



Environmental Scan 2007

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About OSSA

The Ontario Service Safety Alliance (OSSA) is the designated Safe Workplace Association for the service sector in Ontario, delivering health and safety consulting, training, products and services to a wide range of clients. OSSA's innovative products and services provide members with the ability to seamlessly integrate health and safety into their workplace at all levels.

OSSA represents the five service sub-sectors:

- Retail and Wholesale Distribution
- Restaurant and Foodservice
- Tourism and Hospitality
- Office and Related Services
- Vehicle Sales and Service

Our Vision:

Lead and Inspire Change: Workplace Injury and Illness are Unacceptable

Our Mission:

Enable Ontario Service Sector Workplaces to Become the Healthiest and Safest in the World.

We will achieve our Vision and Mission by focusing on four strategic goals:

- Strengthen Internal Business Processes
- Improve Financial Viability
- Leverage External Stakeholders
- Learn and Grow

The staff numbers 66, including 30 field consultants located across the province to provide consulting services directly to clients.

OSSA Products and Services

The OSSA provides a variety of services to help clients integrate health and safety into their normal business practices including:

- Health & Safety Integration Consulting Services
- Specialized Consulting Services
- Products
- Training
- Client Services Line
- OSSA.com
- The Safety Mosaic

Client Value Survey

Each year, the OSSA undertakes a quantitative Client Value Survey to measure its corporate objective related to levels of awareness and satisfaction with OSSA lines of business among active clients. The Strategic Counsel conducted 300 telephone interviews on October 16 and 17, 2006, with active clients who have either purchased an OSSA product, engaged OSSA's consulting services, or purchased OSSA training, in the summer and fall of 2006. Some of the key findings from the survey are listed below in the following categories:

Awareness

OSSA's philosophy continues to be the most widely understood, being correctly identified by three-quarters of clients (74%). Three in five clients (60%) are able to correctly identify OSSA's vision. Again this year, it is OSSA's mission that is least well known among clients (49%); this attribute is at its lowest level since tracking began in 2003.

The need for information was a top driver for initiating contact with OSSA with 18% of respondents giving this reason in 2006 as compared to 7% in 2005.

While the telephone remains the preferred way of contacting OSSA (the choice of 55% of respondents, down from 64% in 2005), there is a shift towards the web (the choice of 37% of respondents up from 25% in 2005). E-mail and fax remain the preferred choice of a small minority of clients (3% and 2% respectively in 2006).

Satisfaction

Clients continue to report almost universal levels of satisfaction with their OSSA experience (95% giving a rating of 5, 6 or 7, and 41% giving a rating of 7 on a 7-point scale). When asked more specifically about their satisfaction with their most recent interaction and the effectiveness of the most recent interaction for improving business, nine in ten clients say they are satisfied (90% and 88% respectively).

OSSA's products and services are rated highly for effectiveness by clients, with more than nine in ten saying the products and services are effective in responding to their company's health and safety needs (94%), helping their organization become self-reliant in addressing health and safety issues (94%), ways to meet health and safety legislation (91%), and integrating health and safety into regular business practices (92%). Large proportions also feel OSSA's products and services are effective in taking into account the regular business practices of their company (89%), and taking into account the different learning styles and abilities of their employees (82%).

Almost universally, clients view OSSA to be an expert on health and safety products, services and training and few could suggest new products or services to offer.

Impact

Most clients continue to report their company has changed how it approaches workplace health and safety as a result of the contact they have had with OSSA; in 2006, 85% report change. Consulting clients (93%) are the most likely to report changes within their company followed by product clients (82%) and then training clients (79%).

Those who have made changes say they increased the priority of health and safety issues (18%), have higher awareness (18%), obtained/implemented training/certification (13%), developed policies/guidelines (12%), formed/improved health and safety committees (10%) and improved knowledge (8%). Among consulting clients, integrating health and safety into the workplace was also a top change made (13%).

Those clients who did not make changes as a result of their contact with OSSA felt they already had a good program in place or that no changes were needed.

Loyalty

Almost all (98%) respondents reported they would work with OSSA again, and nine in ten (90%) say OSSA is their first choice/preferred provider of health and safety products, services and training. These high levels are consistent with those from 2005.

Nineteen out of 20 clients (95%) say they would recommend OSSA to industry peers and business associates; over seven in ten (72%) would be very likely to recommend OSSA. Consulting clients have the highest incidence of saying they are very likely to recommend OSSA, and training clients the lowest.

Introduction to the Environmental Scan

The purpose of this Environmental Scan is to examine events that affect the Ontario Service Safety Alliance and its client base. The scan looks at factors that may affect our client base, particularly economic conditions, demographic shifts, technological advances, legislative changes, and trends in health and safety. The scan is divided up into 5 sub-sectors of the Service Industry that includes: Offices and Related Services, Retail and Wholesale, Restaurant and Foodservices, Tourism and Hospitality and Vehicle Sales and Service.

Executive Summary

The service sector continues to employ the largest number of people in Ontario. Due to the vast range of companies and organizations within the service sector it is sometimes difficult to pinpoint issues unique to this diverse sector though many have emerged. Several issues are affecting the entire sector including: continued labour shortage, low risk perception, a diverse and growing mix of vulnerable population segments (young workers, new immigrants, aging workers, temporary workforce) and the immediate and chronic health and safety concerns not being addressed in the workplace, such as musculoskeletal disorders and occupational disease.

The Gross Domestic Product (GDP) indicates a stable economy and consumer spending is generally on the increase. Canada continues to be a destination for head office locations which is a positive sign for doing business in a global economy. The fate of vehicle manufacturing which affects the service sector in terms of sales, hangs in the balance. Competition from China and their roaring economy continues to threaten the future of this manufacturing element in Ontario and Canada. Ontario employers are struggling against the economic boom in Alberta which appears to be contributing to the labour shortage in Ontario. Alberta employers are offering incentives including paying more than the minimum wage to attract employees.

The service sector is an ideal place for new workers to get their first job because many of the positions are part-time or seasonal and provide flexible hours. The downside however is that many of these positions pay minimum wage, and the labour shortage gives many employees the perception that they can always move to another job. These factors accelerate the high turnover prevalent in the service sector and create problems recruiting for available positions. High staff turnover discourages investment in health and safety training. Employees who receive health and safety training and education perceive this as an investment as individuals and it increases engagement in the employee/employer relationship while decreasing challenges with retention. The ongoing support from government programs and opportunities would continue to support employee training and education in many areas, including health & safety is a benefit.

We may assume that because technology has grown so significantly in society and taken over our daily lives, that business has also embraced technology. The service sector continues to have very diverse needs regarding technology and while some are technologically complex other workplaces still operate in a more face to face and sometimes paper based manner. As technology is introduced into the workplace and it changes work processes, employers need to recognize and acknowledge new health and safety risks such as ergonomic injuries. Provincial initiatives like the Musculoskeletal Disorder Guidelines and Pains and Strains Campaign will improve visibility of these types of risks; but many employers continue to need help understanding the basic of recognizing, assessing and controlling hazards in the workplace.

The depth and breath of health and safety training is unevenly distributed across the sector. The alignment of WSIB awareness activities and MOL enforcement initiatives

assists and motivates employers to engage in health and safety programs. Some believe that mandatory health and safety programs would increase the uptake of health and safety training, OSSA has not experienced this with our clients. Mandatory health and safety training has mixed results in motivating organizations to invest in health and safety training and education. Ontario's choice to build a safety culture and the social norming of higher corporate accountability, performance-based and risk assessment management strategies provides a stronger platform for sustaining health and safety management systems and investment choices.

This year the service sector experienced heightened awareness surrounding business continuity, emergency preparedness and pandemic planning. Violence is also becoming a focus in the service sector, at risk groups include: employees that work face to face with the public, handle cash, work alone and work at night or early in the morning. An emerging issue is that domestic violence is spilling over into the workplace. New noise regulations have also been released to reduce the acceptable decibel level of noise in the workplace.

Another emerging issue that heavily influenced the restaurant and foodservices, as well as the tourism and hospitality sectors, was the presence of bacteria in a number of food products at the point of production rather than preparation.

Of larger concern is the dependence on motor vehicles for transportation. With the increased use of motor vehicles to commute to work, motor vehicle accidents continue to be the leading cause of death and injury for all ages. While the risk is prevalent for those who commute to work it can be of particular concern in the service sector for businesses that employ delivery personnel and travelling sales staff.

Although some companies are making strides to improve their business through technology or efficiencies, health and safety of its employees is often not at the top of the priority list. This decision is due to the perception that service sector jobs are at low risk. A culture shift needs to take place to recognize the value in what's good for the employee, benefits the company. We continue efforts to shift the cultural perception in our sector to recognize that there are risks of workplace illness and injury.

Service Sector Demographic

The service sector is a continuous source of employment growth, accounting for many first-time jobs for young workers, but also employing many older workers. There are approximately 81,000 service sector firms registered with the Workplace Safety and Insurance Board in Ontario.

Overview of Canada's and Ontario's Workplace- General

There have been many changes in 2006 that impact all or most of our sub-sectors.

Ontario's real GDP edged lower by 0.1% in the third quarter (July to September) quarter of 2006, following increases of 0.2% in the second quarter and 0.4% in the first quarter. The decrease in third quarter real GDP was due mainly to a decline in net trade as exports continued to weaken while imports rebounded. Consumer spending and business investment both posted solid growth moderating the impact of weaker trade.¹

Ontario's unemployment rate rose by 0.3 percentage points in January to 6.4%, due to an estimated 32,000 additional labour force participants. Over December 2006 and January 2007, 88,000 (+3.2%) adult women have entered Ontario's labour force, while the number of male participants has increased by just 18,000 (+0.6%).²

While Ontario's overall employment was little changed in January, there were gains in accommodation and food services (+20,000) and professional, scientific and technical services (+16,000). Nevertheless, these gains were offset by losses in business, building and other support services (-15,000); and manufacturing (-13,000).³

One of the biggest factors in the employment rate has been the demand for labour in Alberta. Alberta is desperate for workers to fill vacancies across its economy, stemming from a booming petroleum industry. With Toronto's uneven employment market, many are willing to cross the country to find a job.⁴ This has resulted in companies bidding for staff, paying them more for same and similar positions elsewhere in the country and it has put a drain on Ontario's already existing labour shortages.

In an effort to reduce this trend the federal government is pleading with aging baby boomers to work past retirement. On December 12, 2006 the end of mandatory retirement came into effect, allowing this group which represents 45 percent of Canada's entire workforce, to offset the shortage. Statistics Canada estimates that those workers currently between the ages of 40 and 69 represent 78 per cent of the labour force; highlighting the need to improve programs which help immigrants transfer their skills, make the workplace more accessible to the disabled and encourage native persons to enter the workforce.⁵

Another trend that supports the continued employment of Canada's aging workforce is the flurry of polls and surveys, pointing out how unprepared Canadians are for retirement or how much more they should be investing. Mackenzie Investments released a survey that found nearly 40 per cent of Canadians are concerned they won't be able to afford

their current lifestyle in 10 years. The survey also found 51 per cent of 20 something's have never contributed to an RRSP. Nor have more than 20 per cent of those aged 50 and over.⁶

The Ontario government raised the minimum wage on February 1, 2007, for the fourth time since taking office. In total, the McGuinty government has increased Ontario's minimum wage by 17 per cent from \$6.85 an hour to \$8.00 an hour. A Statistics Canada labour force survey shows that more than half of minimum wage earners are students and another 270,000 are full time and part-time adult workers who are currently living below the poverty line.⁷ Positions common to the service sector, which often rely on tips for additional income, also saw an increase in their base pay, in particular:

- Liquor servers will increase from \$6.75 to \$6.95 per hour
- Hunting and fishing guides currently paid a minimum of \$38.75 for less than five consecutive hours in a day and \$77.50 for five or more hours in a day (whether or not the hours are consecutive) will also increase to \$40.00 and \$80.00 respectively.⁸

Finally, young workers under the age of 18 years old also received a boost in wages. Those under 18 years of age and employed for not more than 28 hours a week during the school year or employed during a school holiday, will rise from \$7.25 to \$7.50 per hour.

Although minimum wage has been increased marginally many say it isn't enough and would like to see it raised to \$10. If the minimum wage continued to be indexed to the official inflation rate from 1976, it would be currently be \$9.09.⁹ Over the years, American and Canadian studies have found teens are the ones most likely to suffer the consequences of a higher minimum wage. Some found a one to three per cent reduction in youth employment, others higher. Businesses don't want to pay teens the higher rate or they cut back on temporary staff. Laurell Richie, national representative of the Canadian Auto Workers union said "The labour market has always managed to adjust to minimum wage increases. It may mean we have to pay a little bit more for a hamburger or restaurant service. But it's been said by many, we enjoy very cheap access to fast foods in North American and its' at a terrible price for a lot of individuals and families."¹⁰

Small to medium sized firms are Ontario's main employer, according to Statistics Canada. More than 1.5 million Ontario's (29 per cent of the labour force) working firms with fewer than 50 employees and 1.3 million (24 per cent of the labour force) work for mid-sized businesses with fewer than 500 workers.¹¹ Canadian small business owners are confident about growth prospects in the coming year, but feel held back by the details of running a business. The number of new businesses that fail before their 3rd year is 50%, with that statistic most new business do not focus money or time on health and safety initiatives but rather try to keep the basic business afloat.¹² In addition, many believe the federal government is not doing enough to support their start-ups, according to a survey

of Canadian small business owners on behalf of accounting software maker Intuit Canada.¹³

There were also some significant events in Federal politics, which affected most Canadians. Canadians received tax relief in the form of a 1% cut to the Goods and Services Tax (GST) and corresponding Harmonized Sales Tax (HST). Although the economic debate about the benefits of personal income tax cuts versus consumption tax cuts will always be a lively one, there is no doubt that putting almost \$5 billion back in the pockets of Canadians was welcome news to everyone.¹⁴

The McGuinty government is recognizing the changing nature of family in Ontario by extending Family Medical Leave to include relatives and close friends. Family Medical Leave gives employees up to eight weeks of job-protected, unpaid leave to care for a gravely ill family member, when there is a significant risk of death within 26 weeks. A recent change now allows employees to provide care for extended family members as well as friends who may be like family. Ontario's Family Medical Leave dovetails with the federal government's Compassionate Care Benefits Program that permit workers in this situation to apply for Employment Insurance benefits while away from work.¹⁵

Heading into 2007, federal politics will continue to be of significant interest. Next spring's federal budget promises to bring additional tax relief to Canadian businesses and taxpayers. However, with controversial issues abounding, a divided House and a new leader of the Liberal Party, election weary Canadians could be finding themselves back at the polls again in 2007.

Overview of all Sub Sectors- Health and Safety

The system partners have teamed up to support and promote a number of health and safety initiatives. The WSIB and/or MOL currently are promoting the following campaigns: Violence, Musculoskeletal Disorder's, High Risk/Last Chance, Noise, Pains and Strains and their awareness campaign Prevent it. These initiatives have been supported by the hiring of 200 new health and safety inspectors at the MOL over the last 2 years.¹⁶

Business continuity and incident management planning have been one of the trends to hit Canadian businesses due to affects of SARS, and critical incidences like major power outages. People availability has been deemed critical to the operation of a business. Increasingly, companies are recognizing that the common element in all business processes is people. Plans must take a more sophisticated approach to mitigating the risk of staff absences bringing business to a halt. Pandemic research has shown that most companies are unprepared for staff absenteeism. Weather emergencies have demonstrated that businesses are severely impacted from staff absences that can extend over several days - even if the technology is still available. Continuity of operations depends at least as much on planning for staff working in flexible, often remote environments, as it depends on resilient architecture.¹⁷

The McGuinty government is protecting the health and safety of Ontario workers by protecting workers from hearing loss. Lower overall daily exposure to noise will help prevent hearing loss in workers, which led to an estimated \$100 million in compensation costs being paid out by the Workplace Safety and Insurance Board (WSIB) over the past decade. The changes to the industrial noise requirements will come into effect on July 1, 2007. They are expected to strengthen worker safety by:

- Reducing Ontario's noise exposure limit from 90 dBA to 85 dBA, and
- Introducing it as a time-weighted average exposure limit, which gives a more accurate assessment of the amount of noise a worker is exposed to over an eight hour period

The World Health Organization reports that one out of every three workers may be working in a sick building. Industry experts agree that one third of all non-residential buildings have air quality problems. Considering that we spend an estimated 90% or more of our lives indoors, inside a constructed environment, this has serious affects.¹⁸

In 2006 and early in 2007 the Ministry of Labour began looking at Ontario workplaces to ensure that they were addressing violence hazards. According to a new study by Statistics Canada, almost one in five violent incidents including physical assault, sexual assault and robbery occurred in the victim's workplace in 2004. There were more than 356,000 violent incidents in Canadian workplaces with most of these incidents (71 percent) were classified as physical assaults. The study also found a high proportion of incidents occurred in the accommodation, food services, retail and wholesale trade and education-services sectors. Another important note was that those who work closely with the public have a greater risk of experiencing physical violence.¹⁹

Finally, although not formally recognised as work-related violence, partner violence, is one of the fastest growing types of violence, in Canada. Statistics indicate that domestic spill-over accounts for the majority of women killed in the workplace. Recently some companies have engaged in educating employees about this trend, and assisting victims. The reality is that partner violence is both a community and a workplace issue. It has an adverse and disruptive effect on worker morale and on customer's perception of the company and its premises. Partner violence also costs organizations millions of dollars, both directly and indirectly through decreased productivity and increased health time spent away from work to cope with problems.²⁰

Motor vehicle accidents continue to be the leading cause of death and injury for all ages. According to rent reports, Canadian workers are spending more time travelling to and from work: 63 minutes in 2005, compared with 54 minutes in 1992.²¹ These longer commutes for drivers increase the risk of a motor vehicle accident. In fact, Canadian workers are more likely to die from traffic related motor vehicle crashes than from any other hazard on the job, including workplace violence and machine-related injuries. It is currently estimated that every 12 minutes someone dies in a motor vehicle collision, every 10 seconds an injury occurs on Canadian roads.²²

Collisions on and off the job have far-reaching financial and psychological effects on employees, their co-workers and families, and their employers. Motor vehicle collisions cost employers \$60 billion annually in medical care, legal expenses, property damage and lost productivity.²³ This is of particular concern to the service sector with some positions requiring a lot of vehicle travel including salespeople, transport and delivery employees and managers and supervisors.

Sub Sector Scan

The following section looks at specific events and trends for each of the five sub sectors including the 5 focus areas: Economic trends, Social and Demographic trends, Legislation and Policy trends, Technology and Industry trends and Health and Safety.

Office and Related Services

Introduction

The majority of office and related businesses are not required to register with the WSIB and may opt for self-insurance or private insurance. The business activities of office and related services are highly diverse, all fall under the rate code 956. It includes: investment dealers, life insurers, law firms, accounting firms, stock exchanges, employment agencies that provide clerical labour and real estate agents.

Economic Trends

The banking industry includes 21 domestic banks, 23 foreign bank subsidiaries and 22 foreign bank branches operating in Canada. In total, these institutions manage almost \$1.8 trillion in assets.²⁴

With the Toronto Stock Exchange hitting record highs this year, the online discount brokerage industry is set to grow even more significantly in 2007. Another reason is the growth in the pre-retired and newly retired consumers who want more hands-on control over their financial investments. According to Toronto based researcher Investor Economics, assets under administration in the online brokerage world rose from \$123 billion last March to about \$155 billion this March, a 26 per cent gain.²⁵

There is also increased confidence in the insurance industries future, according to the latest results of Eastbridge Consulting Group's Voluntary Industry Confidence Index survey. The survey measures how members of the industry, carriers, brokers and vendors view the industries sales expectations for the next 12 months. Results of the survey indicate that the index is at 102.3, which is an increase over the mid-year 2006 results. According to Gil Lowerre, president of Eastbridge, survey respondents were very positive about the outlook for voluntary product sales with over 98 percent expecting sales to increase over the next 12 months with twenty-eight percent predicting a significant increase.²⁶

Social & Demographic Trends

Although there have not been many changes in demographics within the office and related sector but we need to take a closer look at those running the organizations, as well as the issue of work-life balance.

At first glance, the latest word on the so called "Glass ceiling" issue looks positive. A report from executive recruiter Rosenzweig & Co. found that the number of female CEO's at this country's biggest 100 publicly traded companies tripled in 2006 from the previous year. Furthermore, the number of female executives occupying top positions at the same corporations jumped 50 percent on a year over year basis. At a time when women make up more than half of the population and 42.5 percent of the work force, 70 percent of companies rely exclusivity on male corporate officers to run the show. While some progress is being made, women are still having limited success breaking in to the most senior ranks. However, the fact remains, 97 of Canada's largest companies are run

by males CEO's. Of the 521 most senior and highest paid positions at these companies, 6.9 percent were held by women, a rise from 4.6 per cent in 2005 but a dominant 93.1 per cent are still held by men.

Work-life balance continues to be important for employers who are competing for Canada's small pool of talent. Companies like HSBC Canada are taking steps to enhance and improve this portion of their benefit programs. They have improved their policies around work-life and have changed its culture to be more supportive and flexible by providing staff with such programs including Flex-time, Job-sharing, Emergency Child-Care. They also have set up a Valuing Diversity Committee which advises senior management on the issues that particular groups within the bank may face. Also during recruitment efforts, hiring managers noticed a rise in inquiries about HSBC's work-life policies. Paying attention to specific requests has had an impact on new policy and program development in order to satisfy the needs and demands of current and future employees.²⁷

Technology & Industry Trends

The office and related sector experienced blurring of responsibilities in the financial sector, an increase in the number of corporate head office and a misconception of privacy at work.

For the last several years, the insurance distribution market has been experiencing significant and fundamental change. Through this period of insurance distribution evolution, both Managing General Agencies (MGAs) and Brokers have lacked the technology needed to provide competitive advantage and help grow their businesses. According to Carmine Tullio, President and CEO of Univeris, the leader in enterprise wealth management systems, over half of the financial advisors using the Univeris wealth platform are dual-licensed to sell both insurance and mutual funds. Through this new system insurance companies have greater flexibility with the products they offer consumers and can now compete with the banks.²⁸

Fears about foreign takeovers and the "hollowing out" of corporate Canada are vastly overstated, says a new report released by the Conference Board of Canada. It found that the number of head offices in Canada has been growing in recent years, despite a string of high-profile acquisitions of Canadian companies such as Hiram Walker, Hudson's Bay Company and more recently Inco and Falconbridge. Over all the number of head offices in Canada jumped by 100 to 4,161 between 1999 and 2005. According to Statistics Canada head office employment in Canada also grew by 11 per cent during that same period, despite challenges such as a more valuable currency and the rapid rise of China, India and other low-cost economies.²⁹ This is important for Canada to remain a player in the Global market and although the Canadian market is small, on a worldwide scale it is still a very important economy, and trading partner.

Many employees are under the impression that their right to personal privacy extends to the workplace. These people may be surprised at just how widespread employee monitoring truly is. And when it comes to employee privacy, the innocent looking

machine on your desk is the single greatest threat. A survey from amanet.org indicates that 76% of employers monitor websites visited, 50% review computer files, and 55% store and review emails. The same article claims that about one quarter of companies have fired someone for improperly using the Internet.³⁰

Legislation & Policy Trends

Major changes have been implemented into the financial sector in Canada allowing a larger competitive arena and major changes are needed to protect contract employees at employment agencies.

More recent changes to federal law and regulation have opened up new opportunities for foreign banks to operate in Canada, encouraged the start up of new banks with new ownership rules, and given certain non-bank financial institutions direct access to the payments system.³¹ Many of the old barriers prohibiting financial institutions from competing in each other's business have disappeared over the past 15 years. For example, any Canadian life insurance company may now own a bank; a bank may own an investment dealer or a mutual fund company. More recent changes to federal law and regulation have opened up new opportunities for foreign banks to operate in Canada, which encouraged the start up of new banks with new ownership rules, and that has given certain non-bank financial institutions direct access to the payments system. Innovations in technology have enabled financial institutions to offer more products and services in new ways and have triggered the emergence of new types of competitors, such as monocline credit card issuers MBNA Canada and Capital One Bank.³²

Financial companies have a presence nationally but face different legislation across the country. A common interpretation of a single body of securities legislation and a single set of rules is needed, this would take into consideration provincial and territorial concerns, would get rid of the inefficiency of 13 separate regulators which has a negative impact on the financial well-being of all Canadians, said Raymond Protti, President and Chief Executive Officer of the Canadian Bankers Association. According to Protti, Canadian companies are at a competitive disadvantage and are expected to waste millions of dollars every year to meet repetitive and overlapping regulatory requirements.

Of the 100 countries that are part of the International Organization of Securities Commissions, Canada is the only country without a national securities regulator. In a speech to the Halifax Chamber of Commerce, Minister Flaherty said, "What Canada needs is a common securities regulator. Such a regulator would create more investment and jobs, protect investors, save money and give all regions in Canada a real say."³³

Although the majority of contract or temp agencies may run legitimate businesses and treat employees fairly there are those that have taken advantage of recent immigrants and those that are in desperate need of work with limited resources. These vulnerable workers gained support in their bid to achieve protection from "temp" agencies that use unethical or illegal means to exploit Ontario's transient workforce. Liberal MPP Vic Dhillon (Brampton West, Mississauga) has been pushing for a crack-down on the burgeoning temporary employment industry with a private member's bill in the Ontario legislature.

The bill calls for a licensing scheme that will require an annual renewal from the Ministry of Labour for all employment agencies. Those who engage in unethical or illegal practices would lose their license.³⁴ This licensing scheme could be a possible opportunity or partnership for OSSA for education, requiring temp agencies to maintain a positive health and safety record.

Health & Safety

For office and related services, major hazards include: (ergonomics; repetitive strains, sprains and lifting) which now fall under the category of Musculoskeletal Disorders (MSD's); indoor air quality (including mould); violence in the workplace; stress; slips and falls; chemicals; machine guarding/lockout; contact with energized equipment; and material handling and storage of goods.

The office environment could be described as “low hazard” compared to some workplaces where a limb or life could be lost but in reality they are not. Employees often work on a computer for an extended period of time, which is generally how people get hurt, as a result of MSD's. Approximately 70 per cent of injuries occurring in offices are directly related to employees work.³⁵ Simple measures can be taken to avoid this by ensuring that employees have the proper number of breaks to avoid MSD's.

MSD's account for over 40 percent of all lost-time injuries. The Ontario government is committed to reducing workplace injuries by 20 percent by 2008. One of the initiatives to hit this goal was creating a new resource for Ontarians to help protect themselves against painful and costly ergonomic related workplace injuries. The MSD Prevention Guidelines for Ontario offers employers and workers in-depth information about MSD hazards in the workplace so that they can be addressed and controlled. The guideline is available through the WSIB website at <http://www.wsib.on.ca/wsib/wsibsite.nsf/public/PreventMSD>.³⁶

The Ministry of Labour is currently promoting a Pains and Sprains campaign to educate and enforce regulations. Half of all working days lost due to injury are a result of workplace pains and strains. These injuries create huge financial costs for employers and can be serious and disabling for workers. In many cases, pains and strains can be prevented in your workplace by making simple modifications. The ministry has implemented six specific recommendations made by the Minister of Labour's Ergonomics Advisory Panel, which deal with area such as awareness, education and prevention as well as improved training, more resource materials, increased expertise and better tracking of ergonomic-related inspections.³⁷

In general, employers in office and related services industries are unlikely to see health and safety as a priority. Senior Management does not always see the benefit of investing in health and safety education for its employees and would rather spend their budget elsewhere. Return to work programs pose another challenge for this sub-sector, as there are often no alternative jobs available for an employee returning from illness or injury.

Retail and Wholesale

Introduction

The retail and wholesale industry is a diverse group, ranging from general food stores and clothing stores to pharmacies. The rate groups included are:

604 food sales

606 grocery and convenience

607 specialty foods

608 beer sales

636 other sales

638 pharmacies

641 clothing stores

668 computer, electronic, and electrical equipment sales

933 equipment rental and repair services

Economic Trends

Retailers posted their highest monthly sales gain in nine years in December, with widespread increases in all eight retail sectors. The year-end flourish, combined with hot sales in Alberta, pushed sales for 2006 as a whole to their strongest annual growth rate since 1997.³⁸

Total retail sales jumped 2.3% in December to an estimated \$33.5 billion, the fastest monthly growth rate since December 1997. This gain more than offset losses in September and October and a lacklustre 0.3% increase in November. For 2006 as a whole, retailers sold \$391.4 billion worth of goods and services, up 6.4% from 2005 and the highest rate in nine years.³⁹

Wholesalers ended the year on a high note, with the automotive sector providing much of the impetus for the largest monthly gain in over two years. Wholesale sales jumped 2.7% in December to \$42.8 billion, following a 0.3% rise in November. December's increase was the largest since March 2004.⁴⁰

After three years of solid growth, retailers are confident the trend will continue in 2007. Retailers expect that this year, sales and margins will be only slightly softer than last year. Strong results for January 2007 add credence to this outlook, and confirm that customers are shopping more actively in what traditionally has been a quieter month. Retailers point to a number of features that inspire confidence: continued stable interest rates; the prospect of further tax reductions for individuals; a buoyant Western Canada economy; hope that the worst of the bleeding of manufacturing jobs in Central Canada is over; and an expected recovery in the U.S. There is a consensus that the second half of the year should be stronger than the first half.⁴¹

In addition to a solid performance on the retail floor, Canada's merchandise exports hit a record annual high in 2006, despite the first decline in exports to the United States in 3

years. Canadian companies exported nearly \$458.2 billion worth of merchandise last year, up 1.1 per cent from 2005, according to Statistics Canada.⁴²

Although the retail and wholesale sector preformed well overall, there were specific areas which had particular challenges. For example technology products continue to experience deflation, driven by the rapid pace of innovation. The sale of new higher-priced products such as flat screen TV's, MP3 players, and cell phones had raised the average value of transactions for technology retailers, but they also report prices for these products are declining even faster than prices for older generation of products.⁴³

As well, according to Canadian Grocer's 2006 Market Survey 2006 was a challenging year for the country's grocers. Sales at traditional grocery stores, including supermarkets, grocery stores and convenience stores, climbed to \$73.3 billion, up just 1.63% over 2005 and the lowest year over year change since 1996, when there was a .5% decline. The numbers based on Canadian Grocer estimates derived from Statistics Canada Annual.⁴⁴

Finally the late start to winter caused issues for Ontario retailers who were over-stocked with winter merchandise. It is an axiom in the retail trade that if customer have not bought their winter supplies before the middle of January it is very difficult and costly to pay them to take way the overhanging stock.⁴⁵ This situation reversed itself once winter hit full force in mid January and retailers were able to sell winter merchandise.

Social & Demographic Trends

The challenge with attracting employees into retail and wholesale roles continues while a new program offers hope with health and safety training for the incoming labour force.

The retail and wholesale trade continues to experience difficulty attracting employees into their entry level positions. In fact, in a recent report from the Retail Council of Canada, one member said that when he joined the trade many years ago, compensation for entry level jobs in stores and offices was roughly similar. Since then, pay for junior office positions have improved considerably relative to starting pay in retail stores. Many years ago there was an abundance of typists producing extra copies of office documents, they have been replaced by copiers and computers. Today there is a small number of more skilled support staff that manages a much greater paper load. In contrast, retailers have struggled to improve store productivity, and it's not clear that there is any capital equipment that will have a similar effect on the productivity of sales associates and store managers.

This poses a serious long-term challenge to the trade. Retailers will find it increasingly difficult to attract and retain store-level staff as labour markets tighten and technology widens the productivity gap between store personnel and those in other occupations. Retailers have invested heavily in supply chain productivity within 2006. Even if there is no technological "fix" for store productivity, retailers must now invest the same attention and resources in improving the efficiency of their store operations.⁴⁶

Launched in 2004, the Passport to Safety program has been working with School Boards to prepare young people for the workplace. Young people challenge a Passport to Safety “test”, based on learning outcomes developed by health and safety curriculum experts from most provincial and territorial jurisdictions across Canada. Successful participants are awarded a "transcript" that can be attached to resumés to demonstrate their basic awareness of health and safety. This basic level of awareness becomes a foundation on which to build all the other essentials required to be safer and healthier workers.⁴⁷ The program will have an impact on the young workers who will be entering the workforce in the coming years.

Technology & Industry Trends

There has been much news in terms of technology and industry trends for retail and wholesale groups including: changes in foreign ownership in Canada, increases in online shopping, Radio Frequency Identification being introduced to as a commercial application, a security breach at a national retailer, biometric technology for staff sign in, customer relationship management systems for a high end clothier, the increasing cost and nuisance returned goods, an example of more sustainable business practices and a little known environmental issue.

Since 1996, after U.S. giant Wal-Mart Stores Inc. entered the Canadian market, foreign ownership of Canada’s retail industry has jumped to 50 per cent from 20 per cent: but it is not just American retailers that see Canada as a friendly “first stop” on an international expansion program. In recent years, several European multinational players, including H&M, Sephora, Mango and Zara have come to Canada partly for a window on the larger North American market. Canada now has 140 U.S. owned retailers and 115 other international players.⁴⁸

After numerous failures in the late 1990’s, online shopping business appears to have caught on with cautious consumers, the business hit \$7.9 billion, spent on 50 million orders in Canada in 2005, more than tripling 2002’s performance when consumer’s spent \$2.4 billion on 16.6 million orders, according to Statistics Canada. Growth for the 2006 season is being seen at 5-6%. Retailers are finding they benefit as much from online sales as they do from in-store sales that result from customers who research purchases online. A Global Market Insight survey noted 98% of Canadians online have used a search engine to help research or buy a product or service.⁴⁹

Radio Frequency Identification (RFID) also known as transponders, has been around for a long time, one of its original uses being the identification of aircraft during the Second World War. Until recently it was viewed as being too expensive and too limited in functionality for many commercial applications. Advances in technology have both reduced the cost of individual system components and provided increased capabilities, to the point where numerous organizations are either using or considering using RFID technology. In fact, some organizations, notably Wal-Mart and the US Defense Department, have mandated the use of RFID by their business partners⁵⁰. Wal-Mart has pushed its suppliers to use innovative radio-activated tags to chop labour and inventory costs. However, tests using the tags aren’t showing any savings, and suppliers forced to

invest in the relatively expensive technology are not impressed. RFID was to replace the 25 year old bar-code technology printed on labels of products from toothpaste to diamond rings. The bar codes help track inventory and can match a product to a price, but they lack the electronic tags ability to store more detailed information. The current generation of RFID tags costs about 15 cents a piece while bar codes cost a fraction of a cent. Beyond the tags, suppliers have had to bear the cost of buying hardware readers, transponders and antennas and computer software to track and analyze the data.⁵¹

Consumers say they're frustrated and angry about major computer security breach at a leading retailer because they can't get the information they need to protect themselves from fraud or identity theft. The U.S. parent company of Winners and HomeSense said it has passed on the credit and debit card numbers that might have been exposed when hackers got into its computer system to the credit card companies or the banks that issue the cards.⁵²

Employees at Holt Renfrew stores have got it easy when they sign in for the day. All they have to do is place their finger on a POS terminal and they're ready to go. Holt Renfrew is one of the only retailers in Canada using biometrics to track employee activities. The employees love it, because it's tied into the store's time and attendance system. That means everyone gets paid for the hours they work. No more pay discrepancies and no more overtime hours for payroll.⁵³

This spring, Harry Rosen Inc. decided it was time to put the power of customer service technology in the hands of its store associates. In April the company began equipping staff with brand new HP PDA's that serve as an advanced "mini Customer Relationship Management" system. The customised application lets sales personnel look up client records, including their purchase history, sizes colour preferences, personal interests and any other piece of information on the Harry Rosen database. They can even check inventory availability of all store locations on the spot, keep a "to do" list and receive notifications when clothes are ready from the tailor. Steve Jackson, CIO reports that by January 2007 all 450 sales associates will be wired for service. "We believe it's the most advanced CRM system in retail today."⁵⁴

Returned goods, add up to a \$10 billion-a-year headache for Canadian merchants, and the problem is only getting worse. As much as a third of a retailer's sales ends up as returns a new study has found. According to a new research from Boston Consulting Group's Toronto office, an array of retail categories are hit hard, with anywhere from 5 to 30 per cent of sales eaten up by returns. Catalogue and Internet retailers feel the pain the most, particularly those selling consumer electronics and clothing, however, almost no product category is immune.⁵⁵

Increasingly, environmentalists and educated consumers are pushing for retail companies to use more sustainable business practices. Last December, prodded by and working with the environmental group Forrest Ethics, Limited Brands (the \$10 billion U.S. fashion company that operates, among other brands the Victoria's Secret lingerie business) said it would stop using paper from a B.C. company that logs in Alberta. It pledged that by the

end of the year, the 350 million Victoria's Secret catalogues sent out annual would contain at least 10 per cent recycled paper or paper from forest operation certified by an international group, the Forest Stewardship Council.

In a similar vein the global textile industry must become eco-conscious, a report concludes from researchers at Cambridge University titled "Well Dressed?". It explores how to develop a more "sustainable clothing" industry, a seeming oxymoron in a world where fashions change every few months. Clothes and fast clothes in particular are a large and worsening source of the carbon emissions that contribute to global warming, because of how they are both produced and cared for.⁵⁶

Legislation & Policy Trends

Changes in legislation have been positive for retailers in avoiding an impending tax. A class action lawsuit has been filed by grocery workers, and the problem facing retailers that's becoming the world's fastest growing crime wave.

Retailers applauded the government's decision last summer not to move forward with additional surtaxes on the import of bicycles and barbeques. Given the precedent-setting nature of this decision on safeguards, this move was strongly supported by the industry. The Canadian International Trade Tribunal (CITT) had recommended last fall (2005) that the Government of Canada impose surtaxes on imports of bicycles and barbeques as a way to counter the effects of increased imports of these products.⁵⁷

A class action lawsuit has been filed by grocery workers who have allegedly lost more than \$1 billion because of negligence by trustees and some of the country's biggest supermarket chains. Two retirees and a store employee have filed a claim in an Ontario court that seeks class action status for about 300,000 beneficiaries of the Canadian Commercial Workers Industry Pension Plan in a potential high-profile legal battle for removal of the trustees and restitution of the alleged losses.⁵⁸

It's an international problem that's been called the world's fastest growing crime wave. Counterfeit products represent 7 per cent of global trade, or about \$500 billion annually. "Counterfeiters couldn't care less about any quality control. They don't care whether the thing really works or not. When you're talking electrical devices or pharmaceuticals or kids' clothing that isn't fire-retardant, they're just putting everybody at risk" says Sgt. Andris Zarinds of the RCMP federal enforcement branch. As examples, he points to Christmas lights, batteries and faulty electrical cords that aren't up to safety standards and are prone to catching fire. This year, Health Canada issued a warning about fake batteries, saying there have been nearly 90 incidents, since 2000 when counterfeit-brand batteries exploded, 41 in toys. Eight children were burned. And counterfeit batteries can contain poisonous mercury.⁵⁹

The pharmaceutical market has also been flooded with fake drugs that simply don't do what the patients hope and expect. Canada's record on this is so poor the International Anti-Counterfeiting Coalition, which represents the interests of 150 companies and trade

associations has put Canada on a watch list, painting it as a mecca for counterfeit goods.⁶⁰

Health & Safety

According to the Ministry of Labour, major hazards in the retail environment include: ergonomics and overexertion (sprains, strains, lifting); material handling and use of forklifts; material handling and storage of goods; slips and falls and ladder use; electrical contact; being caught in machinery (meat grinders, dough mixers); machine guarding/lockout; WHMIS, Occupational Exposure Limits (OELs), and carbon monoxide (propane powered equipment used in doors); working alone; and violence.⁶¹

For wholesale businesses, the Ministry of Labour identified the following major hazards: slips and falls; moving vehicle traffic (lifting devices); falling materials; being caught in moving machinery (conveyors); carbon monoxide (propane power equipment used indoors); ergonomics (sprains, strains, lifting); heat stress; machine guarding; material handling; and ladder use.⁶²

Violence in the workplace is a growing concern among retailers. There have been numerous examples in the news this year including a Wal-Mart greeter in Vaughan was punched in the face after she tried to stop a shoplifter with a cart full of baby formula, York Region police say.⁶³

Robberies are up overall in Peel (region) but there has been a particular spike in the number of jewellery heists. It's been so bad that robbers, brazenly posing as police officers, hit two other stores last month, prompting Peel police to form a task force. It's not known how many businesses have been robbed, but the jewellers said at least half a dozen retailers across the GTA have been victimized.⁶⁴

Restaurant and Foodservices

Introduction

All restaurant and foodservices clients are represented in the rate group 919. This includes caterers, takeout -foodservices, taverns, bars and nightclubs, licensed and unlicensed restaurants, fast-food restaurants, and those who supply labour to restaurants and caterers.

Economic Trends

Total estimated sales of the restaurants, caterers and taverns industry reached \$3.6 billion in December, a 9.4% increase over December 2005 on a year-over-year basis. The increase in sales, at the national level, was due to higher sales at limited service (+12.6%) and full service restaurants (+7.7%). These two sectors account for almost 85% of the sales for the industry. Sales were also up at food service contractors (+19.2%) and caterers (+7.6%), which accounted for almost 9% of the sales for the industry in December.⁶⁵

Employment in Canada's foodservice industry advanced 3.1% in 2006 to 1,040,300 employees after a 2.7% decline in 2005. The foodservice industry created one in ten new jobs in Canada in 2006 and represents 6.3% of total Canadian employment.

Despite solid job gains in 2006, chronic labour shortages remain a significant impediment to growth in Canada's foodservice industry. There is an estimated shortage of more than 34,000 employees in the foodservice industry today, based on forecasts by the Canadian Tourism Human Resource Council and data from Statistics Canada. The labour shortage is felt most acutely in Western Canada where thousands of foodservice positions go unfilled because the supply of workers can't keep up with demand.⁶⁶

Here's a look at the foodservice employment highlights of 2006:

- As a major source of entry-level and part-time jobs, the foodservice industry employed more than 460,800 young Canadians between the ages of 15 and 24 in 2006. Youth represent 44.3% of all foodservice workers and the industry employs nearly one in five working Canadians under the age of 25.
- People 45 years of age or older were the fastest growing foodservice employee group with a 16.0% increase. Since 1990, the share of foodservice workers 45 years of age or older has jumped from 17.0% to 22.5%.
- While foodservice employment in Central and Western Canada rose 3.9% and 2.5% respectively, a decline in the number of units led to a 0.3% drop in jobs in Atlantic Canada.

- The number of part-time foodservice employees rose by 3.4% compared to a 2.9% increase in full-time employment. Fully 57.2% of foodservice employees work full-time.
- Healthy sales growth at limited-service restaurants led to a 6.8% increase in the number of counter attendants. The number of supervisors and cooks rose by 8.5% and 6.7% respectively.
- The share of female foodservice employees climbed to 61.9% in 2006 compared to 59.0% in 1996.⁶⁷

Social & Demographic Trends

Restaurants are making a significant change to their menu. The challenge of attracting and retaining quality employees and management continues to trouble the restaurant and foodservices sub-sector and the new ways of introducing young people to the industry.

A&W Food Services of Canada has laid claim to being the first national hamburger chain to offer “zero or significantly lower” trans fat menu items. Trans fats, listed on food labels as partially hydrogenated vegetable oil, are though to boost “bad” cholesterol and decrease “good” cholesterol. A&W began working to reduce trans fats a year ago.⁶⁸

McDonald’s Corp. has said it has selected a new trans-fat free oil for cooking but did not say when the oil would be introduced in restaurants. Burger King Holdings Inc. said it has begun testing oils without trans fats with plans for a roll-out by late next year. Among other fast food chains, Wendy’s International Inc. introduced a zero-trans fat oil in August, and Yum Brands Inc.’s KFC and Taco Bell say they will cut trans fats from many of their foods. Starbucks Corp. recently said it was halfway through a plan to purge trans fat from its U.S. menu.⁶⁹

It is more difficult now than ever to find great candidates who are dedicated to the demands of the restaurant industry. Mid-to-upper level managers are leaving the hospitality industry to go into other industries after learning the great systems, disciplines and transferable skills from these demanding jobs. Many companies are seeking outside professional hiring help from recruiting firms or other third parties.⁷⁰

Cara Foods is partnering with Hamilton School Board to prepare students for a career in food services, chefs and they get academic credits and training in food safety.⁷¹ Another program that has been initiated for student engagement is Field to Fork, a one day event in October 2006 introduced 1,600 students and teachers from 5 GTA school boards to career options in the food industry. Field to Fork was organized by some 35 companies in the food industry and offered students a plethora of options should they decide on a career in good services, from research and manufacturing to distribution, operations and marketing.⁷²

Technology & Industry Trends

The restaurant and foodservices sub-sector has experienced: a new threat from a traditional retailer expanding its offerings, online reservations for restaurants still not popular, an innovation that results in cost savings for restaurants and a bacterial contamination that has a new source.

Competition has heated up with traditional retailer Wal-Mart moving into the foodservices sector. Wal-Mart plans on expanding their services to be even more comprehensive shopping experience with customer's with the launch of an expanded supercentre format that will offer customers fresh groceries. The Supercentres will blend Wal-Mart's traditional general merchandise with full grocery sections ranging in size from 30,000 square feet to 45,000 square feet, carrying fresh produce, meat, cheese, deli and bakery items, along with a comprehensive mix of organic and ethnic foods. The first 3 Wal-Mart Supercentres, located in the Ontario communities of Stouffville, London and Ancaster opened on November 8.⁷³

Coyle Hospitality Group Survey finds that more than ¾ of the respondents (78%) replied that they have never booked a dining reservation online. Those who did generally cited positive experiences booking reservations online. Sixty-seven per cent of those polled indicated that the quality of a restaurant's personal website is indeed an indicator of the level of service they can expect to receive when dining there. When asked to rate the importance of website content such as online menus, prices, recent reviews, chef information and photos of the dining area, responses varied. The clear winner was availability of menus leading all other categories in both the 'Must Have' and 'Very Important' categories. Two-thirds of those surveyed felt that menus played a very important role. A restaurant having its own website was also deemed crucial with 86% putting it at or above 'Very Important'. Photos of the dining room were also cited by the majority as at least 'Very Important'. Recent Reviews are important, but only 10% listed them as a 'Must Have'. Sorry chefs, prospective diners placed little emphasis on staff bios.⁷⁴

For the past 3 years Jeff Martin, president of Martin Air Systems has been retrofitting a number of restaurants around the GTA with a system that captures otherwise wasted kitchen heat and uses it to pre-heat water and restaurant air. Total gas consumption drops 35 to 40 per cent, noting that half of all restaurant gas consumption is for food preparation.⁷⁵

In 2006 there were a number of E-coli outbreaks in foods, of particular significance were the spinach and green onion outbreaks. The E. coli outbreaks linked to restaurants have caused illness with at least 63 people in six states. "This (the latest E. coli outbreak) is one of a series of outbreaks, which represent a change in the pattern of food-borne outbreaks," said Dr. Pascal James Imperato, chairman of the Department of Preventive Medicine and Community Health and director of the Master of Public Health Program at SUNY Downstate Medical Center in Brooklyn, N.Y.⁷⁶

These outbreaks are a newer development where the contamination occurs at the place where the food is produced rather than the place it is served. These outbreaks affected both fast food chains and higher end restaurants. Since growing and distributing vegetables has become an "agribusiness," with fewer but larger growers, processors and distributors, there's more chance of contamination, Imperato said. Contamination can occur from irrigation, which can spread E. coli from neighbouring animal grazing lots, and during the packaging in large plants. And that packaging increasingly relies on plastic bags, which create an ideal environment for bacteria such as E. coli to grow, he explained.

“Also in September, an outbreak of salmonella was traced to tomatoes served in restaurants. The outbreak sickened 183 people in 21 states, as well as two people in Canada.”⁷⁷

Legislation & Policy Trends

In the past year; there has still been a fight with the smoking ban, a new program to recover all wine and spirit bottles from landfill sites has been introduced and a new requirement for food handlers in Toronto.

The Canadian Restaurant and Foodservices continues to fight the smoking ban by asking that Ontario's bars, pubs and lounges receive the same opportunity as government-run casinos to build smoking shelters. Real sales in Ontario's bar, tavern and nightclub sector have dropped by 8% or \$21 million in the first five months of the provincial smoking ban that was implemented on June 1 of last year, according to Statistics Canada. Since 2001, the bar, tavern and nightclub sector has suffered a 24% or \$182-million drop in real sales, and an 18% drop in the number of establishments, due in large part to municipal smoking bans and the province-wide ban.⁷⁸

Beginning Feb. 5, 2007, all LCBO customers, including licensees, will pay a deposit of 10 to 20 cents on wine and liquor containers as part of Ontario's new deposit-return system. Brewers Retail Inc (BRI), also known as “The Beer Store”, which will be responsible for providing refunds to licensees under Ontario's new deposit-return system, has announced further details for licensed operators.⁷⁹

A new bylaw requires food handlers in Toronto restaurants to complete a training and certification course, and obtain a food handler certificate from Toronto Public Health. Under the new regulations, all foodservice premises must have at least one certified food handler working in a supervisory capacity during each shift. The bylaw applies to all foodservice establishments located in the city of Toronto, including hot dog carts and refreshment vehicles.⁸⁰

The new regulations will be phased in over five years, with individual compliance dates depending on the frequency of annual inspections. Operations that are currently inspected three times per year must be the first to comply, with handler certification required by Oct. 31, 2007. Operators will be notified of exact compliance dates during their next health inspection.⁸¹

Health & Safety

According to the Ministry of Labour, major hazards for this sub-sector include: slips and falls; mixers; electrical contact; heat stress; strains, sprains, and ergonomics; second hand smoke; lifting and carrying; minimum age; and violence.⁸²

Health and safety has been gaining attention recently in the foodservices industry due to the Ministry of Labour's High Risk and Last Chance initiatives. Franchisees are putting pressure on head offices to provide them with support to address these initiatives. While the Ministry of Labour's efforts promote immediate change, many companies are trying to build the infrastructure to support sustained reductions of their injury rates.

A recent example of violence in the workplace highlights the need for more attention to workers safety. "A trio of bandits locked four Swiss Chalet employees inside the restaurant's freezer in an armed robbery in Georgetown."⁸³ Many businesses that stay open late have developed policies or practices for late night safety, such as providing taxi cabs for workers who do not have a ride home. Other practices include making sure late-night managers have cars, scheduling a minimum number of employees at closing time, and relaxing requirements for young employees to work late shifts.

In order to maintain successful health and safety programs, companies rely on training. Keeping staff trained is a constant challenge due to high turnover rates. Managers who are promoted from within the organization also sometimes lack health and safety knowledge.

Tourism and Hospitality

Introduction

The tourism and hospitality sub-sector includes the following rate groups:

921 hotels, motels, and camping

937 golf courses

944 personal and recreational services

962 advertising and entertainment and

981 membership organizations

Economic Trends

In line with most expert predictions, World Travel & Tourism Council (WTTC) research suggests that global Travel & Tourism will continue to grow at a steady annual rate of 4.2 per cent over the next ten years.⁸⁴

World tourism demand continues to exceed expectations, showing resilience against extraneous factors (in particular terrorism, health scares due to avian flu and rising oil prices). According to the latest issue of the *UNWTO World Tourism Barometer*:

- In the first eight months of 2006 international tourist arrivals totalled 578 million worldwide (+4.5%), up from 553 million in the same period of 2005, a year which saw an all-time record of 806 million people travelling internationally.
- Growth is expected to continue in 2007 at a pace of around 4% worldwide.

The expected 4% growth for 2007, though slightly slower than in previous years, is in line with the UNWTO long-term forecast growth rate of 4.1% a year through 2020. The short term outlook remains very positive; especially against the background of a strong world economy and as favourable exchange rates continue to encourage European and Asian travellers.⁸⁵

Although international travel is expected to remain buoyant Canada did see a 4.1% drop in international travellers.⁸⁶ According to a Statistics Canada report, the number of non-resident travellers dropped 3.5 per cent during July, August and September 2006 while spending by international travellers was down to 2.8 per cent. The number of tourists travelling to Canada from south of the border fell by 3.9 per cent while there was 1 per cent fewer visitor from other countries. There was also a sharp decline of 4.2 per cent in the same day visitors from the U.S. Over the last seven quarters, international tourism spending has fallen by 10 per cent. Despite the national picture, foreign travel is up in Ontario and Toronto which saw a 1.8 per cent increase in overseas visitors to Ontario by the end of October. This increase is being attributed to an aggressive promotion campaign in Europe and Asia. A similar marketing campaign in Mexico has resulted in an 8 per cent increase in visitors during the year. Attracting U.S. travellers to Canada continues to be challenging particularly with the strong performance of the Canadian dollar and more competition from U.S. destination; and the struggle is compounded by higher gas costs, strained political relations, and the continued war on terrorism.⁸⁷

On the flip side Expedia.com, the world's leading online travel provider, introduced the latest issue of its quarterly report, Expedia Travel Trendwatch. The consumer survey conducted by Harris Interactive showed, among other things, that 82 percent of U.S. adults plan to travel by air as much or more this spring as last spring. The same survey revealed that new passport requirements won't likely slow travel to Canada, Mexico, Central and South America, or the Caribbean. Surprisingly, this survey contended that the weakened performance of the U.S. dollar is a relatively small concern to those considering international travel.⁸⁸

Statistics Canada figures, backed by Tourism Toronto numbers show a 70 per cent increase in the number of Chinese visitors to Ontario from January to September, compared to a year ago. Tourism officials say the opening of a direct air link between Shanghai and Toronto earlier this year is one reason for the increase, but it's also the result of a concerted marketing effort by Ontario Tourism officials to attract the travel dollars available to a growing Chinese middle class.⁸⁹ Those numbers are small when compared to the market of Chinese tourists currently available to travel. The president of the Hotel Association of Canada, is pursuing an "approved destination status"(ADS), with China. Until Canada receives the new status, it will be difficult for Chinese leisure travellers to come here. At the moment, only Chinese government workers and people travelling on business are easily able to visit Canada.⁹⁰

With a lack of new big tourist attractions and a few major ones closing including the Olympic Spirit Toronto and the Hershey Factory in Smith Falls.⁹¹ There needs to be some creativity work done to inspire tourists to Ontario. A lot of that then falls to events that draw people to Ontario's cities. Four years in the making, Luminato, the most ambitious arts festival ever mounted in Toronto will have a 10 day program that will feature 70 events (most of them free) and five world premieres.⁹²

Keeping Canadians travelling in Canada is even a challenge. With the strong Canadian dollar and its buying power internationally it's no wonder Stats Canada reports increased spending by Canadians abroad. Increased spending by Canadians abroad pushed Canada's international travel deficit to its highest level ever in the third quarter, edging out the previous high observed nearly 15 years ago. Canadians spent an estimated record \$5.9 billion outside the country, up 2.9% from the previous quarter. Spending abroad has shown an upward trend in recent years, with increases in 11 of the last 13 quarters.⁹³ It also costs less to travel to some international cities like London, England than it does to fly across Canada.

In a surprising move, Air Canada ended all flights to India so it can boost its service to China. Canada will now be the only G8 nation that does not have a national airline servicing India. Yet federal and provincial governments are actively courting Indian trade.⁹⁴

Social & Demographic Trends

The past year tourism and hospitality have faced a number of trials including: a warmer winter that put many companies in a difficult situation, declining box office ticket sales combined with an ACTRA strike and new demographics of customers.

As in all of the sub-sectors a labour shortage is being experienced in Tourism and Hospitality as well. This is a major challenge when coupled with the winter starting much later in Ontario during the 2006-2007 season. Ontario's largest ski resort laid off 1300 workers after closing down its ski operation in the middle of the winter season for the first time in the resort's 65 year history. The laid-off workers at Blue Mountain were made up of full-time seasonal workers and year round part time employees included housekeeping staff, restaurant workers and ski lift operators.⁹⁵ The delayed weather affected all ski resorts in Ontario. By January, the ski resort hired back most of their 1300 seasonal employees.⁹⁶ It is very evident that weather and climate change will continue to have a profound effect on this sub-sector.

The situation in the film and television production industry has been equally challenging with lacklustre turnout at the cinemas and a strike by the members of ACTRA (Alliance of Canadian Cinema, Television and Radio Artists). Canadian admissions have been edging downward for close to five years. Overall box office last year was \$831million. While not a dramatic dip from 2005's \$831.3 million it was enough to register as the fifth consecutive decline since 2002. Indeed, that 2006 total represents a 14.2 per cent drop from the \$968.9 million generated in 2002. Howard Lichtman, president of the Lightning Group, a Toronto based marketing and entertainment consulting firm, remains optimistic about this year's prospects, quoted in Victoria at Show Canada, the annual confab of distributors and exhibitors he predicted "2007 would be a record breaker."⁹⁷

Although initially there was hope that the situation would improve for 2007, the ACTRA strike has cast doubt on hopes of a revival in the production industry, which has been in steep decline in recent years, battered first by the 9/11 terrorist attacks, then SARS in 2003 and the impact of a higher Canadian dollar. Major Toronto film and TV production has been in steady decline since 2003 when it peaked at just over \$928 million that year, according to city hall figures. By 2005, it was down to \$773.1 million. A further decline is expected when the 2006 figures are in and with 2007 starting off with the actor's strike, the trend show no signs of levelling off. This decline affects the livelihoods of ACTRA's 21,000 members, 60 per cent of whom live in Toronto, but that of thousands of behind the scenes technical support and traces workers.⁹⁸

Consumers place additional demands on the tourism and hospitality industry which include high quality products at low cost. Today's leisure travellers, who comprise of more singles, more female travellers, more grandparents travelling with their grandchildren, and more large family units (several generations), are much less concerned about which destination they visit, which means they tend to be less loyal to destinations than they ever were in the past. The increased desire for healthy living and the need to escape highly pressured working environments have stimulated the demand for niche products such as spa/wellness tourism, outdoor activities, cruises, and

educational trips. The consumer is also demanding a more environmentally aware vacation experience. They want more interaction with local people and a more emotional and cultural link to the people and communities they visit.⁹⁹

Technology & Industry Trends

The latest technology and industry trends seem to be geared at the economical, environmentally aware, health conscious and educated tourist. These trends include removing trans fats from cooking oil at hotels, hosting zero-waste conferences, attracting new customers to movie theatres, increased consumer's online capabilities and local marketing activities.

Marriot International Inc. says it will eliminate trans fats from the cooking oil used by its restaurants at more than 2,300 hotels in Canada and the United States. Omni Hotels also said it will cut trans fat by March 1.¹⁰⁰

Another response to the need for a “greener” culture could be seen this year in Canada's first zero-waste international convention. Organizers of the 3000 delegate Professional Convention Management Association convention used real dishes for lunches and dinners at the four day event. Leftover food was delivered to Second Harvest for the city's less fortunate. Food scraps were relegated to composting with the rest earmarked for recycling bins. The zero waste meeting is another selling point for Tourism Toronto.¹⁰¹

The movie theatre industry is looking at innovative ways to attract more people into its theatres, from holding video-game tournaments to showing live rock concerts and Broadway plays on the silver screen. There is also interest in liquor licensing that would allow patrons to bring beer and wine into adult-designated auditoriums.¹⁰²

The growth of online booking as a percentage of overall reservations continues to grow dramatically. More people are booking online and less people are booking through central reservations telephone numbers and offline travel agencies. For example, over the past 3 years, Best Western has seen online bookings grow from between 10 percent to 15 percent of overall traffic to around 40 percent today. At Choice hotels nearly 60% of reservations now come from online bookings. The majority of persons who make reservations online are now booking directly on the hotel or brand's website. This is quite an achievement for the hotel industry despite many new websites attempting to book or refer hotel reservations. Now hotel companies are paying less money to travel portals and are establishing more relationships directly with their guests.¹⁰³

Through the Internet, consumers now have the ability to see and read everything necessary to choose their favourite hotels. Feedback Forums which allow customer to post comments and rate reviews as well as the ability to create their own hotel selection criteria and compare hotels with little effort has decreased the need for the more traditional hotel “star” or “diamond” ratings.¹⁰⁴ TripAdvisor.com. has become the largest travel community in the world, with more than 5 million unbiased reviews and opinions, covering 220,000+ hotels and attractions. In addition to providing travel reviews, the

website also connects travels with major online travel sites, including Expedia.com, Orbitz, Hotels.com and American Airlines, for great deals.¹⁰⁵

The popularity of spa facilities in hotels and resorts has exploded in recent years. For many full-service and resort properties, spas are as much a requirement as restaurants and meeting space.¹⁰⁶

The OSSA Tourism and Hospitality Advisory Committee expressed concern that the marketing, for Canadian tourism spots (both within and outside of Ontario) is not dramatic or compelling.¹⁰⁷ To combat that image a \$100,000 campaign to promote Toronto as an exciting place was launched recently. The four ads, appearing in alternative newspapers in January and February in eight U.S. cities within easy driving distance, were designed to poke fun at the city's stereotypical images as clean, safe and dull. Instead they have provoked home-grown descriptions from ineffectual to "ridiculous" to "deplorable," due partly to some confusion over their message.¹⁰⁸

Legislation & Policy Trends

There have been many changes in the last year that may negatively affect the tourism and hospitality sector that include: the new passport requirements, increased border security, the new program for cargo screening through airports, the cancellation of the Visitor Rebate Program, and legislation requiring changes to tourism facilities.

There is a concern that the Western Hemisphere Travel Initiative passport requirements for all air travellers could also be a challenge to the tourism sub-sector. Beginning in January, Canadians will need passports to fly to the United States. With only about 25 per cent of Americans currently holding passports (compared with 44 per cent of Canadians).¹⁰⁹ Ottawa fears that many Americans will not obtain needed documents to visit Canada that means 150 million Americans will lack passports.¹¹⁰

The federal government is investing \$431 million over the next five years to reinforce border safety, Public Safety Minister Stockwell Day announced. He said the initiative is essential to not only ensure safety, but to keep commerce moving. The bulk of the money will go towards the electronic eManifest program, which allows for computer-automated risk assessments of cargo shipments before they reach Canada.¹¹¹ Another border issue which could affect tourism, is the implementation of the conservatives campaign promise, to arm some of the 5,000 or so people in uniform along the border.¹¹²

Security issues are have also been addressed with Transport Canada moving "aggressively" on a report from the global aviation authority that calls for beefed-up air security through improved cargo screening and better training programs. Currently, Canadians flying to the United States must carry a valid passport or show a special NEXUS cards reserved for frequent travellers. A NEXUS enrolment centre and self-serve kiosks, which can identify and verify travellers in the program through the use of iris-recognition technology, are now operational at the Toronto airport.¹¹³

Rather than saving taxpayers' money, cancelling the GST/HST Visitor Rebate Program

(VRP) will end up costing the government millions more in tax revenues and thousands of lost tourism jobs, according to a new economic impact report. The Visitor Rebate Program is proposed to be eliminated effective April 1, 2007, as part of the package of specific spending restraint measures announced by the Government on September 25, 2006.¹¹⁴ The Federal Government estimates it will save \$86 million in program and administrative costs; however, the GST Visitor Rebate Program for Individual Travellers, an Economic Impact Analysis, commissioned by Global Refund Canada and endorsed by the Tourism Industry Association of Canada and the Frontier Duty Free Association, demonstrates that the savings will be overshadowed by the loss in GDP of \$238 million. This short-sighted fiscal policy will result in a net loss of \$46 million in Government tax revenue and the loss of over 5,700 jobs in the tourism sector.¹¹⁵ The GST VRP is a program that allows foreign visitors to Canada to claim a rebate on GST paid on the items they purchase while in the country.

Although a concern last year, the Smoke Free Ontario Act, which came into effect May 31, 2006, has not caused any significant change to businesses according to the Tourism and Hospitality Advisory Committee.¹¹⁶ The next part of the legislation coming into effect is all displays of tobacco products will be banned two years later, on May 31, 2008.

Other legislation will require changes to tourism facilities. Bill 198, Accessibility for Ontarians with Disabilities Act (AODA), requires the development of sector-specific standards for accessibility. People with disabilities, people from different industries and sectors, and Ontario government ministries work together on committees called Standards Development Committees. The committees recommend proposed accessibility standards to the Ontario government cabinet minister who is responsible for the AODA. The bill comes into effect in 2025 by then all of Ontario will be fully accessible.

Health & Safety

According to the Ministry of Labour, the major health and safety hazards for tourism and hospitality workers are: chemical handling; working with fuels safely; slips and falls; ultraviolet radiation (outside work); occupational exposure limits; strains, sprains and lifting (ergonomics); electrical contact; being caught in machinery; drowning; heat stress; operation of motorized recreational vehicles; working in remote areas; and working alone.¹¹⁷

Pandemic planning is remains as an important issue for this sub-sector. With a global concern over the potential impact of an avian flu pandemic, protecting guests and employees, and the loss of business from that impact is paramount. West Nile virus also remains a concern for tourism employees who work outdoors. According to experts, mosquitoes are showing a preference for feeding on humans instead of birds, resulting in more human infections.¹¹⁸

Labour shortages are predicted to be an issue for this sector and to combat that they are hiring with increased numbers employees over the age of 65 as well as immigrant workers (i.e. some areas are bringing in housekeepers from other countries during high season). Large tourism projects planned in the next year or two (i.e. Woodbine

Entertainment Expansion and Casino Windsor) will put a strain on available labour pools in regions.¹¹⁹

According to the Ministry of Labour, significant health and safety threats for film and TV workers include: dramatic stunts; chemical and safety hazards, fire hazards/pyrotechnics; firearm hazards; heat/cold stress; special lighting (electrical hazards); handling chemicals (WHMIS requirements); carbon monoxide (in use of gasoline-operated equipment); smoke created during filming; and ergonomic issues related to lifting/moving heavy equipment.¹²⁰ The example most recently of this sort of hazard was involving David Richie, 56 (died), was helping disassemble an outdoor set used for a Samuel L. Jackson film, Jumper, when a prop wall collapsed on him and two other men.¹²¹

For live performance workers, serious hazards are: falls; pyrotechnics; smoke and fog; sound; portable electric generators (grounding); noise; and working on or near live exposed parts of equipment and in outdoor venues, because of extreme temperatures.¹²²

Vehicle Sales and Service

Introduction

These groups represent a diverse variety of businesses such as automobile, truck and recreation vehicle sales and services: aftermarket sales; recycling; auto repair and refinishing; tire wholesalers; and retail tire and wholesale suppliers. The Vehicle sales and service sub-sector includes rate groups;

630 vehicle Services repair

636 retail non-food specialty stores

657 automobile and truck dealers

659 other motor vehicles and trailers and

660 home and auto supply stores

Economic Trends

The global auto business is by no means static. A vast restructuring is underway, with active consolidations, shifting alliances, increasing competition, and outside forces entering the business.¹²³

TD Economics said the engine of Canada's auto and parts sector will sputter this year, but not break down. This sector, based largely in Ontario, is battling a number of headwinds, notably in the form of falling light-vehicle sales in North America and the restructuring efforts of the Big Three car makers General Motors, Ford and DaimlerChrysler. Canadian output of autos and light trucks will likely decline by 1.2 per cent this year but that compares to a drop of 2.6 per cent in the U.S.¹²⁴

An analysis of Statistics Canada data indicated that profits for the overall auto industry, which fell to \$886 million (Canadian) last year, are expected to climb back up to \$1.3 billion this year, then to \$2.1 billion in 2007. The report noted that the rise in value of Canada's dollar and China's growing importance as a vehicle and parts maker will affect auto makers and parts companies operating in Canada.¹²⁵ Auto union leader Buzz Hargrove says a tour of the Far East has convinced him that China will completely overrun the North American vehicle industry within 2 decades unless governments take action to thwart a potential flood of imports.¹²⁶

In 2005, 8,730 dealers and 22,877 salespersons were registered under the Motor Vehicle Dealers Act (MVDA). Registration is mandatory for motor vehicle dealers and salespersons in Ontario and is valid for a two year period.¹²⁷

Despite fluctuations in the second half of the year, 2006 sales of new motor vehicles continued their relatively stable upward trend. Prior to 2006, sales showed sizable fluctuations throughout 2005 with the introduction and subsequent removal of dealer incentive programs.¹²⁸

More bankruptcies are looming in the troubled auto parts sector. A record number of auto parts supplier bankruptcies in North America and Europe could be filed in February. The number of distressed suppliers on the auto maker's watch list has grown by 44 per cent

since last year at this time and pointed to excess capacity among plastic-injection moulding companies, makers of interior parts and metal stamping operators.¹²⁹

According to the OSSA Vehicle Sales and Service Advisory committee (VSSAC) the vehicle sales and service sub-sector continues to battle two significant local challenges.

Firstly, underground businesses are threatening the sustainability of legitimate companies in Ontario. It was estimated that 18-20% of these businesses do not register with the WSIB. Underground businesses tend to be cash only businesses that operate a fly-by-night business. If discovered by the MOL they often shut down and then reopen the same location with a different name. There are concerns in the VSSAC that the health and safety of the employees at these locations may not be the highest priority for these businesses, which often do not register with the WSIB. They also feel customers are especially vulnerable to this as they usually aren't aware if it is a legitimate business.¹³⁰

A second challenge is that customers who have an accident are increasingly more adverse to submitting an auto insurance claim. In order to avoid paying increased premiums to auto insurance companies they do not submit a claim and pay for it directly. The number of customers paying out of pocket has risen dramatically over the last couple of years. In Ontario's "No Fault" program even car drivers not responsible for the accident will have premiums increase if a claim is made. To combat that insurance companies are now advertising that you can have 1 accident without a premium increase, but that is a premium service that you pay extra for.¹³¹

Additionally, while more than 30 percent of auto insurance customers who chose not to file a claim after a collision feared their premium would increase, 62 percent of respondent who did file a claim more than six months prior to being surveyed indicate their premium has not been re-adjusted by their insurer.¹³²

Social & Demographic Trends

The vehicle sales and service sub-sector has significant impact on Ontario's economy due to the number of workers the entire industry employs. Employment opportunities are available and attracting people to the roles similar to other sub-sectors continues to be a challenge. A new program hopes to encourage students to enter apprenticeship programs. Although this kind of program is of benefit to the workforce currently there is a challenge of training its current workforce.

The auto sector, Canada biggest manufacturing industry, is concentrated in southern Ontario with 11 assembly plants and hundreds of parts makers. They employ about 150,000 workers directly and produced more than \$1000 billion in vehicle and parts shipments last year.¹³³

The auto parts sector, which employs about 90,000 people, is Canada's most important manufacturing industry and a key exporter. However, the sector has lost about 10,000 jobs in the last two years and expects another 5,000 layoffs in 2007 because of relentless price pressure from customers and rising material and energy expenses.¹³⁴

A job-seeker's market is opening up in Ontario's automotive industry as it prepares for a significant shortage of skilled trades people by the end of the decade. The auto parts manufacturing industry in particular is expected to have nearly half (42%), of its skilled trades jobs unfilled by 2010. While that's the worst of it, other sectors in the auto industry are expected to have shortages ranging from the high 20 percentile, into 30% and 40%. The industry currently employs about 330,000 Ontarians and brings in about 20% of the province's gross domestic product, while representing about 13% of the national GDP.¹³⁵

As part of its Learning to 18 strategy, the province is adding pre-apprenticeship and other programs for high school students at risk of dropping out. It has set a goal of 26,000 new apprenticeship registrants each year by 2008, an increase of more than 50 per cent.¹³⁶ To train new workers to enter this industry, better collaboration is required between the industry and educators, as many in the industry feel that the students do not leave post secondary education with the skills they need to do the job. In addition to this, the equipment used by educational institutions to train the students and is often outdated and not relevant to actual workplaces. The challenge continues once the student enters the workforce where there is a shortage of qualified ethnicities to provide training and support.

When employers have managed to find and retain qualified staff, they then need to keep workers trained on rapidly changing technology. Employers claim they are hard-pressed to spare employees for training during business hours, and the majority of employees said they do not have the time or resources to pursue training outside of work hours. Access to training also varies widely across this sub-sector, depending on region.¹³⁷ There is a need in this industry for more programs that encourage development of internal staff.

Technology & Industry Trends

Many new technologies have been introduced or improved such as: the expansion of fuel saving initiatives including, hybrid cars, cleaner diesel engines and nitrogen in tires. Also a company invented a car that detects drunk-drivers. Challenges still continue for independent repair facilities and access to information and for them to keep up with the computerization that the dealers have.

An explosion of interest in fuel-saving vehicles and the obvious link between oil and national security are having a profound effect on the auto industry. Companies are scrambling to develop energy-saving earth friendly technologies that meet consumer demands for no-compromise transportation, while also cutting the reliance on imported oil.¹³⁸

DaimlerChrysler and Volkswagen announced an agreement to jointly use a clean diesel technology developed by Mercedes-Benz. Under the agreement, both companies will use the term Bluetec to promote the technology of low-emission advanced diesel engines for passenger cars and trucks.¹³⁹ Hybrids are expected to be in increasingly high demand over the next five-years, especially lower-cost models influenced by the expansion of consumer buying power in developing countries. On the other hand, sales of minivans,

SUVs, and large pickup trucks, with crossovers and luxury vehicles are expecting to see a decline in sales.¹⁴⁰

Fuel efficiency can also be found by replacing Nitrogen in tires instead of standard air. With nitrogen tire inflation, improvements can be noted in a vehicle's handling, fuel efficiency and tire life through better tire pressure retention, improved fuel economy and cooler running tire temperatures.¹⁴¹

Toyota Motor Corp. is developing a fail-safe system for cars that detects drunken drivers and automatically shuts the vehicle down if sensors pick up signs of excessive alcohol consumption. The world's number two auto maker hopes to fit cars with the system by the end of 2009. Similar technologies, such as alcohol ignition interlocks are in use in North America.¹⁴²

Due to the increased sophistication of today's vehicles, it is gradually becoming more difficult for independent repair facilities to access the information and develop the skills required to service vehicles; however, vehicle manufacturers are restricting access to tools, training and software to the aftermarket industry. By reserving some of this information for dealership networks, vehicle manufacturers are putting the aftermarket industry at an unfair disadvantage.¹⁴³

With all the advances in vehicle technology, it's the sales team that is being left behind. There is a lack of computerization within dealerships; most of the business is still paper based which affects the business's efficiency.¹⁴⁴

Legislation & Policy

The Automotive Parts Manufacturer's Association indicated in a policy paper that Ottawa's progress is "poor" in dealing with almost 20 issues, ranging from tax credits and immigration to training assistance and border bottlenecks. Ottawa and the Ontario government have each committed \$500 million in aid including a research and training component, to attract new investment to the auto sector in Canada. The two governments have sent most of the aid to auto assembly companies.¹⁴⁵

Firms are asking Ottawa to:

- Keep the dollar at or below 86 cents (U.S.)
- Enhance tax credits for innovation and commercialization
- Integrate customs and security systems to improve border crossings
- Make it easier for trades-people to immigrate to fill critical jobs
- Let employers tap the federal employment insurance fund to educate workers¹⁴⁶

The OSSA VSS Advisory Committee would like to see the MOL become more comprehensive in its inspections of auto body shops. In an effort to improve the process they are suggesting that if an inspector is visiting one shop in a location then they should visit all the shops in the same neighbourhood. They believe this will help drive compliance and education about initiatives and policies within a community and further

reduce injuries within the sector. There is some concern that businesses may be having problems but are not reporting them to the MOL.¹⁴⁷

Health & Safety

The vehicle sales and service sub-sector deals with a wide variety of hazards. According to the Ministry of Labour, major hazards include: lifting devices and hoists; improper blocking; strains, sprains and ergonomics; vehicles moving in gear during repair; tire inflation; noise; solvents, OELs, DSRs, carbon monoxide, isocyanates; falls from ladders or trucks, slips on floor; burns from exposure to flammables such as gas tank repairs; and traffic control (especially within the tow truck industry).

This sub-sector is very concerned about the aging worker population and some employers are worried about an increase in critical incidents. They are also considering how to accommodate older workers and reduce their physical workload.¹⁴⁸ The OSSA advisory committee members also sighted a number of other specific health and safety concerns including the need for signallers behind reversing trucks, the number of companies not reporting injuries, and the difficulties resulting from employees working two jobs.¹⁴⁹

Appendix B: HSA SWOT Analysis

Introduction

The 2007 Sector Level Environmental Scan (Template 1) establishes prime observations and high-level impacts in the areas of economic, social/demographic, legal/policy, technology and health and safety. It is intended to serve as a “living document” that may be amended and changed over time. It is also a reference document for completing the Organizational Scan – HSA SWOT Analysis (Template 2).

Definitions/Glossary of Terms

Key Observation: The Prime Observations in the Sector Scan or a selection thereof. Certainly the Overall Summary will compel the selection of the “critical few” which will serve as the basis for the Summary of Trend/Findings (Template 3).

Strengths: A successful application of a competency or exploitation of a critical factor to develop organization competitiveness.

Weaknesses: An unsuccessful application of a competency or the non-exploitation of a critical factor that diminishes organization competitiveness.

Opportunities: An external condition that could positively impact the organization’s critical performance parameters and improve competitive advantage provided positive action is taken in time.

Threats: An external condition that could negatively impact the organization’s critical performance parameters and diminish competitive advantage provided positive action is not taken in time.

Strategic Response: Goals & objectives that could incorporate one or more of the following:

- Pursue opportunities that would be a good fit to the organization’s strengths.
- Overcome weaknesses to pursue opportunities.
- Identify ways that the organization can use its strengths to reduce its vulnerability to external threats.
- Establish a defensive plan to prevent the firm’s weakness from making it highly susceptible to external threats.

2007 Organizational Scan – HSA SWOT Analysis

Scan Area: ECONOMIC	
Key Observations (Based on column 1 of Template 1):	
<ul style="list-style-type: none"> • Labour shortages are adversely affecting the Service sub-sectors • New and increased security risks will impact the ability to respond to emergencies • Foreign owned companies in Canada may not engage in business practices common in Canada • Counterfeited products are filling stores as globalization of business continues • The strong Canadian dollar increased residents to travel and spend abroad and discouraged Americans from traveling to Canada 	
Impact on injury, illness, disease and fatalities over the next 5 years (2008-2012):	
<ul style="list-style-type: none"> • Inability to fill vacancies could result in overload for existing employees • Workers may not be adequately trained to respond to emergencies resulting from crime (including terrorism) and health risks including pandemics • Health and Safety may or may not be a priority for business owners from other countries as it may or may not be of concern in their home country. • Counterfeited products are not inspected and held to the same standards as regular merchandise is • These sub-sectors are still recovering from SARS. Given too many business challenges, companies may reduce the priority given to health and safety 	
Impact on the Organization:	
Strengths	Weaknesses
<ul style="list-style-type: none"> • OSSA has introduced Pandemic planning and response information on OSSA.com • OSSA's e-learning product can help train staff quickly and economically 	<ul style="list-style-type: none"> • New and foreign business owners may not be familiar with Health and Safety training and not familiar with OSSA so training could be overlooked • OSSA's customer base of 81,000 firms, limits OSSA's ability to serve clients with existing staffing and funding.
Opportunities	Threats
<ul style="list-style-type: none"> • Possible product for counterfeited merchandise and the hazards associated with them • A business case can be made for health and safety and it can be promoted as a profit centre • Businesses are taking security and pandemic risks more seriously, and are willing to consider planning/prevention • Industry, government and trade associations are working together to address labour shortages 	<ul style="list-style-type: none"> • Alberta's booming economy will continue to upset the labour market in Ontario • Health and Safety training will be less of a priority with staff shortages, staff won't be able to be pulled off task for training • The Canadian dollar and gas prices will continue to be high throughout 2007, discouraging American tourists from travelling

Strategic Response:

OSSA continues to develop its renewable revenue streams. We are also focusing on improving the effectiveness and efficiency of our internal business processes. With increased effectiveness, efficiency and revenue we can continue to explore appropriate, or new, ways to service the needs of our diverse sector.

Scan Area: SOCIAL/DEMOGRAPHIC

Key Observations (Based on column 1 of Template 1):

- The growth of high-risk groups such as older workers, foreign workers, young and new workers will impact the workplace
- Unacceptable levels of participation in job related training
- Eliminating trans fats from food products and restaurant menu's
- As the workforce ages we may see more occupational diseases
- Level of immigration continues to increase with the attendant need to integrate them into the workforce
- There are unacceptable levels of participation in health and safety training

Impact on injury, illness, disease and fatalities over the next 5 years (2008-2012):

- Language and cultural barriers as well as work organization and design and lack of training are factors affecting members of these groups and could contribute to increased injuries
- Deficiencies in job knowledge could lead to inappropriate job performance and expose workers to undue risk
- Consumers are becoming aware of the risk of eating foods that contain trans fats
- Chronic injuries and illness may increase over time as the workforce ages

Impact on the Organization:

Strengths

- Elimination of trans fats from restaurant menu's provides consumers with healthier options for food choices
- OSSA has partnered in research on young workers
- Some OSSA advisory committee members already have experience employing older workers

Weaknesses

- OSSA continues to be challenged regarding support of workplaces that require health and safety materials training in other languages

Opportunities

- OSSA can develop products and services to support older workers
- Passport to Safety program has prepared students with Health and Safety training prior to leaving high school

Threats

- If employers do not make Health and Safety training mandatory employee illness and injury could increase
- Deficiencies in job training can lead to poor job performance and increased risk

Strategic Response:

OSSA is actively participating in CRE-OD initiatives studying occupational disease in the service sector, and will be actively working on a dermatitis project
 OSSA is developing an aging worker product to address this need.
 We routinely support the youth education through partnerships with school boards who use our training materials.
 OSSA has developed some French language resources for clients
 OSSA continues to encourage workplaces to invest in health and safety training

Scan Area: LEGAL/POLICY	
<p>Key Observations (Based on column 1 of Template 1):</p> <ul style="list-style-type: none"> • Development of strategies to reduce ergonomic-related injuries • Increased enforcement of health and safety regulations • Elimination of a mandatory retirement age • Underground businesses continue to undercut legitimate businesses in the vehicle services industry • Western Hemisphere Travel Initiative has been implemented and all Canadians flying to the U.S. require a passport 	
<p>Impact on injury, illness, disease and fatalities over the next 5 years (2008-2012):</p> <ul style="list-style-type: none"> • Ergonomic-related hazards are a significant source of injuries in the workplace • Push towards greater compliance will help to reduce injuries and illnesses • Potential for older workers to be in the labour force longer • Underground businesses are less likely to follow health and safety legislation and best practices, putting workers at greater risk for injury • The number of Americans travelling to Canada is expected to decline as ¾ of Americans do not have a passport 	
Impact on the Organization:	
<p>Strengths</p> <ul style="list-style-type: none"> • OSSA already has a number of products, training resources and information to address ergonomics • OSSA has services to address high risk employers • OSSA participates on numerous system initiatives • Increased enforcement from the MOL allows us to talk-the-talk while they walk-the-walk, if there isn't consequences to rule breaking then their isn't incentive to follow the rules 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Support is needed from the MOL to inspect all businesses of an industry within a given geographical area and to track down underground businesses • System initiatives put a strain on OSSA resources
<p>Opportunities</p> <ul style="list-style-type: none"> • Working with the MOL/WSIB on strategic initiatives like ergonomics will build strong programs and adherence to them • Promoting programs for older workers will be essential for service sector companies as they have unique needs and requirements 	<p>Threats</p> <ul style="list-style-type: none"> • Elimination of early retirement could increase illness and injury as it takes older workers more time to return to work from injury due to decreased immune systems • Decreased American tourists significantly affect the service sector and with ¼ of Americans having a valid passport the Western Hemisphere Travel Initiative will have a negative impact on Ontario tourism at least in the short term • Many small businesses have few resources to address health and safety gaps

Strategic Response:

OSSA continues to work with the client segmentation information to develop resources and tools to support the unique needs of the identified client segments. We are also conducting an initiative to create an "OSSA Client Profile" to deepen our understanding. OSSA continues to work with trade associations to reach more clients

Scan Area: TECHNOLOGY

Key Observations (Based on column 1 of Template 1):

- Automotive technology is becoming more complex all the time due to computerization of vehicles. It is a constant challenge for technicians to keep up with the training they need to perform repairs.
- Prolonged computer work
- Access to computers/internet resources could be of benefit to employees for information and training
- Internet facilitates self reliance
- Enhanced knowledge sharing technology

Impact on injury, illness, disease and fatalities over the next 5 years (2008-2012):

- Lack of up-to-date training could lead to injury
- Employees who work primarily on computers are susceptible to ergonomic injuries. Many such employees have little job variation and may not take appropriate precautions (i.e. rest breaks, correct desk set up, etc.)
- Many service sector employees do not have access to computers either because it is not a requirement of the job or that investment has not been taken
- Technology has changed the types of injuries and level of injuries in all sectors

Impact on the Organization:

Strengths

- OSSA's e-learning product gives our members convenient and flexible training
- Online capabilities allow us to serve a larger number of customers efficiently

Weaknesses

- Online technologies such a e-learning are expensive to develop and implement
- Our e-learning is limited to certification part 1

Opportunities

- Work with associations to push for sharing of information and technology to allow service technicians to provide better service to customers, decreasing stress and injury
- Some companies are embracing online training
- The number of e-learning based workers is growing
- MOL Ergonomic initiative should raise awareness of the ergonomic dangers of using technology

Threats

- Knowledge sharing and training cannot be addressed through technology when the majority of service sector employees do not have access to computers
- Not all firms, or all employees within firms, have access to computers or the Internet
- Some employees do not have computer skills
- Lack of technically qualified automotive workers could lead to untrained workers doing jobs
- Technology related ergonomic injuries are not always recognized until they have become chronic and/or severe

Strategic Response:

OSSA currently has an initiative to review the MSD Guidelines and their application throughout the OSSA product and service line to ensure that our clients are getting the most up to date information. OSSA is evaluating the success of its e-learning and developing a strategy to move forward. We are working with a system partner to share experiences, success and learning's regarding the use of e-learning in our business streams.

OSSA has a knowledge management initiative which will look at the ways OSSA gathers and shares information internally and externally.

Scan Area: Health and Safety

Key Observations (Based on column 1 of Template 1):

- The final SARS report points to province-wide systemic inadequacies in preparedness, infection control and worker safety systems
- Many young workers do not receive OHS training when they begin a job
- Increasing integration of Return to Work with primary prevention
- In Ontario, 89% of lost-time injuries and related impacts were due to three general hazards including; bodily reaction and overexertion, falls, contact with objects and equipment
- Increased emphasis on security
- Low perception of injury/illness risk continues to be a challenge in the service sector

Impact on injury, illness, disease and fatalities over the next 5 years (2008-2012):

- Lack of preparedness could result in increased transmission of disease and possible business failure
- New and young workers tend to have higher injury rates
- Return to Work should be early, safe, suitable and sustainable. This is intended to help decrease the reoccurrence of injuries
- There is an opportunity for a dramatic reduction in workplace injuries if businesses focus on these three hazards types
- Partner violence not only happens at home but its affects extend to the workplace. Security measures should be taken to protect employees while at work
- Employers often do not provide health and safety training for employees or direct resources to prevention because they do not believe risks are significant. Failure to train employees or pay attention to health and safety sets the stage for increased injuries

Impact on the Organization:**Strengths**

- OSSA has introduced Pandemic planning and response information, has improved its MSD information on OSSA.com
- Return to work programs have been successfully implemented to reduce further injury
- OSSA has improved and updated it's Certification part II product to increase awareness of the variety of forms of violence, including domestic spill-over
- OSSA has a suite of ergonomic training products

Weaknesses

- Low perception of risk in the Service sector continues to be thorn in OSSA's side, with more funding for marketing and PR campaign that would raise OSSA's profile and increase visibility to the majority of clients we currently do not work with

<p>Opportunities</p> <ul style="list-style-type: none"> • OSSA may revamp Young worker program and re-launch to reduce injury to this high risk group • MOL initiatives have forced employers to pay attention to health and safety • MOL ergonomic initiative has the potential to influence a high-claims area 	<p>Threats</p> <ul style="list-style-type: none"> • Addressing partner violence and its effects on the workplace is critical • Continued low risk perception on the part of service sector employers • High staff turnover discourages investment in training • Training temporary, contract and seasonal staff is a challenge • It may be difficult to keep up with the needs of ageing workers as numbers increase
<p>Strategic Response:</p> <p>OSSA continues to support clients in addressing MOL expectations. We present health and safety as a critical component of workplace life. We promote integration of health and safety into normal business practices as the most effect means of preventing illness and injury and of sustaining best practices.</p> <p>OSSA is updating and evaluating is product and service offering too align with system initiatives. OSSA is looking at client demographics to ensure it is providing products and services that meet the client where they need to be met, and provide products and services they need to reduce accident and illness on the job.</p>	

<p>Scan Area: Overall Summary</p>
<p>Key Observations (Summarize preceding observations that have significant impacts in each focus area):</p> <ul style="list-style-type: none"> • Labour shortage continues to be a major concern in all sub-sectors • New and increased security risks will impact the response of companies to emergencies • Participation n health and safety training and programs is offensive deplorable • The emergence of high risk groups including older workers, foreign workers, young and new workers will impact the service sector • Access to computers/internet resources could be of benefit to employees for information and training • Increased enforcement of health and safety regulations • Low perception of injury/illness risk continues to be a challenge in the service sector
<p>Impact on injury, illness, disease and fatalities over the next 5 years (2008-2012):</p> <ul style="list-style-type: none"> • Reaction time and response to emergencies will have a massive impact on employees and customers • Employees may not have access to resources or have been trained to response to emergency situations • Deficiencies in job knowledge could lead to unacceptable performance and expose workers to unnecessary risk • Many service sector employees currently do no have access to computers either because it is not a requirement of their job or that investment has not been taken • Promotion of regulations across all sectors will helped to decrease the level of injury and illness • Health and Safety training may not be a part of mandatory training for employees or supply resources for prevention, this significantly increases the chance of injury and illness in the workplace

Impact on the Organization:	
<p>Strengths</p> <ul style="list-style-type: none"> • OSSA has posted pandemic planning resources on OSSA.com • OSSA's e-learning product can be of benefit to train staff in an quick and efficient manner • Increased enforcement from the MOL strengthens our products and programs to support system initiatives 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Knowledge sharing and training cannot be addressed through technology when the majority of service sector employees do not have access to computers • Support is needed from the Ministry of Labour to inspect all businesses of an industry within a given geographical area and to track down underground businesses • Low perception of risk in the service sector continues to be a challenge OSSA faces when dealing with clients, raising the level of awareness is needed to educate employers about OSSA and what we can do to support their health and safety initiatives
<p>Opportunities</p> <ul style="list-style-type: none"> • Clients have made plans for emergency situations or are now starting to look at making plans. OSSA can assist them • Partnerships with the MOL/WSIB on strategic initiatives will build stronger programs and observance of them 	<p>Threats</p> <ul style="list-style-type: none"> • Alberta's booming economy will continue to upset Ontario's labour market • Health and Safety training will not be a priority with staff shortages, staff cannot participate in training due to limited staff coverage • Lack of training can lead to needless risk to employees' personal health and safety
<p>Strategic Response:</p> <p>OSSA through the Environmental Scan and other initiatives does its best to understand our clients to ensure we provide the right product for the needs of the customer. OSSA has developed products and training specifically for the unique needs of the Service sector. Continued partnership with system partners benefits everyone involved.</p>	

Appendix B: 2007 Sector Level Environmental Scan

Introduction

The following template has been developed as a means of summarizing the 2007 macro environmental scan. It is intended to provide a concise summary of observations and potential impacts at the macro level. A table has been created for each of the focus areas: Economic, Social/Demographic, Legal/Policy, Technology and Health & Safety. By following the Guidelines below, HSAs are requested to add narrative to the Summarized Macro Scan, as appropriate, thereby developing a 2007 Sector Level Environmental Scan.

Scan Area: ECONOMIC				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 - 12	Explanations
1. Labour shortages are adversely affecting the Service sectors .	C	Inability to fill vacancies could result in overload for existing employees.	A	The labour shortage still represents significant risk, fuelled by the high number of retirees and an economic boom in Alberta which lures Ontario's workers to the higher paying job market.. Immigrants are seen as a viable way to fill the gaps but language differences presents a barrier.
2. Transfer of work programs, resources and staff from federal to provincial levels of government.	N	Potential benefit to businesses from increased opportunities for training and employment services.	N	This may represent an opportunity for increased apprenticeship programs for some of our sub-sectors.
3. New and increased security risks will impact the ability to respond to emergencies.	C	Workers may not be adequately trained to respond to emergencies resulting from crime (including terrorism) and health risks including pandemics.	A	Workers may not be trained because of a low risk perception, low profit margins, and a general lack of awareness about these issues.

Scan Area: ECONOMIC				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 - 12	Explanations
4. Impacts of global economic transformation on OHS due to new competitive forces.	C	Workers may not be adequately prepared for new work processes.	N	A global economy means that Ontario workplaces have higher competition, and need to keep up with technological, environmental and social mandates of other countries. In order to remain competitive they may have to change the way they do business. However, generally there are few new work processes in the service sector
5. A future labour shortage and mismatch of required skills to available workers will be two significant issues to address in the future. Workers with less marketable skills struggle to find a good job and a decent income.	C	Mismatching may result in knowledge gaps that are not addressed due to assumed understanding. This may result in increased risk of injuries.	A	Promotion of young workers into supervisory positions without the knowledge necessary to do the job is common in the service sector. Often staff are promoted with out proper training. On the job training is prevalent in this sector and health and safety training is not consistent across the sub-sectors and even within companies and organizations.

Scan Area: ECONOMIC				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 - 12	Explanations
6. Small and medium enterprises (SMEs) continue to have unique needs.	C	Changing business focus could lead to new work processes for which workers are not adequately prepared.	A	Small and medium enterprises often do not have resources or personnel dedicated to health and safety. The number of new businesses that fail before their 3 rd year is 50%, with that statistic most new business do not focus money or time on Health and Safety initiatives but rather try to keep the basic business afloat.
7. Foreign owned companies in Canada may not engage in business practices common in Canada.	C	Health and Safety may or may not be a priority for business owners from other countries, as they tend to be dominated by their home-countries health and safety mandate.	A	All companies entering the Canadian marketplace should be introduced to all legal and social obligations the employer has to its employees.
8. Counterfeited products are filling stores as globalization of business continues.	C	Counterfeited products are not inspected and held to the same standards as regular merchandise is.	A	Products that consumers purchase could be dangerous and harmful to them and their families. The same applies to fake drugs, they may harm people when ingested instead of help.

Scan Area: ECONOMIC				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 - 12	Explanations
9. The strong Canadian dollar increased residents to travel and spend abroad and discouraged Americans from traveling to Canada.	C	Tourism and hospitality and Restaurants rely on travellers for a large if not all of their business. These sub-sectors are still recovering from SARS. Given too many business challenges, companies may reduce the priority given to health and safety.	A	The Canadian dollar reached a 28 year high in 2006 and shows some stability in 2007. U.S. visitor to Canada are finding that their money is buying less than it used to. In early 2006, Statistics Canada reported the number of same-day cross-border vehicle trips made by Americans to Canada fell to their lowest level on record. This means that tourism and hospitality business will be concentrating on improving the draw of tourists to Ontario, instead of on Health and Safety initiatives.
10. The high cost of oil and gas increased the cost of doing business and discouraged road travel.	C	The need to spend more to produce a product or service lowers profits and may limit spending on health and safety initiative or prevention strategies. Decreased road travel affects business volume for tourism, restaurants and vehicle-related businesses.	A	Oil and gas prices are have been unstable due to war in the middle east and a fire at a refinery in Southern Ontario in March 2007. Prices are expected to remain high for the foreseeable future. The drop in tourism, restaurant and vehicle sales and service related businesses means that these business may concentrate on improving their bottom-line, not focusing on health and safety.

Scan Area: SOCIAL/DEMOGRAPHIC				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
1. Baby Boomers will continue to participate in the workforce beyond traditional retirement age.	N	Potential for transfer of business knowledge to less experienced workers.	N	There is increased opportunity for transfer of business and health and safety practices. Challenges occur because of the generational differences and can be affected by moral. There could be also be negative effects in that there may be barriers to acceptance and application of the knowledge. There are very different needs and motivations between the two groups.
2. Local Health Integration Networks (LHINS) will oversee the majority portion of Ontario health care budget.	N	Coordination of health care services will impact healthcare delivery.	N	No impact anticipated on the Service sector.
3. The growth of high-risk groups such as older workers, foreign workers, young and new workers will impact the workplace.	C	Language and cultural barriers as well as work organization and design and lack of training are factors affecting members of these groups and could contribute to increased injuries.	A	All of the mentioned groups are employed in all Service sector and continue to be a concern. Each has unique needs and not all of them are being addressed by employers currently. Training will need to be more customized to include all high risk groups.

Scan Area: SOCIAL/DEMOGRAPHIC				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
4. As the workforce ages over the next decade we will see more occupational diseases because of the latency periods involved.	C	Some diseases show up years or even decades after the first exposure. In some cases, health conditions which may not be caused by the exposure can be aggravated by workplace exposures.	A	Dermatitis is an example of this in our sub-sectors. After repeated, long term exposure this sort of conditions affects our clients. The same is true for Sick Building Syndrome, many office workers experience symptoms and it is not diagnosed that it is their workplace that is making them sick.
5. The level of immigration continues to increase with the attendant need to successfully integrate the immigrant population into the workforce and society overall.	C	Language and cultural barriers may be associated with increased injury levels. New workers tend to have higher injury rates than workers on the job for longer periods; therefore new immigrants entering the workforce may experience higher injury levels.	A	With increased immigration to sustain the Canadian population this will be a long term issue. Without proper training in a language that immigrant workers comprehend, injury rates will continue to be higher for this group.
6. Unacceptable levels of participation in job related training.	C	Deficiencies in job knowledge could lead to inappropriate job performance and expose workers to undue risk.	A	Training programs either are not in place due to lack of funding or they are not made mandatory for the workforce or are not consistent due to time restraints of labour shortages.

Scan Area: SOCIAL/DEMOGRAPHIC					
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A		
			2008 – 12	Explanations	
7. The population in Canada is aging and this will dramatically impact the workforce over the next decade.		C	<p>Chronic injury and illness levels may increase over time as the workforce ages.</p> <p>Older workers may not recover from injury or return to work as quickly as younger workers.</p> <p>Increased “dependency ratios” may create more stress due to work-life balance issues.</p> <p>An increase in the older population could change the dynamics of personal- and health-care services.</p>	A	<p>Yes, chronic injury and illness will increase without proper training and programs to support workers.</p> <p>Older workers rate of recovery is slower than those of younger workers. Companies need to understand the needs of different workers and adjust accordingly in order to retain staff.</p> <p>If there is an older workforce then there will be more demand for personal and health care services.</p>
8. Eliminating trans fats from food products and restaurant menu's.		N	<p>Consumers are becoming aware of the risk of eating foods that contain trans fats.</p>	F	<p>Educated consumers are demanding more from food products and healthier menu options in restaurants. Affected service sector businesses have been making changes that respond to customer demands.</p>

Scan Area: LEGAL/POLICY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
1. Farm operations are now covered under the Occupational Health and Safety Act as of June 30, 2006.	N	Compliance with legislative requirements for workplace health and safety should result in fewer farm-related injuries. The migratory nature of some farm workers exposes them to risk of injuries from lack of training and exposure to new work environments.	N	This does not affect the Service Sub-sectors. Although OSSA is supporting the Farm Safety Association through a partnership for product sharing/customization.
2. The new <i>Regulatory Modernization Act, 2006</i> (Ontario Bill 69) will change the way government inspects, investigates and enforces compliance of businesses with the laws of Ontario.	N	Combining enforcement efforts across government ministries/agencies will have the general effect of reducing risk and enhancing safety.	F	OSSA continues to support the alignment of the H&S System in Ontario. OSSA is engaged in more system initiatives which further supports our sectors, however we are challenged by resource allocation planning.
3. Emergency Management and Civil Protection Act (EMCPA) outlines the criteria and process for declaring an emergency; the response requirements and the process for withdrawing the declaration.	N	It is important that all OHS partners as well as ON workplaces know how to respond to a declared emergency BEFORE there is an incident.	F	OSSA participates as a member of the OHSCO emergency management committee to inform internal planning and external communication of vital information to all service sector clients. This may mean that we need to update our training materials to reflect the Emergency Management and Civil Protection Act.

Scan Area: LEGAL/POLICY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
4. Development of strategies to reduce ergonomic-related injuries.	C	Ergonomic-related hazards are a significant source of injuries in the workplace.	F	Although MSD related injuries are the number one injury in the service sector, ergonomic-related hazards have been a low priority for employers because the effects don't become apparent immediately. This hazard is very difficult to recognize and identify. New strategies will increase the awareness and reduction of hazards
5. Increased enforcement of health and safety regulations.	C	Push towards greater compliance will help to reduce injuries and illnesses.	F	More enforcement will compel less motivated employers to comply with regulations to protect workers from injury and illness.
6. Continuing expectations for accountability, performance-based and risk-management approach for all public sector organizations.	C	Increased emphasis on stronger management systems may extend to health and safety.	F	As accountability is driven into organizations employers may take a more holistic approach to running their business and begin to integrate health and safety into their daily business practices.
7. Elimination of a mandatory retirement age.	C	Potential for older workers to be in the labour force longer.	N	Older workers may enjoy staying in the workforce longer or may not if they cannot afford not to be working. Injury and illness rate may go up as older workers are more susceptible to illness due to decreasing immunity and cognition levels decrease over time so injuries could increase as well. But older workers are needed to fill the labour shortage and knowledge transfer is very important.

Scan Area: LEGAL/POLICY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
8. Smoking ban in workplaces and public places.	C	Workers will no longer be exposed to second hand smoke in the workplace.	F	<p>The smoking ban is highly favourable from a health and safety perspective. However, some businesses (restaurants, bars, and casinos) have lost revenue due to the ban. Businesses that are close to the US border may lose business to smoke-friendly facilities in the US.</p> <p>The impact of this legislation will likely lessen over time as customers get used to the ban.</p>
9. Underground businesses continue to undercut legitimate businesses in the vehicle services industry.	C	Underground businesses are less likely to follow health and safety legislation and best practices, putting workers at greater risk for injury.	A	Underground businesses tend to provide services more cheaply and ignore health and safety legislation. It is difficult for legitimate businesses, which do devote resources to health and safety, to compete. Also it is difficult for customers to know if they are dealing with a legitimate business or not.

Scan Area: LEGAL/POLICY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
10. Western Hemisphere Travel Initiative has been implemented and all Canadians flying to the U.S. require a passport.	C	The number of Americans travelling to Canada is expected to decline as $\frac{3}{4}$ of Americans do not have a passport. This will affect tourism and restaurant businesses. If revenues decrease, businesses may reduce staff, or at the very least, have fewer resources to devote to health and safety.	N	<p>The Passport Office has been crippled, service that normally takes 2 weeks is now over 2 months to receive a passport. The impact of this legislation is expected to last for a couple of years, until travellers get used to the new legislation. This may increase the number of Canadians that stay within Canada to vacation.</p> <p>Conversely since less than $\frac{1}{4}$ of Americans have a valid passport (American tourism) revenues will be adversely affected.</p>

Scan Area: TECHNOLOGY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
1. Increased installation of Global Positioning System (GPS) in automobiles.	C	Driver distraction is known to be a hazard for drivers. On the other hand, GPS has practical applications for locating workers. E.g. miners, taxi drivers.	F	Vehicle fatalities are the number one cause of worker deaths. There may be opportunities to improve the risk to those workers who work alone in delivery or sales positions in the service sector, allowing them access to information they might not necessarily have access to re: routes, emergency services, ability for the workplace to know where their employees are currently located. There may also be uses in the Tourism and Hospitality sector for those businesses that use guides for fishing, hunting and eco-tourism.
2. Fast pace of technology enhanced work environment can be addictive and physically harmful.	N	Workers may be “hooked” on using the technology thereby forcing them to work more and increase the degree of repetitive motions.		It is important that workplaces assess the risk of any new technology introduced into the workplace.
3. LED technology applied to textile and other materials may be useful in limited lighting environments.	N	Could minimize risk by increasing visibility for those working in low light or for search and rescue purposes.	F	This may be of interest to tourism and hospitality business that employ the use of guides for fishing, hunting or eco-vacations in Ontario’s more remote areas

Scan Area: TECHNOLOGY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
4. New technologies, new work processes and human-machine interfaces.	C	Workers face the risk of mental and emotional strain when faced with extreme changes in the workplace.	N	As the Service sector is very much a human interaction, there are not a lot of opportunities for machine interfaces. New technologies do becoming challenging for those that are not comfortable with upgrading their skills. A lot of the time the issue is that the company has not invested in technologies that could save time and money due to the initial cost of implementation.
5. The use of the Internet facilitates self-reliance through self-service.	C	The Internet is an additional tool that could be used to make health and safety information accessible to employers and workers. Over-reliance on the self-service approach to accessing prevention information is haphazard and could result in more illness and fatalities.	N	Not all service sector employees have workplace access to the Internet. However there has been increased interest in this area, particularly in those businesses that use the internet or web-based training for other parts of their organization. OSSA is currently reviewing the success of their own internet based health and safety training tool. There is concern that internet based training does not, on its own, facilitate transfer of knowledge/change in behaviour.
6. Technological improvements have changed the types of injuries and the levels of injuries in all industries.	C	Technology advancements have both positive and negative effects on the level of injuries, illness, disease and fatalities amongst workers depending on the industry and type of work.	N	Constant evaluation of new technologies is important for workplaces, as there is risk for the introduction of a new hazard. Improper posture of the hands, wrists and arms has negative effects on the worker. Using technology allows for more efficient use of time.

Scan Area: TECHNOLOGY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
7. Enhanced knowledge-sharing technology.	C	Increased access to health and safety knowledge can help workplace parties improve prevention efforts, and increase effectiveness of health and safety professionals, including the Prevention Partners.	F	Prevention partners can use the internet to influence companies across all sectors on high impact initiatives like MSD, Violence, Noise. There will be less of an excuse that companies not engaging in health and safety programs will have as it is at their fingertips with the internet.
8. Increased investment in equipment upgrades and replacements.	C	New equipment may be safer than older equipment; therefore this trend may lead to lower injury rates.	F	This assumes that the new equipment does not introduce any new hazards or stresses.
9. Toyota is developing a fail safe system for cars that detect drunk drivers that automatically shut the vehicle down if sensors pick up excessive alcohol consumption.	N	This type of technology could significantly reduce vehicle accidents which has the greatest number of fatalities of all hazards.	F	Reduction of vehicle collisions is welcomed by OSSA.
10. Automotive technology is becoming more complex all the time due to computerization of vehicles. It is a constant challenge for technicians to keep up with the training they need to perform repairs.	C	Lack of up-to-date training could lead to injury.	A	Increased possibility of psychosocial hazards in the workplace as a result of increased stress or lack of control over job.

Scan Area: TECHNOLOGY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
11. Technology that enables people to work anytime, anywhere (Blackberries, laptops, cell phones)	C	Devices that give employees constant access to work may promote longer worker hours, increase stress, and discourage work/life balance. These devices can also be ergonomically unfriendly.	A	Being constantly connected to work may increase worker stress and lead to ergonomic injuries, or other psychosocial hazards.
12. Prolonged computer work	C	Employees who work primarily on computers are susceptible to ergonomic injuries. Many such employees have little job variation and may not take appropriate precautions (i.e. rest breaks, correct desk set up, etc.).	A	Injuries related to computer work often occur very gradually over time, but can result in chronic pain.

Scan Area: HEALTH AND SAFETY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
1. The final SARS report points to province-wide systemic inadequacies in preparedness, infection control and worker safety systems.	N	Lack of preparedness could result in increased transmission of disease and possible business failure.	F	Several sub-sectors have taken Business Continuity/Pandemic planning as a high priority and have plans set in place currently. Any business that is deemed by the government as an essential service was mandated to have their plan prepared and in place by now.
2. Access to training may be affected by people's attitudes.	N	Failure to participate in training on work processes, equipment and health and safety increases risk of injuries.	N	When a company deems training is important and is committed to keeping employees safe that increases employee respect. By making training mandatory for all employees it creates an understanding that training is a priority and everyone will have the same knowledge of expectations within the company.
3. Emergence of multi-factorial risks.	C	Combined effects of poor ergonomic design, poor work organization, mental and emotional demands will increase risk of injuries.	A	Multiple negative health and safety factors compound the problem. In the long run it will cost the employer more as the combined issues produce more illness and injuries, rates will spike.
4. Many young workers do not receive OHS training when they begin a job.	C	New and young workers have higher injury rates.	A	These workers could be part-time and or seasonal and those types of workers have a high turnover rate and they are lower paid positions which employers do not see value in investing training dollars when they will not be in the position long to "benefit" from it.

Scan Area: HEALTH AND SAFETY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
5. Mental health is often affected by many factors (“stressors”) in the workplace, including high demand/low control, high effort/low reward.	C	Adverse effects on mental health, including anxiety, anger or depression, may lead to other physical health and safety problems at home or at work such as conflicts, violence, substance abuse, injuries or disease and/or pain.		Employers lack of work life balance policies and insufficient training may exacerbate the impact of Mental health on an employee in a challenging work environment.
6. Increasing integration of Return to Work with primary prevention.	C	Return to Work should be early, safe, suitable and sustainable. This is intended to help decrease the reoccurrence of injuries.	N	Employers need to balance the importance of allowing an injured employee back to work at the best time for the employee versus filling the gap that was created by their departure so as not to slow down the rate of recovery if the employee is bought back too early and re-injures themselves.
7. In Ontario, 89% of lost-time injuries and related impacts were due to three general hazards including; bodily reaction and overexertion, falls, contact with objects and equipment.	C	There is an opportunity for a dramatic reduction in workplace injuries if businesses focus on these three hazards types.	N	These injuries will continue to be a concern for Service sector workers until mandatory health and safety training is conducted for all employees equally. Employers need to understand the benefits of investing in this training program.

Scan Area: HEALTH AND SAFETY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
8. Environmental changes and increased efforts to control them (e.g. global warming, ozone depletion, Kyoto accord).	C	Increased potential for heat, stress, UV exposure.	A	Continued degradation of the planet is a concern of scientists and should be for the general public as it will affect everyone. Breathing oxygen, drinking water, commuting to and from work and even weather patterns will affect all workers. Business in the service sector will have to assess the changing needs of workers exposed to the outdoors working in both the hot and cold weather.
9. Increased emphasis on security.	C	Partner violence not only happens at home but its affects extend to the workplace. Security measures should be taken to protect employees while at work.	A	Violence in the workplace is a growing concern. Many companies are starting to realize the cost of violence to them and the affect on the general public. Employees that work alone, with clients, handle cash, work late at night or early in the morning are all at significant risk for violence. Security policies and programs should be investigated to find out if everything is being done to protect workers.
10. E. coli and salmonella outbreaks in several food products.	N	Illness and death may occur if contact is made with food with E. coli and salmonella.	A	With the globalization of business, with fewer but larger companies growing, processing and distributing food that increases the chance of contamination. Unsuspecting consumers trust restaurants to inspect and serve safe food.

Scan Area: HEALTH AND SAFETY				
Prime Sector Observations New Trend: N Continuing Trend: C		Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 3 Neutral = N, Favourable = F, Adverse = A	
			2008 – 12	Explanations
11. Low perception of injury/illness risk continues to be a challenge in the service sector.	C	Employers are often do not provide health and safety training for employees or direct resources to prevention because they do not believe risks are significant. Failure to train employees or pay attention to health and safety sets the stage for increased injuries.	A	The perception of risk does not appear to be increasing.

Summary of Scan Areas				
Prime Sector Observations	Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 2		Organizational Responses
		Neutral = N, Favourable = F, Adverse = A		
		2008 – 12	Explanations	
<p>ECONOMIC:</p> <p>The Service sector is dealing with a labour shortage.</p>	<p>A labour shortage may lead to heavier workloads and/or employees working without adequate training. We will also see a greater number of older workers remaining in the workforce. All of the above situations may lead to increased risk of injury.</p>	A	<p>The labour shortage is likely to get worse as the baby boomer generation ages. At present, immigration is not providing enough workers, or workers with the right skills, to alleviate the shortage.</p>	<p>Skills and language upgrading for immigrants is essential. Older worker programs and policies need to be made to protect them from injury and illness.</p>
<p>SOCIAL/DEMOGRAPHIC:</p> <p>The service sector employs many part-time, temporary, and seasonal workers. Turnover is especially high in the service sector with many jobs only paying minimum wage.</p>	<p>Employers are unwilling to invest in health and safety training for non- full-time staff members who are likely to leave within a short time period.</p>	A	<p>There is greater risk of injury and illness for workers who do not have proper health and safety training.</p>	<p>Communicate the business case for health and safety training. Promote health and safety training for all employees.</p> <p>Provide flexible self-paced training tools. New options for OSSA-hosted or employer-site training and e-learning.</p>

Summary of Scan Areas				
Prime Sector Observations	Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 2 Neutral = N, Favourable = F, Adverse = A		Organizational Responses
		2008 – 12	Explanations	
<p>LEGAL/POLICY:</p> <p>Increased enforcement of health and safety regulations.</p>	<p>More inspectors have been hired and with emphasis on programs like High Risk and Last chance the MOL has increased the rate of service sector compliance with health and safety legislation and will continue to.</p>	F	<p>Through compliance of legislation companies will adhere to health and safety programs and policies to protect workers.</p>	<p>The OSSA has developed products and services to support employers achieve compliance and pass inspections and audits.</p>
<p>TECHNOLOGY:</p> <p>The Service sector has an opportunity to invest in technology to improve efficiency and customer service.</p>	<p>Some technologies could enhance the workplace and make work safer for service sector employees but those technologies are not being implemented due to budget constraints in a challenging environment.</p>	N	<p>Internet applications and other computerization of tasks has not been implemented at the employee level across the sector.</p>	<p>The OSSA continues to investigate opportunities to improve the customers experience with our organization, there are specific initiatives within the organization to address efficiency and customer service.</p> <p>The OSSA is also evaluating the success of it's current e-learning product and will be developing an e-learning strategy.</p>

Summary of Scan Areas				
Prime Sector Observations	Potential Impact of Column 1 on Injury, Illness, Disease and Fatalities	Measure of Potential Impact reported on Column 2		Organizational Responses
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		2008 – 12	Explanations	
<p>HEALTH & SAFETY:</p> <p>Due to longer commutes workers are spending more time in vehicles, increasing the likelihood of a collision.</p>	<p>Motor vehicle collisions are the leading cause of death and injury for all ages. Employers are bearing the cost for injuries that occur on or off the job and with a labour shortage being experienced this issue has a massive impact.</p>	A	<p>Vehicle collisions have far reaching financial and psychological effects on employees, co-workers families and employers.</p>	<p>The OSSA continues to educate employers about the risks and costs of workplace injury and illness through products, services, consulting, website, and trade association partnerships.</p>
<p>OVERALL:</p> <p>Low perception of risk continues to be prevalent in the service sector.</p>	<p>Employers are reluctant to spend money on health and safety training, resources, or prevention because they do not believe the risk of injury/illness is significant.</p>	A	<p>Failure to take health and safety seriously sets the stage for increased rates of employee injury.</p>	<p>The OSSA is committed to supporting service sector employers build policies and programs that protect workers from illness and injury to make Ontario the safest and healthiest workplaces in the world.</p>

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