

Strategic Transportation & Development Analysis

A Comprehensive Effort to Keep Ohio Moving and Growing

In House Bill 23, effective July 1, 2023, Governor Mike DeWine and the Ohio Legislature directed the Ohio Department of Transportation (ODOT) to conduct a strategic analysis of Ohio's highway corridors and how they can support statewide economic growth.

The Strategic Transportation and Development Analysis is a comprehensive review of Ohio's transportation system in the context of ODOT's broader mission to provide a transportation system that is safe, accessible, well-maintained, and positioned for the future. The Study identified current and future congestion risk "hotspots" on major highways across Ohio. Most are being addressed or partially addressed by ODOT projects or related planning efforts that are underway.

Approach

The Study examined development trends, including statewide and regional demographics, economic development opportunities, passenger and freight travel needs over the next 10, 20, and 30 years, and transportation system congestion risks in seven economic regions and along six interregional corridors. This includes Toledo to Columbus and Sandusky to Columbus, as explicitly referenced in House Bill 23.

Engagement

The Study also included robust stakeholder engagement with more than 500 transportation and economic development stakeholders across Ohio, including elected officials, business leaders, and regional and local governments through interviews, listening sessions, a statewide webinar, and a statewide survey.

The Study's outcome is a better understanding of how Ohio's transportation system – particularly its major highways – influences and supports statewide economic growth.



Where Ohio is Today and Where it is Going

Ohio's economy and quality of life rely on the transportation system, which is the backbone for moving people and goods within Ohio and between Ohio and the world. Current and future trends across demographics, economics, workforce, and development impact the system's performance today and into the future.

Demographic Key Findings

In 2023, Ohio's population was 11.8 million, ranking it the seventh largest in the nation.

Ohio's population could increase by up to 334,000 people by 2055 due to:

- Increased economic opportunity
- Affordable housing/cost of living
- Geopolitical stability
- Migration away from areas threatened by extreme weather

Economics Key Findings

In 2023, Ohio's GDP was \$872.7 billion, the seventh highest in the nation. Ohio's multimodal transportation system, including its highways, rail corridors, airports, transit systems, and marine ports, supports the industries and the workforce that drive the state's economy.

Ohio's Largest Industries Today *(Ranked by number of employees)*

- Education and Health Services
- Professional and Business Services
- Leisure and Hospitality
- Trade, Transportation, and Utilities

In addition to these statewide industry rankings, the seven JobsOhio regions have distinctive economic characteristics that create competitive advantages in Ohio, the Great Lakes region, and nationally.

Workforce Key Findings

In 2022, nearly 6 million Ohioans participated in the workforce. Employment growth is positive in almost all sectors, with business and financial services and trade, transportation, and utilities sectors driving growth.

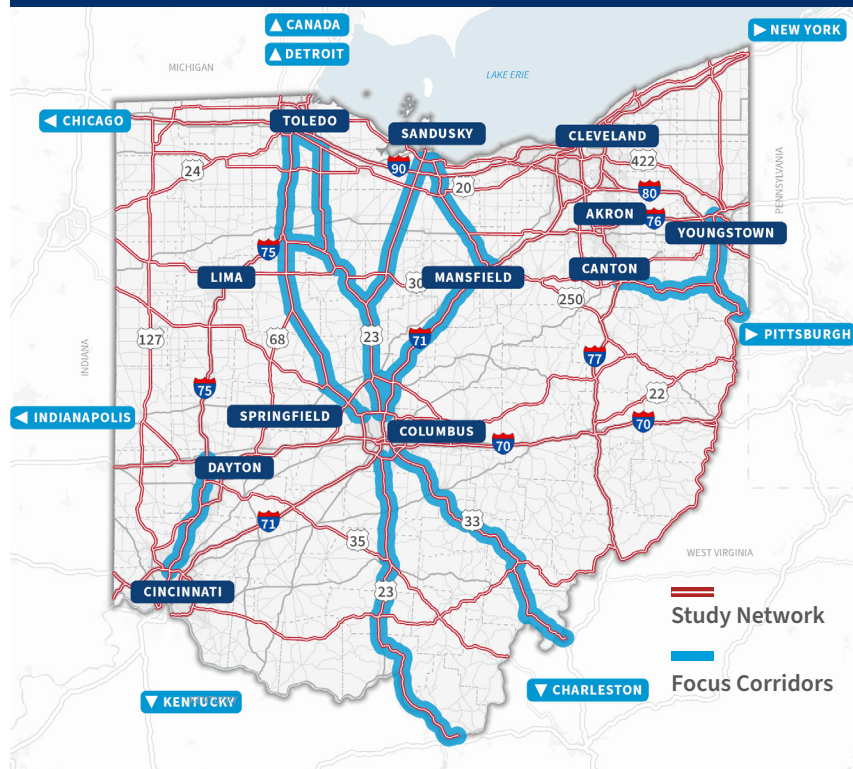
The Study found current and future workforce access challenges in some regions, jeopardizing economic growth and productivity. Workforce access is the number of workers accessing an employment site within 40 minutes. However, the emergence of remote work could help mitigate future workforce access challenges.

Development Key Findings

Since 1990, many urban and suburban counties have experienced widespread land use changes. Others have not. Some city centers have become denser, and mixed-use development has reemerged. More localized growth is expected around the state.

The Columbus, Cincinnati, and Dayton triangle is forecasted to have the most widespread development changes.

Focus Corridors



Source: Strategic Transportation and Development Analysis Team

How Ohio's Transportation System Supports the Economy

Ohio's highway network moves people and goods across the state and beyond. While travel volume on Ohio's entire highway network is expected to remain relatively stable, travel on the Study Network, a smaller portion of the highway network, is forecasted to grow up to 18% through 2055.

Study Network Hotspots

The Study identified 72 congestion risk hotspots on the Study Network that may constrain economic growth opportunities across Ohio's seven regions.

Focus Corridor Congestion Risks

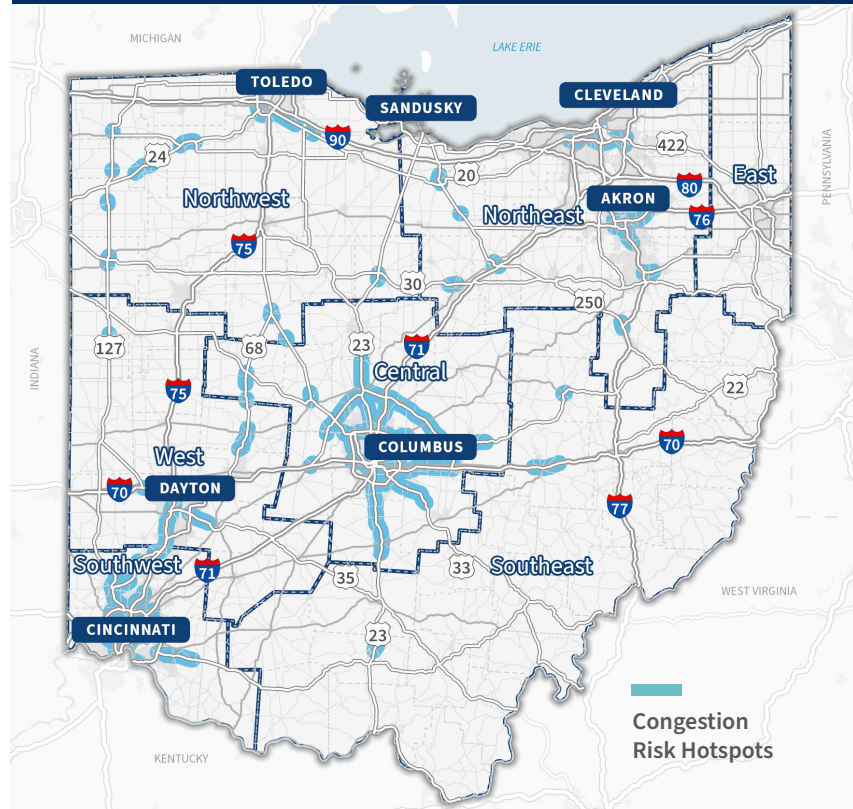
Travel patterns and the performance of interregional connections on the Study Network were also analyzed. Interregional corridors provide direct, high-capacity connections to existing industry clusters, skilled workforces, and priority development sites across Ohio and connect primary markets across the state.

Based on these findings, six focus corridors were identified for further investigation:

- Toledo-Columbus (explicitly referenced in House Bill 23)
- Sandusky-Columbus (explicitly referenced in House Bill 23)
- Columbus-Kentucky/West Virginia (US23, US52)
- Columbus-West Virginia (US33)
- Cincinnati-Dayton (I-75)
- Canton/Youngstown-West Virginia/ Pennsylvania (US30, SR11)

Many corridors operate well today and are forecasted to continue to operate well into the future. Locations with multiple and widespread congestion risks are primarily in the Central Ohio and Southwest Ohio regions, with additional segments in the urbanized areas of Cleveland, Akron, and Dayton.

Congestion Risk Hotspots



Source: Strategic Transportation and Development Analysis Team

Findings

Ohio's interregional trade corridors are vital to the state's economic growth, but select corridors face congestion risks.

- Site development creates opportunities and risks.
- Shifts in Ohio's workforce will impact demand for transportation.
- Growth in truck volumes will impact system preservation, efficiency, and operations.
- The intersection of development pressures and transportation needs vary significantly across Ohio.

Actionable Recommendations

The Strategic Transportation and Development Analysis identified priority areas facing transportation risks that could negatively impact statewide economic growth. Existing ODOT projects already manage risks in most of these priority areas.

There are three types of priority areas:

- Priority areas with projects in progress, either already in construction or in development
- Priority areas with studies in progress that, when completed, will position ODOT with new projects to manage risks
- Priority areas that need project development

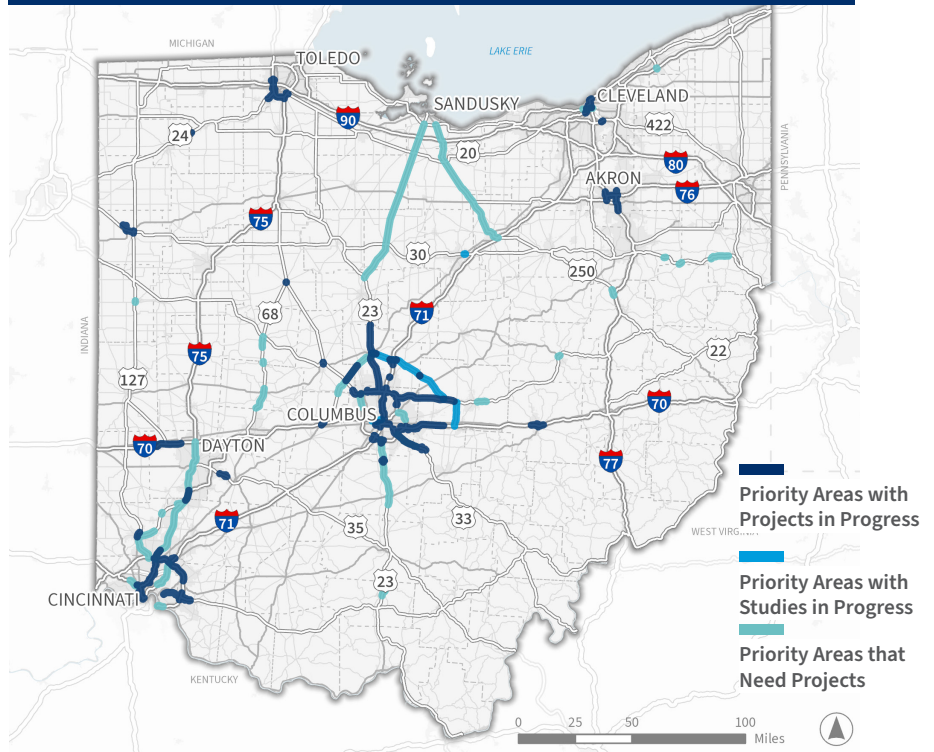
The priority areas include:

- 72 congestion risk hotspots identified through the regional Study Network analysis.
- Six segments identified through the focus corridor need assessments where congestion, safety, access management, or other corridor constraints limit interregional mobility for people and goods.



Download the full report, accompanying appendices, and a digital interactive mapping tool at transportation.ohio.gov/stateridestudy.

Priority Areas, Projects, Studies, and Needs



ODOT is actively developing highway projects to expand capacity and improve operations that will manage congestion risks at 51 of the 72 hotspots.



Department of
Transportation