# Quarterly Update for Stakeholders

**from Eastern Ontario Leadership Council** Project Coordinator Kathryn Wood

April 15, 2020

### What's Happening to the regional Commuter Strategy Project?

Late last fall, you may have received notification of the launch of the Eastern Ontario Commuter Strategy project. Quite understandably, you may be wondering what is happening with the project, given that a) a very large proportion of commuters can't actually commute right now; b) we are unable to undertake the broad consultations with employers, commuters (or potential commuters) and organizations that serve our workforce and our workplaces, and c) it's not clear if we will be able to run the intended pilot projects for cross-boundary group transportation that are (at the moment) scheduled to begin in September of this year.

To say that the COVID-19 pandemic has disrupted our economy and our transportation sector is an understatement! So, what do we do? The answer: adjust the project to adapt to the new reality.

Fortunately, we held off on major expenditures from the project budget until we had a sense for how our economic world is changing, and how we might adjust to the new economic landscape to be of maximum benefit to stakeholders across the region. As a result, we are now in a position to initiate consultations on transportation-related matters, and gather 'current situation' data using digital technologies instead of face-to-face meetings (as much as those are useful). Going digital may allow those who might have had difficulty getting to a meeting to participate online.

Here's why we are now prepared to move forward on this project and think it is vital that we do:

1. **We have an extraordinary opportunity** to understand how labour markets, the overall economy, and transportation are influenced by a disruptive force like the COVID-19 pandemic. We can potentially track the labour market and the economy as a whole in both the 'lockdown' period and the 'recovery' period over the next year. Sharing data, insights, and approaches in as close to real time as possible could be enormously helpful to our communities and others across the province and beyond. Our sincere thanks go to the Ontario Ministry of Labour, Training and Skills Development for supporting this project.

2. **The point of the project is to understand** how access (or lack thereof) to transportation services may be limiting workers' ability to find and keep employment, and employers' ability to find the right people for their organizations. Regardless of how and when the current

restrictions are lifted, we still need that understanding. The only difference is that the 'new normal' may look quite different than the world we were used to earlier this year.

3. **'Fresh' data is now essential**. The value of historical data and the patterns of mobility between and among communities is probably now limited to having established the baseline… the way the world 'used' to be. For instance, how many of us think that the 'commuter maps' created from 2016 census data and placed on [Dropbox](#) still represent the mobility patterns of today, or more importantly the patterns of tomorrow. Truth be told, we don't really know. Yet, if we are to develop potential transportation service options for the commuters of the future, and evaluate their likely sustainability, we need better --- more current --- data. We can begin to gather that data --- and supplement it over time --- in four immediate ways:

   - *Use online surveys to find out how far we've fallen* (in terms of employment and mobility) due to COVID-19. (*These surveys will be launched imminently, providing an opportunity to gather region-wide data on immediate impact as well as factors that could influence future demand for commuter services, such as 'working from home' or shifting demand for different modes of commuter transportation*.)

   - *Probe case studies of how/when economic recovery has taken place following other pandemics or major economic disruptions* and identify any factors that seem to accelerate recovery. (*We have a project under way right now to try to answer these questions*).

   - *Access third party data sets* such as Vicinity Jobs and EMSI Analyst that allow us to link labour market data and regional economic data. The EOLC has had a regional subscription to Vicinity Jobs for nine months and will continue to track and report on both job postings and job seekers (both employed and unemployed) in the coming months.

   The EOLC also has a subscription to EMSI Analyst that runs into the spring of 2021 and will provide information on the sizes, sectors, geographic distribution and production levels of the region's business sector, as well as

> **Highlights of <u>Digital</u> Job Postings in March 2020:**
>
> - Total postings down 5% from February and down 17% since January 31**.**
> - Demand for healthcare, social assistance and retail workers was strong in March.
> - Data for April will be available in mid-May.
> - Online profiles (new or refreshed) were up by 23% over February but 5% lower than levels in January 2020

information on job postings, educational achievement by our citizenry, and ways to measure/estimate impact of the region's economic activity.

- ***Gather fresh data using municipal traffic counting equipment*** that allows us to compare 'current' traffic volumes and types to the most recent Average Annual Daily Traffic counts that municipalities gather as part of their efforts to optimize road maintenance. Bear in mind that 'fresh' traffic counts are one way of understanding the current 'hit' to the economy due to COVID-19. (*If your municipality owns its own equipment and can gather some data in April or early May, this will be quite useful in understand what the 'new world' looks like from passenger or freight perspectives. Some municipalities are already organizing to collect this data for regional use as well as to enhance their own understanding of transportation and their local economy*.)

***Please see the appendices to this report for a compilation of recent third-party data related to mobility for multiple purposes including work. All of this data was made available in the public domain.***

**Here are five ways you can help right now:**

1. ***Look at the maps for your community*** (or neighbouring ones) that are currently available in [Dropbox](#). Let us know what might have changed in your community or what is going to change in the near-term that would affect commuting patterns. For instance, construction might have been under way (or recently completed) on new commercial or industrial space. New housing subdivisions might have been approved. Major public roadworks might have been completed that are now likely to shift traffic. Certain roads might have been designated truck only or truck excluded. We are not asking you to try to predict how COVID-19 will affect traffic patterns… just identify those local decisions that you think are likely to change traffic patterns.

2. ***Please ask your public works department or roads superintendent to reach out to us*** (either the project coordinator, Kathryn Wood at [kwood4297@gmail.com](mailto:kwood4297@gmail.com) or data collection coordinator Glen LeClair at [org21@live.ca](mailto:org21@live.ca) so we can obtain any local transportation/traffic data you can share. We are particularly interested in location-specific traffic counts (AADT) and over-sized, over-load permitting processes (if any).

3. ***Share your own BR&E results.*** If your municipality has done a *Business Retention and Expansion study* in the past two years --- especially if you asked about labour market issues or transportation issues --- this information would be extremely useful. We do not need or want information that would identify specific businesses. Aggregated data or data by sector is still quite useful.

4. ***Reach out to your employers and commuters***. Please let our project coordinator, [Kathryn Wood](#) know if you are willing to share a survey link to <u>employers</u> through your own business email contact list. And if you are willing to post a <u>commuter-focused</u> survey link on your website or through social media.

5. ***Signal your interest in being kept in touch with plans for commuter transportation pilot projects*** as the region begins to see economic recovery. No one knows yet when this will be but let us know if your community is interested in keeping in touch with consultation on how potential pilot projects might be evaluated and when a Call for Proposals would be issued (not before August 2020).

**What Else is Going On?**

The Eastern Ontario Leadership Council has initiated several other actions related to regional economic development and specific projects that are unfolding now or will be shortly:

- **The EOLC reached an agreement with the Centre for Advanced Computing at Queen's University to provide secure data repository services** for data being collected and analyzed to guide decision-makers in the months ahead. These data sets contain no personally identifiable information, and will be used under strictly controlled conditions, to develop region-specific, evidence-based insights, policy recommendations, and program or service designs. Results of this work will be shared with interested stakeholders within and beyond the region. You can subscribe to receive automatic updates [here](#) or check the [EOLC website](#).

- **The EOLC recently received provincial confirmation of funding for a Labour Market AI Project** designed to improve the region's ability to identify and respond to labour market trends, providing guidance to a wide array of stakeholders including economic development officers, employers, trainers and educators, and labour market intermediaries. While the project is expected to generate current and (eventually) predictive labour market reports, it will also undertake the development and preliminary testing of a 'minimum viable product' version of a digital tools to help end users conduct their own analyses. A best practices report summarizing learnings on utilization of machine learning and AI in labour markets, especially in smaller communities or on a regional basis will also be produced. Project oversight will be

the responsibility of the EOLC's Workforce Development and Deployment Working Group. Anyone interested in participating in this project should contact the Project Coordinator, Kathryn Wood.

- **The EOLC has negotiated and launched a fast-turnaround project with an economics-focused firm in the region** to gain further insight into the economic impact of, and recovery from something like COVID-19. The project is expected to yield insights into the factors that lead to communities, and economies and labour markets being able to recover quickly. The findings of this work will be shared as soon as the work is completed.

- **The EOLC has been working for several months now on a freight-related pilot project** to explore the opportunity for an online 'one-window' permitting application for shipments moving across municipal boundaries. This project, which involves five adjacent local governments, is a collaboration with Transnomis and the Ontario Good Roads Association. The Ministry of Municipal Affairs and Housing is supporting financial modelling which will assess the prospects for this application to improve the efficiency and service delivery of municipal governments in these types of permitting functions. For more information, contact the EOLC's Project Coordinator, Kathryn Wood.

**Please go back over this report and let us know which parts of the EOLC's work are of greatest interest to you, and if your organization would like to be involved in some aspect of this work. Thank you for your attention to this report.**

Kathryn Wood
Project Coordinator, Eastern Ontario Leadership Council

**Appendix: Google Has Been Documenting Change in Mobility Patterns for Several Months**

In November 2019, Google Research published a blog post on *New Insights into Human Mobility with Privacy Preserving Aggregation*. This post specifically mentioned the link between human mobility and pandemics, infrastructure planning and responses to natural disasters. They followed this in early 2020 with what is intended to be a series of reports on mobility changes in many counties including Canada. The baseline for comparative purposes is a five-week period from January 3-February 6, 2020.

This data is drawn from Google's own datasets that allow them to prepare reports that "chart movement trends over time by geography, across different categories of places such as retail and recreation, groceries and pharmacies, parks, transit stations, workplaces, and residential."

The first two reports (March 29 and April 5) show that mobility declines in four of six categories (transit stations, retail & recreation, workplaces, groceries & pharmacy) were initially quite dramatic but have largely levelled off. Given the baseline period (Jan-Feb/winter), it may not be a surprise to see relatively modest declines in use of parks, and social distancing cautions may have dampened residential visits.

Differences between Canada-wide and Ontario-wide data are relatively modest (perhaps not a surprise given that Ontario is a major component of the national dataset). However, it is an open question if the Eastern Ontario experience mirrors the provincial picture. **We simply don't know.  Should we?**

| Mobility Purpose | Canada – March 29/20 | Ontario – March 29/20 | Canada – April 5/20 | Ontario – April 5/20 | Eastern Ontario |
|---|---|---|---|---|---|
| Retail & Recreation | -59% | -59% | -63% | -60% | ? |
| Grocery & Pharmacy | -35% | -33% | **-45%** | **-32%** | ? |
| Parks | -16% | -14% | -13% | -11% | ? |
| Transit Stations | -66% | -66% | -67% | -67% | ? |
| Workplaces | -44% | -46% | -46% | -47% | ? |
| Residential | **+14%** | **+14%** | **+14%** | **+14%** | ? |

Note: Transit Station declines in Toronto (TTC) are apparently much higher than the national average.

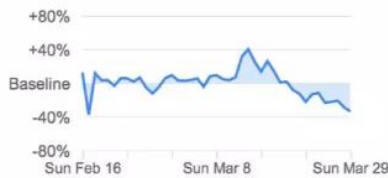**Ontario – March 29 Mobility Change Report from Google**
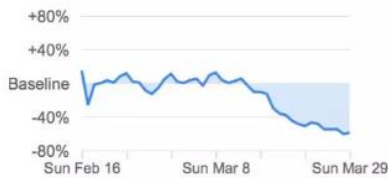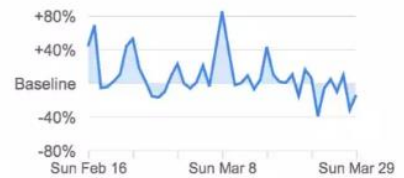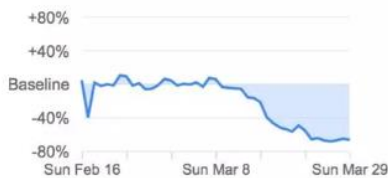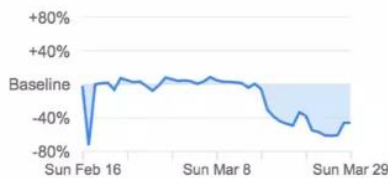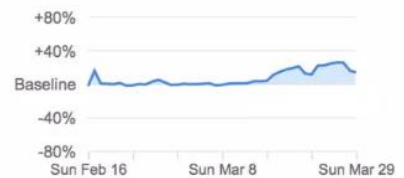


**Ontario – April 5 Mobility Change Report from Google**
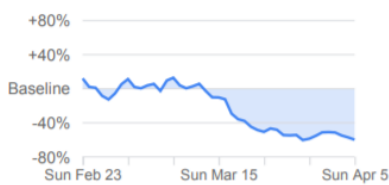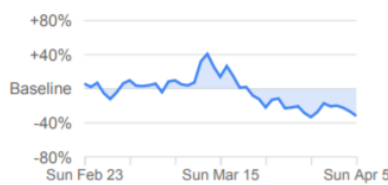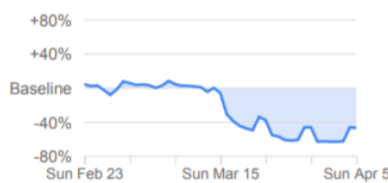
## Mobility changes in Canada for March 29, 2020

Here is how movement around certain places has changed in Canada after physical distancing and orders to stay at home.

**Grocery & pharmacy** -35%

Grocery markets, food warehouses, farmers markets, specialty food shops, drug stores, and pharmacies

-59% **Retail & recreation**

Restaurants, cafes, shopping centres, theme parks, museums, libraries, and movie theatres

**Parks** -16%

National parks, public beaches, marinas, dog parks, plazas, and public gardens

-66% **Transit stations**

Public transport hubs such as subway, bus, and train stations

**Residential** +14%

Houses, apartment buildings and condos

-44% **Workplaces**

Offices, retail outlets, etc.

Changes are compared to a baseline that is the median value for that day of the week during the five week period between Jan 3–Feb 6, 2020

CTV NEWS

**Appendix: From Environics: Percentage of Population Going Out of Their Homes on Weekends Dropped Almost in Half from Feb to April 2020:**
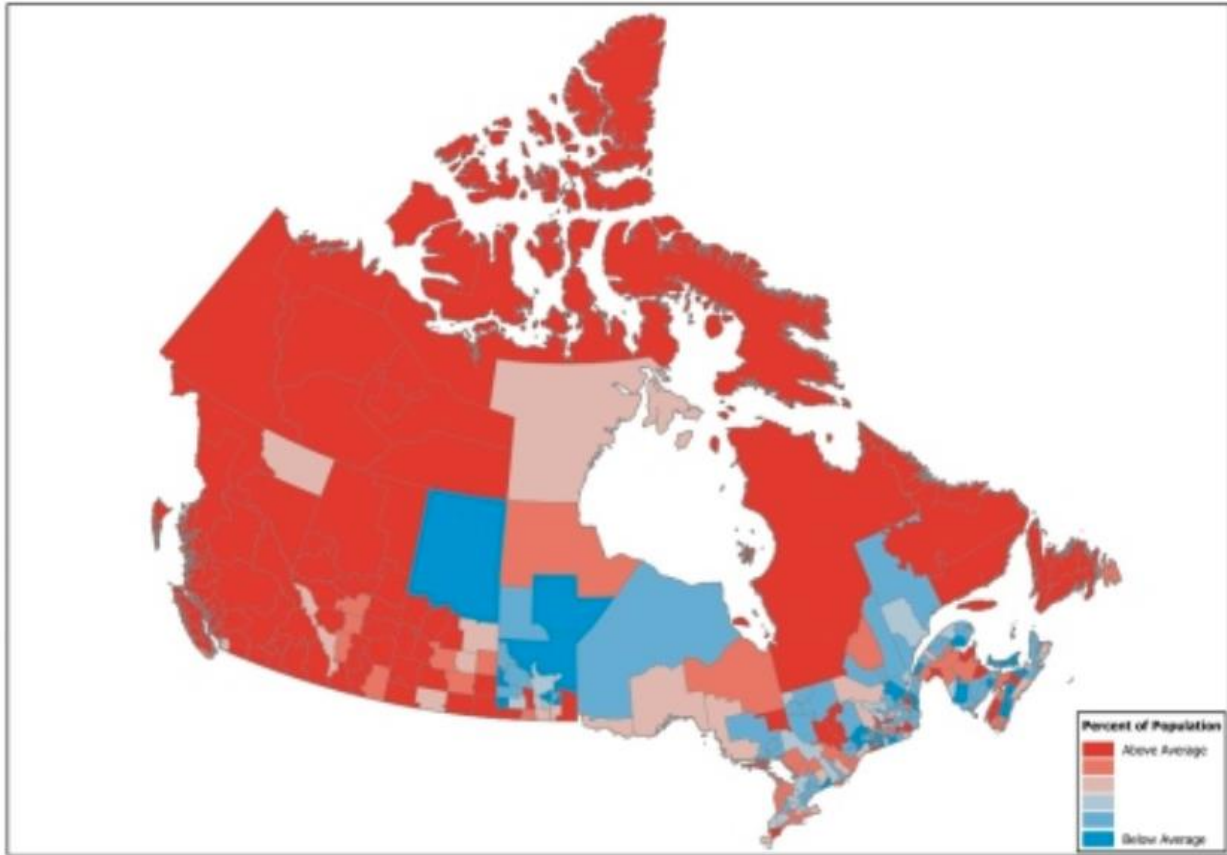


*Figure 1 - Environics Analytics' depiction of degree to which people were 'out and about' on the April 4-5 weekend (as compared to February. Pink, orange and red means a larger share of the population than 'average' was out in the community that weekend. Data was drawn indirectly from cell phone with location turned on; sample sizes are unknown but were analyzed by Census Diuvsion. Although the CDs in Southern Ontario are small, it appears that Northumberland, Hastings, Lennox and Addington, the City of Ottawa and the United Counties of Prescott and Russell were 'below average' in the share of people out and about. The others appear to be higher than average although often not by much. Remember that the analysis may not have separated towns and cities from rural data for areas outside the GTA. In February, between 26 and 32% of householders went out on weekends. By April, the number had dropped to 16% (national average).*