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Executive Summary

The purpose of this paper is to support the development of Access Ohio 2045 (AO45) by providing an overview of Ohio’s travel and tourism industry, assessing trends in the industry to better understand visitors’ needs, and subsequently recommend ways to better integrate travel and tourism considerations in Ohio’s statewide transportation planning process. The travel and tourism information in this paper comes primarily from TourismOhio, the state’s tourism agency.

CURRENT STATE OF TRAVEL AND TOURISM IN OHIO

Travel and tourism is a growing industry in Ohio with visitor spending and tourism visits increasing at annualized rates of 3.7 percent and 3 percent, respectively, from 2013 to 2017. It generates 10.6 percent of the state’s sales tax revenue, which equates to $4.1 billion in taxes collected from 2012 to 2016. Additionally, the travel and tourism industry supports 428,000 jobs in the state, with Ohio ranking 7th in the nation for jobs supported by the travel economy.

Given tourism’s importance in Ohio’s economy, transportation investments by the state that ensure safe and reliable access for visitors could contribute to economic growth. This is underscored in 2016’s Fixing America’s Surface Transportation Act (FAST Act), which requires states and Metropolitan Planning Organizations (MPOs) to consider enhancing travel and tourism as a factor in their transportation planning processes.

Currently, ODOT supports the travel and tourism industry by providing tourists information (e.g. maps, online traffic updates, tourist-oriented directional signs, scenic byway trip planning resources) and offering support to those in the travel and tourism industry. This support comes in the form of assistance to the rail tourism industry, guidance on scenic byway designation, Transportation Alternatives Program funding, and designation of State and U.S. Bicycle Routes.

EMERGING TRENDS AND OPPORTUNITIES

TourismOhio continues to focus on the growth of tourism in the state through increased outreach which includes expanding TourismOhio’s marketing campaign to new states, offering advertising assistance to destinations, attractions and event organizers, as well as promoting Ohio Adventure Trails and Road Trips focused on food, shopping, coffee, history, sightseeing and spirits trails. Ohio Adventure Trails and Road Trips vary in size and scope; some are concentrated regions while others traverse the state.

TourismOhio focuses its marketing strategy on region-based travel instead of specific attractions. This makes visitors aware of all nearby attractions in each region, so tourists may choose to go to more than one site based on proximity. In addition to the geographic regions (Northeast, Northwest, Southeast, Southwest, and Central), TourismOhio highlights the Amish Country region, which they believe has the potential for more tourist visits given an increased planning focus and opportunity for motor vehicles and buggies to safely share the road.

Other potential areas for tourism growth which TourismOhio believes could benefit from improved transportation infrastructure are the expanding attractions in Sandusky (e.g. new indoor waterparks), new...
developments in northern Columbus (e.g. Planet Oasis), and the additional shuttles and tours being planned for Ashtabula Wine Country. Continuing to work on designating State and U.S. Bicycle Routes (USBRs) as originally recommended in Access Ohio 2040 (AO40) is an opportunity to support bicycle tourism and travel to and throughout Ohio. Potential enhancements to intercity passenger rail travel is another area that could be assessed to further support tourism in the State. Finally, noting the continued growth in travel to Ohio’s major cities, TourismOhio considers reliable transportation to airports and downtown areas an increasingly critical and strategic service.

However, to properly incorporate travel and tourism needs into transportation planning, ODOT needs data such as tourism origin-destination patterns and seasonal characteristics. Analyzing and applying this type of data to determine how systems level transportation investment and services benefit tourists could support the Economic Competitiveness goal proposed in AO45. Such efforts could serve to refine measures which track the interrelationship between travel and tourism and transportation planning and could also better inform the development of Ohio’s Strategic Transportation System (STS), which ODOT will review as part of AO45. Additional collaboration between the travel and tourism industry and ODOT could also lead to the development of new coordination points and identify stakeholders when transportation projects impact tourism access. Finally, given ODOT’s role in the state’s scenic byway program, specifically its oversight of the byway organizations’ Corridor Management Plans (CMPs), ODOT could consider incorporating the CMPs in its planning process to ensure that the scenic byways continue to retain the qualities that led to the designation.
Introduction

OVERVIEW OF THE ROLE AND IMPACT OF TRAVEL AND TOURISM IN OHIO

Domestic travel spending in the United States has increased by 84 percent (4.15 percent annualized) from 2002 to 2017 and is anticipated to grow by an additional 22 percent (4.05 percent annualized) from 2017 to 2022 (Figure 1).1 Like other states, Ohio aims to capitalize on this projected growth by drawing visitors, and their spending dollars, to its attractions and events. This effort is led by Ohio’s tourism agency, TourismOhio, which is tasked with making the state’s tourism industry a significant driver of economic prosperity.

TourismOhio data for 2017 (Figure 2) highlights the recent growth of tourism in Ohio. Full results are posted on its website and include:2

- Since 2013, the annualized growth rate for visitor spending has been 3.7 percent.
- Since 2013, the annualized growth rate for tourism visits has been 3 percent.
- Tourism supported jobs (full time, part time, seasonal) increased by 1,000 from 2016.
- 42 million tourism visits were overnight trips.

In subsequent discussions with TourismOhio, they noted that of the 219 million tourism visits to state attractions, the majority are Ohioans, with Michigan, Pennsylvania, and Indiana topping the list.

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in terms of origin of out-of-state visitors to Ohio.

In 2016, the Ohio Travel Association, the Ohio Association of Convention and Visitors Bureaus, and the Ohio Hotel & Lodging Association developed a report titled *Ohio Tourism Works*. In addition to highlighting the state’s various tourism accolades (Figure 3), the report quantifies the travel and tourism industry’s contributions to the state. The industry generates 10.6 percent of total sales taxes collected by Ohio, which has resulted in $4.1 billion in taxes collected from 2012 to 2016. The report also notes that while FY 2016 saw an average expansion of 1.1 percent in sales tax collections among Ohio industries, sales tax collected by the travel industry expanded by 2.6 percent that year, generating $915.7 million in tax receipts. Additionally, the report cites that Ohio ranks 7th in the nation in the number of jobs supported by the travel economy.³

### Travel & Tourism in Ohio:

- 10.6% of state tax revenue,
- $4.1B in taxes from 2012-16,
- 7th in the nation for jobs supported by travel economy

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**FIGURE 3 - OHIO TOURISM ACCOLADES**

| **Cedar Point** is a 16-time winner of the Golden Ticket Award by Amusement Today (goldenticketawards.com) |
| The Hilton Columbus Downtown won the prestigious Connie Award as best property across all Hilton brands for an unprecedented three years running |
| The Welsh Hills Inn in Licking County was voted the best B&B/Inn in the U.S., and no. 4 in the entire world, by the TripAdvisor Traveler’s Choice Awards |
| USA Today voted three Ohio zoos in their top 10 list: 1. Toledo Zoo, 2. Cincinnati Zoo, 3. Columbus Zoo and Aquarium (10best.com) |
| Cincinnati made it into the 50 best places to travel in the world in 2017 list by the Travel + Leisure (journal-news.com) |
| Cleveland ranks in the top five U.S. cities for business travel according to On Call International (Cleveland.com) |
| The Toledo Zoo’s Light Before Christmas were voted the best zoo light display in the USA Today’s 10 Best Readers’ Choice contest (toledoblade.com) |
| Ohio restaurants landed nine of the 100 spots on OpenTable’s list of Hot Spot Restaurants in America in 2017 (Cleveland.com) |
| Cleveland Museum of Art ranked 2nd best museum in the U.S. by Business Insider Magazine (clevescene.com) |
| Eight Ohio beers are in national ranking by Paste Magazine (Cleveland.com) |
| Gervasi Vineyard receives USA Today 10 Best Readers’ Choice Awards for Best Wine Country Hotel and Best Winery Restaurant (tasteohiowines.com) |
| Hocking Hills is in USA Today’s list for ten great places to bond on family vacations |
| Stan Hywet Hall & Gardens was named the #1 historic home tour in America for 2016, chosen by readers of USA Today and 10Best.com |
| Ohio is one of the best states in the country for beer lovers. Both Cincinnati and Columbus ranked in the top 10 cities for beer drinkers, according to a new report from SmartAsset (daytondailynews.com) |
| Rock and Roll Hall of Fame is featured in USA Today’s best museums exhibits in the U.S. for spring 2017 |
| Ohio Earthworks are globally significant, recognized by UNESCO for consideration as a world heritage sight |

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RELATIONSHIP BETWEEN TRAVEL/TOURISM AND TRANSPORTATION

The obvious relationship between tourism and transportation stems from the need of tourists and travelers to reliably access attractions and events. A 2004 Transportation Research Board (TRB) report titled *Integrating Tourism and Recreation Travel with Transportation Planning and Project Delivery* ("2004 TRB Report") notes that one reason certain states are farther along in the development of their tourism/transportation dialogue is their understanding of the role tourism plays in states’ economic vitality. Given tourism’s importance in Ohio’s economy, transportation investments by the state that enhance travel and tourism could contribute to economic growth in the state. Other conclusions from the report include:

- Transportation planning should consider tourism sites, particularly measures to ensure safe and convenient access to them while mitigating the congestion they may cause, and the differing needs of visitors traveling to the sites (e.g. elderly, handicapped).
- Transportation agencies desire improvements in the availability and detail of tourism travel data, with origin-destination patterns, visitor traffic counts, and seasonal characteristics being some of the most requested/helpful data points.
- Transportation and tourism agencies should assess where it makes sense to coordinate on project delivery from both planning and funding standpoints.

Fixing America’s Surface Transportation Act (FAST Act)

The importance of considering travel and tourism in transportation planning is underscored in 2016’s Fixing America’s Surface Transportation Act (FAST Act). The FAST Act requires states and MPOs to consider and implement strategies for enhancing travel and tourism as part of their transportation planning processes and requires MPOs to consult with tourism agencies and officials when developing their transportation plans.5

The FAST Act also created the National Advisory Committee on Travel and Tourism Infrastructure (NACTTI), which serves as a resource to the Secretary of Transportation on “matters relating to the role of intermodal transportation in facilitating mobility with respect to travel and tourism activities.” NACTTI members consist

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4 Transportation Research Board (TRB). (2004). NCHRP Synthesis 329 Integrating Tourism and Recreation Travel with Transportation Planning and Project Delivery
of executives from both the public and private sectors with backgrounds in either tourism or transportation. The full list of the committee’s roles is listed in Appendix A.

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6 USDOT. National Advisory Committee on Travel and Tourism Infrastructure. Accessed October 15, 2018 from https://www.transportation.gov/NACTTI
Where Are We Today

ODOT’S CURRENT INITIATIVES FOR TRAVEL AND TOURISM

As the agency charged with preserving, improving and enhancing Ohio’s transportation system, many of ODOT’s programs and projects already benefit the travel and tourism industry as they ensure visitors traveling to, from and within the state have safe and reliable access to its tourism sites and the many establishments that are part of, or benefit from, the tourism industry, such as hotels and restaurants. The following ODOT initiatives and offerings are ones that are more closely aligned to the tourism industry or serve as a more direct resource to tourists and travelers.

Maps

ODOT provides static Ohio Transportation Maps (Figure 4) that can be viewed and ordered via its website. The latest edition available was produced in 2015. Orders of maps have been placed on hold until spring of 2019 when an updated edition is scheduled for release.\(^7\)

The maps highlight rest areas, state and national parks, as well as various points of interest such as museums and zoos. Maps are available for the state, its counties, and its major cities.

FIGURE 4 - OHIO TRANSPORTATION MAP

OHGO

OHGO is ODOT’s online tool for real-time traffic updates (Figure 5). While certainly not limited to use by tourists, OHGO still serves as a useful resource to visitors as evidenced by TourismOhio’s inclusion of a hyperlink to OHGO on select pages of its website.

While tourists may be informed by other ITS technology as well (e.g. dynamic signs),

FIGURE 5 - ODOT’S OHGO WEBSITE

OHGO is one they can access anywhere to better plan their trips.

**Transportation Alternatives Program (TAP)**

ODOT’s Transportation Alternatives Program (TAP) “provides funds for projects that advance non-motorized transportation facilities, historic transportation preservation, and environmental mitigation and vegetation management activities.”\(^8\) TAP funding is federally sourced and administered through ODOT. While not all projects funded through TAP can be considered tourism-related, from 2013 to 2017, TAP projects in Ohio involving trail facilities or pedestrian and bicycle facilities accounted for over 62 percent of all TAP funding.\(^9\) These trail projects promote recreational tourism as well as provide multimodal transportation options. As stated previously, ODOT funds and implements many programs and projects that benefit tourism. However, TAP is highlighted as it is one of the largest funding sources for scenic trails and bikeways.

**State and U.S. Bicycle Route (USBR) Development**

The increasing importance of bicycle infrastructure is underscored in the American Association of State Highway and Transportation Officials’ (AASHTO) development of a national corridor plan for numbered U.S. Bicycle Routes (USBRs). These routes are meant to provide better connectivity for cyclists to travel in and between states throughout the country. In the U.S., bicycling is the second most popular outdoor recreation activity, with bicycle tourism generating $71 billion annually.\(^10\)

USBR 50 is the first USBR designated in Ohio, its designation being a key recommendation in Access Ohio 2040 (AO40). The designated portion of the route starts in Indiana from Terre Haute to Richmond, Indiana. It continues into Ohio passing through the cities of Dayton, Columbus and Steubenville. After a short discontinuity in the trail over West Virginia, it begins again in Pennsylvania passing through Pittsburgh to Frostburg, Maryland, and finally to Washington, D.C. When fully completed, USBR 50 will allow cyclists to traverse the U.S. from Washington, D.C. to San Francisco. In the effort to designate USBRs, ODOT assesses draft routes, updates mapping, requests designations on behalf of the local jurisdictions, and provides initial signage for the routes.\(^11\)

The State and U.S. Bicycle Route System aims to connect communities and destinations, fostering support for local businesses and the tourism industry, and subsequently helping regions to grow by promoting towns located along the trails. In this effort, ODOT is working with local jurisdictions to assess the proposed routes based on safety, connectivity, and economic development.\(^12\) One notable state route is the Ohio to Erie trail (OTE) referred to as Route 1 in Ohio and, once designated, will be part of USBR 21. OTE is a collection of

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\(^8\) ODOT. (2015). Transportation Alternatives Program Guidelines


\(^11\) ODOT. State and US Bicycle Route Development. Accessed November 2, 2018 from http://www.dot.state.oh.us/Divisions/Planning/ProgramManagement/HighwaySafety/ActiveTransportation/Pages/USBR.aspx

\(^12\) ODOT. State and US Bicycle Route Development. Accessed November 2, 2018 from http://www.dot.state.oh.us/Divisions/Planning/ProgramManagement/HighwaySafety/ActiveTransportation/Pages/USBR.aspx
regional trails and on-road routes spanning Ohio from Cincinnati to Cleveland. A map of designated and proposed bike routes in Ohio taken from ODOT’s Transportation Information Mapping System (TIMS) is shown in Figure 6.

![Map of designated and proposed bike routes in Ohio](image)

**FIGURE 6 - DESIGNATED AND PROPOSED STATE AND US BICYCLE ROUTE SYSTEM**

**Rail Tourism Program**

The Ohio Rail Development Commission (ORDC), an independent agency of ODOT, provides support to the rail tourism industry through its Rail Tourism Program. The program’s goals are to:

1. Promote local economic development through rail tourism activities; and
2. Support scenic railroads, rail museums, rail excursion organizations and others involved in the rail tourism industry.
The latter alludes to the state’s nine scenic railroads, 14 rail museums or displays, and two rail excursion organizations. The program provides marketing and technical assistance, as well as financial assistance in the form of grants and loans.\textsuperscript{13}

**Tourist-Oriented Directional Signs (TODS) Program**

Administered by Ohio Logos, Inc. on behalf of ODOT, the Tourist-Oriented Directional Signs (TODS) Program permits eligible tourist-oriented activities to be identified on directional signs that are placed at conventional road and expressway at-grade intersections, and ensures the signs follow established ODOT guidelines.\textsuperscript{14}

**Scenic Byways Program**

ODOT offers resources such as pictures, videos, and story maps to those planning trips through Ohio’s 27 scenic byways (Figure 7). The 2004 TRB Report points out that typically DOTs do not want to promote increased travel demand, but tourism such as scenic byways is a notable exception.

For groups wishing to designate a system of roads as a scenic byway, ODOT offers assistance, coordination and funding opportunities. If the designation is approved, those groups become byway organizations and are required by ODOT to submit Five Year Corridor Management Plans (CMPs), which specify “the actions, procedures, controls, operational practices, and administrative strategies necessary to maintain the scenic, historic, recreational, cultural, archeological, and natural qualities (or intrinsic qualities) of the scenic byway.”\textsuperscript{15}

In 2012, ODOT engaged with a consultant to assess its CMP review process and subsequently better assist byway organizations in developing

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\textsuperscript{13} ODOT. ORDC - Ohio Rail Tourism. Accessed November 2, 2018 from http://www.dot.state.oh.us/Divisions/Rail/Programs/travel/Pages/RailTourism.aspx


\textsuperscript{15} ODOT. Ohio’s Scenic Byways Program. Accessed October 17, 2018 from http://www.dot.state.oh.us/OhioByways/Pages/default.aspx
their Five Year CMPs. The final report was completed in 2015 and included recommendations such as:\(^{16}\):

- Provide evaluative feedback on byway organizations’ CMP submissions to help them understand both strong and weak areas in their CMPs.
- Establish de-designation for non-compliant byway organizations, but support options as alternatives to de-designation.
- Partner with other state agencies/statewide organizations to use the information from the CMPs for inclusion in tourism marketing efforts.

**Other Tourism-Related Involvement**

Another near-term activity regarding ODOT’s consideration of tourism is its Maintenance of Traffic (MOT) plan which factors in impacts to tourist attractions when planning road closures and detours.\(^{17}\) Also, ODOT has recently placed welcome signs at I-70E near the Indiana border and Ironton-Russell bridge.\(^ {18}\)

**TRAVEL AND TOURISM TRENDS**

**Increased Outreach**

With its 2018 budget of $10.3 million, TourismOhio’s paid marketing efforts have expanded and now include Ohio, Michigan, Pennsylvania, Indiana, Kentucky and West Virginia. The goal of the expanded marketing campaign is to increase the total number of visits to Ohio. To increase awareness of all that Ohio has to offer, TourismOhio provides the opportunity to create free listings for destinations and events to be included in an online database accessible to consumers. TourismOhio also offers the tourism industry a co-op advertising program which includes targeted advertising opportunities, among other services.


Online Guides

TourismOhio noted that there is a trend towards less reliance on wayfinding signs, so an emphasis has been placed on ensuring information about attractions and events is available online. The ability to quickly update content combined with increasing reliance on internet-ready devices makes online guides a favored option. This is certainly not specific to Ohio, but still impacts how tourists in Ohio find things to do. As such, TourismOhio has developed its own app that allows users to search for attractions and events throughout the state (Figure 8).

Adventure Trails

While Ohio has over 5,000 miles of natural trails, TourismOhio has recently been promoting Adventure Trails. There are currently more than 60 Adventure Trails categorized by type (e.g. food, drinks, shopping) and varying in size and number of stops. Figure 9 shows a map of where the trails are located. Some have stops throughout the state (e.g. Ohio Ice Cream Trail), some within a county (e.g. Butler County Donut Trail), while others are specific to a city (e.g. Put-In-Bay Foodie Trail).

TourismOhio is also interested in promoting Ohio Road Trips like Illinois’ Route 66,19 which lists various attractions and events travelers can visit along the route.

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Social Media

While traversing through an Adventure Trail or visiting any of the other events or attractions Ohio has to offer, visitors are encouraged to document their trips by posting pictures online, using designated social media hashtags.\(^{20}\) This trend of documenting the places one goes by posting pictures online is not lost on TourismOhio; in fact, it develops, and tracks hashtags used by visitors. Visitors then become marketing tools themselves, showing their online followers what Ohio has to offer. TourismOhio’s 2017 Year in Review Report focuses heavily on social media tracking items such as total social media engagement, referral traffic to their website from Facebook, number of Facebook fans, and number of Twitter followers.\(^{21}\) Additionally, it tracks the most “Instagrammed” areas around the state with locations such as Quicken Loans Arena, Cedar Point, The Ohio State University, Progressive Field, and Kings Island topping the list.

TOURISM REGIONS

Figure 10 shows the boundaries for TourismOhio’s regions. A focus on regions as opposed to attractions better prepares TourismOhio to inform those that are visiting a specific attraction that there are other nearby sites and events they may want to visit as well. Thinking in terms of tourism regions could also be considered a reasonable approach for transportation planning as visitors to multiple sites within the same region will likely rely on the same roads, airports, or transit when accessing them.

On its website, TourismOhio showcases the regions by giving a summary and listing the major cities in each region, which can be further drilled down for specific attractions and events in those cities.

In addition to the 5 geographic regions, TourismOhio also includes “Amish Country” (Figure 11), which is made up of Amish communities located within Geauga, Adams, Hardin, Holmes, Tuscarawas, and Wayne Counties.

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\(^{20}\) A hashtag is a way for people to categorize, find and join conversations on a particular topic on online forums such as Twitter or Instagram by using keywords or phrases preceded by the “#” symbol; e.g. “#ohiofindithere.

Amish Country

It isn’t easy to choose a favorite memory from Ohio’s Amish Country. Maybe it’s taking a photograph of horses and buggies tethered in a row at a farm auction. It could be choosing a blackberry or rhubarb pie, still warm from the oven at one of the area’s family-owned bakeries. Perhaps it’s tasting...Read more
Where Are We Going?

TOURISM GROWTH OPPORTUNITIES

TourismOhio believes there are a few specific areas where tourism growth opportunities would benefit from improved transportation planning and infrastructure. While continued investments in most of the areas listed below seemingly support this anticipated growth, data showing trends in origin-destination patterns and seasonal tourism traffic would be needed to fully understand the impact of growth on Ohio’s transportation system.

Sandusky Attractions

Home to many indoor water parks, Cedar Point amusement park, and the shores of Lake Erie, Sandusky remains a popular tourist destination that continues to grow in tourism visits. Transportation infrastructure from Central Ohio to Sandusky is an issue TourismOhio believes needs to be considered in future transportation planning efforts.

Northern Columbus Developments

New developments in northern Columbus, the growth of the Polaris area, the addition of Top Golf, and plans for Planet Oasis will likely cause an increase in traffic to northern Columbus and areas just north of it. This anticipated traffic increase is of concern to TourismOhio.

Ashtabula Wine Country

The popular Ashtabula wine country area is expected to see continued growth. As such, business owners are looking to add additional wine shuttles and winery tours to accommodate more visitors. This increased use of the local transportation system could be a consideration for transportation planners.

U.S. Bicycle Routes (USBRs)

As previously noted, USBR 50 is the first USBR designated in Ohio. AO40 had anticipated its designation, and noted that by 2020, “ODOT will work with MPOs, RPOs, and local governments to complete the designation of the remaining USBRs in Ohio, in the following order: USBR 21, 25, 30, and 40.”22 In Ohio, the proposed routes are:

- **USBR 21** - A draft route map indicates that it will largely follow the Ohio to Erie Trail, superseding State Bike Route 1.

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• **USBR 25** - A draft route map indicates that it will follow the Ohio to Erie Trail from Cincinnati to Xenia, the Creekside Trail to Dayton, the Great Miami River Recreation Trail and Canal Run to the outskirts of Piqua, and north through Toledo.

• **USBR 30** - A draft route map calls for USBR 30 to follow the nascent North Coast Inland Trail.

• **USBR 40** – AO40 proposes a route that follows the Great Ohio Lake-to-River Greenway in eastern Ohio.

These routes connect travelers from across the United States to destinations across Ohio, promoting growth in local businesses and the tourism industry in trail towns and regions along these routes.

**Growth in Visits to Major Cities**

TourismOhio has seen continued growth in visits to the state’s major cities from both motor vehicle and air travel. Major sporting events have increased trips and travel activity to and within cities’ downtown areas. The 2022 NBA All-Star Game alone is expected to produce an economic impact of $100 million. Increasing traffic into major cities is a concern of TourismOhio that it suggests could be alleviated with an increased focus on planning for reliable transportation mobility and connections between airports and downtowns.

**Cuyahoga Valley National Park**

While Ohio has 75 state parks, Cuyahoga Valley National Park is the only national park in Ohio, and in 2015 it was the 11th most visited national park in the U.S. It also serves as an example of a site where significant travel and trip-making related planning data was gathered from visitors. A visitor survey conducted in 2015 had findings that included:

- 80 percent of visitors were from Ohio
- 96 percent of visitor groups visited as part of a day trip
- 89 percent of visitor groups are not likely to use a shuttle service to reach park destinations on a future visit
- 71 percent of visitor groups are not likely to combine a shuttle service with a ride on the Cuyahoga Valley Scenic Railroad train on a future visit
- 90 percent of visitor groups used a car, truck, or SUV to enter;

Analyzing this type of data can better inform transportation planning efforts when considering how to best manage visitor volumes in this area.

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Prior to the visitor survey, a Rail Study was conducted in 2013 that provided a 20-year framework for the growth and development of Cuyahoga Valley Scenic Railroad (CVSR). A review of this study could be explored further to see how it may be incorporated in current planning efforts.

Findings and Future Direction for Ohio

TourismOhio believes current trends and increased outreach efforts will lead to increased tourism traffic in Ohio. How ODOT ultimately plans and prepares for this future level of visitor demand is important. New opportunities could exist for greater coordination and collaboration between state and local partners. More tourist-related data, and visitor information and projections could inform transportation planning decisions.

PLANNING OPPORTUNITIES

Data and Performance Measures

Transportation planning starts with data. As previously noted, the 2004 TRB Report highlighted the desire by transportation agencies for improvements in the availability and detail of tourism travel data. While visitors and tourists are a subset of transportation system users, to enhance travel and tourism as prescribed by the FAST Act, ODOT needs to understand the current impact travel and tourism has on Ohio’s system.

At least one Ohio MPO currently factors travel and tourism trip-making in its travel demand model (TDM). The TDM of the Erie County Regional Planning Commission (ERPC) accounts for recreational travel patterns, noting that tourism forecasts, particularly seasonal variability, is an important component of travel demand forecasting. It is also considering future improvements to incorporating tourism data such as implementing a travel survey to capture additional information on tourist travel behavior. ERPC may serve as a good example of how travel and tourism data can be collected, shared and used in the transportation planning process.

Once a system for analyzing tourism data is in place, the development of performance measures that are relevant to travel and tourism could be ODOT’s next step in ensuring transportation planning is working towards enhancing travel and tourism. Some of these measures could support the Quality of Life goal and objectives proposed for AO45 and be refined over time as additional data becomes available and through subsequent updates to Access Ohio. These measures could include accessibility to accommodate the varying needs of tourists, transportation options and services in proximity to destinations, trip making reliability between airports and downtowns and alleviation of corridor congestion during peak tourist seasons.

Better tourism-specific data could also help ODOT as it reviews the state’s Strategic Transportation System (STS), which represents the “backbone” of the state’s transportation network. The categorizations (national, statewide, regional, local) and many of the characteristics (e.g. volume, connectivity) used in the corridor analysis to develop the STS can be tied back to tourism. However, while ODOT can review highway connectivity to tourism hubs, it would still require origin-destination and seasonal variation data to

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accurately account for the impact tourism has on traffic volumes. Additionally, tourism connectivity specific to bicycle facilities, particularly new tourism sites being developed around bicycle trails, would be a data point that ODOT would need to properly factor tourism in those corridors.

**Collaboration with Tourism Agency and other Tourism Stakeholders**

The 2004 TRB Report also puts an emphasis on collaboration. In certain instances, it could make sense for ODOT to collaborate with TourismOhio on projects from a planning and/or funding standpoint. The latter would take the form of the agencies leveraging funding opportunities supported through the matching of state, local, and private-sector funds using programs such as TAP. In terms of project planning, design and timing could be key points to discuss with TourismOhio and other tourism stakeholders (e.g. area businesses, local agencies), particularly given the seasonal aspect of certain tourism sites. Establishing a forum for the agencies and organizations to cross-reference upcoming projects and developments in their respective sectors could help determine if collaboration would be beneficial. ODOT district offices and MPOs could take the lead in this regard given their familiarity with the local environment and conditions. Other opportunities for coordination from the 2004 TRB Report that ODOT could consider are:

- Provide planning coordination and technical assistance to municipalities, business associations, and local and regional planning organizations for the development and implementation of land-use plans for economic development projects.
- Identify and forecast economic activity on or near the highway transportation corridor for district offices, municipalities, planners, and economic development organizations.
- Develop institutional mechanisms to direct tourism industry input into state DOT activities; i.e. formal processes that would allow for tourism stakeholders to provide feedback directly to ODOT.
- Conduct visitor information center focus groups designed to gather feedback from a diversity of users, as well as to collect feedback from traveler support organizations.
- Draft formal policy statements recognizing tourism as an important benefit of transportation investment.

**Ohio Byways Corridor Management Plans**

ODOT’s role of providing oversight of the byway organization’s Corridor Management Plans (CMP) gives it great insight into the qualities that allowed for those specific portions of roadway to receive their scenic byway designations. As the 2015 consultant report points out, the ODOT district planning representatives can act as the primary points of coordination with the byway organizations and play a major role in ensuring transportation plans account for the items in the CMPs. If CMPs are integrated in the planning process, ODOT could look at developing performance measures to gauge the success of the Scenic Byways Program based on the goals and objectives listed in the CMPs.
Appendix A - NACTTI Roles

NATIONAL ADVISORY COMMITTEE ON TRAVEL AND TOURISM INFRASTRUCTURE

Roles of the Committee

- Advise the Secretary of Transportation on current and emerging priorities, issues, projects, and funding needs related to the use of the intermodal transportation network of the United States to facilitate travel and tourism;
- Serve as a forum for discussion for travel and tourism stakeholders on transportation issues affecting interstate and interregional mobility of passengers;
- Promote the sharing of information between the private and public sectors on transportation issues impacting travel and tourism;
- Gather information, develop technical advice, and make recommendations to the Secretary on policies that improve the condition and performance of an integrated national transportation system;
- Identify critical transportation facilities and corridors that facilitate and support the interstate and interregional transportation of passengers for tourism, commercial, and recreational activities;
- Provide for development of measures of condition, safety, and performance for transportation related to travel and tourism;
- Provide for development of transportation investment, data, and planning tools to assist Federal, State, and local officials in making investment decisions relating to transportation projects that improve travel and tourism; and
- Address other issues of transportation policy and programs impacting the movement of travelers for tourism and recreational purposes, including by making legislative recommendations.