

DEVELOPMENT TRENDS ON TOD CORRIDORS

AN ELEMENT OF THE TOD ZONING STUDY



County Planning



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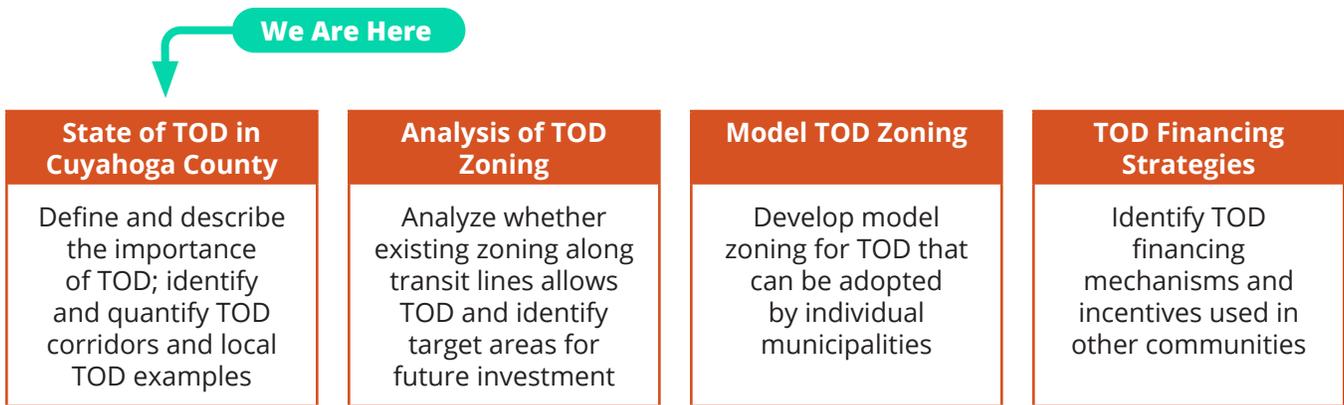


INTRODUCTION

This document is a supplementary report to the *State of TOD in Cuyahoga County* document released as part of the first phase of the TOD Zoning Study. This document details recent TOD projects in Cuyahoga County, the value these projects add to our communities, and the location of TOD investments.

THE TOD ZONING STUDY & INITIATIVE

The TOD Zoning Study is a four-part study that aims to understand and offer improvements to local zoning and land use strategies in a way that supports additional transit-oriented development. The four objectives of the TOD Zoning Study are outlined below, and additional work may arise out of this initial series of steps.



WHO WE ARE

Together, County Planning and GCRTA have partnered on the TOD initiative—in collaboration with the Cities of Cleveland, Shaker Heights, and Fairview Park; as well as other local communities, agencies, and entities—to encourage and support those seeking to build transit-oriented developments along major transit corridors.

This effort builds upon existing knowledge and previous work to expand TOD efforts throughout the County while providing a robust understanding of TOD land use and zoning policies across multiple communities. To follow along with the progress of the study, contact the partner agencies or visit our website at www.CountyPlanning.us/TOD.

DEVELOPMENT TRENDS: KEY TAKEAWAYS

The *Development Trends on TOD Corridors* document identifies major projects that added more than \$1 million in building value over a one-year period along 22 TOD corridors in Cuyahoga County. In the decade from 2012 to 2021, there were 383 major developments—including new construction and renovation—constructed along these corridors as follows:

\$2.9b

worth of added value was invested in major projects along TOD walksheds in the decade from 2012 to 2021, an average of \$290m annually

\$394m

worth of added value was invested within TOD walksheds in 2014, which was the year with the highest amount of investment in the last decade

81.1%

of added value from major development within TOD walksheds occurred in the City of Cleveland

14.0%

of added value from major development within TOD walksheds occurred in the inner ring suburbs

49.3%

of the major development that occurred within the City of Cleveland took place in Downtown Cleveland

22

of the 26 communities along TOD corridors had at least one project that added more than \$1m in added value in the last decade

The nearly three billion dollars invested in major new development within TOD walksheds in the last decade shows the continued demand for housing, retail, and employment along our transit corridors. Shaping these developments with more walkable designs and layouts can support our transit system and riders, while encouraging reinvestment in existing communities and neighborhoods.

DATA IN CONTEXT

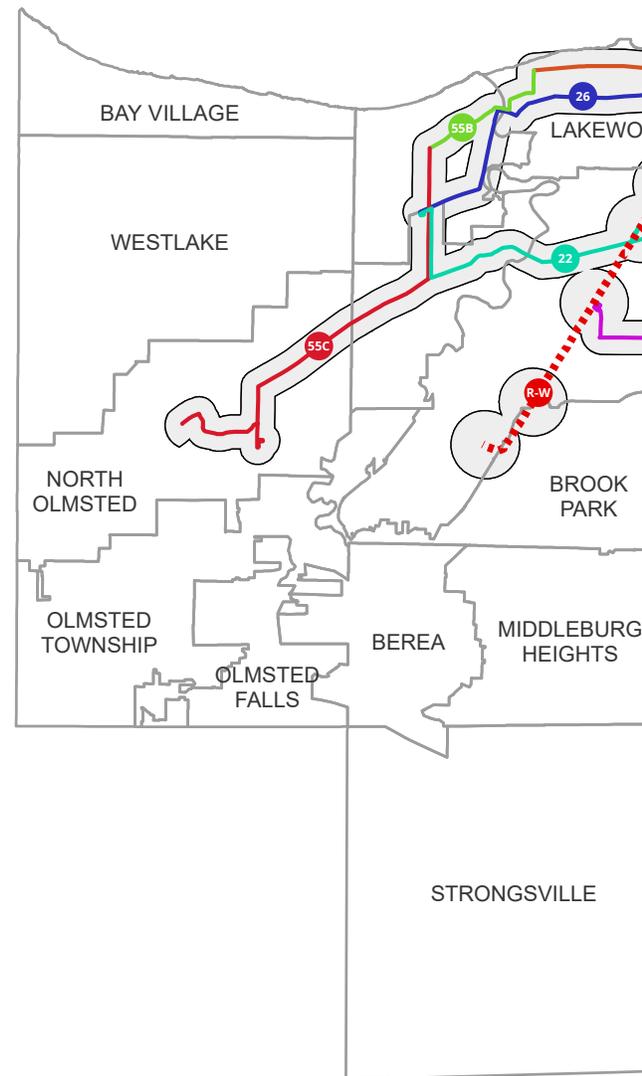
TOD CORRIDORS & WALKSHEDS

As part of the *State of TOD* analysis, 22 transit lines were selected based on a detailed analysis to be TOD corridors. These corridors have the frequent service necessary to support transit-oriented development and the existing density or transit-dependent population that need frequent service. Not all the TOD corridors for this analysis directly correspond to existing GCRTA routes. The TOD corridors may correspond to portions of existing bus routes that meet the standard in this study.

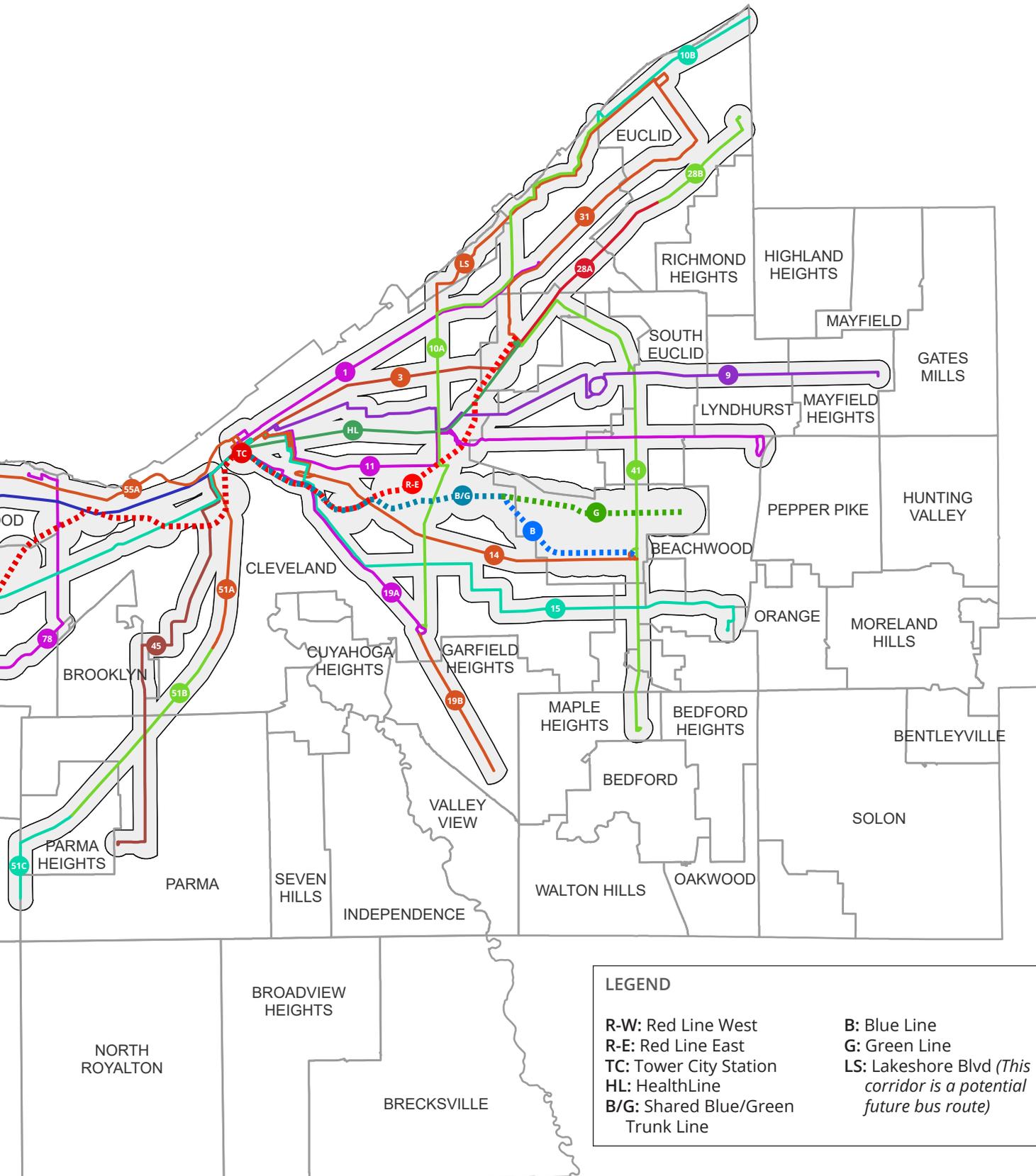
Additionally, 26 communities are located within the defined TOD walksheds, which are shown in grey on the map. To determine TOD walksheds, a quarter mile buffer around each bus stop and a half mile buffer around each train station was mapped. This report details major developments located within these TOD walksheds.

CORRIDOR & WALKSHED SUMMARY

- Number of TOD Corridors: 22
- Number of Communities in Walksheds: 26*



*Four additional communities have very small areas within the TOD walksheds, but were not ultimately included in this list: Bedford, Orange, Pepper Pike, and Richmond Heights.



LEGEND

R-W: Red Line West	B: Blue Line
R-E: Red Line East	G: Green Line
TC: Tower City Station	LS: Lakeshore Blvd (<i>This corridor is a potential future bus route</i>)
HL: HealthLine	
B/G: Shared Blue/Green Trunk Line	

DATA & SOURCES

Data in this document comes from the Cuyahoga County Fiscal Office, which maintains a complete historical record of all property transactions; maintains records of property ownership, valuation, and taxation; and collects special assessments for public improvements. Specifically, this document uses the Fiscal Office's Delta Track data, which shows the change in valuation data from one year to the next.

Developments in this report include only those projects which added more than \$1 million in building value over the course of a year, and the data may not include certain tax exempt projects for which significant portions of value are abated or exempt. Throughout the report, references may be made to

developments, major developments, and projects—these terms are interchangeable and in all cases are referencing developments with added building value of more than \$1 million over a one-year time frame.



GCRTA's modern bus fleet provides transit access to many parts of Cuyahoga County.

DATA & THE COVID-19 PANDEMIC

The data in this document corresponds to time periods prior to, during, and after the outbreak of the Covid-19 Pandemic. Some of the effects of the Covid-19 pandemic will be discussed in this document; however, the ongoing pandemic means certain effects are continuing.

DATA ACCURACY

This document generally uses information collected and shared by external sources. The goal of the document is to provide only the most relevant and accurate data available; however, we have not independently verified the information. For questions about data, suggestions for improvements, or identification of errors, please contact County Planning.

TIME FRAME & TRANSIT CHANGES

This report includes data on major developments beginning in 2012 and ending in 2021 that are located within identified TOD walksheds. During this time frame, a number of significant transit changes occurred, which are important to consider. In December of 2014, GCRTA opened the Cleveland State Line, the system's second bus rapid transit (BRT) line which serves the western suburbs and downtown Cleveland. The RTA's 55, 55B, and 55C lines were all integrated into the Cleveland State Line.

In spring of 2017, MetroHealth and GCRTA announced that the transit system's Route 51 bus line would be renamed and rebranded as the MetroHealth Line. In December of 2017, the MetroHealth Line was officially launched. The RTA's 51A, 51B, and 51C lines were all integrated into the new MetroHealth Line.



GCRTA's Cleveland State Line opened in 2014 and includes dedicated rush-hour bus lanes along Clifton Boulevard.

On October 26, 2020 GCRTA announced that the Waterfront Line would be suspended until further notice due to a track rehabilitation project at Tower City. Before the planned resumption of the service, a Waterfront Line bridge underwent an extensive safety inspection. On September 8, 2021 GCRTA announced that the line would be suspended indefinitely due to safety concerns related to the Waterfront Line Bridge. As of 2022, work is underway on repairing this bridge.

In June 2021, GCRTA launched a system redesign called 'NEXT GEN RTA'. This redesign was created to increase frequency, expand access, and create more comprehensive bus routes across Cuyahoga County. As part of this plan for improved service, certain bus stops were eliminated and some bus routes were changed.

DEVELOPMENT TRENDS

ADDED BUILDING VALUE OF MAJOR DEVELOPMENTS

Figure 1 on page 11 shows the added building value of major developments within TOD walksheds in Cuyahoga County within the past decade. The data illustrates the significant level of investment happening within TOD walksheds, with \$2,898,767,400 worth of investments occurring. This averages to \$290m annually in new construction and substantial rehabilitation in TOD walksheds.

Figure 2 on page 11 shows the added building value of all major developments in Cuyahoga County within the past decade, both inside and outside TOD walksheds. The bars in teal represent development inside of TOD walksheds, while the bars in pink represent development outside TOD walksheds. Like Figure 1, added value fluctuated throughout the decade, but reached its peak in 2019 at approximately \$766m, with over half of that development occurring within TOD walksheds. By 2020, the added value was cut in half to \$411m, and by 2021 the added value reached an all time low at \$366m. In total, \$5,402,059,000 of major development was added throughout Cuyahoga County over the past decade, averaging \$540m annually. In six of those years, the added value of major developments within TOD walksheds comprised a majority of major developments in Cuyahoga County as a whole.

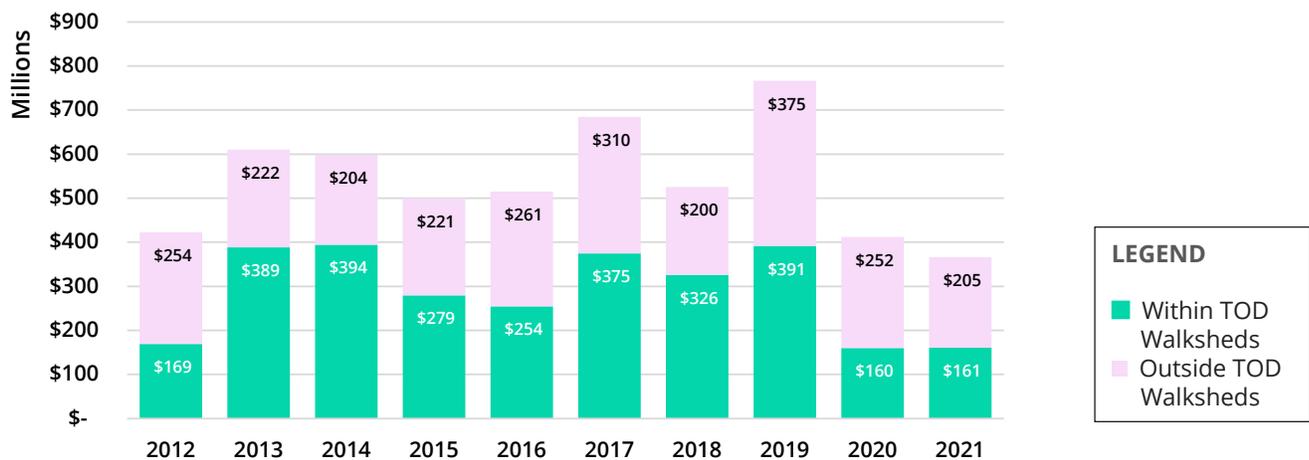
COVID-19 EFFECTS

The Covid-19 pandemic adversely impacted the construction industry, and as a result, construction firms experienced and are still experiencing challenges. In 2020 during the early stages of the pandemic, many contractors lacked the capital resources needed to pay their employees and keep their businesses running. Furthermore, many major investments stalled due to uncertainty, and many construction firms downsized. Now, over two years later, many construction projects have resumed, but contractors continue to experience the effects of the pandemic, including a shortage of construction materials, fewer workers, and a significant increase in costs due to inflation.

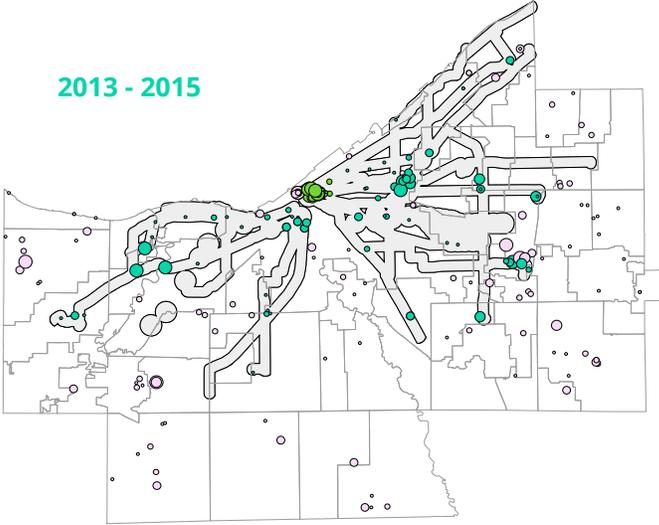
FIGURE 1
ADDED BUILDING VALUE OF MAJOR DEVELOPMENTS WITHIN TOD WALKSHEDS, 2012-2021



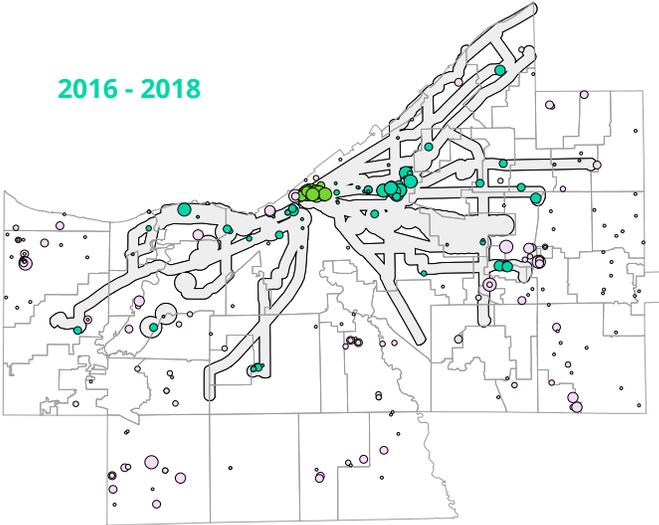
FIGURE 2
ADDED BUILDING VALUE OF ALL MAJOR DEVELOPMENTS IN CUYAHOGA COUNTY, 2012-2021



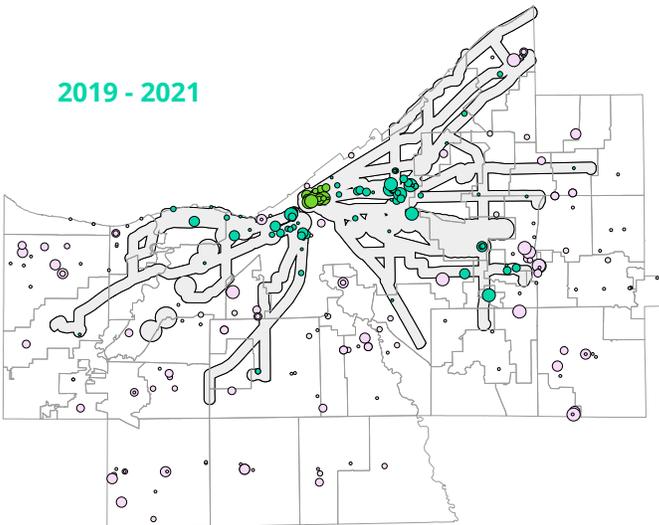
2013 - 2015



2016 - 2018



2019 - 2021



Added Value by Location Over Time

The maps on this page display developments by three-year periods within Cuyahoga County. The series shows the sustained investments in Downtown Cleveland as well as growing areas of investment in Cleveland's Near West Side and the Chagrin Highlands.

COMMUNITY TRENDS

ADDED BUILDING VALUE BY COMMUNITY

Figure 3 on page 15 displays the added building value of major developments within TOD walksheds by community. Cities in Cuyahoga County were grouped into five categories: Inner Ring West, Inner Ring East, Outer Ring West, Outer Ring East, and the City of Cleveland.

- **Inner Ring Suburbs** are those communities outside of Cleveland that were generally built prior to 1960. They generally have more walkable business districts, a grid pattern of streets, a mix of land uses and are typically fully built out. An example of an inner ring suburb is Euclid.
- **Outer Ring Suburbs** are those communities at the edge of Cuyahoga County that have developed more recently and generally have a more suburban configuration. In many cases, these communities still have previously undeveloped land that provides opportunities for new development. An example of an outer ring suburb is North Olmsted.

The City of Cleveland accounted for 81.1% of the total added building value, the highest amount of the five categories. This was followed by the Inner Ring East (10.7%), the Inner Ring West (3.3%), the Outer Ring East (3.3%), and the Outer Ring West (1.6%). Importantly, communities may be experiencing development outside of TOD walksheds that would not be captured here.

ADDED BUILDING VALUE BY CITY OF CLEVELAND NEIGHBORHOODS

Figure 4 on page 15 displays the added value of major developments within TOD walksheds by Cleveland neighborhoods. Neighborhoods in Cleveland were grouped into four categories; Downtown, University Circle, East Side, and West Side. Downtown has attracted the largest amount of investment in Cleveland, with 49.3% of all added value occurring here. This was followed by the East Side neighborhoods (21.9%), University Circle (16.7%), and West Side neighborhoods (12.1%). When comparing these two graphs, one can see that the most investment occurred in the central core of the City and the County, while a smaller percentage occurred on the west side.

FIGURE 3
ADDED BUILDING VALUE OF MAJOR DEVELOPMENTS WITHIN TOD WALKSHEDS BY COMMUNITY, 2012-2021

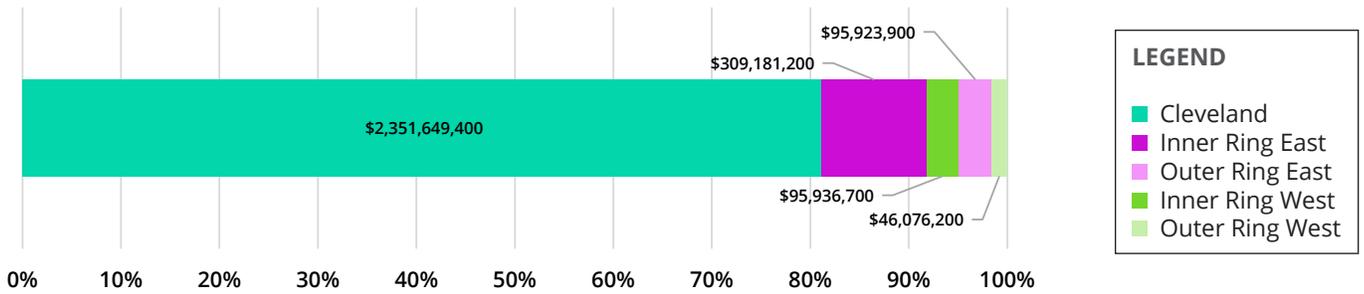


FIGURE 4
ADDED BUILDING VALUE OF MAJOR DEVELOPMENTS WITHIN TOD WALKSHEDS BY CLEVELAND NEIGHBORHOODS, 2012-2021

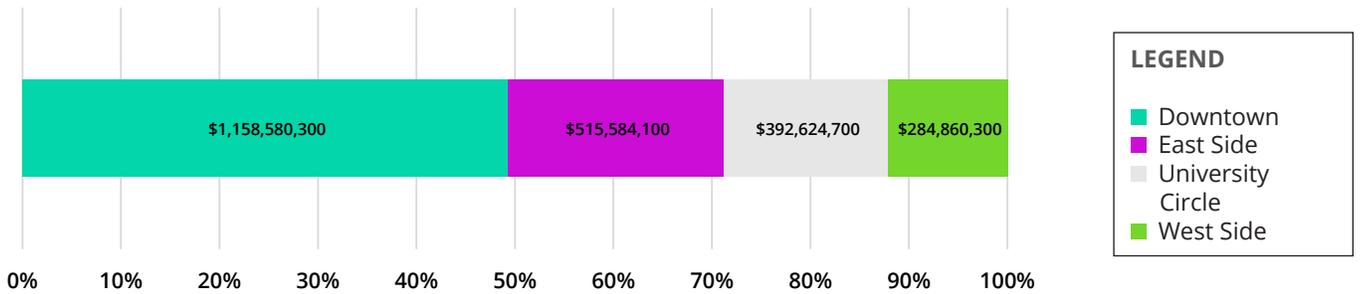


FIGURE 5
DATA BY COMMUNITY

The following list displays the total amount of added value for major developments within TOD walksheds by community.

Note Regarding Data

The values listed in this chart correspond to investments both within a TOD walkshed and within the specified community. Communities may be experiencing development outside of TOD walksheds that would not be listed in this chart.

**Communities that do not intersect with a TOD walkshed are not listed here*

Cuyahoga Communities	2012-2021 Investments	Percent of Total
Beachwood	\$80,741,400	2.8%
Bratenahl	\$1,088,900	0.0%
Brook Park	\$1,319,200	0.0%
Brooklyn	\$1,274,200	0.0%
Cleveland	\$2,351,649,400	81.1%
Cleveland Heights	\$2,567,000	0.1%
East Cleveland	\$21,264,400	0.7%
Euclid	\$22,232,300	0.8%
Fairview Park	\$31,249,200	1.1%
Garfield Heights	\$10,803,700	0.4%
Highland Hills	\$20,716,400	0.7%
Lakewood	\$35,153,500	1.2%
Linndale	\$-	0.0%
Lyndhurst	\$10,860,100	0.4%
Maple Heights	\$62,397,200	2.2%
Mayfield Heights	\$4,322,400	0.1%
Middleburg Heights	\$-	0.0%
North Olmsted	\$20,274,300	0.7%
North Randall	\$96,689,000	3.3%
Parma	\$26,940,600	0.9%
Parma Heights	\$-	0.0%
Rocky River	\$25,801,900	0.9%
Shaker Heights	\$36,527,400	1.3%
South Euclid	\$32,168,800	1.1%
University Heights	\$-	0.0%
Warrensville Heights	\$2,726,100	0.1%
Total	\$2,898,767,400	100.0%

FIGURE 6
DATA BY CLEVELAND NEIGHBORHOOD

The following list displays the total amount of added value for major developments within TOD walksheds by Cleveland neighborhood.

Cleveland Neighborhoods	2012-2021 Investments	Percent of Total
Bellaire-Puritas	\$-	0.0%
Broadway-Slavic Village	\$2,192,900	0.1%
Brooklyn Centre	\$3,124,600	0.1%
Buckeye Shaker	\$14,951,800	0.6%
Central	\$43,377,700	1.8%
Clark Fulton	\$20,067,100	0.9%
Collinwood Nottingham	\$2,866,200	0.1%
Cudell	\$22,881,600	1.0%
Cuyahoga Valley	\$-	0.0%
Detroit-Shoreway	\$19,345,100	0.8%
Downtown	\$1,158,580,300	49.3%
Edgewater	\$11,088,800	0.5%
Euclid Green	\$4,192,500	0.2%
Fairfax	\$299,752,200	12.7%
Glenville	\$14,031,400	0.6%
Goodrich-Kirtland Park	\$10,609,600	0.5%
Hopkins	\$7,448,000	0.3%
Hough	\$97,798,800	4.2%
Jefferson	\$3,655,900	0.2%
Kamms Corners	\$33,094,000	1.4%
Kinsman	\$1,123,800	0.0%
Lee-Harvard	\$11,697,600	0.5%
Mount Pleasant	\$-	0.0%
North Shore Collinwood	\$-	0.0%
Ohio City	\$134,839,000	5.7%
Old Brooklyn	\$1,061,100	0.0%
Saint Clair-Superior	\$2,558,400	0.1%
Stockyards	\$4,689,700	0.2%
Tremont	\$23,565,400	1.0%
Union-Miles Park	\$3,915,500	0.2%
University Circle	\$392,624,700	16.7%
West Boulevard	\$-	0.0%
Woodland Hills	\$6,515,700	0.3%
Cleveland Total	\$2,351,649,400	100.0%

Note Regarding Data

The values listed in this chart correspond to investments both within a TOD walkshed and within the specified neighborhood. Neighborhoods may be experiencing development outside of TOD walksheds that would not be listed in this chart.

**The Lee-Seville neighborhood of Cleveland is not listed here because no TOD walksheds intersect with the neighborhood*

RECENT PROJECTS

Recent projects include those completed in 2021 and unfinished projects that have seen substantial construction in 2021. The values shown for these projects correspond to value added by the construction or renovation of buildings, but not associated land value changes.

RECENT PROJECTS WITHIN THE CITY OF CLEVELAND

Figure 7 on page 19 displays the 10 largest recent projects within the City of Cleveland. Combined, these 10 projects brought a total of approximately \$105m in added value to the City in 2021. These projects were scattered throughout Cleveland along TOD walksheds, but the majority were located in Ohio City, which saw over \$41m of added investment. The Ohio City projects all included a residential component and three of them included a retail component as well. The largest project was Church + State located in Ohio City's Hingetown area and consisting of two buildings: the 11-story State building and the six-story Church building. Together these two structures made up an 158-unit apartment complex, along with several retail businesses on the ground floor. Other notable projects in Ohio City included The Quarter, The Dexter, and BVQ Lofts.

Substantial investment was also added to Downtown, University Circle, and Tremont, with two unique projects accounting for 16% of the total investment: an Amazon Hub on Madison Avenue in the Cudell neighborhood and the Tru by Hilton Hotel in Midtown located along Euclid Avenue. These two projects brought a combined \$16.8m in value to the City. Overall, 80% of recent developments within the TOD walksheds were multi-family residential, with four of them having a mixed-use development component.

RECENT PROJECTS IN SUBURBAN COMMUNITIES

Figure 8 on page 19 displays the only four recent projects in TOD walksheds located outside of the City of Cleveland. These four projects combined brought a total of approximately \$7.6m in added value to Cuyahoga County. Similarly to Figure 7, the majority of these developments were residential, with two being multi-family residential.

FIGURE 7
TEN LARGEST RECENT PROJECTS, CITY OF CLEVELAND

TOD Project	Location	Land Use(s)	2021 Value Added	Total Value Added
1. Church + State	Ohio City	Residential, Retail	\$19.7m	\$19.7m
2. The May Company	Downtown	Residential, Retail, Office	\$17.1m	\$27.1m
3. Axis on Ansel	University Circle	Residential	\$14.0m	\$14.0m
4. Amazon Hub	Cudell	Industrial	\$10.5m	\$14.9m
5. St. Joseph's Commons	Tremont	Residential	\$9.6m	\$9.6m
6. The Quarter	Ohio City	Residential, Retail	\$9.4m	\$9.4m
7. The Dexter	Ohio City	Residential, Retail	\$6.4m	\$6.4m
8. Tru by Hilton	Midtown	Hotel	\$6.3m	\$9.0m
9. 1609 Hazel	University Circle	Residential	\$6.3m	\$9.5m
10. BVQ Lofts	Ohio City	Residential	\$6.0m	\$6.0m
Total			\$105.3m	\$125.6m

FIGURE 8
LARGEST RECENT PROJECTS, SUBURBAN COMMUNITIES

TOD Project	Location	Land Use(s)	2021 Value Added	Total Value Added
1. The Alcazar	Cleveland Heights	Residential	\$2.6m	\$2.6m
2. Van Aken District	Shaker Heights	Retail	\$2.3m	\$18.0m*
3. Single-Family Home	Lakewood	Residential	\$1.5m	\$1.5m
4. Terrace Towers	East Cleveland	Residential	\$1.2m	\$1.2m
Total			\$7.6m	\$23.3m

*The \$18.0m worth of added value includes the added building value for three parcels, which together form the Van Aken District: PPN 736-10-007, 736-10-008, 736-10-009

The 2021 Value Added column displays the estimated value added by the renovation or construction of buildings as determined by the County Fiscal Office for 2021. Development projects may not be completed, but may be substantially underway, and the County Fiscal Office has calculated the added building value up to this point.

The Total Value Added column displays the estimated value added by the renovation or construction of buildings over the course of a project. This number was calculated by summing the added building value for parcels associated with the project over its lifespan.

TRANSITWAY TRENDS

ADDED BUILDING VALUE BY TRANSIT TYPE

Figure 9 on page 21 shows the added value of major developments within TOD walksheds by three transit types within the past decade:

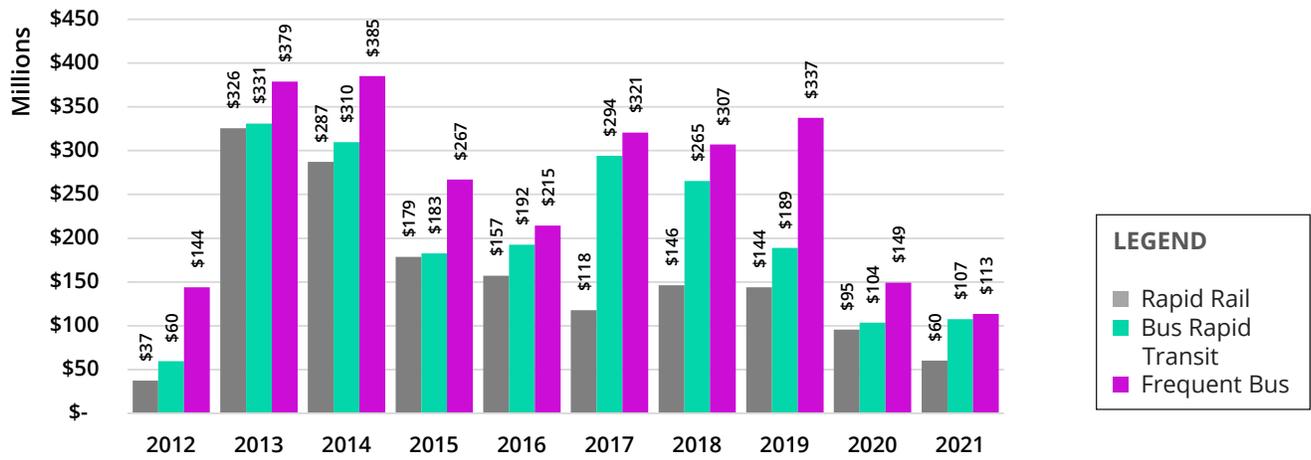
- **Rapid Rail:** Includes the walksheds of the Red Line, Blue Line, and Green Line
- **Bus Rapid Transit:** Includes the walksheds of the Cleveland State Line, MetroHealth Line, and the HealthLine
- **Frequent Bus:** Includes the walksheds of any other bus line that is considered a TOD corridor

This analysis shows which types of transit corridors attracted the most investment. For this analysis, developments were coded based on whether they fell into any one of the transitway types. A development located at the intersection of a rapid rail station and a frequent bus stop was counted for both type of corridor. As such, certain projects were included in more than one transitway metric and the total amount of investment shown on the chart includes duplicate developments.

Figure 9 on page 21 shows that the most value was added in developments located along frequent bus corridors. In every year between 2012 and 2021, these frequent bus corridors saw the most new investment. This was followed by investments along bus rapid transit corridors, which accounted for the second highest amount of investment each year. Developments around rapid rail stations fluctuated the most and in some years was nearly equal to developments around bus rapid transit lines and in other years was significantly lower.

In total during the decade from 2012 to 2021, \$2.6b was invested along frequent bus corridors, \$2.0b was invested along bus rapid transit corridors, and \$1.5b was invested near rapid rail stations. When controlled for area, however, a slightly different picture emerges. During that same time period, there was \$120.3m per square mile invested around bus rapid transit corridors, \$73.2m per square mile invested around rapid rail stations, and \$40.5m per square mile invested around frequent bus corridors.

FIGURE 9
ADDED BUILDING VALUE OF MAJOR DEVELOPMENTS WITHIN TOD WALKSHEDS BY TRANSIT TYPE, 2012-2021





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