

October 13, 2022

IREM Columbus  
Presents:

Silicon in the Heartland



# Welcome



Anthony Tynan, CPM<sup>®</sup>  
Columbus Chapter  
President



## Platinum Industry Partners



# Gold Industry Partners



**MOSELEY ELEVATOR**



**PRIME  
SECURED**



# Silver Industry Partners



## Upcoming IREM Events

### Installation Dinner

*Renaissance Westerville*

*November 2, 5:30pm*

### Forecast Breakfast

*Hilton Columbus Downtown*

*December 1, 9am*



# Moderator



Skip Weiler  
President  
The Robert Weiler Company



# Speaker



Matt McQuade  
Managing Director, Business Development  
One Columbus



# Speaker



William Murdock  
Executive Director  
Mid-Ohio Regional Planning Commission



# **The Vision**

**TO BECOME THE MOST PROSPEROUS  
REGION IN THE UNITED STATES**

**Prosperity is defined as the process of social and  
economic advancement of all residents within the  
Columbus Region**

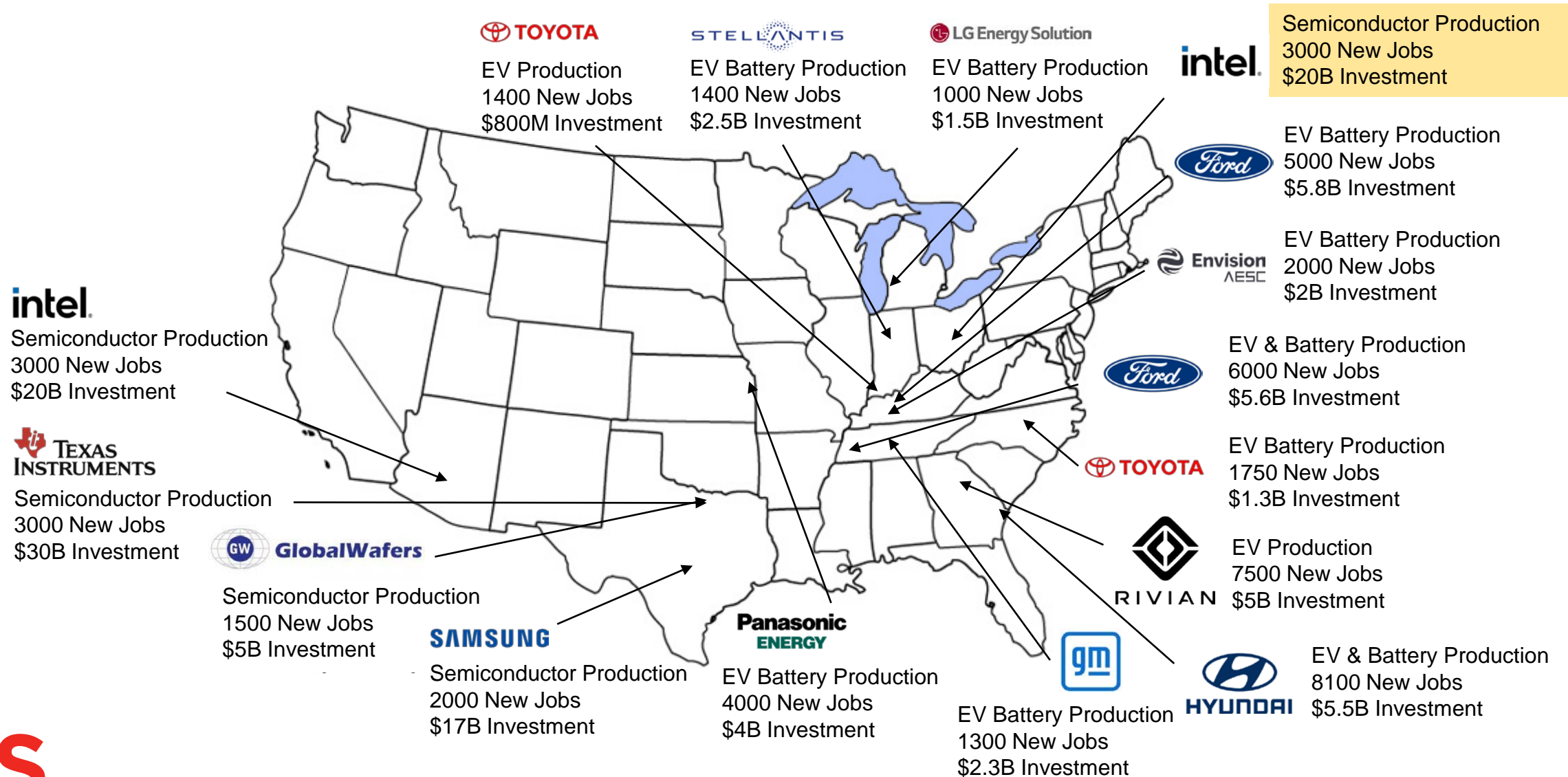
# Regional Strategy

## SEVEN CORE OBJECTIVES

- 1 Serve**  
existing businesses
- 2 Attract**  
new businesses
- 3 Support**  
entrepreneurship and  
high-growth firms
- 4 Prepare**  
communities for the future

- 5 Cultivate**  
diversity, equity and inclusion
- 6 Engage**  
locally and globally
- 7 Market & Promote**  
the Columbus Region globally

# Auto/Semiconductor Locations (2021-2022)



# Ohio Rising

## JOBSOHIO REGIONAL PARTNERS



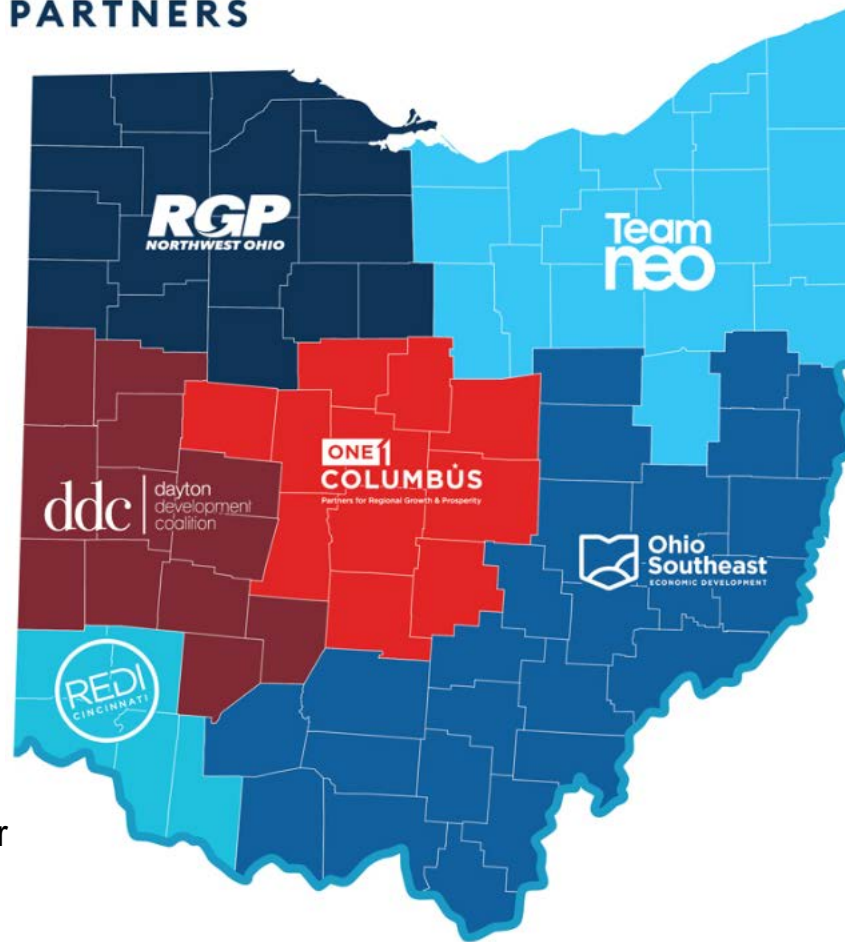
EV Drive Systems  
\$760M Investment



EV Battery Components  
1,200 New Jobs  
\$916M Investment



Expansion – Freight Forwarder  
1,000 New Jobs  
\$18M Investment



Aer Lingus 

Cleveland to Dublin  
Launches May 2023



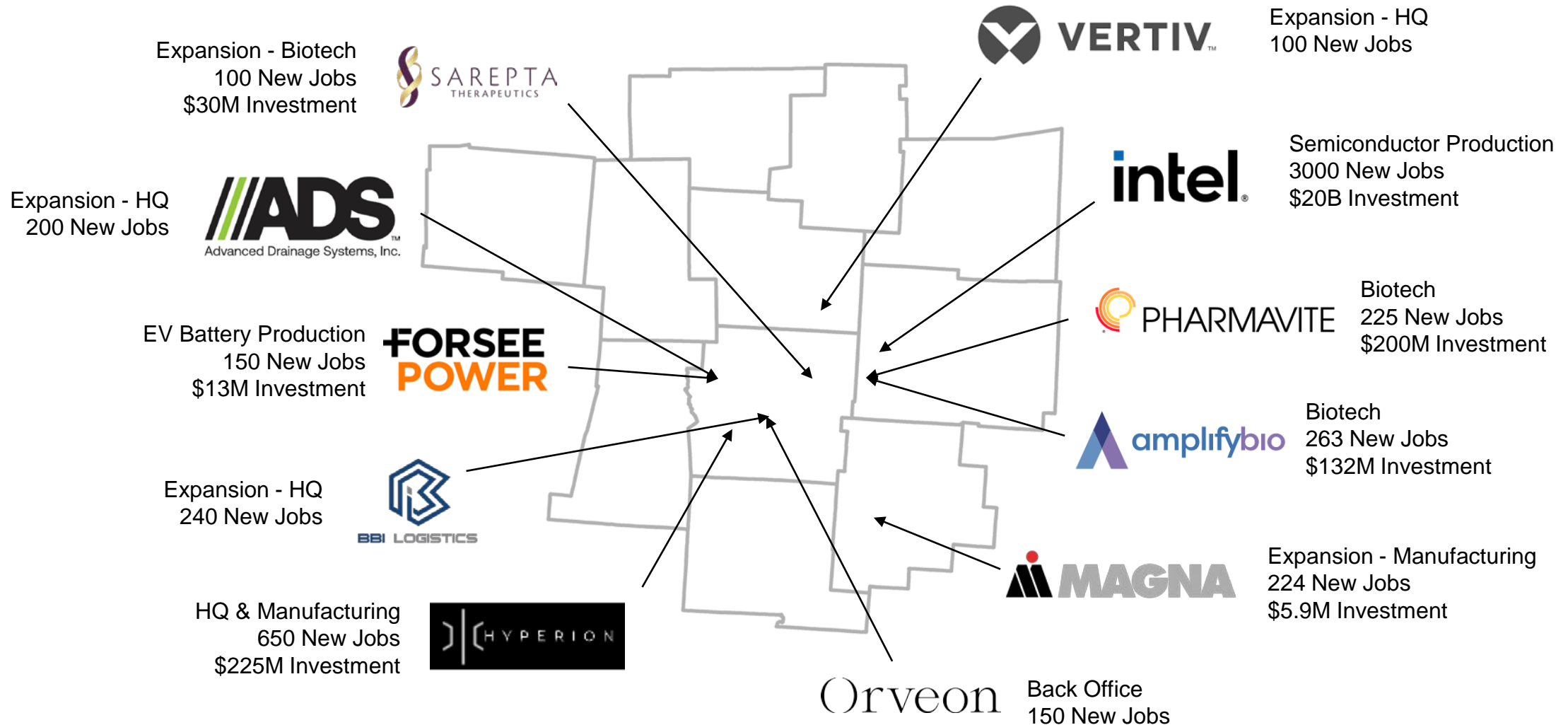
Expansion - EV Production  
1800 New Jobs  
\$1.5B Investment

  
charles river

Expansion – Lab Services  
500 New Jobs  
\$212M Investment



# Notable Projects YTD



Source: One Columbus, data analyzed 9/28/2022



# What's Driving Investment?

The Columbus Region is young....

## Top 10

Among large metros in the U.S. for concentration of young professionals (age 25-34)

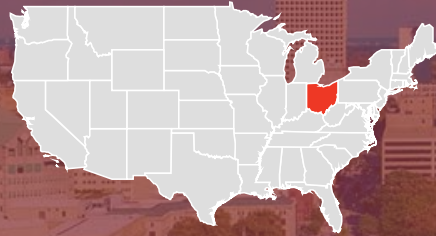
## No. 1

in the Midwest for millennial migration\*

## No. 12

in the U.S. for millennial migration\*

growing....



## Net Migration

More people moved to the Region from New York, Chicago, L.A., Boston, Pittsburgh, and Portland than left Columbus for those same areas from 2018-2020.

## Only City

in the Midwest to add >100,000 people in the past decade

diversifying....

92%

of regional population growth last decade was from non-white only groups.

Columbus Region Population Growth (millions)



and affordable.



91.5

cost of living index  
(U.S. national average = 100.0)



\$1,123.46

avg. savings worker / year  
(compared with national wages\*)

# Why Winning Matters

- Ohio is answering a national call to action
- Places the Columbus Region and Ohio firmly on the global stage
- Helps future-proof our regional economy
- Impacts will be felt across the State of Ohio and the Midwest
- Will cement Ohio as a top talent magnet



# Semiconductor Industry

## FACTORS DRIVING DEMAND TODAY AND INDUSTRY STATISTICS

- **PC/Computer segment** - Work-from-home, cloud adoption, healthcare, datacenters and the increased use of AI
- **Communications segment** - Rollout of 5G and the Internet of Things
- **Industrial segment** - Internet of Things, digitization of everything
- **Automotive** - Electrification, connected and autonomous vehicles
- **Defense** - All major U.S. defense systems and platforms

6%

Long-term semiconductor  
sector growth rate (global)

8:1

Estimated economic  
multiplier



# Semiconductor Supply Chain

## KEY CONSIDERATIONS AND SUPPLIER CATEGORIES

- 30-50 Tier 1 industry suppliers are following Intel to Ohio
- Team Ohio has engaged suppliers in multiple venues, including SEMICON
- August 2<sup>nd</sup> Supplier Day: 150+ representatives from nearly 50 companies
- Major supplier categories
  - Tools
  - Production materials
  - Environmental
  - Staffing/Technical



# Emerging Industries

## SEMICONDUCTOR

**38** Projects **17** Leads

(**43** Related to **intel.**)

**22,846**  
Potential Jobs Created

**\$1.15B**  
New Jobs Payroll

**\$127.3B**  
Fixed Asset Investment

## EV (AUTOMOTIVE)

**12** Projects **15** Leads

**31,935**  
Potential Jobs Created

**\$1.7B**  
New Jobs Payroll

**\$26.4B**  
Fixed Asset Investment

## LIFE SCIENCES

**6** Projects **7** Leads

**794**  
Potential Jobs Created

**\$59.8M**  
New Jobs Payroll

**\$488.5M**  
Fixed Asset Investment



# Thank you



# Intel's Impact & Central Ohio's Growth

William Murdock, Executive Director, MORPC



MID-OHIO REGIONAL  
**MORPC**  
PLANNING COMMISSION

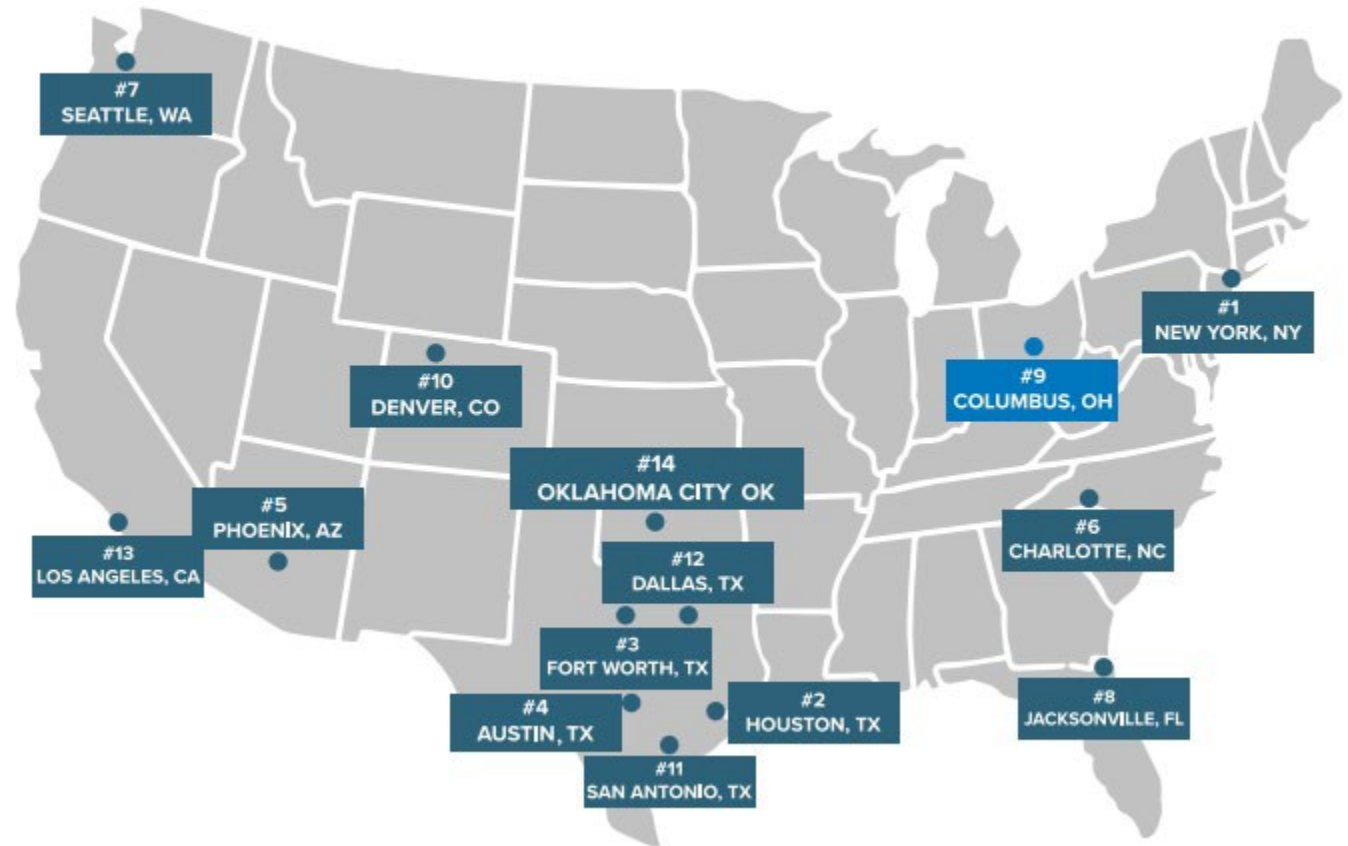
# 2020 CENSUS DATA



MORPC

- Central Ohio grew over the last decade – **adding nearly 240,000 residents** from 2010 to 2020.
- Central Ohio ranked **27th** in **population growth among all metros**.
- And among *cities with population growth more than 100K*, **Columbus ranked 9<sup>th</sup>**.
- Columbus was the **only Midwestern city** to grow by more than 100,000 residents.

## CITIES WITH POPULATION GROWTH >100,000 2010 – 2020, RANKED BY GROWTH



Learn more at [morpc.org/data](https://morpc.org/data)

# SUSTAINABILITY AND GROWTH

**How can Central Ohio  
accommodate growth *and*  
maintain a balance of  
social, environmental and  
economic well-being?**

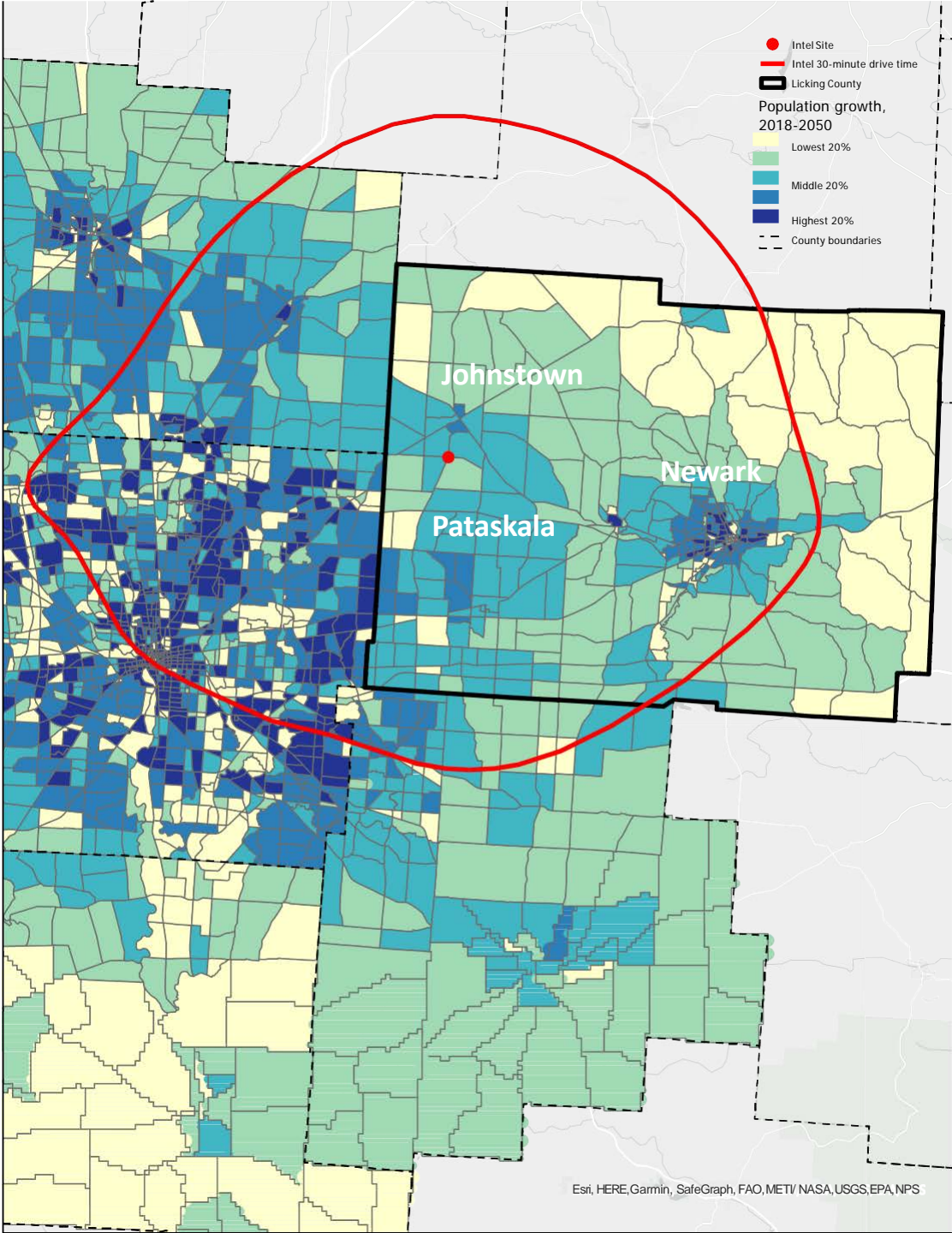
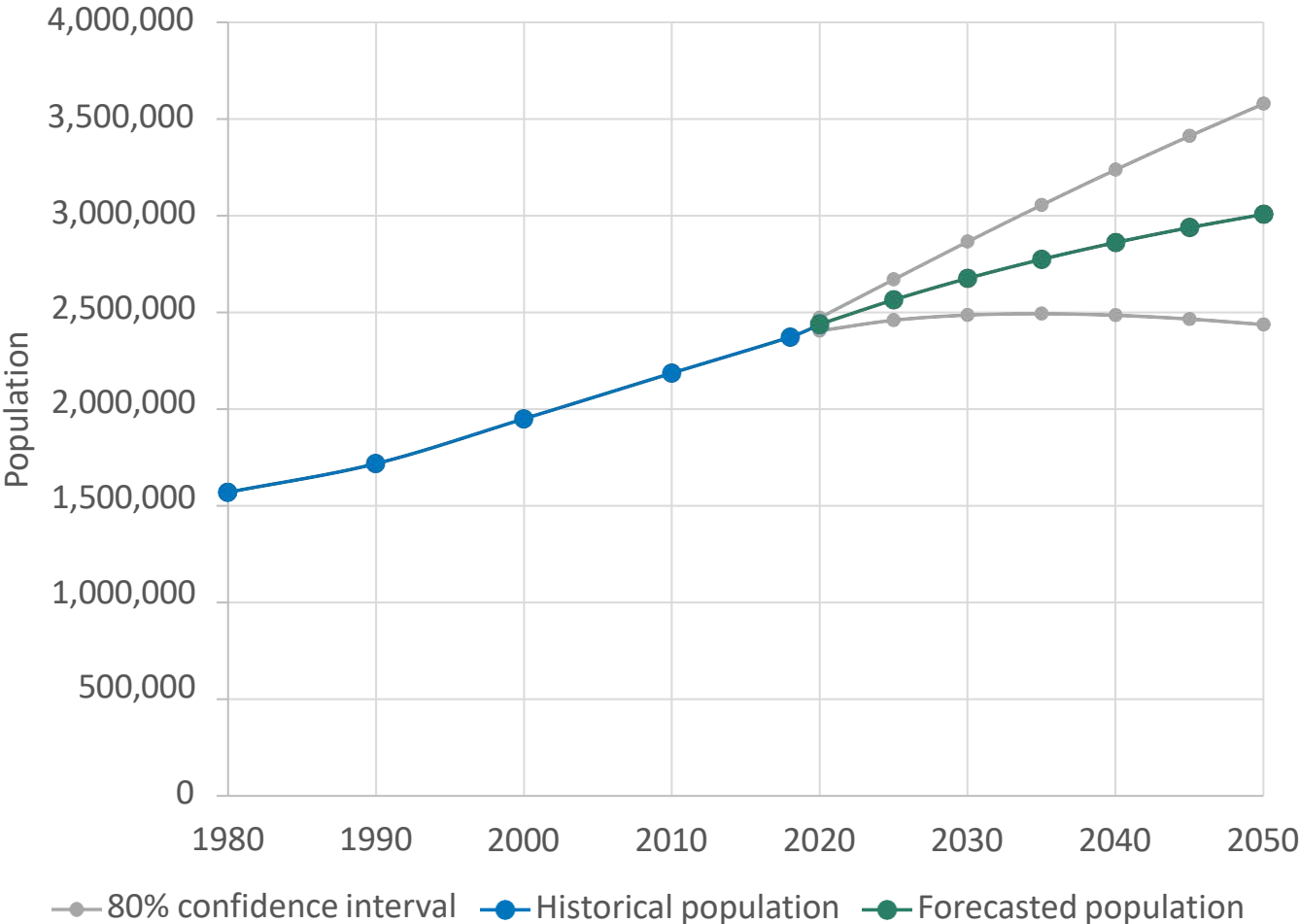




# A REGION OF 3 MILLION PEOPLE BY 2050

Historical and forecasted population,  
MORPC 15-County Region

Source: MORPC Central Ohio Population Resource Hub





# HOUSING PRODUCTION REMAINS LOW



MORPC

Housing Production  
**Surplus**



2000s

Housing Production  
**Deficit**



2010s

*Average HH size: 2.5 people*

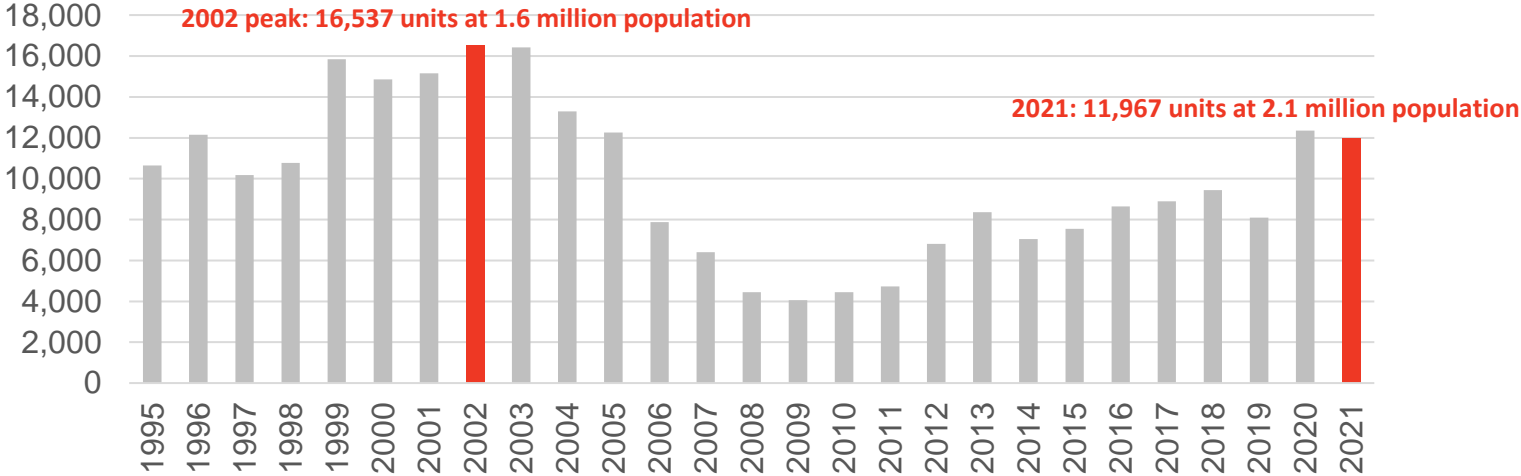
# HOUSING DEMAND > SUPPLY

In 2021, Central Ohio lagged peer markets in housing construction

Columbus was building 40% more housing 20 years ago...  
With 500k fewer people!

Columbus, OH	11,000
Austin, TX	45,581
Nashville, TN	27,961
Charlotte, NC	26,426
Raleigh, NC	21,460
Indianapolis, IN	11,482

ANNUAL HOUSING PERMITS, COLUMBUS MSA

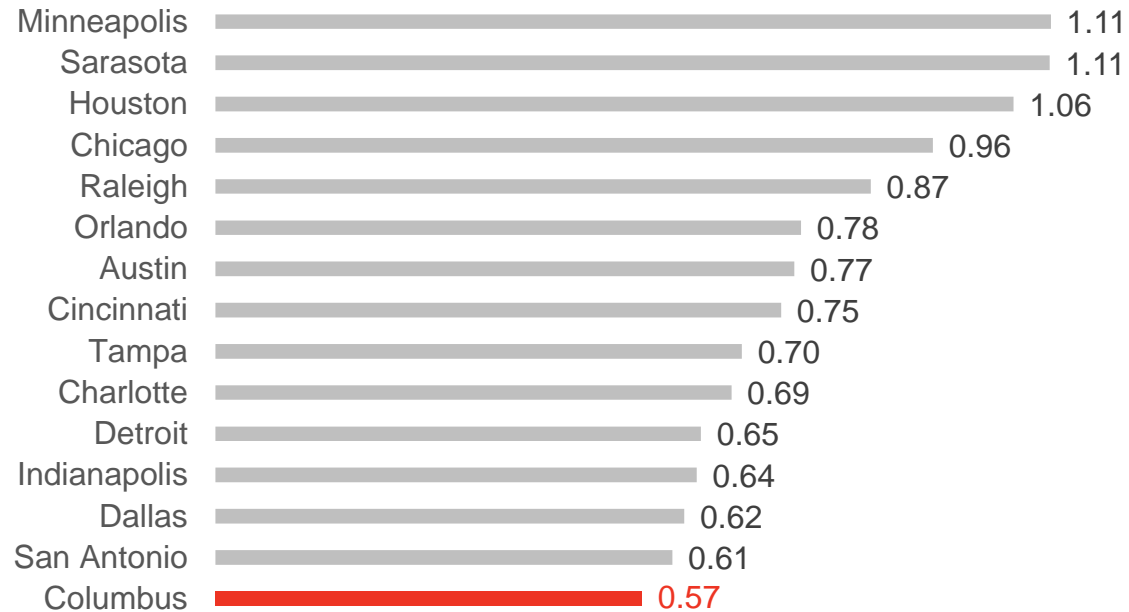


• Source: U.S. Census Bureau.

# HOUSING SUPPLY LAGS JOB GROWTH

Relative to economic growth, Columbus is producing too little housing.  
The optimal ratio is 0.9-1.0 home for every job.

## HOUSING UNITS PERMITTED PER JOB CREATED IN M/I HOMES' MARKETS, 2010-2020



- Sources: U.S. Census Bureau, 2010 and 2020 Decennial Census; U.S. Census Bureau, Building Permits Survey.

# CORE HOUSING ISSUES & PRIORITY ACTIONS



Increased competition  
for homes



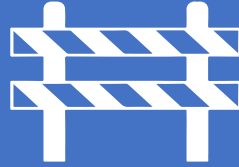
Adopt “Green Tape”  
development review



Limited supply of homes  
priced for low-income  
households



Create a state housing  
tax credit



Barriers limiting access  
to homes



Enact source-of-income  
protection laws



Demand for more diverse  
housing stock



Pilot diverse lower-cost  
housing products

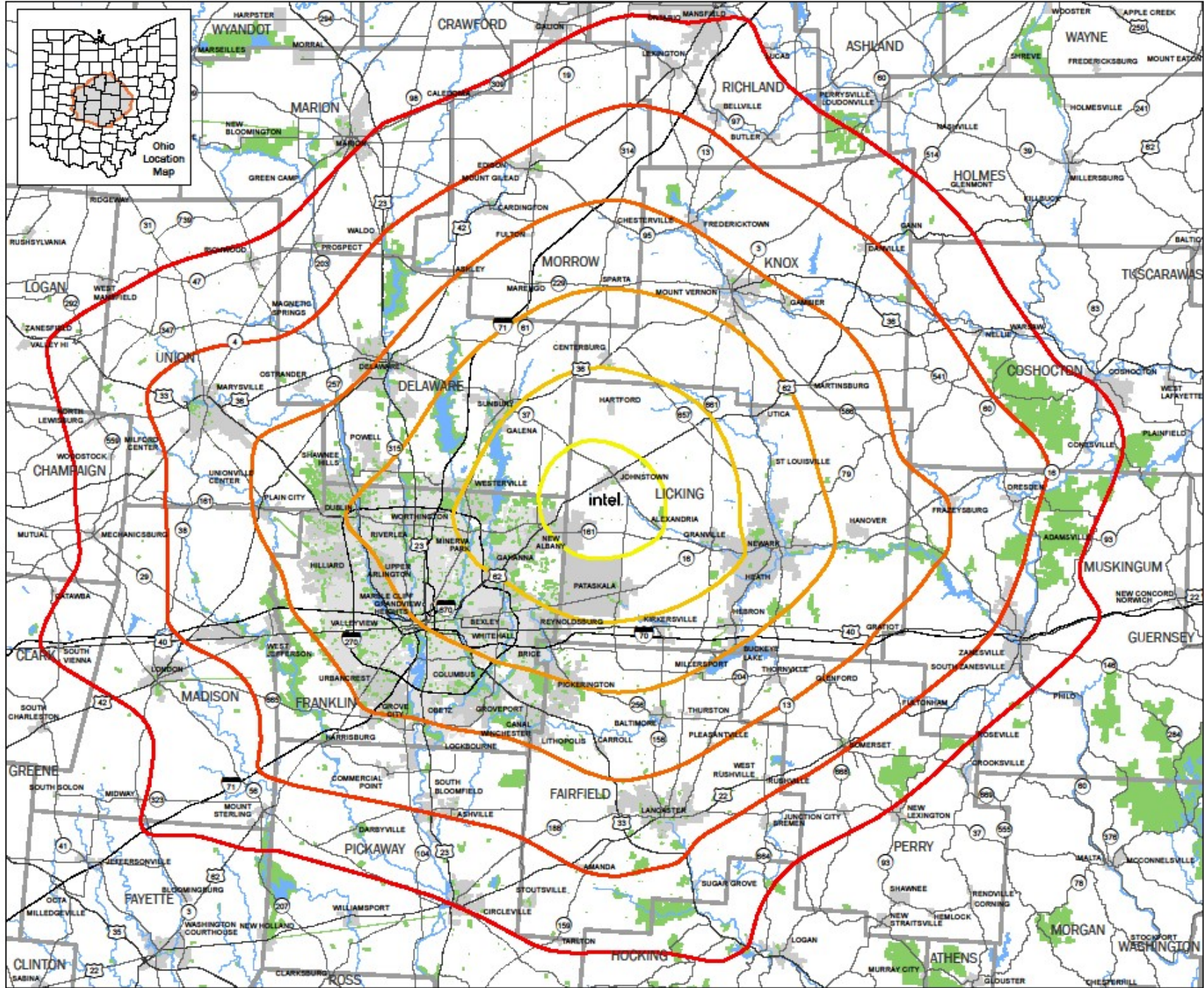


Housing instability  
among Central Ohioans



Tenant-based rental  
assistance





# Intel Site Driving Times

intel. Intel Site  
Travel Time in minutes

- 60
- 50
- 40
- 30
- 20
- 10
- Park/Open Space

Note:  
Travel assumed by car.  
Travel times are approximate from Intel site out at 3pm.  
Buffers generated using ESRI Network.



The information shown on this map is compiled from various sources made available to us which we believe to be reliable.  
N:\ArcGIS\REQUESTS\Intel\Intel Plant\Intel Base.aprx  
4/28/2022



## 2024-2050 COLUMBUS AREA METROPOLITAN TRANSPORTATION PLAN



*Reduce per capita energy consumption and promote alternative fuel resources to increase affordability and resilience of regional energy supplies.*



*Protect natural resources and mitigate infrastructure vulnerabilities to maintain a healthy ecosystem and community.*



*Create sustainable neighborhoods to improve all residents' quality of life.*



*Increase regional collaboration and employ innovative transportation solutions to maximize the return on public expenditures.*

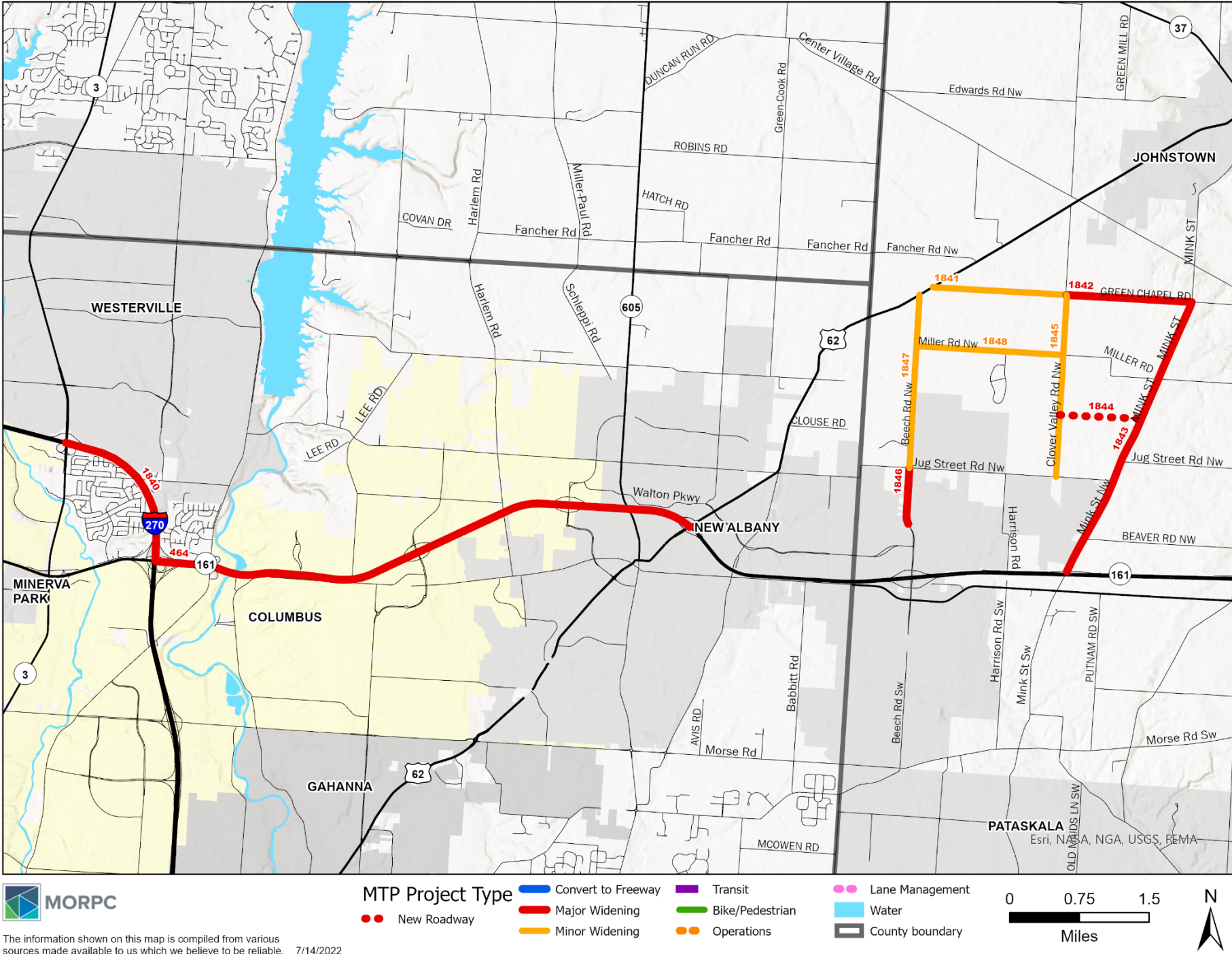
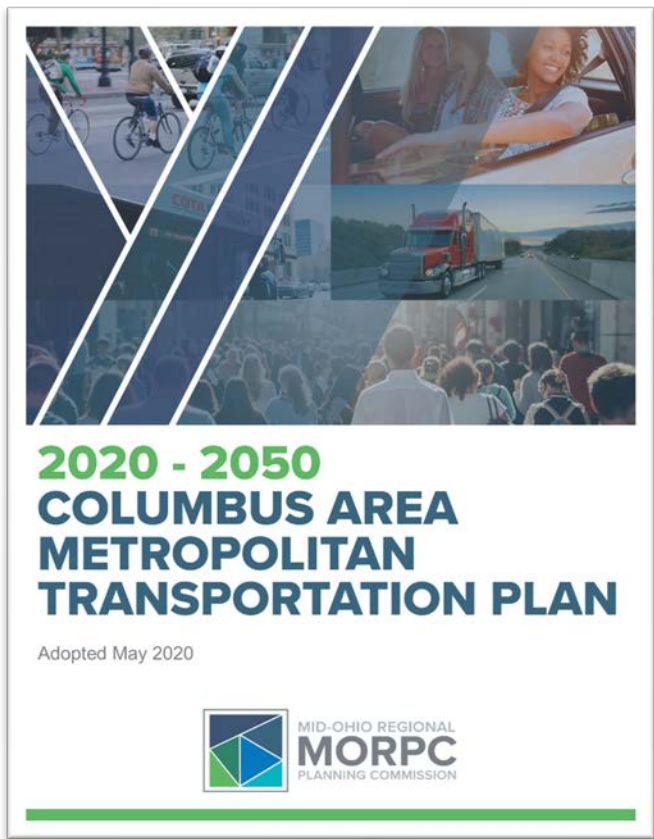


*Position central Ohio to attract and retain economic opportunity to prosper as a region and compete globally.*



*Provide transportation and mobility to benefit the health, safety, and welfare of all people.*

# 2020-2050 MTP AMENDMENTS





# PROPOSED AMENDMENTS

***Bold italic*** = new or changed project component

MTP ID	Project Description	Year	Cost Estimate (YOE \$)
464	SR-161 from <b><i>I-270</i></b> to US-62, <b><i>Add one lane each direction</i></b>	<b><i>2024</i></b>	<b><i>\$65.8 million</i></b>
1840	<b><i>I-270 from SR-161 to SR-3; Add one lane in northbound direction</i></b>	<b><i>2024</i></b>	<b><i>\$19.8 million</i></b>
1841	<b><i>Green Chapel Rd. from US 62 to Clover Valley Rd; Add turn lanes and complete street facilities to 2 lane roadway</i></b>	<b><i>2024</i></b>	<b><i>\$19.5 million</i></b>
1842	<b><i>Green Chapel Rd. from Clover Valley Rd. to Mink St; Widen road from 2 lanes to 4 lanes total both directions with complete street facilities</i></b>	<b><i>2024</i></b>	<b><i>\$19.5 million</i></b>
1843	<b><i>Mink St. from SR-161 eastbound ramps to Green Chapel Rd; Widen road from 2 lanes to 4 lanes total both directions with complete street facilities</i></b>	<b><i>2024</i></b>	<b><i>\$38.4 million</i></b>
1844	<b><i>Harrison Rd. Extension from Clover Valley Rd. to Mink St.; New Roadway 1 lane(s) each direction with complete street facilities</i></b>	<b><i>2024</i></b>	<b><i>\$9.5 million</i></b>
1845	<b><i>Clover Valley Rd. from Jug St. to Green Chapel Rd. Add turn lanes and complete street facilities to 2 lane roadway</i></b>	<b><i>2024</i></b>	<b><i>\$15.9 million</i></b>
1846	<b><i>Beech Rd. from Innovation Corridor way to Jug St.; Widen road from 2 to 4 lanes total both directions with complete street facilities</i></b>	<b><i>2030</i></b>	<b><i>\$9.3 million</i></b>
1847	<b><i>Beech Rd. from Jug St. to US-62; Add turn lanes and complete street facilities to 2 lane roadway</i></b>	<b><i>2030</i></b>	<b><i>\$16.1 million</i></b>
1848	<b><i>Miller Rd. from Beech Rd. to Clover Valley Rd; Add turn lanes and complete street facilities to 2 lane roadway</i></b>	<b><i>2030</i></b>	<b><i>\$13.7 million</i></b>



# MORE OPTIONS MEET MORE NEEDS

*We want and need more:*



Homes



Walkability



Amenities



Mobility



Green Space



MORPC

# MORE OPTIONS = POSITIVE IMPACTS



TRANSPORTATION  
VEHICLE  
MILES TRAVELED



HOUSEHOLD  
COSTS



LAND  
CONSUMPTION



TAX  
REVENUES



TRANSPORTATION  
MODE SHARE



GREENHOUSE  
GAS EMISSIONS



LOCAL  
INFRASTRUCTURE  
AND SERVICES



TRANSPORTATION  
ACCESS







# PASSENGER RAIL



**LINKUS**

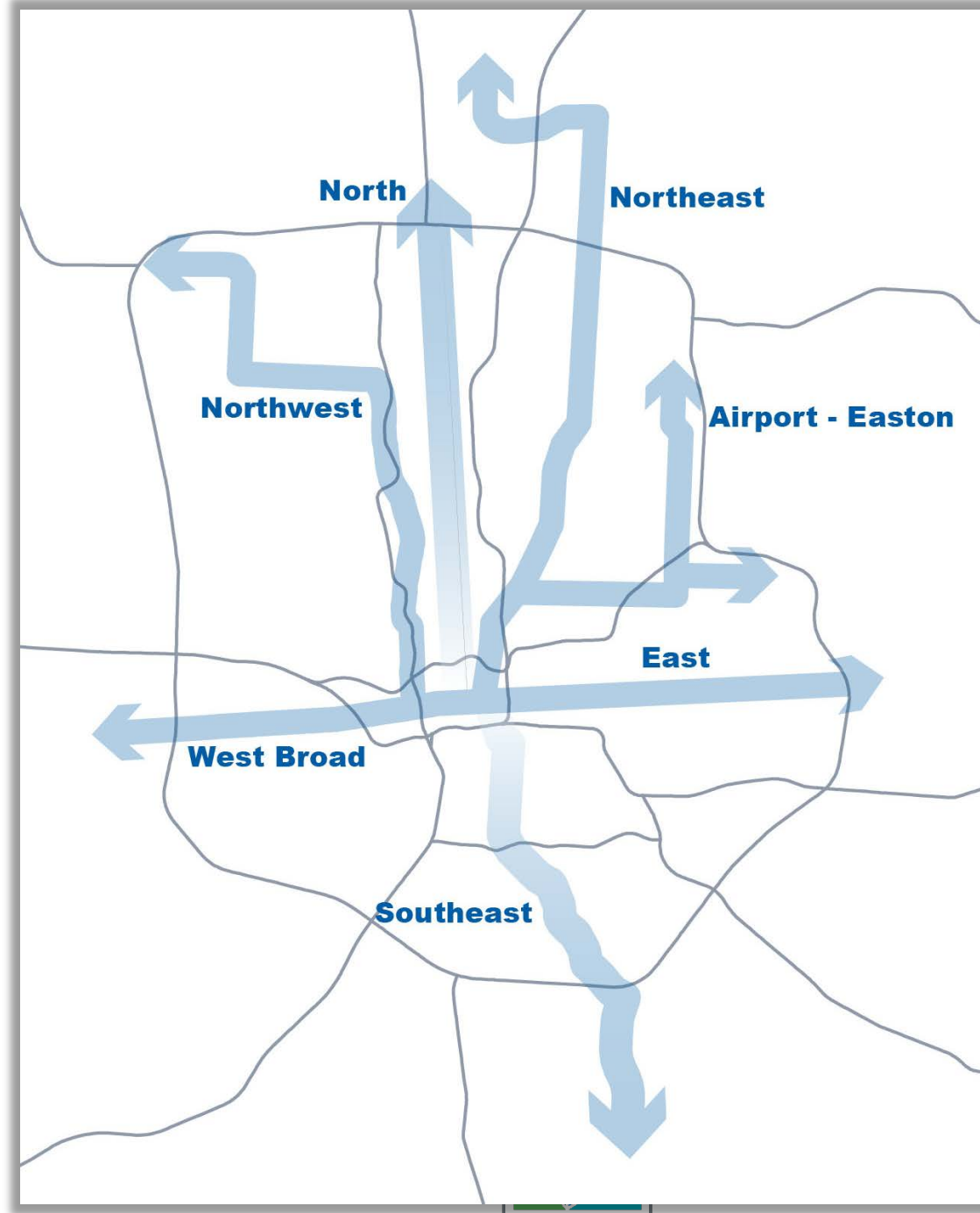


**Link<sup>★</sup>US**

Moving our region. **Together.**

MOBILITY CORRIDORS INITIATIVE

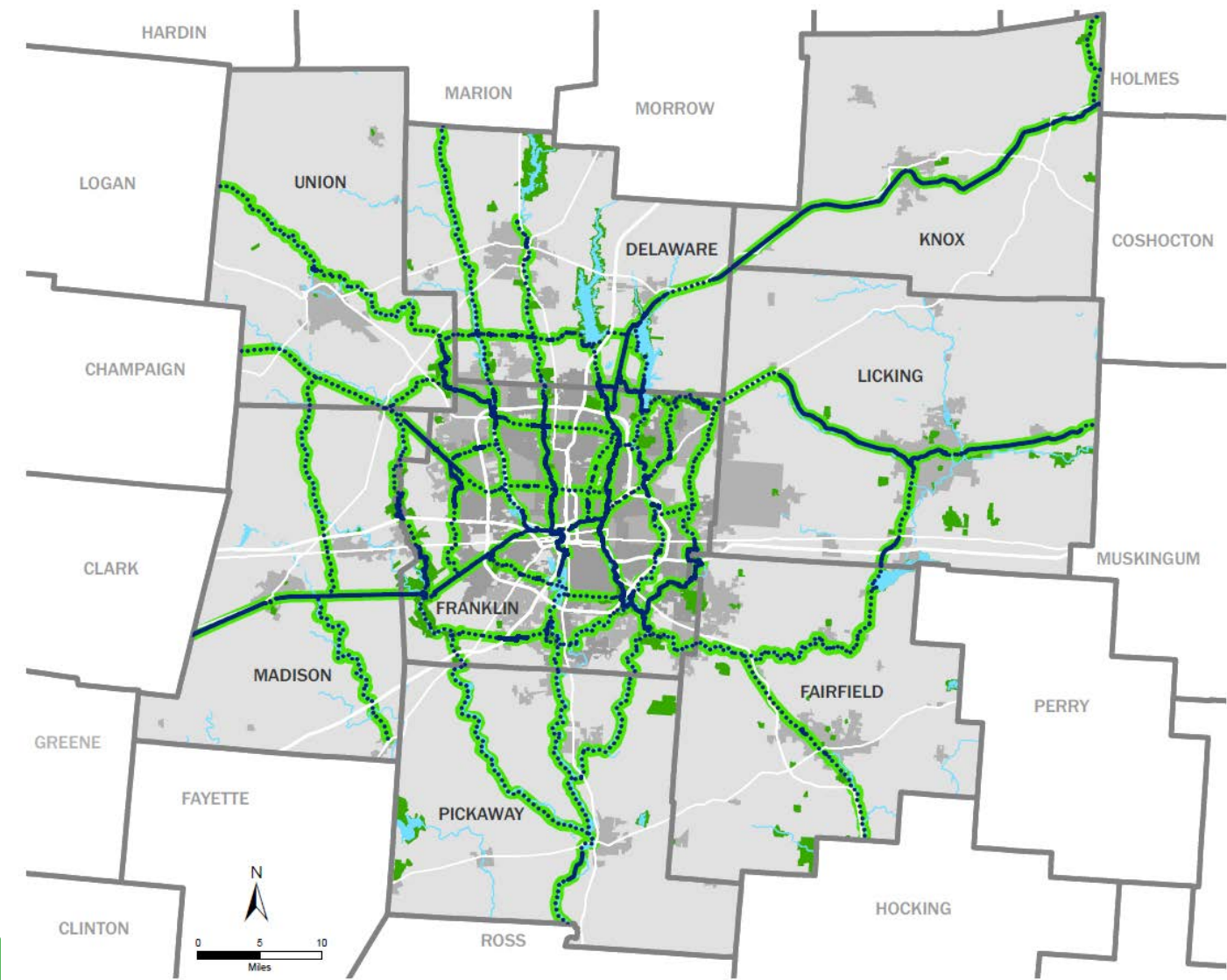
[linkuscolumbus.com](http://linkuscolumbus.com)



# GREENWAYS



MORPC



Regional Trail of Significance

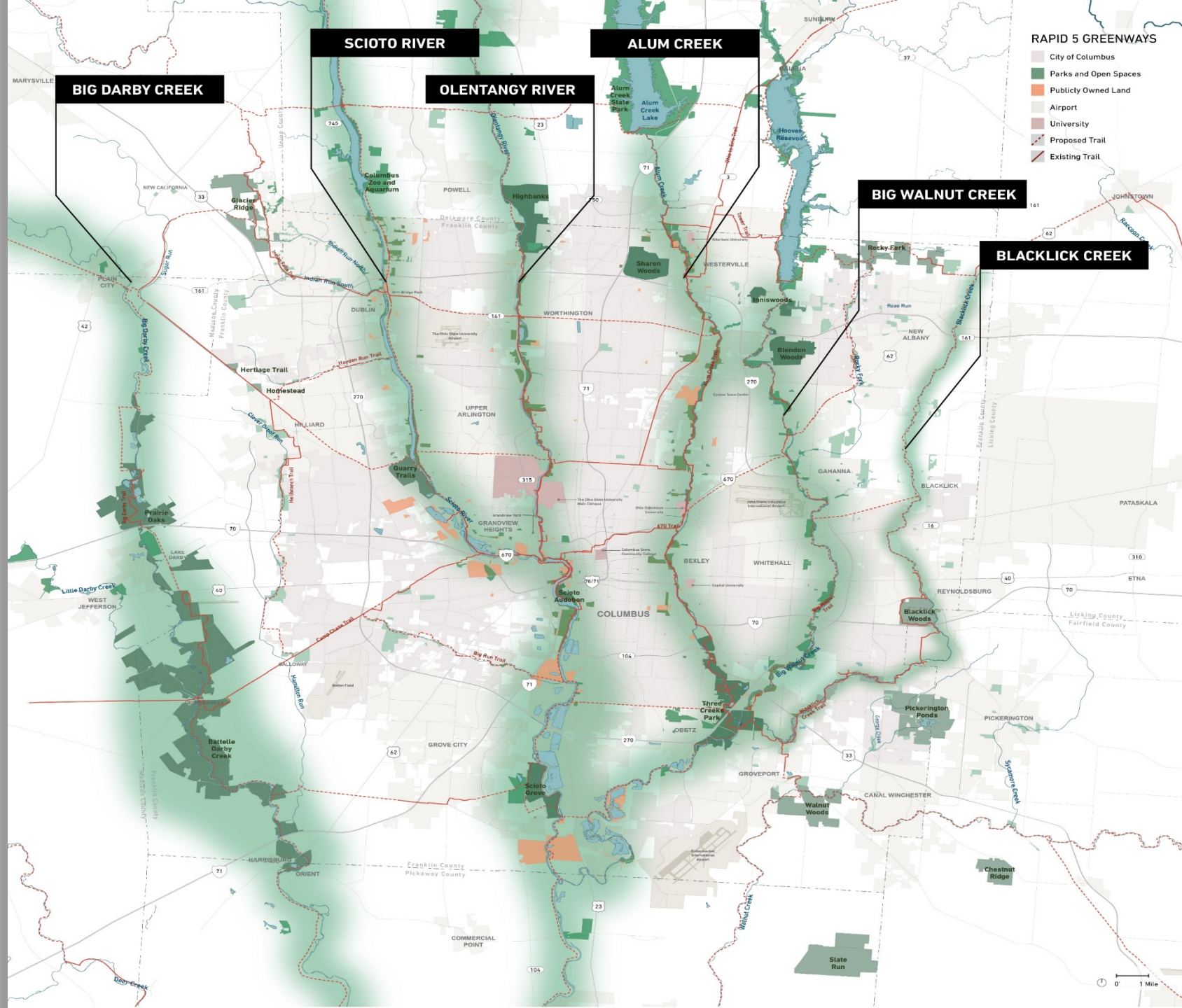
- Existing Multi-use Path
- Proposed Multi-use Path
- Greenway Trail Corridor
- River/Water
- Park/Open Space







**rapid5.org**





**Thank you, IREM Columbus!**

**You are a critical part of  
Central Ohio's future.**

**Together we can create an  
environment for prosperity.**

October 13, 2022

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