

**Strategic**  
**Transportation  
& Development**  

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**Analysis**

**OARC – Transportation Committee**  
**August 23<sup>rd</sup>, 2024**



**Department of  
Transportation**

# Content:

- Analysis Overview & Context
- Step 1: Existing Conditions & Stress Test
- Step 2: Develop Actionable Recommendations

## STEP 1

### Review Existing Conditions & Conduct Stress Test

Gather insights and analysis to **identify transportation and economic development needs and opportunities**

## STEP 2

### Identify Recommendations

Use insights and analysis to **identify actionable recommendations for transportation system projects to support economic growth**

### Submit Findings

Deliver analysis to the Governor and Legislature by December 31, 2024



# Analysis Overview

## Purpose, Process, & Schedule



# HB23, Section 203.47

**A statewide study of the Ohio transportation system, in collaboration with the Department of Development and the Governor's Office of Workforce Transformation. The study shall:**

## STEP 1

- ✓ Analyze **statewide and regional demographics**, investigate **economic development growth opportunities**, examine **current transportation systems and capacities**
- ✓ Forecast **passenger and freight travel needs** over a ten-, twenty-, and thirty-year timeframe
- ✓ Identify **current and future transportation links**, evaluate and rank **current and potential risks of future system congestion**, and

## STEP 2

- Make **actionable recommendations** for **transportation system projects** to **support statewide economic growth**, including improving links between Toledo and Columbus and between Sandusky and Columbus
- At any time, individual hotspot locations may receive advanced analysis of conceptual remedies with planning level costs

**The study shall be completed by December 31, 2024.**

# Step 1: Existing Conditions & Stress Test



# Existing Conditions & Stress Test Analyses

**Statewide Demographics** – Population & household characteristics & forecasts

**Statewide Economics** – Industry trends, trade patterns, and tourism

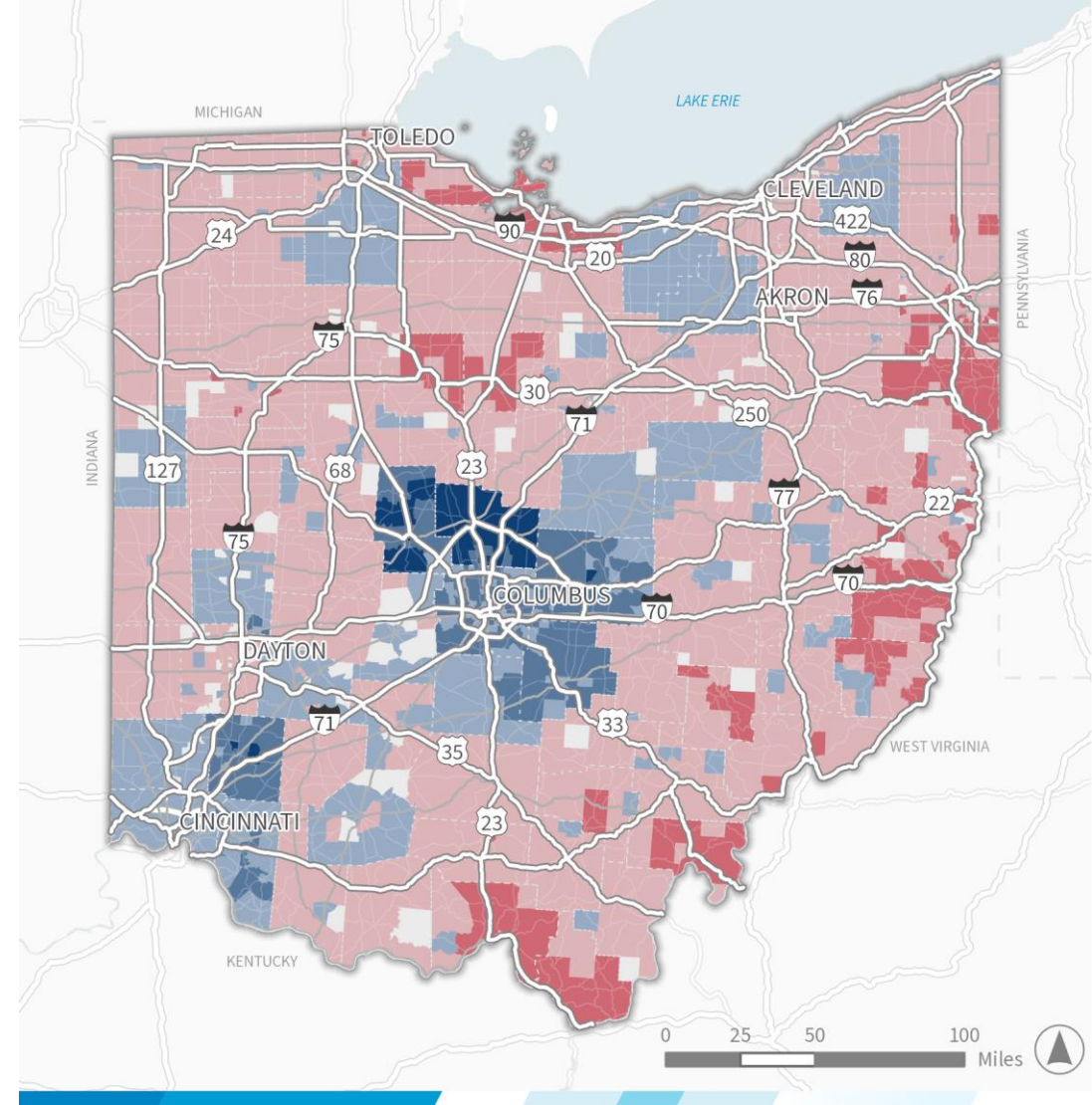
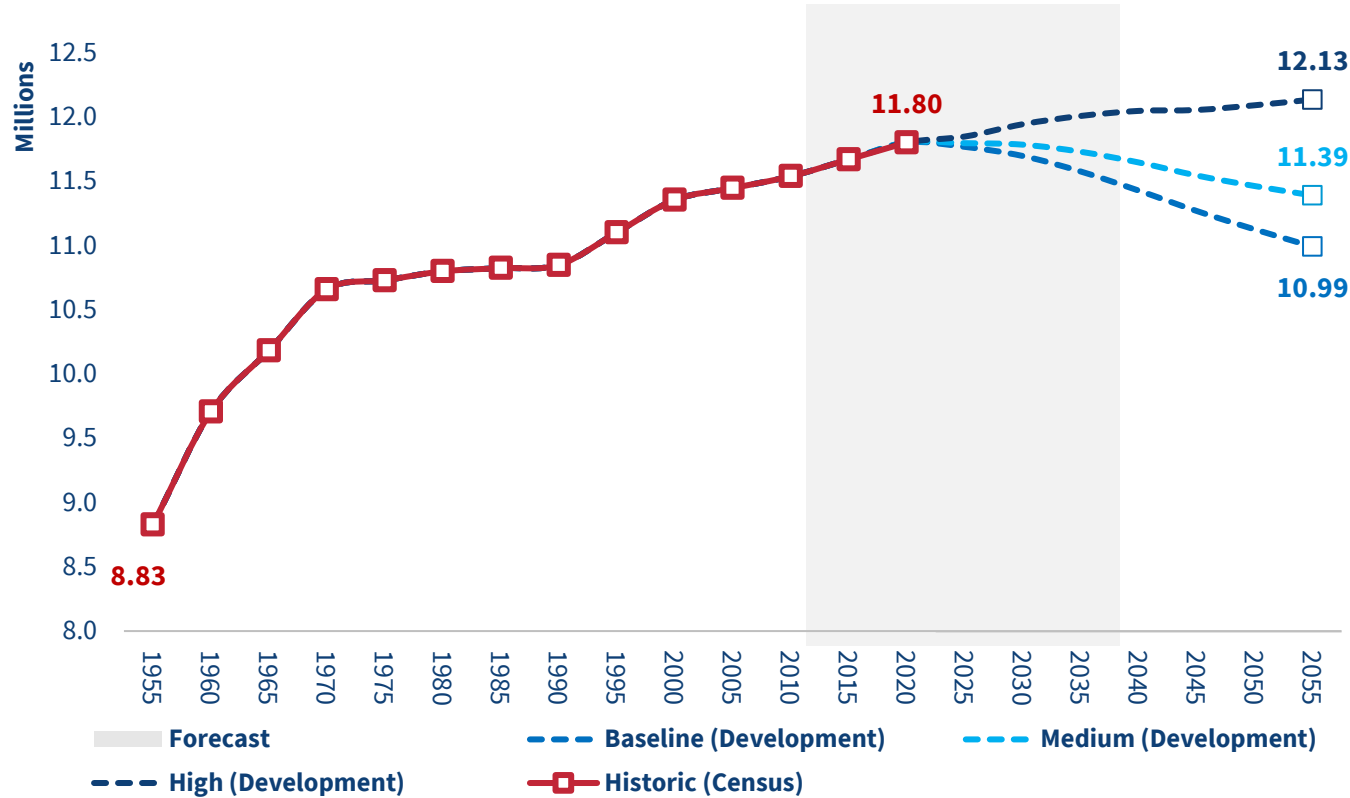
**Statewide Workforce** – Employment trends, including worker characteristics & commuting patterns

**Statewide Development** – Land use patterns & site development trends & plans

**Statewide Transportation** – Travel patterns, market connections, & system- & corridor-level congestion risks

# Statewide Demographics

## Statewide Historic & Projected Population Growth Scenarios



### Change in Population

Baseline Scenario, 2025 to 2055

- Decrease (15% or more)
- Increase (1% to 15%)
- Decrease (1% to 15%)
- Increase (16% to 30%)
- Minimal Change
- Increase (30% or more)

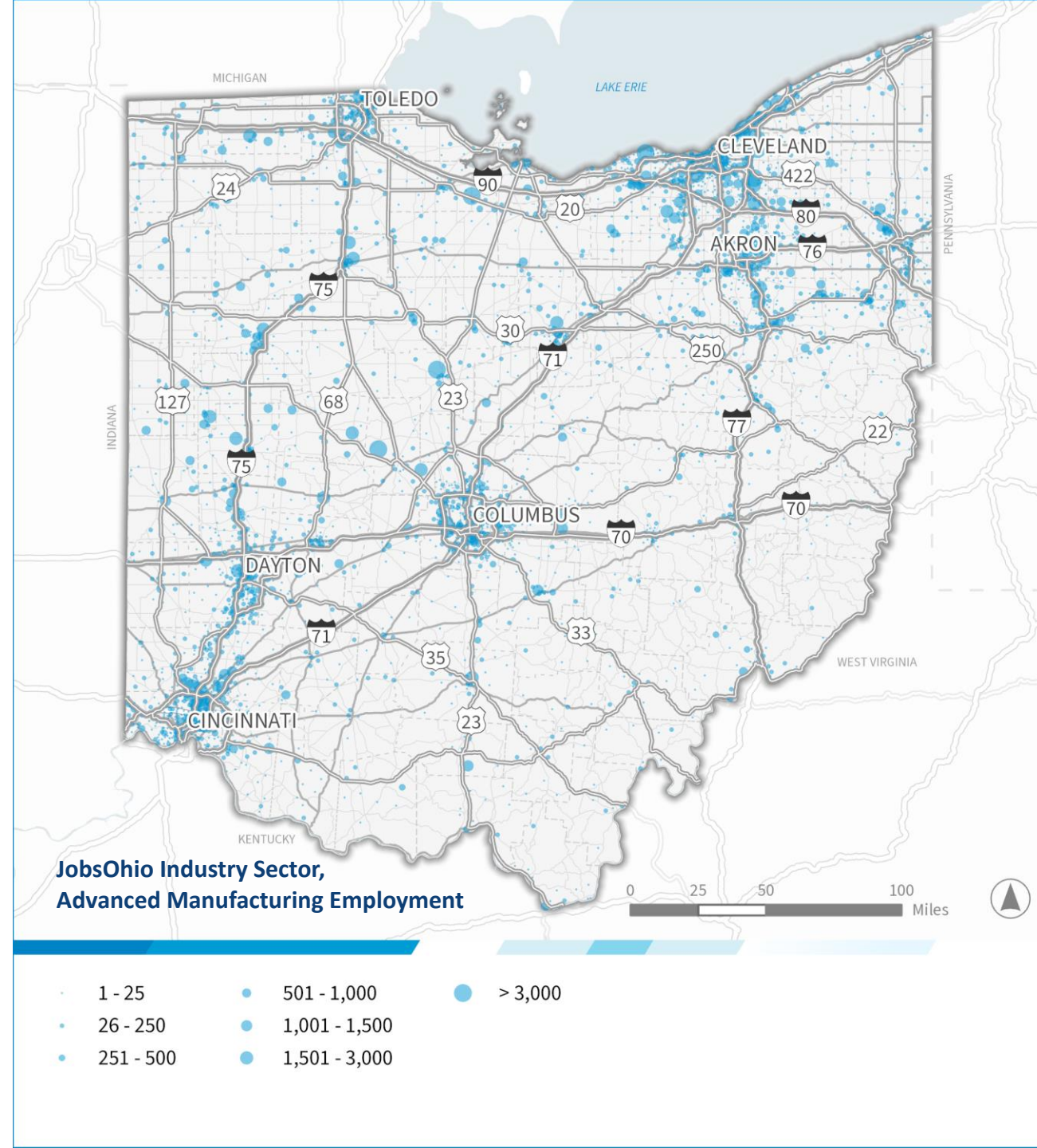
# Statewide Economics

TABLE 2 - EMPLOYMENT BY JOBSOHIO INDUSTRY SECTORS

Sector	2012	2022	Growth	Growth (percent)
Advanced Manufacturing	480,459	473,789	-6,670	-1%
Advanced Mobility	16,124	16,948	824	5%
Aerospace & Aviation	38,518	39,663	1,145	3%
Automotive	117,838	119,744	1,906	2%
Energy and Chemicals	183,034	200,189	17,155	9%
Financial Services	243,335	261,564	18,229	7%
Food and Agribusiness	75,737	86,353	10,616	14%
Healthcare	29,280	29,486	206	1%
Logistics and Distribution	411,412	480,674	69,262	17%
Military and Federal	17,469	17,994	525	3%
Technology	107,457	113,690	6,233	6%
<b>Total, all industries</b>	<b>5,048,166</b>	<b>5,392,612</b>	<b>344,446</b>	<b>7%</b>

Source: CS, BLS QCEW and JobsOhio Sectors

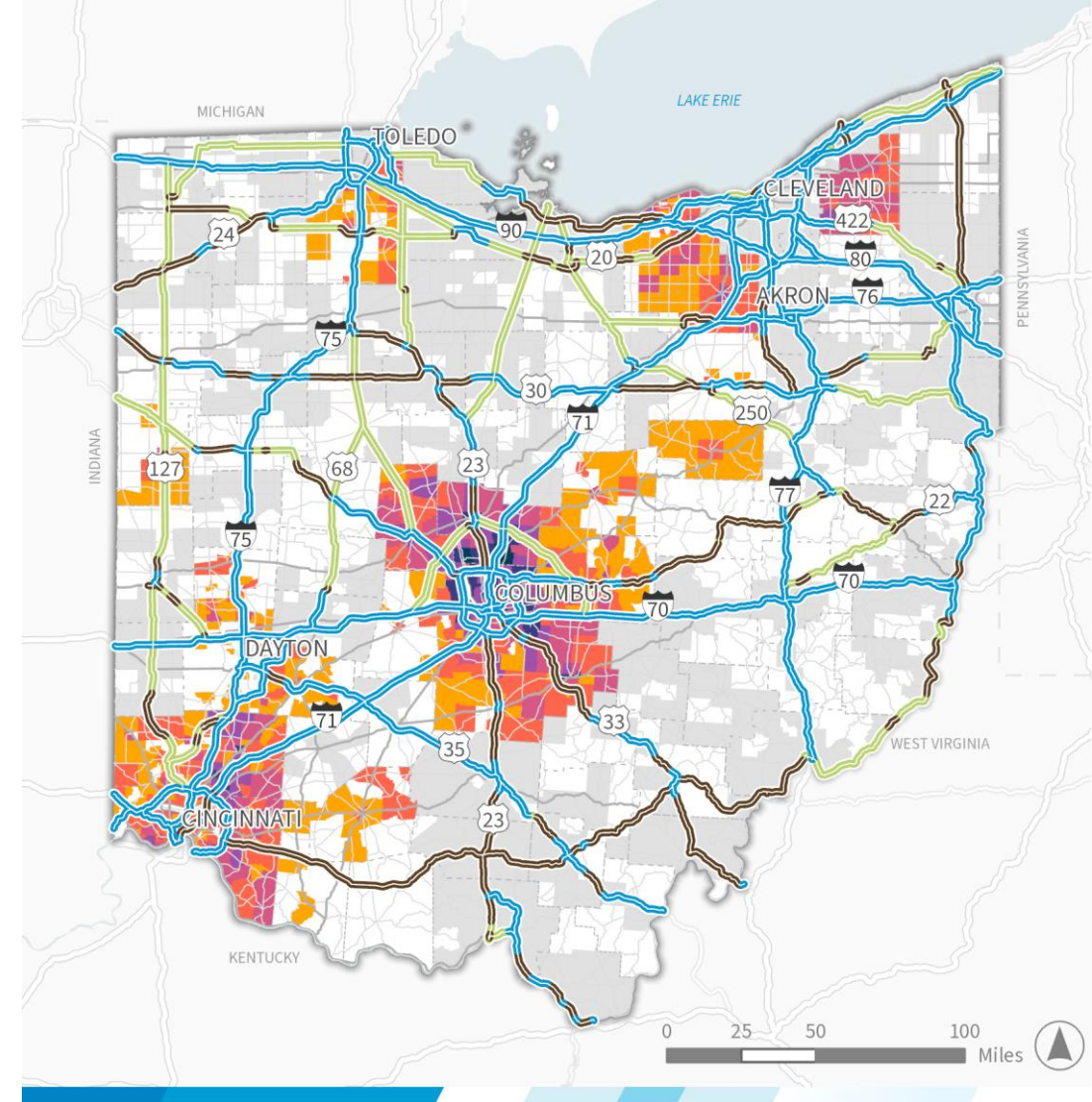
Note: Employment in individual JobsOhio Sectors cannot be summed together because certain underlying NAICS codes are assigned to multiple sectors.





# Statewide Development

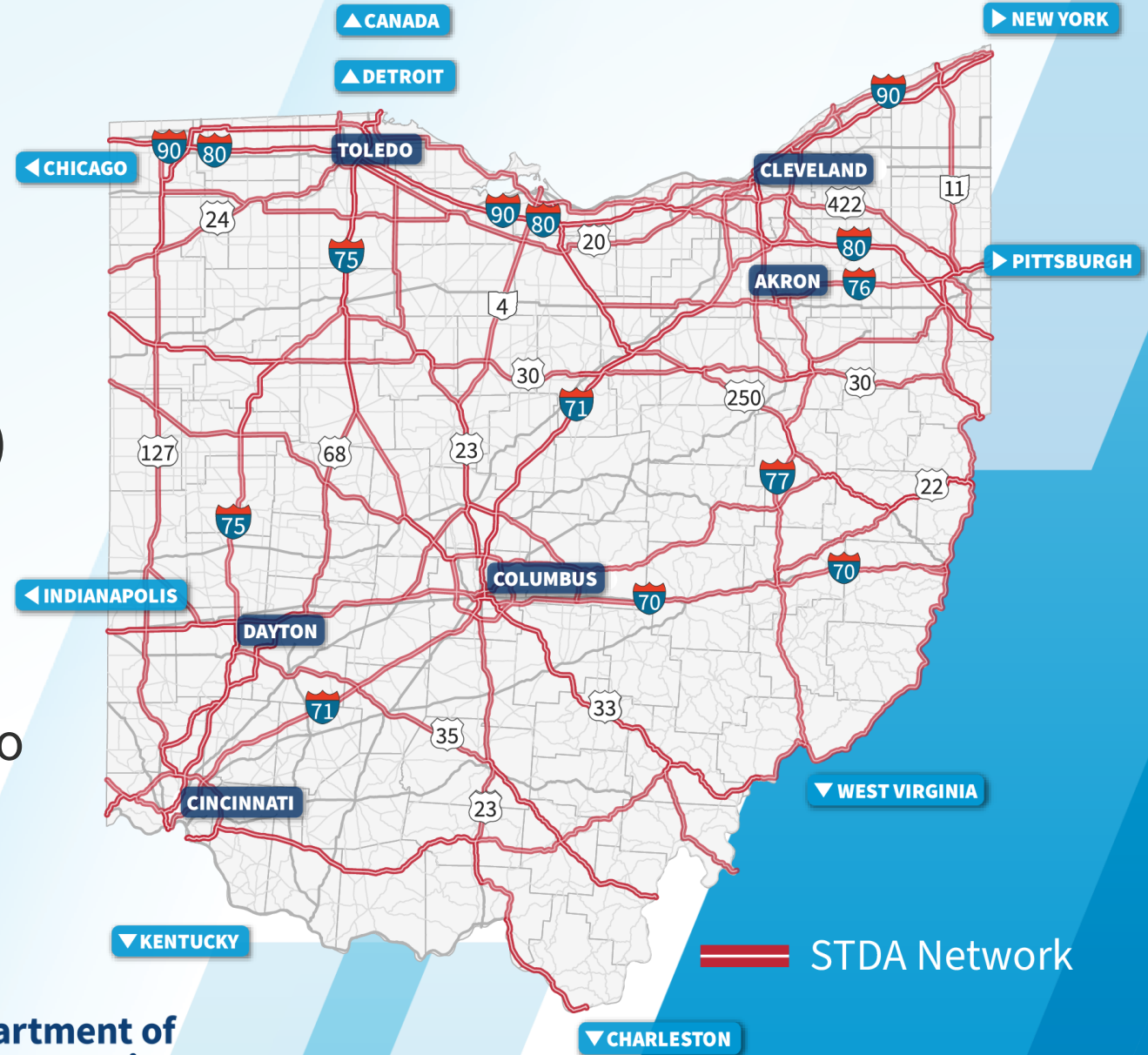
- Historic, current and future land use patterns and areas of potential significant growth
- Site development trends and plans
- Anticipated growth areas along network segments with partial or no access control



# Statewide Transportation

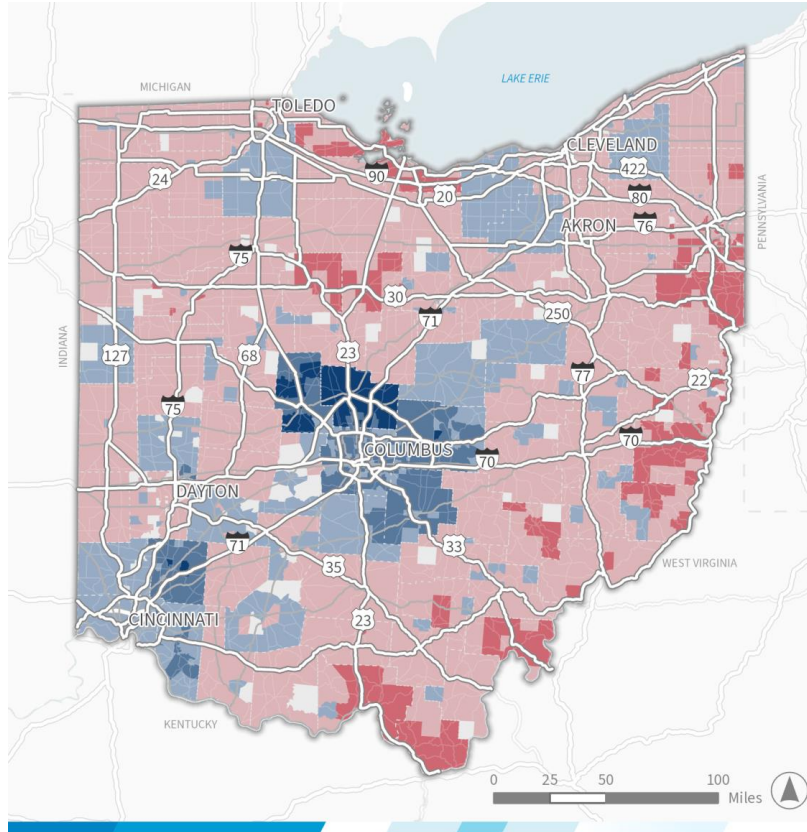
## STDA Network

- **Market Connections** (interregional)
  - **44** markets connected by...
  - **38** corridors (64 unique paths)
- **Regional Networks** (intraregional)
  - **7** regions (representing JobsOhio regions and combination of MPOs/RTPOs)



# Forecasting Future Congestion

## Population Change

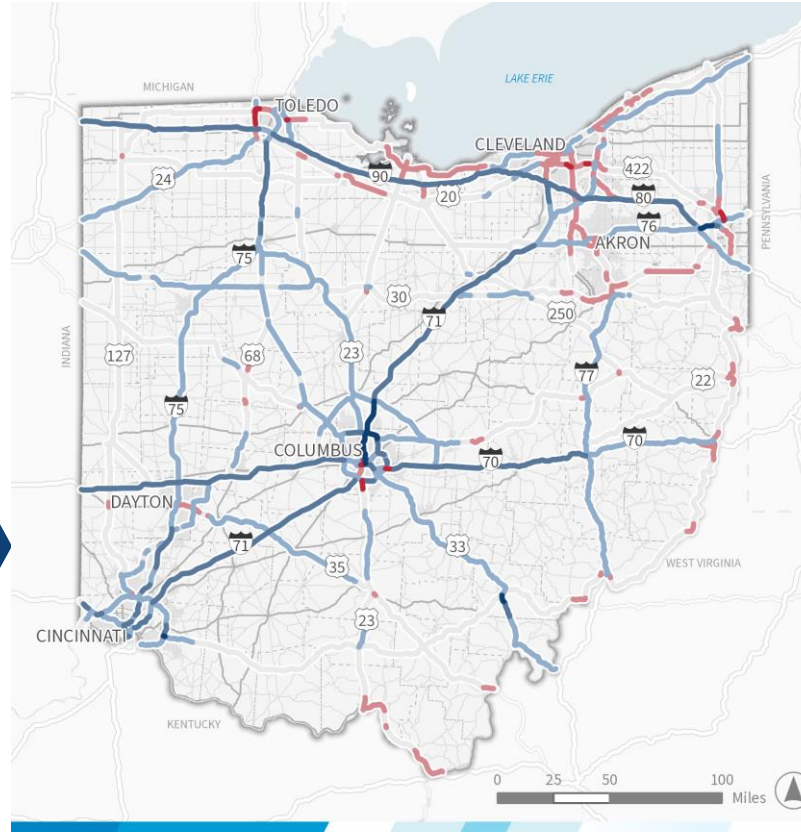


### Change in Population

Baseline Scenario, 2025 to 2055

- Decrease (15% or more)
- Increase (1% to 15%)
- Increase (16% to 30%)
- Increase (30% or more)
- Minimal Change

## Traffic Change

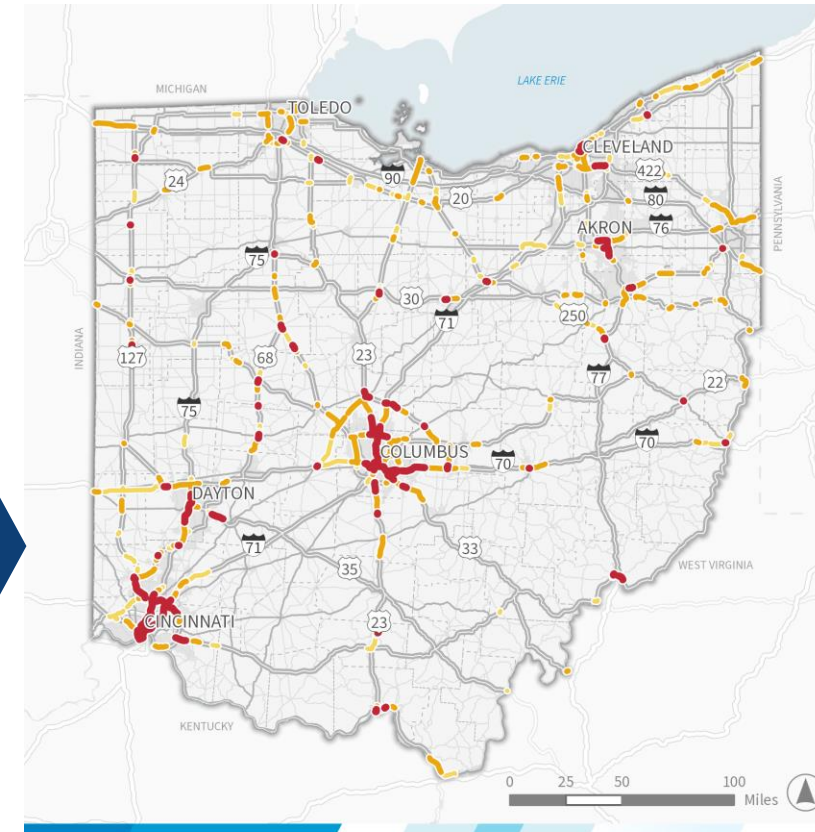


### Change in Total Volume

Baseline Scenario, 2025 to 2055

- Less than -5,000
- 4,999 to -500
- Minimal Change
- 501 to 5,000
- 5,001 to 10,000
- More than 10,000

## Congestion Forecast

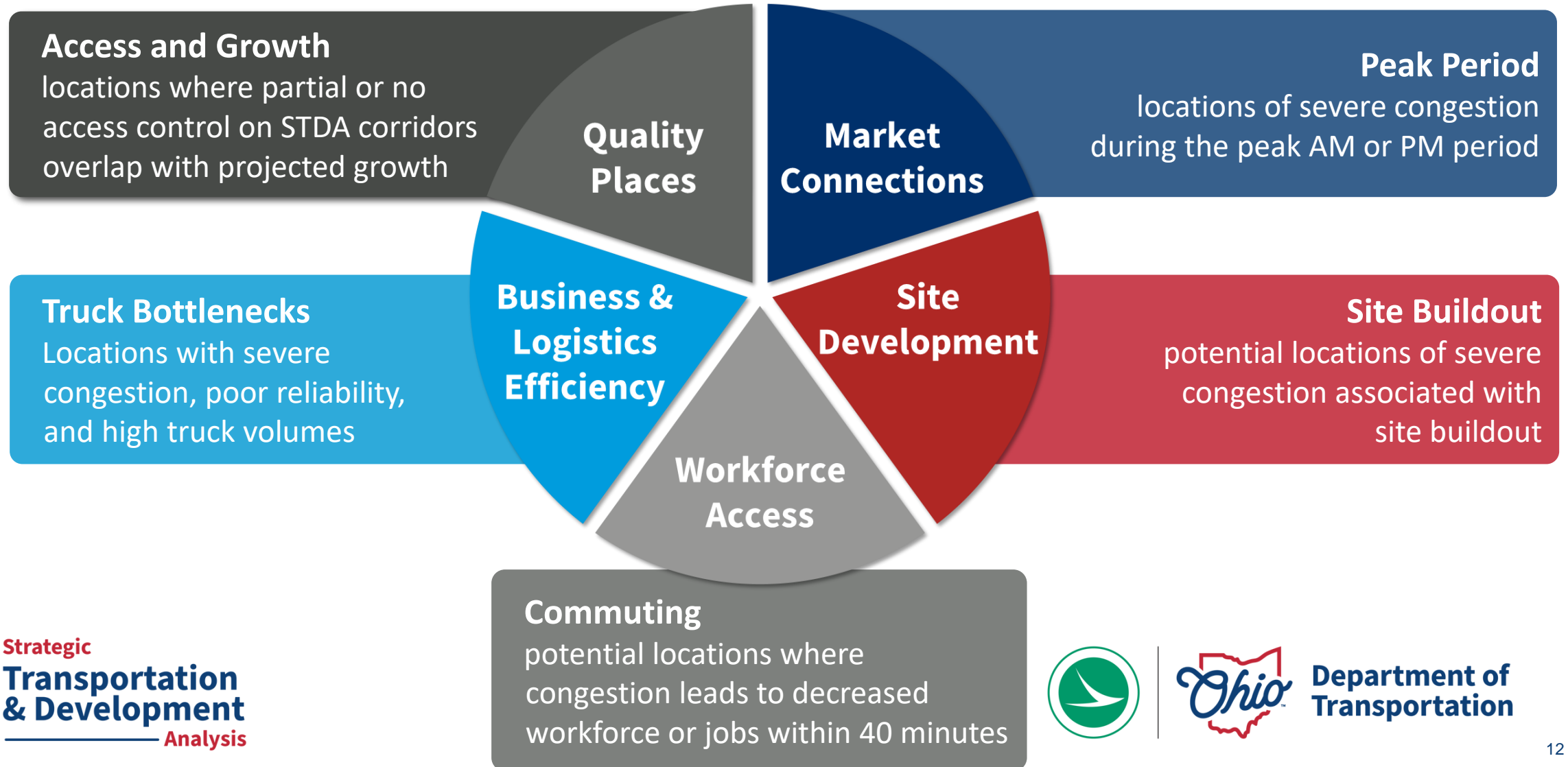


### Peak Period (Weekday) Congestion

Baseline Scenario, 2055

- Near Congestion
- Congestion
- Severe Congestion

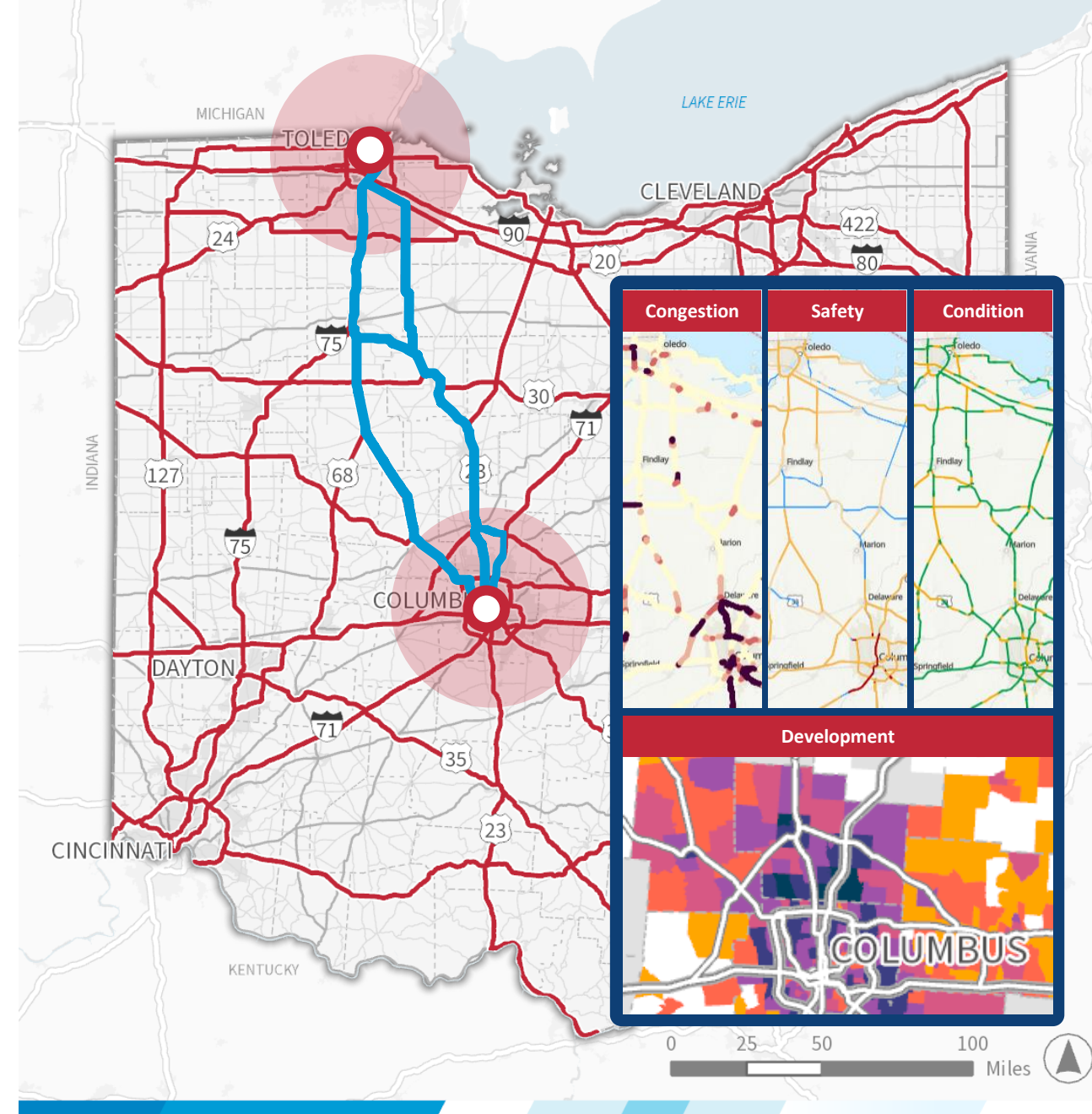
# Risks: Views of System Congestion



# Market Connections

(Toledo - Columbus Example)

- Defined the primary links used to connect trade/travel market today and travel characteristics.
- Analyzed transportation performance issues that exist along these facilities today.
- Identified where future performance may suffer due to potential development and population change.
- Evaluated economic value in relation to other economic corridors.



# Step 2: Develop Actionable Recommendations



# Recommendations

## “Actionable” Recommendations

Hotspot Strategies

Corridor Improvement  
Strategies

Statewide Strategies

# Statewide Policy/Program Review

## Market Connections

- Access management policy and process
- Corridor management and preservation programs
- Corridor operations and technology programs

## Site Development

- Site readiness and authentication processes
- Site readiness incentive/funding programs
- Site access improvement programs

## Workforce Access

- Programs supporting commute flexibility
- Multimodal programs
- Private/employer funded/operated programs

## Business and Logistics Efficiency

- Commercial vehicle programs supporting safe/efficient operations
- Rural development and investment programs
- Statewide safety and traffic management programs

## Quality Places

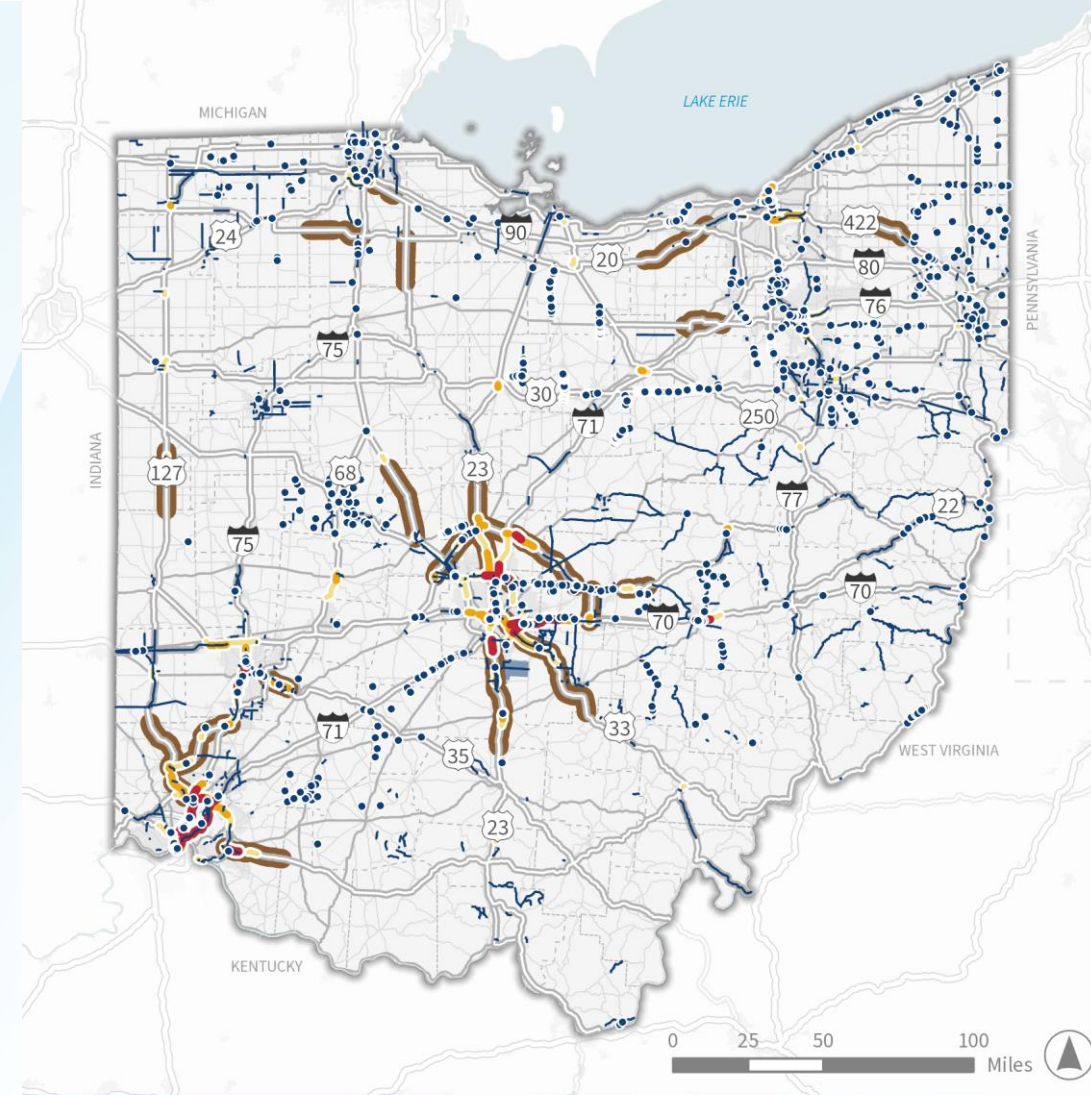
- Complete streets and active transportation programs
- Local/community investment/development programs
- Tourism and recreation related programs





# Hotspot Strategies

- Review existing and planned projects compared to risks to determine gaps
  - Major ODOT investments
  - Ongoing ODOT project development
  - MPO/RTPO transportation plans
- **Identify ODOT next steps to address gaps**



## Major Capacity / Mobility Projects

- Intersection / Interchange
- Roadway Alignments
- General Areas

## Composite Congestion Risks

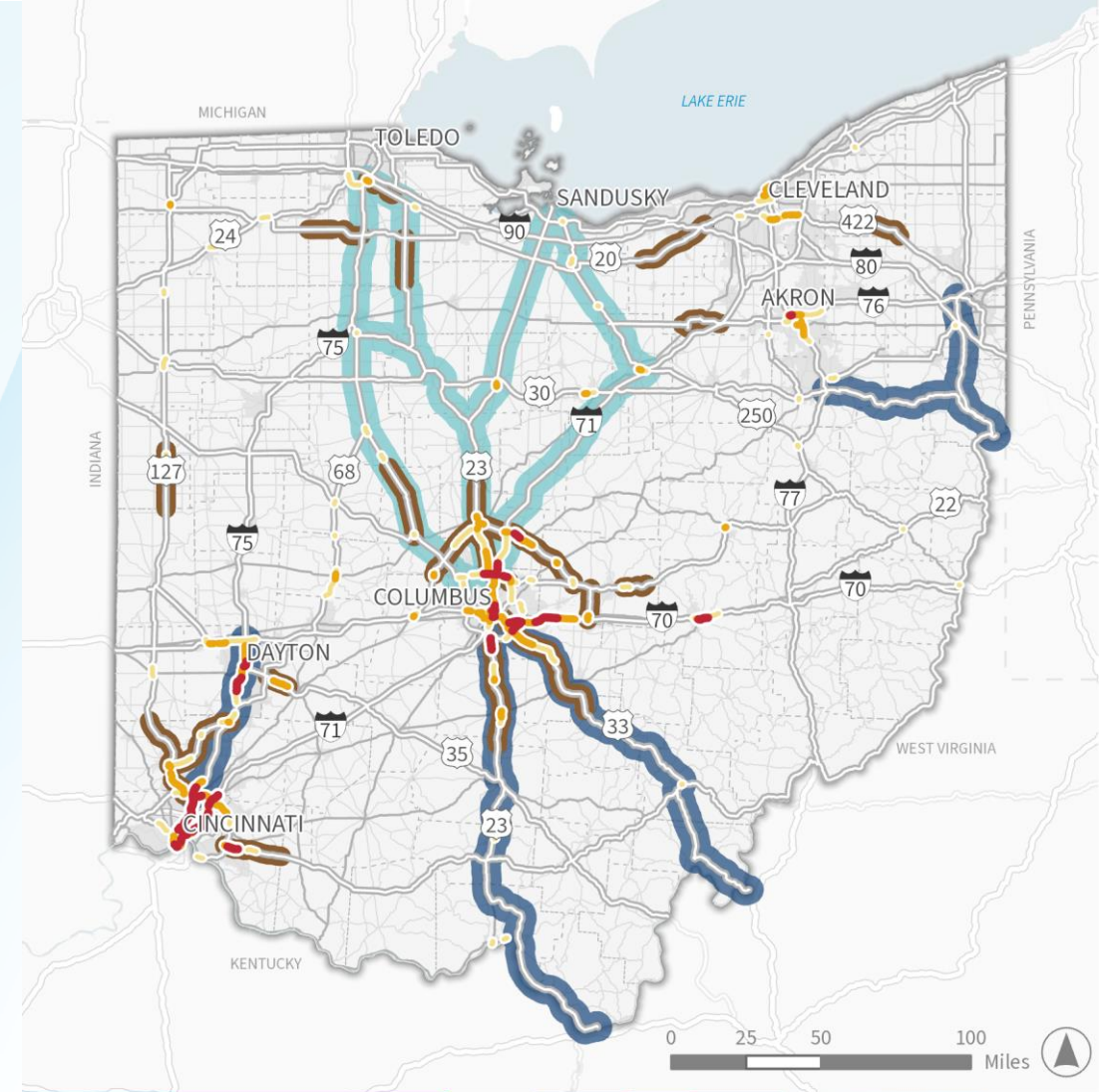
All Scenarios, 2055

- 0 Risk Types
- 1 Risk Type
- 2 Risk Types
- 3 Risk Types
- Partial or No Access Control Corridors in Growth Areas



# Corridor Improvement Strategies

Corridor	ODOT District Overlap
<b>Corridors Required by HB23:</b>	
Sandusky – Columbus (SR 4, US 23, US 250, I-71)	D3, D6
Toledo – Columbus (I-75, US 23, SR 15, US 68, SR 31, US 33)	D1, D2, D6
<b>Additional Corridors:</b>	
Columbus – KY (US 23, US 52)	D6, D9
Columbus – WV (US 33)	D6, D10
Cincinnati – Dayton (I-75, SR 4)	D7, D8
Canton/Youngstown - Pittsburg (US 30, SR11)	D3, D4, D11



## Priority Corridors

- █ Statutorily Required Corridors
- █ Additional Corridors
- █ Partial or No Access Control Corridors in Growth Areas

## Composite Congestion Risk

All Scenarios, 2055

- █ 0 Risk Types
- █ 1 Risk Type
- █ 2 Risk Types
- █ 3 Risk Types



# STDA Deliverables

STDA Deliverables	Content
<b>STDA Report and Executive Summary</b>	Substantive report that fully addresses HB23 (includes a standalone executive summary document)
<b>Technical Reports and Appendices (8 total):</b> <ul style="list-style-type: none"> <li>• 6 CIS Technical Reports</li> <li>• 1 Engagement Appendix</li> <li>• 1 Methodology Appendix</li> </ul>	Technical reports and appendices documenting entire STDA, including six CIS
<b>Summary Fact Sheets and Presentations (x)</b> <i>(pending ODOT direction)</i>	Regional profiles (7, one for each JobsOhio region); other factsheets and presentations for key topics as needed

Shared through **STDA website**

Interactive access to data and maps through **STDA BI Tool**





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