

II RESIDENTIAL GROWTH IN OXFORD HIGHER THAN HISTORICAL TRENDS AMIDST BROADER DEMOGRAPHIC CHANGE

Oxford has continued to experience a growing population, housing and employment base. Residential growth has been particularly strong in recent years relative to longer term historical trends, owing in part to the influence of the GGH and influx of residents from neighbouring economic centres of Kitchener-Waterloo to the east and London to the west. Owing to a strong industrial economic base and the success of a few key employers, the County has also experienced steady job growth since 2001. This job growth has taken place in spite of economic shifts in the broader economy and declining employment in much of Southwestern Ontario.

This section summarizes the residential and employment growth and change in Oxford that has occurred over recent Census periods and discusses key demographic and economic trends likely to affect the future growth outlook.

A. COUNTY EXPERIENCED SIGNIFICANTLY HIGHER POPULATION GROWTH OVER RECENT CENSUS PERIOD

Oxford has continued to add population since 2001, with a significant upswing in residential growth in recent years. The County remains an attractive settlement location for those who currently live and work in surrounding regions, and experienced net in-migration in each of the last three Census periods. The level of net-in-migration increased over the 2011 to 2016 period, with 3,700 net in-migrants, comparing to roughly 2,000 in each of the prior two five-year periods (see Table 1).

Table 1

Historical Population and Net In-Migration County of Oxford, 2001-2016				
Census Year	Total Population (Including Census Net Undercoverage)	Population Growth		Net In-Migration
		Net Change	Compound Annual Growth Rate	
2001	103,200			
2006	106,600	3,400	0.65%	2,250
2011	108,700	2,100	0.39%	2,050
2016	113,900	5,200	0.94%	3,710

Source: Statistics Canada Census data.

Higher population growth between 2011 and 2016 was driven by continued rapid growth in the GGH. Many GGH municipalities outside the GTA have experienced high in-migration, in large part because of relatively lower housing prices further from the major urban centres. This effect has been most pronounced in areas to the west where major economic and transportation corridors connect the GGH to American markets.

B. HOUSING GROWTH OUTPACING GROWTH IN POPULATION

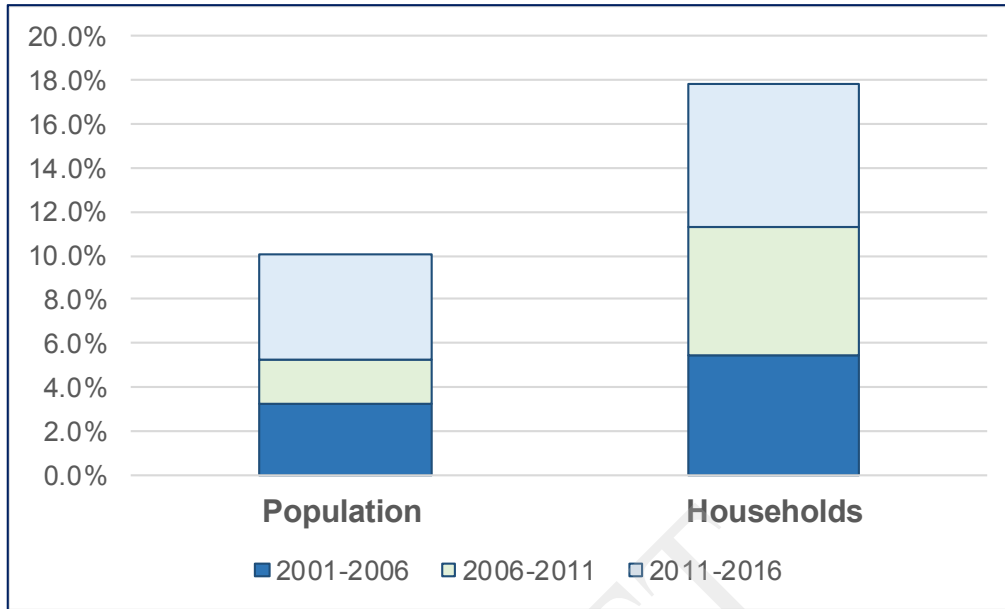
Recent population growth resulted in more than 7,000 households being added to the County between 2001 and 2016, with the highest growth being in the most recent Census period (see Table 2).

Table 2

Historical Household Growth County of Oxford, 2001-2016			
Census Year	Households	Household Growth	
		Net Change	Compound Annual Growth Rate
2001	37,270		
2006	39,310	2,040	1.1%
2011	41,560	2,250	1.1%
2016	44,270	2,710	1.3%

Source: Statistics Canada Census data.

Household growth in the County has out-paced population growth in recent years. This is illustrated in Figure 1 below.

Figure 1: Residential Growth Rates by Census Period, Oxford County, 2001-2016

The different growth rates between population and households is due in large part to an aging population, a demographic feature of Oxford that mirrors most of Ontario, particularly in communities outside major urban centres. The aging population results in a declining average household size as older populations generally have households with more “empty nesters”, fewer children, and more single people due to divorce and widowing. The effect is that a greater number of households is required to house the same amount of population than if that population were younger. The sustained fall in average household size that has occurred in Oxford is highlighted in Table 3.

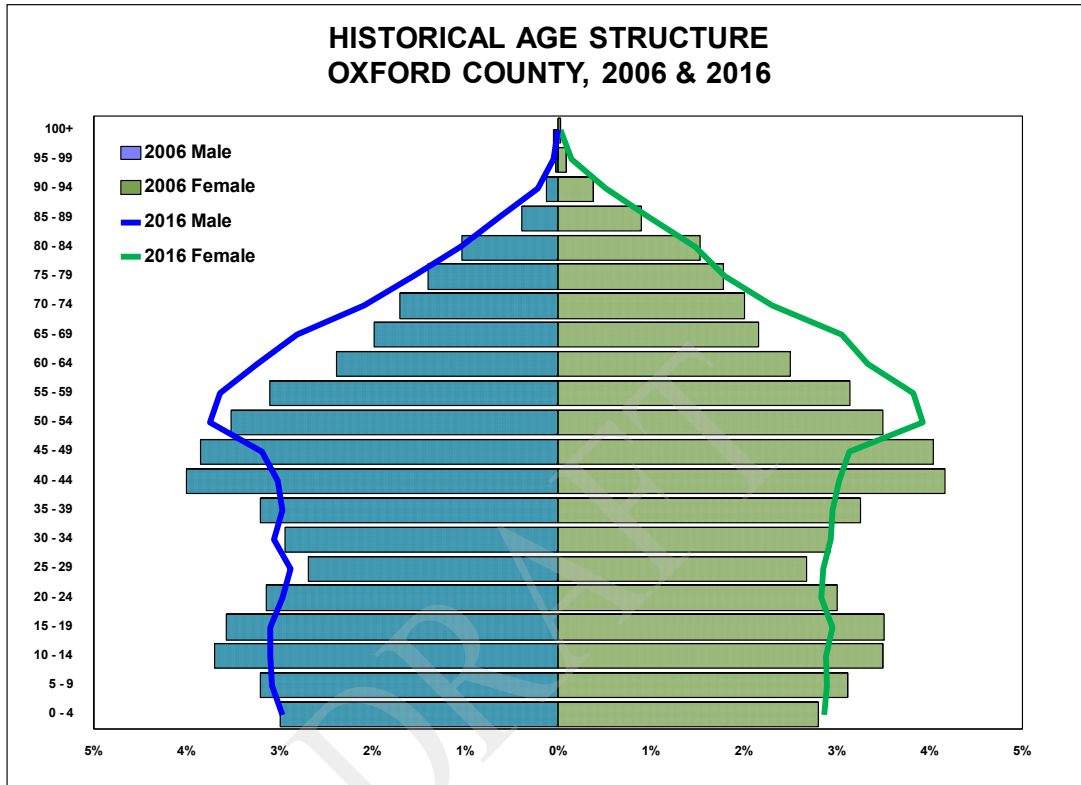
Table 3

Average Household Size, Oxford County, 2001-2016	
Year	Persons per unit (ppu)
2001	2.62
2016	2.57
2011	2.50
2016	2.47

Figure 2 illustrates the change in the age structure of the population in Oxford since 2006. The aging demographic trend is anticipated to continue and is a

key determining factor when forecasting future growth and change in the County. Within the context of an aging population, the population would stabilize and begin to decline in the absence of in-migration.

Figure 2: Change in Population Age Structure, 2006 to 2016

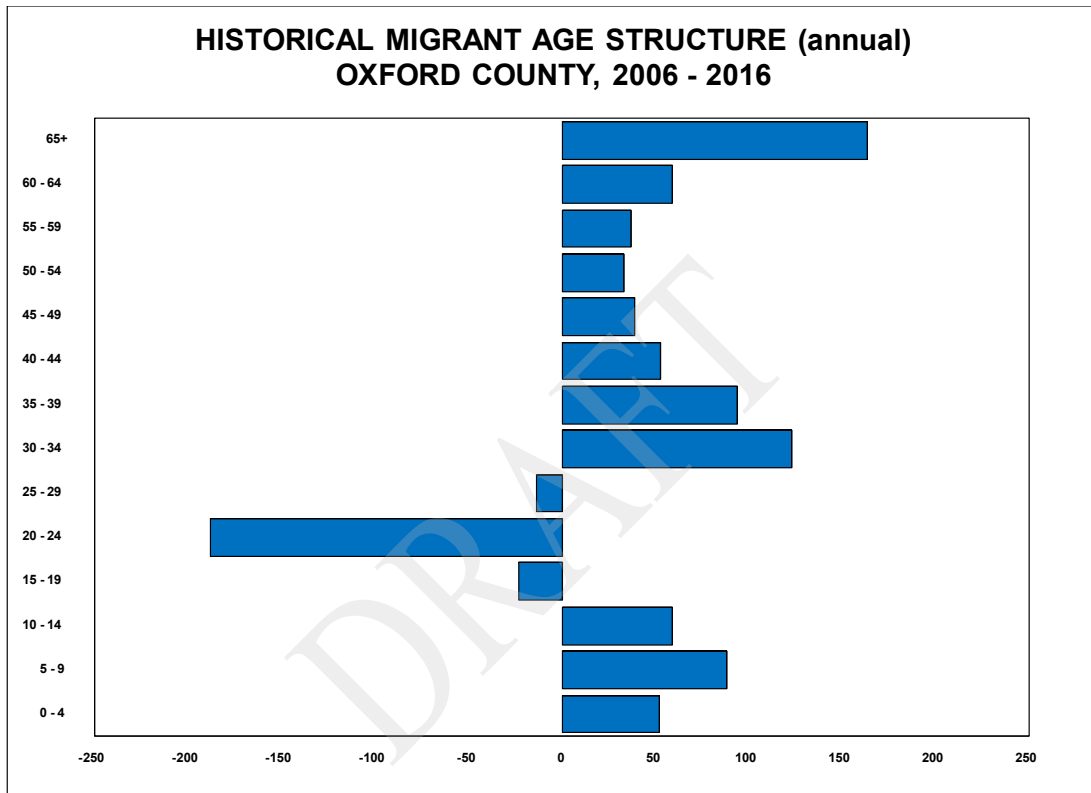


The age-structure of migrants is also a key consideration in understanding recent growth and change in the County and assessing the future growth outlook. Figure 3 sets out annual net-migrants by age group over the 2006 to 2016 period. As shown, there is significant out-migration of younger aged adults, who are drawn to education and employment opportunities in larger urban centres. The pattern of some young adults leaving for the “big city” is common throughout the province with the recipient communities largely limited to the GTA, Waterloo Region, Ottawa and London.

What is unusual in Oxford is the relatively large in-migration of seniors to the County. People in these older age groups do not often move and, when they

do, it is more typically to Muskoka and other cottage and recreation-oriented areas with a broad range of amenities or to areas with significant small town and rural attraction such as Northumberland, Wellington and Oxford. However, Oxford attracts unusually a high number of seniors compared to these other areas.

Figure 3: Age Structure of Migrants, 2006 to 2016



Source: Statistics Canada, 2011 and 2016 Census data.

C. PATTERN OF HOUSING CONTINUES

Housing in the County is dominated by low density ground-oriented units, owing to the largely rural character of most Oxford communities. As the pattern of overall growth in the County has reinforced long-standing distribution within Oxford, so too has the built form of housing by type.

Notwithstanding, residential building permit activity suggests somewhat of an increased proportion of higher density housing types and somewhat fewer single-detached units in recent years (see Tables 4 and 5).

Table 4

Historical Households by Type Oxford County, 2001-2016				
Year	Single/Semi	Rows	Apts	Total
2001	29,620	2,080	5,570	37,270
2006	30,980	2,270	6,070	39,320
2011	32,680	2,510	6,370	41,560
2016	34,520	2,670	7,080	44,270
2001-2016	4,900	590	1,510	7,000
Share 2001	79%	6%	15%	
Share 2016	78%	6%	16%	

Source: Hemson Consulting Ltd. based on Statistics Canada data

Note: The housing categories shown here combine the following statistics Canada categories: Singles are single detached, mobiles and other single attached; Semis are semi-detached; Rows are rows; and Apartments are apartments of five or more stories, apartments under five stories and duplexes.

Table 5

Residential Building Permits by Housing Unit Type County of Oxford, 2011-2018				
	Single/Semi	Rowhouse	Apartment	Total
2011-2016	2615	457	813	3885
Share by Type	67%	12%	21%	100%
2017-2018	836	206	206	1,510
Share by Type	55%	14%	14%	100%

Source: Hemson Consulting Ltd. based on data provided Oxford County and Statistics Canada.

While the level of residential growth and age composition of Oxford residents, existing and new, has shifted over recent Census periods with continued immigration to the County, the relative distribution of population and housing has remained generally consistent with historical patterns.

D. DISTRIBUTION OF RECENT GROWTH WITHIN THE COUNTY CONTINUES TO REINFORCE LONGER TERM PATTERN

The location of residential growth within the County over the last three Census periods has continued to reinforce historical patterns in Oxford, particularly the split between the more urban and rural municipalities. Tables 6 to 9 below provide total population and households and growth over the 2001 to 2016 period at the Area Municipal level. Most of the residential growth that has occurred since 2001 was concentrated in the three urban municipalities in Oxford – Woodstock, Ingersoll and Tillsonburg. The City of Woodstock, being the County’s primary urban centre, has accounted for 70% of population growth and 56% of growth in households since 2001. Taken together with Tillsonburg, Ingersoll and Norwich, these municipalities accounted for all of the net growth in population in the County since 2001 and 90% of net growth in households. Notwithstanding this significant concentration of residential growth within a few municipalities, all Area Municipalities in Oxford added households over the 2001 to 2016 period. Over the same timeframe, some Area Municipalities experienced moderate declines in population. This pattern reinforces the notion of the aging population trend, which is generally most pronounced in rural communities further from major urban centres.

Table 6

Historical Total Population¹ by Area Municipality, Oxford County, 2001-2016				
Municipality	Total Population by Area Municipality			
	2001	2006	2011	2016
Woodstock	35,160	37,360	38,810	42,040
Norwich	10,890	10,870	11,020	11,310
Tillsonburg	14,610	15,370	15,730	16,310
South-West Oxford	8,090	7,870	7,750	7,880
Ingersoll	11,410	12,190	12,490	13,110
Zorra	8,370	8,420	8,280	8,360
East Zorra-Tavistock	7,170	7,270	7,030	7,330
Blandford-Blenheim	7,500	7,200	7,560	7,600
Oxford County	103,200	106,600	108,700	113,900

Source: Hemson Consulting based on Statistics Canada Census data.

¹ Total Population including Census net undercoverage.

Note: Census data has been adjusted to account for boundary changes as a result of annexations, where applicable.

Table 7

Historical Population 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	2,200	1,450	3,230	65%	69%	62%	6,880	69%
Norwich	-20	150	290	-1%	7%	6%	420	4%
Tillsonburg	760	360	580	22%	17%	11%	1,700	16%
South-West Oxford	-220	-120	130	-6%	-6%	3%	-210	0%
Ingersoll	780	300	620	23%	14%	12%	1,700	16%
Zorra	50	-140	80	1%	-7%	2%	-10	0%
East Zorra-Tavistock	100	-240	300	3%	-11%	6%	160	0%
Blandford-Blenheim	-300	360	40	-9%	17%	1%	100	0%
Oxford County	3,400	2,100	5,200	100%	100%	100%	10,700	100%

Table 8

Historical Housing 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	1,150	1,170	1,450	57%	51%	54%	3,770	69%
Norwich	40	130	100	2%	6%	4%	270	4%
Tillsonburg	430	440	310	21%	19%	11%	1,180	16%
South-West Oxford	-10	0	110	0%	0%	4%	100	0%
Ingersoll	360	220	300	18%	10%	11%	880	16%
Zorra	70	50	130	3%	2%	5%	250	0%
East Zorra-Tavistock	60	70	190	3%	3%	7%	320	0%
Blandford-Blenheim	-20	140	110	-1%	6%	4%	230	0%
Oxford County	2,030	2,300	2,700	100%	100%	100%	7,030	100%

Table 9

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%	8,300	89%
Norwich	-20	-370	580	0%	-168%	14%	190	2%
Tillsonburg	510	-2,240	740	11%	-1018%	18%	-990	0%
South-West Oxford	700	-190	560	14%	-86%	13%	1,070	12%
Ingersoll	1,070	-190	290	22%	-86%	7%	1,170	13%
Zorra	50	140	-250	1%	64%	-6%	-60	0%
East Zorra-Tavistock	-270	-60	400	-6%	-27%	10%	70	1%
Blandford-Blenheim	-40	60	-540	-1%	27%	-13%	-520	0%
Oxford County	4,840	220	4,190	100%	100%	100%	9,250	100%

Source: Hemson Consulting Ltd. based on Statistics Canada data. Note: Census data has been adjusted to account for boundary changes as a result of annexations, where applicable.