

III COUNTY CONTINUED TO EXPERIENCE EMPLOYMENT GROWTH AMIDST BROADER ECONOMIC SHIFT

This section examines the growth and change that has occurred in Oxford's employment base since 2001. The County has continued to experience employment growth over that period. The distribution of this growth has varied within the County amidst shifts in the broader economy.

A. COUNTY ADDED JOBS IN EACH CENSUS PERIOD SINCE 2001

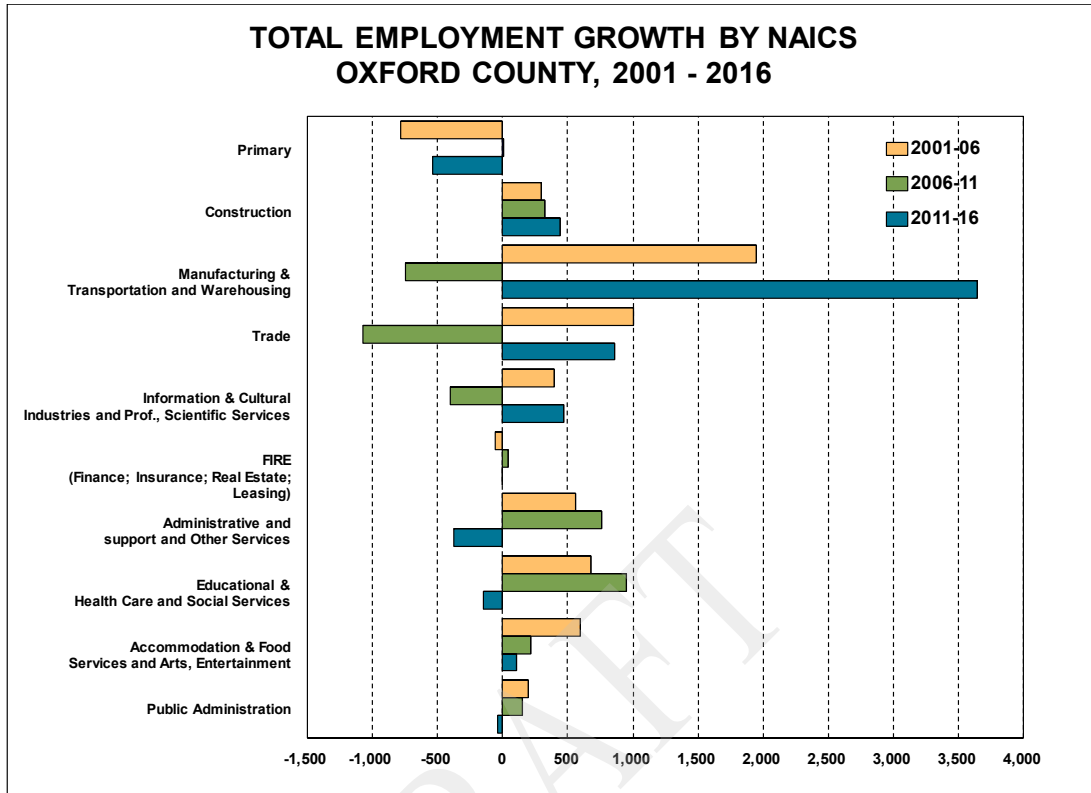
The County has continued to add jobs during each Census period since 2001. However, growth between 2006 and 2011 was much more modest relative to prior periods, as shown in Table 8 below. The slower growth was due to the recession of 2008 – 2009, when manufacturing was particularly hard-hit by job losses.

Table 10

Historical Total Place of Work Employment Oxford County, 2001-2016				
Year	Employment	Net Change	Growth Rate	Activity Rate
2001	48,080			
2006	52,960	4,880	1.95%	48.4%
2011	53,140	180	0.07%	51.5%
2016	57,330	4,190	1.53%	50.3%

In the context of broad economic shifts across Ontario, in particular a shift away from traditional manufacturing and goods-producing industries to a more service-based economy, overall job growth in Oxford involved job decline in some economic sectors offset by rapid growth in others. The local shift in employment by North American Industry Classification System (NAICS) code since 2001 is illustrated in Figure 4 below.

Figure 4: Change in Employment by NAICS, 2001-2016



Source: Hemson Consulting Ltd. based on Statistics Canada data.

At the County level, Oxford's continued employment growth since 2001 compares favourably with other municipalities in southwestern Ontario, where manufacturing has historically represented a major part of the employment base. The job recovery after the 2008-2009 recession was striking and included growth by 21% in the industrial sectors. This was the highest industrial job growth of any County or Region in Ontario (Essex (Windsor) posted the next highest growth rate at 17%). Nearly all of the 2011-2016 job growth in was in Transportation Equipment Manufacturing; that is, in the County's two auto plants and parts manufacturers.

B. EMPLOYMENT GROWTH ALSO CONCENTRATED IN FEW OXFORD AREA MUNICIPALITIES

While the amount and type of employment has been variable in recent years so too has the distribution of growth within the County. At the Area Municipal

level, employment growth was distributed unevenly within Oxford and focussed on longstanding job centres. Table 11 highlights net change in total employment and respective shares of County growth by Area Municipality from 2001 to 2016.

As with population and housing growth, 90% of net employment growth in Oxford was in Woodstock. Ingersoll and Southwest Oxford also experienced significant growth over this time frame relative to the balance of Area Municipalities.

Many municipalities in Oxford declined in employment, especially during the 2006 to 2011 timeframe, when much of the manufacturing base in Ontario similarly declined. Woodstock was the exception, which continued to add significant employment jobs over all three Census periods. This resiliency in the local economic market during the recession and decline through much of Southwestern Ontario was in largest part owing to the opening of the Toyota plant in 2008. The large growth in South-West Oxford over the period is primarily related to the transportation uses to the west of the CAMI plant.

In the more rural communities in the county, the cyclical changes are partly related to the economic cycles but may also be statistical. In particular, the National Household Survey (which replaced the long-form Census in 2011, only) had a much lower response rate in rural than urban communities. In these communities, it is probably best to focus on the longer term trends than to draw significant conclusions from a single Census period.

Table 11

Historical Total Employment by Area Municipality, Oxford, 2001-2016				
Municipality	Total Place of Work Employment by Area Municipality			
	2001	2006	2011	2016
Woodstock	17,130	19,950	23,040	25,430
Norwich	3,860	3,840	3,470	4,050
Tillsonburg	9,570	10,080	7,840	8,580
South-West Oxford	1,780	2,480	2,290	2,850
Ingersoll	7,820	8,890	8,700	8,990
Zorra	2,860	2,910	3,050	2,800
East Zorra-Tavistock	2,730	2,460	2,400	2,800
Blandford-Blenheim	2,340	2,300	2,360	1,820
Oxford County	48,080	52,920	53,140	57,330

Table 12

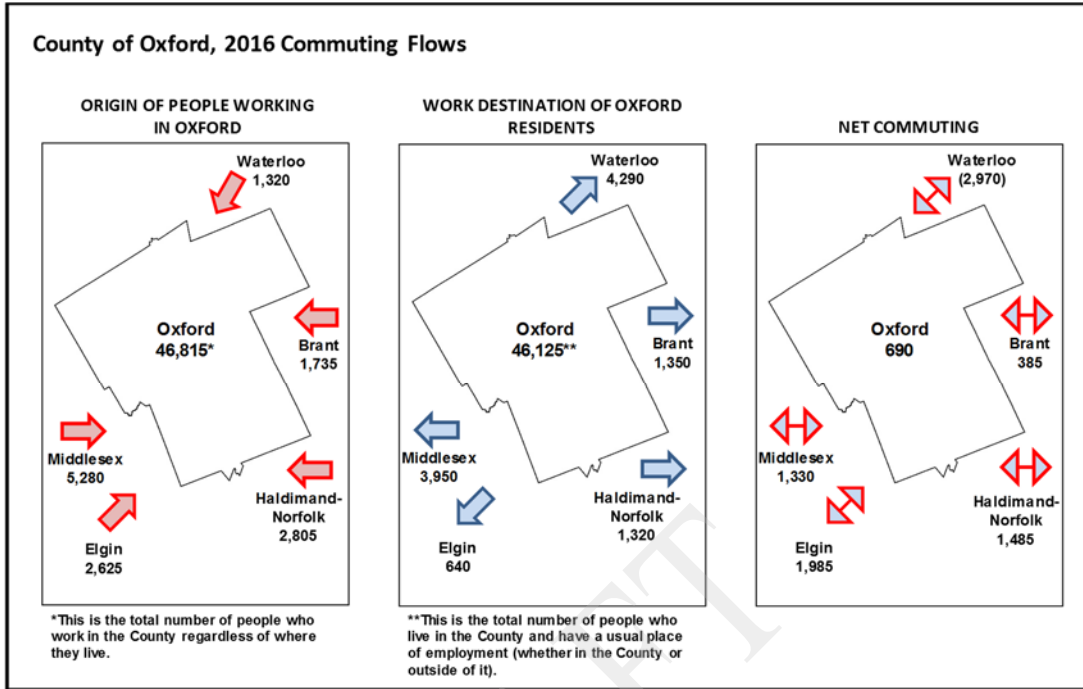
Historical Total Employment Growth and Share of County-wide Growth by Area Municipality County of Oxford, 2001-2016								
Municipality	Net Change			Share of County-wide Growth			2001-2016	
	2001-2006	2006-2011	2011-2016	2001-2006	2006-2011	2011-2016	Net Change	Share of County-wide Growth
Woodstock	2,820	3,090	2,390	58%	1405%	57%	8,450	89%
Norwich	-20	-370	580	0%	-168%	14%	160	2%
Tillsonburg	510	-2,240	740	11%	-1018%	18%	-970	0%
South-West Oxford	700	-190	560	14%	-86%	13%	1,110	12%
Ingersoll	1,070	-190	290	22%	-86%	7%	1,270	13%
Zorra	50	140	-250	1%	64%	-6%	-70	0%
East Zorra-Tavistock	-270	-60	400	-6%	-27%	10%	50	1%
Blandford-Blenheim	-40	60	-540	-1%	27%	-13%	-520	0%
Oxford County	4,840	220	4,190	100%	100%	100%	9,480	100%

The role of Oxford within the broader economic region is another key consideration in assessing the future growth outlook of the County. The figure illustrates the major flows of commuters into and out of the County and neighbouring upper-tier municipalities.

The County provides employment opportunities to residents within and beyond its borders, with net in-commuting of 700 employees in 2016. The largest flows into and out of the County are to Middlesex. The Region of Waterloo is the only adjacent municipality to which Oxford experiences net out-commuting, mainly to the urban centres of Kitchener, Waterloo and Cambridge.

Of Oxford's 46,000 employed residents in 2016, nearly 70% lived and worked in the County. The largest internal commuting flows are to Woodstock, Ingersoll, largely to the Toyota and GM CAMI plants; and to Tillsonburg.

Figure 5: Top Net Commuting Flows, 2016



Source: Hemson Consulting Ltd. based on Statistics Canada Place of Work and Resident Employment Labour Force data. The graphic illustrates the most significant flows of commuters into and out of the County. 31,100 Oxford residents both live and work within the County. Note: Work at home employment is excluded from the above figures.