,268	13,160	12.6%	11.5%	
Finance, insurance, real estate, insurance	4,380	4,770	4.1%	4.2%	
Business service	5,085	7,225	4.8%	6.3%	
Accommodation, food and beverage and other services	17,670	20,650	16.7%	18.0%	
Sub-total	40,403	45,805	38.2%	39.9%	13.4%
<b><u>Institutional</u></b>					
Government Service	3,885	4,215	3.7%	3.7%	
Education service, Health, Social Services	17,705	17,680	16.8%	15.4%	
Sub-total	21,590	21,895	20.4%	19.1%	1.4%
<b>Total Employment</b>	105,700	114,665	100.0%	100.0%	8.5%

Source: Statistics Canada, EDP Consulting

A further understanding of sector trends was developed from a review of Statistics Canada LFS for the Windsor CMA. Although this data pertains to the employed labour force rather than employment at fixed places of work, it is likely that the overall trends in employment growth are similar for Windsor.

Based on Statistics Canada LFS data for the Windsor CMA, it appears that there had been steady growth in the size of the employed labour force in the Windsor CMA between 1996 and 2006. However, a substantial decline occurred in the size of the employed labour force in 2007, resulting from closures and downsizing in the automotive manufacturing sector and its ripple effect through other sectors, as well as from impacts to manufacturing, retail and tourism related sectors resulting from the high Canadian dollar relative to the U.S. dollar. The average size of the Windsor CMA labour force in 2007 (based on data for January to September) was 156,200. This is slightly higher than the 2001 level, but around 5% lower than the 2006 level.

The composition of the employed labour force in the Windsor CMA has changed somewhat by sector in recent years, particularly between 2006 and 2007 as shown in Table 3 and discussed on the following pages.

**Table 3: Windsor CMA Employed Labour ('000) by Sector**

Industry Classification (NAICs)	1996	2001	2006	Average 2007*
<b>Total Industries</b>	139.5	155.7	165.1	156.2
<b>Agriculture Forestry Fishing and Hunting</b>	-	-	1.8	0.2
<b>Mining and Oil and Gas Extraction</b>	-	-	-	-
<b>Utilities</b>	-	-	-	-
<b>Building Construction</b>	8.7	6.9	6.7	7.6
<b>Manufacturing</b>	35.2	46.5	43.7	35.9
<b>Wholesale Trade</b>	3.5	3.8	2.9	3.1
<b>Retail Trade</b>	18.3	16.0	20.4	18.7
<b>Transportation and Warehousing</b>	5.4	6.1	6.7	5.9
<b>Information and Cultural Industries</b>	2.1	1.8	1.6	1.8
<b>Finance and Insurance</b>	4.0	2.7	4.3	4.7
<b>Real Estate Rental and Leasing</b>	2.3	-	3.6	1.7
<b>Professional Scientific and Technical Services</b>	4.8	6.6	8.1	9.8
<b>Management of Companies and Enterprises</b>	-	-	-	-
<b>Administrative and Support</b>	3.8	4.8	4.9	5.3
<b>Educational Services</b>	7.4	10.1	10.6	10.3
<b>Health Care and Social Assistance</b>	14.7	16.2	20.4	19.9
<b>Arts Entertainment and Recreation</b>	6.7	8.6	4.1	4.6
<b>Accommodation and Food Services</b>	10.8	10.9	14.3	13.2
<b>Other Services(except Public Admin)</b>	6.7	6.0	5.8	6.4
<b>Public Administration</b>	3.4	4.7	4.2	4.9

\*based on data for January to September

Source: Statistics Canada, Labour Force Survey, program A100707; EDP Consulting.

## 2.2.2 Manufacturing Sector Employment and Labour Force Trends

Manufacturing is identified as a target in the *Windsor-Essex Economic Development Strategy* with high priority to retention and expansion. Based on census data, the manufacturing sector accounted for 31.2% and 29.7% of employment at fixed places of work in Windsor in 1996 and 2001 respectively. Based on LFS data for the Windsor CMA for 1996 and 2001, the manufacturing sector accounted for 25.2% and 29.9% of the CMA employed labour force in those years respectively. The manufacturing sector's share of the employed labour force in the Windsor CMA was 26.5% in 2006, dropping to around 23.0% in 2007 (based on data for January to September).

The Windsor CMA employed labour force in the manufacturing sector dropped significantly from its 2001 and 2006 levels of around 46,500 and 43,700 respectively to an average of about 35,900 in 2007 (based on data for January to September). Much of this drop occurred in automotive manufacturing and related sectors, which is in part due to the major restructuring and downsizing of the Big 3 North American automakers. Closures of Ford's Casting Plant and the Essex Engine Plant have associated job losses of 1,200. Additional closures in the manufacturing sector in the Windsor CMA over the last year have resulted in the loss of roughly an additional 1,500 jobs. On a more positive side, Daimler Chrysler launched its 5<sup>th</sup> generation minivan in Windsor in 2007 and new automotive parts manufacturing operations have recently established in Windsor to supply parts for the redesigned minivan.

Data on the size of the employed labour force in the manufacturing sector in the Windsor CMA are provided in Table 4 on the following page. As shown, significant employment increases occurred between 1996 and 2001 for transportation equipment manufacturing and machinery manufacturing, followed by declines in 2006 and 2007. Plastics and rubber manufacturing employment increased consistently between 1996 and 2006, but declined in 2007.

**Table 4: Windsor CMA Employed Labour ('000) in Manufacturing Sector**

Industry Classification (NAICs)	1996	2001	2006	Average 2007*
<b>Total Industries</b>	139.5	155.7	165.1	156.2
<b>Manufacturing (31-33)</b>	35.2	46.5	43.7	35.9
<b>Food Manufacturing</b>	-	-	1.7	0.5
<b>Beverage and Tobacco Products</b>	-	-	-	0.2
<b>Textile Mills</b>	-	-	-	-
<b>Textile Product Mills</b>	-	-	-	-
<b>Clothing Manufacturing</b>	-	-	-	-
<b>Leather &amp; Allied Product Manufacturing</b>	-	-	-	-
<b>Wood Product Manufacturing</b>	-	-	-	-
<b>Paper Manufacturing</b>	-	-	-	-
<b>Printing Manufacturing</b>	-	-	-	-
<b>Petroleum and Coal Manufacturing</b>	-	-	-	-
<b>Chemical Manufacturing</b>	-	-	1.8	0.7
<b>Plastics and Rubber Manufacturing</b>	2.1	3.6	4.3	2.9
<b>Non-Metallic Mineral Manufacturing</b>	-	-	-	-
<b>Primary Metal Manufacturing</b>	-	-	-	-
<b>Fabricated Metal Product Manufacturing</b>	3.5	2.7	2.6	3.1
<b>Machinery Manufacturing</b>	3.1	6.8	5.3	3.9
<b>Computer and Electronic Manufacturing</b>	-	-	-	-
<b>Electric Equipment Appliance Manufacturing</b>	-	-	-	-
<b>Transportation Equipment Manufacturing</b>	20.2	26.7	21.8	18.3
<b>Furniture and Related Manufacturing</b>	-	-	-	-
<b>Miscellaneous Manufacturing</b>	-	-	-	-

\*based on data for January to September

Source: Statistics Canada, Labour Force Survey, program A100707; EDP Consulting.

### *Assumptions for Employment Projections*

The following assumptions have been used in estimating employment growth in this sector:

- Manufacturing will continue to be an important sector in Windsor, but its relative share of employment will be lower than in the past.
- Manufacturing sector employment levels will continue to be adversely impacted at least in the short term by the high Canadian dollar relative to the U.S. dollar, high energy and materials costs, and by competition from lower cost offshore and southern U.S locations.

- It is unlikely that there will be the demand for a new large automotive assembly facility in Windsor within the planning period, particularly within the early part. This is based on recent restructuring trends of North American automakers, the already high market presence of North American automakers in Windsor, locational decisions of Asian automakers (to locate in greenfield areas where they can be the largest employer in the area and not face significant labour competition), and discussions with representatives of the Windsor Essex Development Commission.
- Greater diversification is expected in the manufacturing sector in Windsor, with less heavy manufacturing, and more light manufacturing and advanced manufacturing where the key competitive advantage is specialized skill and knowledge, rather than cost.
- Productivity gains and increased automation will result in lower employment densities per heavy manufacturing facility as the same level of manufacturing output will be produced with fewer employees.
- For the employment projections, it is assumed that manufacturing employment will account for about 23% of total employment at fixed places of work in Windsor (based on 2007 LFS data) early in the planning period, decreasing gradually to 21.5% in 2026. This may be compared to 29.7% in 2001.

### **2.2.3 Other Industrial Related Employment**

Other industrial related sectors include: wholesale trade, transportation, storage, communications and other utilities, and communications sectors. The health of key segments in this overall sector grouping is closely linked to the health of the manufacturing sector. This sector grouping accounted for 9.7% and 10.8% of the employment at fixed places of work in Windsor in 1996 and 2001 respectively. Based on the LFS data for the Windsor CMA for 1996 and 2001, a higher portion of labour was employed in this grouping, accounting for 13.4% and 13.2% respectively. The higher level compared to the census may potentially be attributed to a larger portion of these workers not having a fixed location of work (particularly those employed in the transportation segment). In 2006 and 2007,

this industry grouping accounted for 11.4% and 12.3% of the employed labour force in the CMA respectively.

### *Assumptions for Employment Projections*

- For the employment projections, it is assumed that other industrial related employment is equivalent to roughly 60% of the level of employment accounted for by the manufacturing sector. This is based on its relative proportion to manufacturing employment using data from the 2007 LFS. While this is a higher proportion than in the past, it takes into account that while manufacturing employment has declined, there was growth in other industrial related sectors such as wholesale trade, transportation and warehousing, communications, utilities, etc. Additionally given Windsor's strategic location as an international gateway, the attractiveness of the city for logistics, warehousing and distribution facilities will likely increase.

## **2.2.4 Population and Business Service Related Employment**

The population and business service category includes several sectors that offer services to the local population and tourists, and businesses. These include retail trade; finance, insurance, real estate; business services; accommodation, food and beverage services; and arts, entertainment and recreation. The population and business service category grouping accounted for 38.2% of employment at fixed places of work in Windsor in 1996 and 39.9% in 2001.

Retail trade and tourism related sectors have been adversely impacted by the high Canadian dollar relative to the U.S. dollar which has resulted in retail spending leakage to the U.S. The high Canadian dollar along with the Western Hemisphere Travel Initiative has resulted in lower tourism visitation/spending in Windsor by U.S. residents. This has also likely negatively impacted employment levels in these sectors. For example, based on LFS data for the Windsor CMA, around 20,400 people were employed in the retail sector in 2006, compared to an average of 18,700 in 2007 (based on data for January to September). However it is noted that the level of employed labour in the retail sector in the Windsor CMA has fluctuated widely over the past ten years. It was 17,700 in 2005.

It is expected that the \$400 million expansion and renovation of Casino Windsor, which will include 100,000 square feet of convention space and a 5,000 seat entertainment venue, will likely be a stimulus to further visitation and investment in Windsor, particularly in the downtown core.

Significant growth has occurred in the professional, scientific, and technical services segment of the Windsor CMA employed labour force. This sub-sector increased from 4,800 in 1996 to 8,100 in 2006, and is reported at around 9,800 for 2007 (based on data for January to September). The financial and insurance sub-sector increased from 4,000 in 1996 to 4,300 in 2006, and also showed growth between 2006 and 2007, increasing to 4,700.

Two sectors in the population and business services sector grouping are identified as targets in the *Windsor-Essex Economic Development Strategy*: financial services are identified as an emerging target, and tourism is identified as a target sector for business expansion, retention and attraction.

### *Assumptions for Employment Projections*

The following assumptions have been used in estimating employment growth in this sector grouping:

- It is likely that adverse impacts will remain for retail and tourism sector employment in Windsor in the short term as long as the value of the Canadian dollar is close to the U.S. dollar. It is generally believed by economists that the Canadian dollar is presently overpriced compared to the U.S. dollar and is above its long term trend line.
- The level of growth in some of the sectors in the population and business services sector grouping will depend on the extent to which Windsor can diversify its economy to a more knowledge based service economy.
- For the purpose of the employment at fixed places of work projections, it is assumed that this employment grouping will continue to increase in its share of employment in the future due in part to population and tourism growth and also as Windsor attracts more knowledge intensive service businesses. It is expected that this sector grouping will account for 40% of the employment

at fixed places of work early in the planning period, increasing to up to 44.5%. In comparison, this sector grouping accounted for 39.9% of employment at fixed places of work in Windsor in 2001.

### **2.2.5 Institutional Employment**

The institutional employment sector includes health services, education services, social services and other government services. The institutional sector accounted for 20.4% and 19.1% of employment at fixed places of work in Windsor in 1996 and 2001 respectively. Based on LFS data, this sector accounted for about 18.3% of the employed labour in the Windsor CMA in 1996, 19.9% in 2006, and increased to 22.5% in 2007 (based on data for January to September).

Institutional employment in Windsor, particularly employment related to health care, is expected to increase in future years due to the aging population. The Windsor CMA labour force employed in the health care and social assistance sub-sector increased from 14,700 in 1996 to 20,400 in 2006. It declined to 19,900 in 2007 (based on data for January to September).

The Windsor CMA labour force employed in the education services sub-sector increased from 7,400 in 1996 to 10,600 in 2006, and declined to 10,300 in 2007.

Further growth is expected in the education sector including a \$40 million investment by the Provincial government in the University of Windsor's planned \$110 million Centre of Engineering and Innovation, which will eventually house 1,400 students.

Education and health care are identified as target sectors in the *Windsor-Essex Economic Development Strategy*: health care is identified as a sector with potential for expansion; post secondary education is identified as an expansion target.

#### ***Assumptions for Employment Projections***

Assumptions used in estimating employment growth in this sector grouping are noted on the following page:

- The relative importance of institutional employment to total employment in Windsor will be higher earlier in the planning period than in later years. This is the case because employment levels for these government sectors have generally remained stable or increased in the Windsor CMA while there has been a significant decline in manufacturing employment in the last year. Therefore as the total employment number and manufacturing employment has declined, the percentage of employment accounted for by the institutional sector has actually increased as a result.
- For the purpose of the employment projections, the relative portion of this sector of total employment at fixed places of work is estimated to increase to close to 29% in 2007, and gradually drop down to 21.1% later in the planning period as other sectors recover from the 2007 declines. Absolute growth in the number of people employed in the institutional sector is expected throughout the planning period. This sector is estimated to account for 21.1% of employment at fixed places of work in Windsor in 2026. In comparison, this sector accounted for 19.1% of employment at fixed places of work in Windsor in 2001.

### **2.2.6 Primary Industries**

Primary industries include agriculture, forestry, fishing, hunting, mining, and oil and gas extraction. Primary industries accounted for about 0.5% of employment at fixed places of work in Windsor in 1996 and 2001 (505 and 550 persons respectively).

Due to low numbers, data are not reported for primary industries for most years in the LFS for the Windsor CMA and therefore no conclusions can be drawn from the LFS data for the primary services sector.

#### ***Assumptions for Employment Projections***

The following assumptions have been used in estimating employment growth in this sector:

- Little growth is expected in employment within Windsor's primary sector industries. It is expected that growth in this sector will generally occur in less urbanized areas of the region, rather than in Windsor.
- In the year 2026, employment in the primary industries sector is estimated to account for about 0.1% of employment at fixed places of work in Windsor.

### 2.2.7 Other Relevant Trends

Other recent economic trends in Windsor have included the following:

- There has been a marked decline in the value of building permits in the past year. Between 1996 and 2006, the value of building permits averaged around \$367 million. As of September 30, 2007, the value of building permits in Windsor for that year was only \$143 million. In terms of distribution by sector, there has been a significant decline of building activity in the industrial sector in 2007 compared to previous years (around 5% of the total value of building permits compared to the average of around 14% between 1996 and 2006); a substantial increase in building permit activity in the institutional sector, and a decline in the residential sector. The relative portion accounted for by the commercial sector has remained consistent.
- High vacancy exists for the retail and office sectors, particularly in downtown Windsor. The overall vacancy rate of 22% for the Windsor office market remains higher than most other metropolitan areas in Ontario with the Windsor downtown core having even higher rates (CB Richard Ellis, *MarketView, Windsor-Essex, Second Quarter 2007*).
- Windsor was named as "A Best Small City in North America for Investment" in the April 2007 issue of *Foreign Direct Investment (fDi)* magazine. This is very positive publicity for the city directed at site selectors and investors who read the fDi magazine, which may help generate investment interests.
- Forecasts for employment in the Windsor CMA have been downgraded by the Conference Board of Canada over the past year. In its Autumn 2006 *Metropolitan Outlook for Windsor*, the employed labour force in the CMA was forecasted to increase by an average of 1% per annum over the 4 year period

between 2006 - 2010. This was downgraded in the November 2007 forecast to per annum declines of -0.3% over this period. The Conference Board forecasts that the Windsor CMA employed labour force will return to its 2006 level in 2011.

- Based on an analysis of the City of Windsor Official Plan amendments, undertaken by City Planning staff, a shift away from manufacturing and toward services and commercial uses has been noted.
- Based on data from the Windsor Essex Development Commission documented in the *City of Windsor Annexed Area Master Plan Study* report, industrial land absorption averaged 27.4 hectares per year between 1993 and 2002. Relatively high consumption was noted for the years 1997, 1999 and 2000. When those years are excluded from the calculation, the average is roughly 20 hectares per annum. Data on land consumption in Windsor for more recent years are not readily available.

## **3.0 WINDSOR EMPLOYMENT PROJECTIONS**

### **3.1 Employment Scenarios**

Three scenarios were developed for the Windsor employment at fixed places of work projections using the employment growth approach and taking into account the findings of Chapter 2 of this report. The Base Case is considered to be the most likely scenario.

An overview of the key assumptions used in each scenario is provided below.

#### **3.1.1 Base Case Scenario**

The Base Case Scenario is based on the following data and assumptions:

- The Base Case Scenario uses the estimated 2006 employment level and data from the LFS for 2007, and builds upon projections from the Conference Board of Canada for the next five years.
- Assumes that employment at fixed places of work in Windsor declines by about 2,400 between 2006 and the end of 2007.
- Assumes that Windsor's employment at fixed places of work level returns to its 2006 level in 2010.
- Assumes slow growth starting at 0.5% in 2008 and increasing gradually to 1.0% per annum, with an overall employment at fixed places of work level of around 141,800 (rounded to the nearest 100) in 2026.
- Employment at fixed places of work to population ratio (uses Lapointe Consulting Reference Scenario population projections) for 2026 is consistent with the 2006 level.
- 2026 employment at fixed places of work estimate of 141,800 is roughly 1% lower the projected employment at fixed places of work estimate for a

'Medium Growth Scenario' identified in the *City of Windsor Annexed Area Master Plan Study*.

- Under the Base Case Scenario, the number of new jobs at fixed places of work in Windsor between 2007 and 2026, after subtracting the estimated 2006 employment level, is around 21,100.

### 3.1.2 Low Growth Scenario

The Low Growth Scenario is based on the following data and assumptions:

- Uses the estimated 2006 employment level and data from the LFS for 2007, and builds upon projections from the Conference Board of Canada for the next five years.
- Assumes that employment at fixed places of work decreases in Windsor by about 3.5% between 2006 and 2007, which is consistent with the reported decline in the Windsor CMA employed labour force between 2006 and 2007 (average up to September, 2007).
- Assumes slow growth starting at 0.25% in 2008 and increasing gradually up to 0.50% per annum, with an overall employment level of around 125,200 in 2026 (rounded to the nearest 100).
- Assumes that suburban areas capture increasing levels of new employment in the Windsor CMA.
- Assumes more difficulty in economic recovery/diversification than in the Base Case.
- Employment at fixed places of work to population ratio (uses Lapointe Consulting Low Growth Scenario population projections for 2026) is 0.51.
- 2026 employment at fixed places of work estimate of 125,200 is roughly 1.0% lower than projected employment at fixed places of work estimate for 2026 for a 'Low Growth Scenario' identified in the *City of Windsor Annexed Area Master Plan Study*.

- Under the Low Growth Scenario, the number of new jobs at fixed places of employment in Windsor between 2007 and 2026, after subtracting the estimated 2006 employment level, is around 4,500.

### 3.1.3 High Growth Case

The High Growth Scenario is based on the following data and assumptions:

- Uses the estimated 2006 employment level and data from the LFS for 2007, and builds upon projections from the Conference Board of Canada for the next five years.
- Assumes that employment at fixed places of work in Windsor declines by about 900 between 2006 and the end of 2007.
- Assumes high growth, starting at about 1% per annum and increasing consistently to 1.75%.
- Assumes that Windsor's role as an economic centre and international economic gateway is significantly strengthened.
- Employment at fixed places of work to population ratio (uses Lapointe Consulting High Growth Scenario population projections for 2026) is 0.60.
- 2026 employment at fixed places of work estimate of 162,500 is roughly 5.5% lower than the projected employment at fixed places of work estimate for a 'High Growth Scenario' identified in the *City of Windsor Annexed Area Master Plan Study*.
- Under the High Growth Scenario, the number of new jobs at fixed places of employment in Windsor between 2007 and 2026, after subtracting the estimated 2006 employment level, is around 41,800.

### 3.1.4 Summary of Employment Scenarios

A summary of the employment projections for each scenario is provided the table below.

**Table 5: Employment at Fixed Places of Work Projections, Windsor**

Scenario	2006	2011	2016	2021	2026
Base Case	120,700	120,970	126,200	133,290	141,840
Low Growth	120,700	117,650	119,120	122,130	125,220
High Growth	120,700	125,900	136,630	149,010	162,520

Source: EDP Consulting

The Base Case scenario is considered to be the most appropriate for the twenty year planning period based on past and expected future trends. A 2026 employment level of around 141,840 is projected under this scenario, which would represent an increase of 21,140 jobs at fixed places of work in Windsor over the planning period from the estimated 2006 level. Based on sector trends and assumptions outlined in Chapter 2, it is estimated that these jobs will be distributed by sector groupings as shown in Table 6.

**Table 6: New Employment at Fixed Places of Work in Windsor (Base Case)**

Sector	New Employment (2007-2026)
Manufacturing	4,545
Other Industrial Related	2,705
Population and Business Services	9,410
Institutional	4,460
Primary	20
<b>Total</b>	<b>21,140</b>

Source: EDP Consulting

It should be noted that only a portion of new employment is expected to locate within business parks/employment lands areas, with the remainder locating in institutional, commercial and 'working at home' locations. The employment lands portion of new employment is estimated based on a number of adjustments as discussed in Section 3.2 on the following page.

## **3.2 Adjustments to Employment Projections**

The employment projections for employment lands in Windsor have been adjusted for the following categories.

### **3.2.1 Primary Employment**

Jobs in the primary sector have been excluded from the employment lands analysis as these jobs will be located on agricultural or resource lands.

### **3.2.2 Place of Work Adjustments**

The 'working at home' portion of employment at fixed places of work in Windsor was 3.1% in 2001, which is low relative to the provincial level of 8.5%. It is expected that the working at home portion in Windsor will increase as the city shifts from a heavy manufacturing focused economy towards a more diversified service economy. Technological advances will continue to facilitate working at home.

It is assumed that the 'working at home' portion will comprise around 6% of the 2026 employment at fixed places of work in Windsor and that these will be primarily workers in the services sector. At the same time, the 'working at home' portion of employment in Ontario will rise, but Windsor will remain lower than the Ontario average due to its continuing high level of manufacturing employment relative to the provincial average.

### **3.2.3 Intensification Adjustment**

In the *City of Windsor Annexed Area Master Plan Study*, it is assumed that 2% of new employment will be accommodated within underutilized buildings and vacant parcels throughout Windsor. For the purpose of this present analysis, no intensification adjustment is used for manufacturing employment. This takes into account that much of Windsor's older vacant industrial buildings were purpose-built and would be difficult to adapt to new industrial uses, and are generally unattractive from a market perspective.

### 3.2.4 Population and Business Services Employment Adjustment

It is assumed that roughly 80% of the new population and business services jobs will be located in the downtown, other commercial areas and a portion will be working at home (as noted in Section 3.2.2). Roughly 20% of new employment in this sector grouping is expected to locate on employment lands.

### 3.2.5 Institutional Employment Adjustment

It is assumed that 90% of future institutional employment will occur on land designated or zoned for institutional uses and not in business parks/industrial employment lands.

## 3.3 Projected Employment for Business Parks/Employment Lands

Based on the assumptions outlined in Section 3.2, the level of employment which is expected to locate on employment lands in Windsor is around 9,445, which is roughly 45% of the new employment at fixed places of work projected for Windsor between 2007 and 2026.

**Table 7: Estimated New Jobs on Employment Lands in Windsor**

<b>Sector</b>	<b>New Employment (2007-2026)</b>
<b>Manufacturing</b>	4,545
<b>Other Industrial Related</b>	2,570
<b>Population and Business Services</b>	1,880
<b>Institutional</b>	450
<b>Total</b>	9,445

Source: EDP Consulting

## 4.0 EMPLOYMENT LANDS ASSESSMENT

### 4.1 Employment Lands Density Assumptions

A detailed analysis of employment density trends is not possible within the scope of this assignment. Density factors have been estimated based on secondary source materials, including the *City of Windsor Annexed Area Master Plan Study*. The overall average 'employees per hectare' factor for employment lands in that study is 22.6.

In this present study, it is assumed that the density levels of employment lands in Windsor will likely be higher than the average used in the *City of Windsor Annexed Area Master Plan Study*. In developing this range, consideration was given to the 'employees per hectare' factors for mixed uses business parks and employment lands elsewhere in Ontario. Density factor data on comparable communities located in proximity to Windsor are not readily available. However, data are available for the Greater Golden Horseshoe (GGH) communities. This provides some insight on the range of density levels in mixed use business parks. Employment densities for business parks in large towns and cities in the GGH range from 30 to 68 employees per net hectare. Recent studies have shown that business park densities in communities in the outer areas of the GGH such as Hamilton have been around 31 employees per net hectare, with 37 employees per net hectare used for planning purposes.

Based on the type of development which has occurred in the past in Windsor, and taking into account that future development will likely be higher density in new mixed use business parks than in the past but will likely remain lower than the densities in the GGH, it is estimated that the density for new employment lands in Windsor will be roughly between 23 and 28 employees per net hectare. It is assumed that the majority of employment in business parks/employment areas will be light manufacturing, other industrial related development such as logistics related services, business services, institutional services such as training schools, offices and ancillary uses.

## 4.2 Lands Needs Adjustment Factors

Estimates of the amount of employment lands needed to accommodate projected employment have been adjusted by the following factors:

- Suitability factor: 5% was added to employment land requirements to take into account potentially unsuitable lands from a topographic and environmental perspective;
- Vacancy factor: 15% was added to provide for market choice;
- Conversion from Net to Gross lands: a net-to-gross factor of 80% is assumed to allow for servicing, roads, parking areas, landscaping, etc.

## 4.3 Projected Employment Lands Requirements

Land area requirements for business parks and employment lands jobs for the 20 year planning period were calculated using the employment lands density and land adjustment assumptions outlined in the previous sections. Based on this approach, it is estimated that roughly between 400 to 500 net hectares of employment lands are needed to support the projected employment on such lands within the planning period in Windsor. The total gross land area needed is estimated at roughly 500 to 625 hectares. It is noted that this does not include the land required to support the additional new jobs located in commercial and institutional areas elsewhere in the city.

The estimated land requirements calculated in this present analysis is comparable to estimated land requirements based on based on past absorption rates, excluding peak development years.

This estimate of employment land requirements in the present study is lower than the projected industrial land requirements identified in the *City of Windsor Annexed Area Master Plan Study*. A need for 528 net hectares was projected in that study, plus it was recommended that an additional 350 hectares of land be allocated for multimodal facilities and large scale manufacturing facilities.

The key reasons for the differences in the findings of these studies are as follows:

- A base year of 2001 is used in the *City of Windsor Annexed Area Master Plan Study* to calculate the additional employment to 2026, and therefore the amount of lands needed to satisfy projected growth is based on a 25 year period, rather than on a 20 year period as is the case in the present study, where a base year of 2006 is used.
- The projected employment mix and densities differ between the two studies. The projected employment lands mix in the *City of Windsor Annexed Area Master Plan Study* is estimated at 25% heavy industrial and 75% light industrial based on past trends. In the present study, based on more recent data and trends, it is assumed that heavy manufacturing will account for around 10% of new jobs on employment lands. Light industrial and other industrial related uses are estimated to account for 65%. Other uses such as offices, business services, institutional uses such as technical schools, and ancillary uses are estimated to account for 25%.

No allowance is provided in this present study for additional space to accommodate new large scale automotive assembly facilities. As discussed earlier, it is considered unlikely that there will be the demand for new large automotive assembly facilities in Windsor within the planning period, particularly within the early part. This assumption is based on recent restructuring trends of North American automakers; the already high market presence of North American automakers in Windsor; recent locational decisions of Asian automakers to locate in greenfield areas where they can be the largest employer in the area and not face significant labour competition; and discussions with representatives of the Windsor Essex Development Commission.

#### **4.4 Vacant Employment Lands Supply**

Based upon information provided by the City of Windsor Planning Department, the supply of vacant employment lands in Windsor in 2006 was 281 hectares. This was comprised of 120 parcels comprising a total of 95 hectares of Business Parks lands and 200 parcels comprising a total of 186 hectares of Industrial lands.

A detailed analysis of vacant employment lands has not been undertaken in this study. However, based on observations in the *Looking Back Summary Report for the*

*Official Plan Review* (January 2007), information from the Windsor-Essex Development Commission and the *City of Windsor Annexed Area Master Plan Study*, it appears that the supply of vacant designated or zoned employment lands in Windsor that are suitable for business park and industrial development is significantly lower than the estimated 281 hectares.

Generally, parcels need to be in excess of 1 hectare and contiguous to be suitable for business park/industrial development. In the *City of Windsor Annexed Area Master Plan Study*, it was noted that in 2006 there were approximately 125 hectares of land zoned for industrial/business park development that were over 1 hectare and generally contiguous. For the purpose of this present study, a market suitability factor has been applied to this estimate to take into account that portions of this land (particularly parcels in older industrial areas in Windsor) are unattractive from a market perspective. It is therefore estimated that the vacant supply of suitable employment lands (not taking into account the Annexed lands) is more likely to be in the order of 100 hectares. It should be noted however that the uncommitted portion of these lands available to new investors is likely much lower.

#### **4.5 Amendment Number 60 to the Official Plan**

A new supply of unserviced employment lands has recently become available in the Sandwich South Area of Windsor through Amendment Number 60 to the City of Windsor Official Plan. Amendment No. 60 pertains to approximately 2,530 gross hectares of land at the east end of Windsor, generally bounded by Highway 401 to the south, 7th Concession to the west, the E C Row Expressway to the north, and the midpoint of County Road and the 11th Concession to the east. The portion of land designated for business parks and future employment areas is roughly 1,036 gross hectares.

Phasing of the physical servicing for these lands is expected to be as follows:

##### Immediate to Short Term (Present to 2010)

- Employment lands located adjacent to the Windsor Airport, north of County Road 42 and west of Lauzon Parkway: 275 gross hectares of land in this area are designated as 'Future Employment Lands'; phasing of servicing will take place as needed through an expansion of physical services.

- South of the E C Row Expressway, east of the existing Twin Oaks Business Park, north of the CP Railway and west of Banwell Road: 52 gross hectares of land in this area are designated as 'Business Park'; phasing of physical services is estimated to take place between 2007 to 2010.
- Area in the vicinity of Baseline Road, CP Rail line, and 7<sup>th</sup> Concession Road: 3 gross hectares of land in this area are designated as 'Business Park': the estimating phasing of servicing is 2007 to 2010.
- Based upon the above, roughly 330 gross hectares of designated employment/business parks lands in the Sandwich South Area are expected to be serviced within the immediate to short term.

#### Medium Term (2010 to 2017)

- East side of Lauzon Parkway: 54 gross hectares of land in this area are designated as 'Future Employment Lands'; the estimated phasing of servicing for this area is 2010 to 2014.
- Employment areas on the south side of City Rd 42: 204 gross hectares of land in this area are designated as 'Future Employment Lands'; the estimated phasing of servicing in this area is 2014 to 2017.
- Based upon the above, roughly 258 gross hectares of designated employment/business parks lands are expected to be serviced within the medium term (2010 to 2017).

#### Long Term (Beyond 2017)

- Remaining 448 hectares of lands designated as 'Future Employment Areas', located north of Highway 401 to the eastern limits of Windsor: servicing is expected to occur beyond 2017.

## 4.6 New Supply of Employment Lands Required

As noted in Section 4.3 of this report, it is estimated that roughly between 400 to 500 net hectares of employment lands are needed to support the number of new jobs projected for employment lands within the 20 year planning period in Windsor. The supply of vacant suitable serviced employment lands in business parks and industrial areas in Windsor is estimated to be in the order of net 100 hectares. The demand for new employment lands, not taking into account the Annexed Lands is therefore estimated to be around 300 to 400 net hectares, or 375 to 500 gross hectares. The need for additional land to accommodate large scale manufacturing and a multi-modal facility has not been identified in this study.

As discussed in the previous section, around 1,036 gross hectares of lands for employment uses have been designated for the former Sandwich South Area of Windsor area, generally to the south and east of airport lands. It is expected that approximately 330 gross hectares of land will be serviced in the short term (immediate to 3 year time frame), and 258 gross hectares of land will be serviced within the medium term (next 3 to 10 years). This amount of land will accommodate the projected employment growth for the 20 year planning period.

## 5.0 CONCLUSIONS

This study has provided employment projections for fixed places of work in Windsor between 2007 and 2026, and estimates of the amount of land needed to accommodate projected new employment in industrial areas and business parks in Windsor. An employment growth approach was used to project employment for the 20 year planning period, taking into account past and expected future sector and growth trends.

The Windsor economy is currently undergoing substantial change as it adjusts to restructuring in the automotive manufacturing sector and its ripple effect throughout other sectors and the ongoing shift toward a service economy. As such, there is significant uncertainty in projecting long term future economic conditions and employment in Windsor until the local economy stabilizes, which will be beyond the time frame of this study. In this context, it will be particularly important to revisit these employment projections and lands needs analysis as part of the next Official Plan Review in 2013.

The economic restructuring in Windsor will bring about a change in the type of employment lands needed, with less land needed for heavy manufacturing uses than estimated in past studies and more mixed use business parks and employment lands for light industrial uses, offices, business services, logistics facilities, institutional uses such as technical schools, and ancillary uses.

A key premise of this study is that the Windsor economy is restructuring away from heavy manufacturing toward more light and advanced manufacturing and a knowledge based service economy. Additionally, a key assumption is that it is unlikely that there will be the demand for new large automotive assembly facilities in Windsor within the 20 year planning period, particularly within the early part.

Three employment projection scenarios have been prepared in this study: Low, Base, and High Growth scenarios. The Base Case Scenario is considered to be the most likely scenario. This scenario assumes an overall employment at fixed places of work level of around 141,800 in Windsor in 2026. Under the Base Case Scenario, the number of new jobs at fixed places of employment in Windsor between 2007 and 2026, after subtracting the estimated 2006 employment level, is estimated at around 21,100. The level of employment which is expected to locate

on employment lands in Windsor is around 9,445, which is roughly 45% of the new employment projected for Windsor between 2007 and 2026. It is estimated that roughly between 400 to 500 net hectares of employment lands are needed to support the projected employment on such lands within the planning period in Windsor. The total gross land area needed is estimated at roughly 500 to 625 hectares. Taking into account the supply of vacant employment lands in Windsor including the new supply of business parks and future employment lands in the Sandwich South Area of Windsor designated in OPA No. 60, it is concluded that a more than adequate supply of employment lands is available to accommodate projected employment growth for the 20 year planning period.

While the demand for additional tracts of land to accommodate large scale heavy manufacturing is not projected in this present study, it is noted that should such demand occur in the latter part of the planning period, this could be accommodated on employment lands targeted for servicing beyond 2017. The demand for land to accommodate large scale manufacturing should be revisited as part of the next Official Plan Review in 2013.

The availability of high quality serviced business parks/employment lands is one of several factors that potential investors consider in site selection decisions. Therefore, to enhance Windsor's competitiveness in attracting future investment, it will be important to ensure that a good supply of serviced vacant employment land is available throughout the planning period. A relatively limited amount of uncommitted high quality serviced employment lands are available in Windsor at present. As such, it will be particularly important for the City of Windsor to move forward with the development of Secondary Plans and servicing of employment lands in Sandwich South area, with the exception of the lands on the north side of Highway 401 that are slated for servicing after 2017.