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St. Clair: Summary Demographic Profile

The St. Clair Township has a population of more than 14,000 people. Between 2011 and 2016, the population declined by three per cent. While the population in the township is aging the average age is below the County level (42.9 versus 43.9). The Township's population density per square kilometre is only 22.8; well below the county.

One of the challenges facing the community has been the lack of inward migration. While the 2016 data is not available until November, the 2011 National Household Survey found that less than six per cent of the population were first generation immigrants. Eighty-two per cent of the township's population is at least a third generation Canadian. Only 0.8 per cent of the population living in St. Clair in 2011 had moved there from another province within the previous five years; about half the Ontario average and less than a third when compared to the country as a whole.

Table 1 provides the summary demographic information for 2016.

Table 1: Summary demographic profile for St. Cla
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		Lambton		
	St. Clair	County	<u>Ontario</u>	<u>Canada</u>
Population, 2016	14,086	126,638	13,448,494	35,151,728
Population, 2011	14,515	126,199	12,851,821	33,476,688
Population percentage change, 2011 to 2016	-3.0	0.3	4.6	5.0
Population density per square kilometre	22.8	42.2	14.8	3.9
Population by age group				
0 to 14 years	17%	15%	16%	17%
15 to 24 years	11%	11%	13%	12%
25 to 44 years	22%	22%	26%	26%
45 to 64 years	31%	30%	28%	28%
65+	20%	22%	17%	17%
Average age	42.9	43.9	41	41
Average household size (persons)	2.4	2.3	2.6	2.4
0, 1, 1, 0, 1, 00,40,0				

Source: Statistics Canada 2016 Census.

The 2011 National Household Survey provides insight into the income profile for St. Clair (Table 2). The 2016 Census data on income will be published in November 2017.

From the NHS, the median cost of dwellings (housing) was \$179,830 in the community or about 40 per cent below the Ontario average. The share of owner households spending 30 per cent or more of total income on shelter costs in St. Clair was 50 per cent below the provincial level and the lowest of all municipalities in Lambton County.

At the same time, overall average personal income in St. Clair was above both the provincial and national level. Median family income was also above both the provincial and national level in 2011.



Table 2: Income profile for St. Clair – from the National Household Survey

		Lambton		
	St. Clair	County	<u>Ontario</u>	<u>Canada</u>
% of owner households spending 30% or more of household total income on shelter costs	10.3	13.4	20.9	18.5
Median monthly shelter costs for owned dwellings (\$)	\$693	\$757	\$1,163	\$978
Median value of dwellings (\$)	\$179,830	\$180,165	\$300,862	\$280,552
Average personal income \$	\$43,682	\$41,241	\$42,264	\$40,650
Employment income %	70.3	67.7	74.8	74.7
Wages and salaries %	67.2	64.3	70.1	70.3
Self-employment income %	3.1	3.4	4.6	4.4
Investment income %	4.6	4.1	4.2	4.6
Retirement pensions, superannuation and annuities %	9.8	10.9	7	6.7
Canada/Quebec Pension Plan benefits %	4	4.5	3.4	3.5
Old Age Security pensions and Guaranteed Income Supplement %	3	3.7	2.8	3.1
Median family income \$	\$86,849	\$77,637	\$80,987	\$76,511
Source: Statistics Canada 2011 National Household Survey.				



St. Clair Industrial Profile: Introduction

As of December 2016, there were 1,259 business locations (hereafter referred to as firms or establishments) in St. Clair Township of which 303 had employees. These are establishments that are registered and providing payroll and other information to the Canada Revenue Agency (CRA). The data comes from Statistics Canada's Canadian Business Patterns database which provides information on the establishments by detailed industry (NAICS) and employment size.

The industry profiles below provide a summary of the key sectors and the number of firms by employment size. In addition, the economic structure is compared to Ontario as a whole to provide a first level insight into firm intensity and size. The tables show the number of firms by sector adjusted for population size (per 10,000 population) to allow for a meaningful comparison to the provincial economy. For example, there are 52 businesses in St. Clair active in the retail trade sector (NAICS 44-45). Compared to Ontario, there are only half as many retail businesses (adjusted for population size) in St. Clair Township and the average size of a retail business is slightly smaller (20 per cent smaller, displayed as 0.8 in the table).

The data is presented at a detailed sector level to help provide an initial assessment of areas in which the St. Clair Township has a very high concentration of firms or a low concentration. See Appendix B for a more detailed description of the source and methodology.

Table 1 compares the St. Clair economic profile to the province as a whole by firm concentration and average firm size. Appendix A provides detailed tables listing the number of firms in each industry group, the size by employment range and the comparison to the Ontario economy as a whole.

Initial Observations:

- Overall, the St. Clair economy has a heavy concentration of firms in the agriculture sector. Many have limited or no formal employment. Soybean farming is the largest sub-sector.
- The community has a higher concentration of firms in heavy and civil engineering construction.
- St. Clair has a significant manufacturing sector with a relatively large number of firms; 10 of them with at least 50 employees.
- The Township has a very small services economy relative to its size. There are 50 per cent fewer firms in retail and wholesale trade, 50 per cent fewer in finance and insurance and 70 per cent less in professional services.
- The community has 60 per cent fewer firms in accommodation and food services compared to the Province as a whole.



Table 3: St. Clair Industrial Profile: Summary

Firms by employment size/concentration compared to Ontario

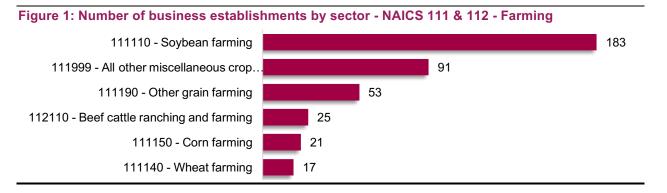
		Without employees		Employ				Avg. pe location		d to ONT
Industry: Total	Total 1259	956		10-192 37	0-495 15	14	100+	उ <u>ष्</u> 17	# Firms 0.8	Avg.size 1.2
Unclassified	79	68	227 10	1	12	0	0	4	0.8	0.8
Sub-total, classified	1180	888	217	36	15	14	10	17	0.4	1.2
11 - Agriculture, forestry, fishing and hunting	440	408	29	2	0	1	0	6	9.1	0.6
, , ,	7	408	0	0	1	0	0	30	3.5	1.0
21 - Mining, quarrying, and oil and gas 22 - Utilities	8	6	2	0	0	0	0	2	2.8	0.1
23 - Construction	109	71	29	3	5	0	1	12	0.8	1.3
31-33 - Manufacturing	35	11	9	3	2	5	5	71	0.8	2.3
41 - Wholesale trade	21	7	9	4	0	0	1	28	0.5	1.6
44-45 - Retail trade	52	27	18	4	1	2	0	12	0.5	0.8
48-49 - Transportation and warehousing	66	42	17	6	0	1	0	10	0.3	1.0
51 - Information and cultural industries	4	4	0	0	0	0	0	n/a	0.2	n/a
52 - Finance and insurance	41	29	8	3	0	0	1	18	0.5	1.0
53 - Real estate and rental and leasing	137	126	9	2	0	0	0	4	0.6	0.5
54 - Professional, scientific and technical	58	42	15	1	0	0	0	3	0.3	0.5
55 - Management of companies and enterprises	12	10	0	0	0	1	1	188	0.9	3.4
56 - Administrative and support, waste	50	35	10	2	1	2	0	17	0.9	0.8
management and remediation services	30	33	10	_	_	_	Ū	-,	0.5	0.0
61 - Educational services	4	2	2	0	0	0	0	5	0.3	0.2
62 - Health care and social assistance	33	16	14	2	1	0	0	6	0.4	0.5
71 - Arts, entertainment and recreation	11	7	2	1	1	0	0	14	0.5	0.6
72 - Accommodation and food services	16	3	8	2	3	0	0	11	0.4	0.6
81 - Other services (except public	75	36	36	1	0	2	0	7	0.8	1.0
91 - Public administration	1	0	0	0	0	0	1	150	0.6	1.3
					-	-				



Primary Industries

St. Clair has a very high concentration of establishments in the crop production sector; specifically soybean farming which is the main area of farming in the community. Compared to the provincial economy, there are over 100 times as many soybean farms. There is also a comparatively large number of establishments in the animal production sector. Most of the farms do not have significant employment. According to Statistics Canada, only seven of the 183 crop production firms have formal employment and none have more than 10 workers.

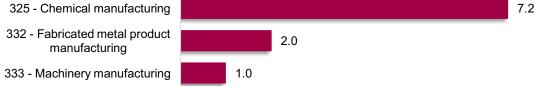
St. Clair is home to seven firms in the oil and gas sector of which six have no formal employment and one has between 20-49 employees.



Construction and Manufacturing

There are eight firms in the St. Clair utilities sector of which seven are in the electric power generation, transmission and distribution. Only one firm has formal employment. The construction sector features 109 firms of which 38 have formal employment. The community has a higher concentration of firms in the heavy and civil engineering sector compared to the Province as a whole (70 per cent more adjusted for population size). Only one firm has more than 100 employees. St. Clair is home to an impressive manufacturing sector featuring 35 firms of which 24 have formal employment. There are two petroleum manufacturing firms; one with more than 100 employees. There are 10 chemical manufacturing firms – more than seven times as many as the Province as a whole adjusted for population size of which seven have at least 50 employees. The table below shows the breakdown of chemical manufacturing firms subsector. The Township also has a high concentration of fabricated metal product manufacturers; double the provincial level. Most are relatively small. Of the 11 firms, five have no formal employment and five have less than 50 employees.





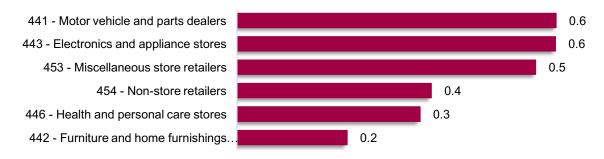


Trade and Transportation

St. Clair has a much smaller trade sector compared to several other municipalities in Lambton County and to the Province as a whole. There are 52 firms in the retail trade sector, 21 in the wholesale trade sector and 66 in the transportation and warehousing sector. The sub-sectors where St. Clair at least meets the national average for the number of firms includes NAICS 445 - Food and beverage stores, NAICS 447 - Gasoline stations and NAICS 452 - General merchandise stores. Sectors with a significantly lower concentration are shown in Figure 3. There are three relatively large wholesale firms in the community; one with over 100 employees.

St. Clair has 52 firms in the truck transportation sector. They are mostly one-person establishments. The data shows that 37 of the 52 have no formal employment and only one has more than 10 workers.

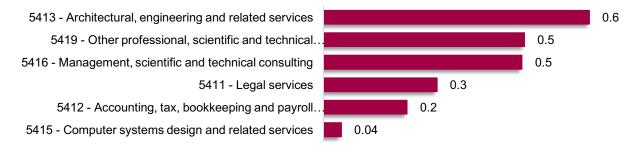
Figure 3: Retail sub-sectors with a low concentration of firms relative to the Ontario economy (Ontario = 1.0)



Information, Finance and Professional Services

St. Clair has more than 300 firms in various services industries including 41 in finance and insurance, 137 in real estate, 58 in professional services and 50 in administrative services. Most of these firms are single entrepreneur businesses with no formal employment. In general St. Clair is under-represented in these areas. There are relatively few firms in banking and financial investment services. There are 70 per cent fewer firms in professional services. The variance with the provincial level is shown in Figure 4. There are 46 firms in the administrated services sector of which the two largest sub-sectors are janitorial service and landscaping services. There are almost twice as many firms in NAICS 561730 - Landscaping services compared to the province as a whole.

Figure 4: Professional services sub-sectors with a low concentration of firms relative to the Ontario economy (Ontario = 1.0)



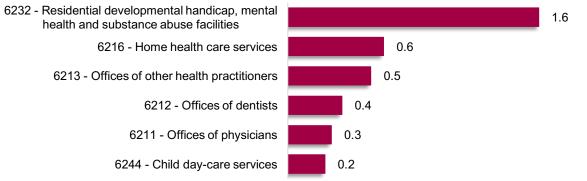


Education, Health Care and Public Administration

There are three schools in St. Clair each with fewer than 10 employees. Two schools are involved in athletic instruction and the other is listed in "all other schools".

There are 33 establishments in the health care and social assistance sector and 17 have some level of employment. This is another services sector where St. Clair is mostly under-represented when compared to the county and the province as a whole. There are nine physicians' offices which is 70 percent less compared to the province adjusted for population size. There are 50 per cent fewer offices of other health practitioners as the province. The only sub-sector with a higher concentration of firms is NAICS 6232 Residential developmental handicap, mental health and substance abuse facilities.

Figure 5: Health-related sub-sectors - concentration of firms relative to the Ontario economy (Ontario = 1.0)



Tourism

St. Clair Township is home to 27 firms in the two main tourism sectors: NAICS 71 - Arts, entertainment and recreation and NAICS 72 - Accommodation and food services. There are 12 firms in the full-service restaurants and limited-service eating places sector; 60 per cent fewer than the province as a whole adjusted for population size. There is one registered heritage institution in the community and one motel. There are nine firms in NAICS 7139 - Other amusement and recreation industries 30 per cent more when compared to Ontario.

Other Sectors

St. Clair is home to 75 firms in the personal services sector including 16 firms in NAICS 8113 - Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance. This concentration is nearly five times that of the province as a whole adjusted for population size. There is a higher concentration of firms in personal and household goods repair and 70 per cent more religious organizations.



Appendix

Appendix A: Detailed Industry Tables

112991 - Animal combination farming

115 - Support activities for agriculture

213 - Support activities - mining/oil&gas

211 - Oil and gas extraction

Table 4: St. Clair Industrial Profile: Primary Industries

Firms by employment size/concentration compared to Ontario Avg. per location 1.0 = Average**Employment Range** Compared to ONT Industry: Total <10 10-1920-4950-99 100+ # Firms Avg.size 111 - Crop production 16.9 0.5 111110 - Soybean farming 45.6 0.7 111140 - Wheat farming n/a 29.2 n/a 111150 - Corn farming 7.1 8.0 111190 - Other grain farming 13.8 1.1 111999 - All other miscellaneous crop farming 16.8 1.5 112 - Animal production 2.6 0.6 112110 - Beef cattle ranching and farming 4.3 0.5 112210 - Hog and pig farming 3.0 0.4 112410 - Sheep farming n/a 6.2 n/a 112920 - Horse and other equine production n/a 2.2 n/a

0 n/a

0 n/a

0 30

3.6

3.3

1.6

21.7

0.5

n/a

n/a

1.2



Table 5: St. Clair Industrial Profile: Construction and Manufacturing

Firms by employment size/concentration compared to Ontario employees Avg. Without location 1.0 = Average**Employment Range** Compared to ONT per <10 10-1920-4950-99 100+ Industry: Total # Firms Avg.size 221 - Utilities 2.8 0.1 2211 - Electric power generation, transmission 2.9 0.0 and distribution 0.7 8.0 236 - Construction of buildings 237 - Heavy and civil engineering construction 1.7 0.6 238 - Specialty trade contractors 0.7 1.6 311 - Food manufacturing n n 0.6 0.1 321 - Wood product manufacturing 0.5 0.3 324 - Petroleum and coal product manufacturing 1 151 11.0 4.2 325 - Chemical manufacturing 7.2 2.6 3251 - Basic chemical manufacturing 30.2 2.3 3252 - Resin, synthetic rubber, and artificial 2 125 44.8 1.6 and synthetic fibres and filaments 3253 - Pesticide, fertilizer and other n 1 300 10.8 12.5 agricultural chemical manufacturing 3259 - Other chemical product manufacturing 2.9 1.0 326 - Plastics and rubber products 0.7 0.0 331 - Primary metal manufacturing 2.4 1.0 332 - Fabricated metal product manufacturing 2.0 0.9 3324 - Boiler, tank and shipping container 9.8 0.6 manufacturing 3327 - Machine shops, turned product, and 1.5 0.1 screw, nut and bolt manufacturing 3328 - Coating, engraving, cold and heat 4.8 0.3 treating and allied activities 3329 - Other fabricated metal product n/a 2.8 n/a manufacturing 333 - Machinery manufacturing 1.0 0.1 339 - Miscellaneous manufacturing n/a 0.2 n/a Source: Statistics Canada Canadian Business Patterns (December 2016).



Table 6: St. Clair Industrial Profile: Trade & Transportation

Firms by employment size/concentration compared to Ontario employees Employment Range of the control of t Avg. Without 1.0 = Average Compared to ONT per Total # Firms Avg.size Industry: 417 - Machinery, equipment and supplies 0.6 0.2 merchant wholesalers 418 - Miscellaneous merchant wholesalers 0.7 7.6 1 110 441 - Motor vehicle and parts dealers 0.6 0.1 442 - Furniture and home furnishings stores 0.2 0.6 443 - Electronics and appliance stores n/a 0.6 n/a 444 - Building material and garden equipment 8.0 8.0 and supplies dealers 445 - Food and beverage stores 1.0 1.0 446 - Health and personal care stores 0.3 0.6 447 - Gasoline stations 1.1 0.5 452 - General merchandise stores 1.1 0.1 453 - Miscellaneous store retailers 0.4 0.5 454 - Non-store retailers 0.4 0.2 483 - Water transportation 24.3 0.2 484 - Truck transportation 1.0 0.9 486 - Pipeline transportation 34.7 0.4 487 - Scenic and sightseeing transportation n/a 5.1 n/a 488 - Support activities for transportation 0.6 8.0 492 - Couriers and messengers n/a 0.2 n/a 493 - Warehousing and storage 1.1 1.3



Table 7: St. Clair Industrial Profile: Information, Finance and Professional Services Firms by employment size/concentration compared to Ontario

Industry:	Total	Without employees		Employi LO-1920		_	00+	Avg. per location	Compare	verage ed to ONT Avg.size
512 - Motion picture and sound recording	1	1	0	0	0	0	0	n/a	0.1	n/a
517 - Telecommunications	1	1	0	0	0	0	0	n/a	0.5	n/a
518 - Data processing, hosting, and related	1	1	0	0	0	0	0	n/a	0.6	n/a
519 - Other information services	1	1	0	0	0	0	0	n/a	0.3	n/a
522 - Credit intermediation and related activities	7	0	3	3	0	0	1	30	0.7	1.3
523 - Financial investment and related activities	30	27	3	0	0	0	0	2	0.5	0.1
524 - Insurance carriers and related activities	4	2	2	0	0	0	0	2	0.3	0.1
531 - Real estate	125	119	5	1	0	0	0	4	0.5	0.5
532 - Rental and leasing services	12	7	4	1	0	0	0	5	2.1	0.4
541 - Professional, scientific and tech. services	58	42	15	1	0	0	0	3	0.3	0.5
5411 - Legal services	5	5	0	0	0	0	0	n/a	0.3	n/a
5412 - Accounting, tax preparation, bookkeeping and payroll services	4	3	1	0	0	0	0	2	0.2	0.3
5413 - Architectural, engineering and related services	11	2	9	0	0	0	0	3	0.6	0.3
5415 - Computer systems design and related services	2	2	0	0	0	0	0	n/a	0.0	n/a
5416 - Management, scientific and technical consulting services	24	19	5	0	0	0	0	2	0.5	0.4
5419 - Other professional, scientific and technical services	10	9	0	1	0	0	0	15	0.5	1.8
561 - Administrative and support services	46	32	10	2	1	1	0	13	0.8	0.6
562 - Waste management and remediation	4	3	0	0	0	1	0	75	2.2	4.0



Table 8: St. Clair Industrial Profile: Education, health care and public administration

Firms by employment size/concentration compared to Ontario Employment Range chi 10-1920-4950-99 100+ 1 0 0 0 Avg. 1.0 = Average Compared to ONT Industry: Total # Firms Avg.size 611620 - Athletic instruction 2 0.5 611690 - All other schools and instruction 1 0 0 0.2 1 0 0 0 n/a n/a 611710 - Educational support services 0 0 1 0 1 0 0 2 0.6 0.2 6211 - Offices of physicians 9 1 8 0 0 0 0 3 0.3 0.9 6212 - Offices of dentists 4 0 0 0 0 0 n/a 0.4 n/a 14 6213 - Offices of other health practitioners 9 5 0 0 0 0 3 0.5 0.6 6216 - Home health care services 1 1 0 0 0 0 0 n/a 0.6 n/a 6232 - Residential developmental handicap, 3 0 2 0 0 12 1 0 1.6 8.0 mental health and substance abuse facilities 0.2 6244 - Child day-care services 2 0 0 0 0 30 1.4 1 1 913910 - Other local, municipal and regional 1 0 0 0 0 0 1 150 1.5 1.2 public administration

Source: Statistics Canada Canadian Business Patterns (December 2016).

Table 9: St. Clair Industrial Profile: Tourism

Firms by employment size/concentration compared to Ontario

Industry:	employees Total	Without		Employ 10-192		_		Avg. per location	Compare	Average ed to ONT Avg.size
7112 - Spectator sports	1	0	1	0	0	0	0	2	1.1	0.1
7115 - Independent artists, writers and	1	1	0	0	0	0	0	n/a	0.1	n/a
performers										
7131 - Amusement parks and arcades	0	0	0	0	0	0	0	n/a	-	n/a
7132 - Gambling industries	0	0	0	0	0	0	0	n/a	-	n/a
7139 - Other amusement and recreation	9	6	1	1	1	0	0	17	1.3	0.7
industries										
7211 - Traveller accommodation	1	0	1	0	0	0	0	7	0.2	0.2
7223 - Special food services	3	1	2	0	0	0	0	2	0.7	0.1
7224 - Drinking places (alcoholic beverages)	0	0	0	0	0	0	0	n/a	-	n/a
7225 - Full-service restaurants and limited- service eating places	12	2	5	2	3	0	0	14	0.4	0.7



Table 10: St. Clair Industrial Profile: Other

Firms by employment size/concentration compared to Ontario employees Avg. Without 1.0 = Average **Employment Range** Compared to ONT per <10 10-1920-4950-99 100+ Industry: Total # Firms Avg.size 8111 - Automotive repair and maintenance 1.1 0.7 8112 - Electronic and precision equipment repair 0.5 0.2 and maintenance 8113 - Commercial and industrial machinery and 4.7 2.2 equipment (except automotive and electronic) repair and maintenance 8114 - Personal and household goods repair and n/a 1.1 n/a maintenance 8121 - Personal care services 0.3 1.9 8122 - Funeral services 2.2 0.2 8123 - Dry cleaning and laundry services n/a 0.4 n/a 8129 - Other personal services 0.7 0.6 0.3 8131 - Religious organizations 1.7 8132 - Grant-making and giving services n/a 0.6 n/a 8133 - Social advocacy organizations n/a 0.9 n/a 8134 - Civic and social organizations 0.4 0.1 8139 - Business, professional, labour and other 0.1 0.2 membership organizations



Appendix B: Source and Methodology

The data in this report is taken from the December 2016 edition of Canadian Business Patterns which is published by Statistics Canada. Canadian business patterns data provide counts of active locations by industry classification and employment size categories for Canada and the provinces/territories. Data are compiled from the Business Register, which is a repository of information on the Canadian business population.

In order to be included in this database, a business must have been assigned a NAICS code and meet at least one of the following criteria: be an employer (i.e., have employees), be a corporate tax filer (T2), be a GST registrant with sales greater than \$0, file an individual tax return (T1) showing business revenue greater than \$0 and for which we can match the Business Number (BN) to the Social Insurance Number (SIN) and/or show evidence (obtained via profiling activities) of size.

In order to compare the community's economic structure to the province as a whole, the data was standardized in two ways:

The number of firms was adjusted based on population size and then compared to the provincial economy. A number greater than 1.0 means a higher concentration of firms (relative to population size).

The average size of firm by sector was estimated by taking the mid-point employment level for each employment