

2025 EDITION DEVELOPMENT TRENDS ON TOD CORRIDORS

AN ELEMENT OF THE TOD ZONING STUDY



Cuyahoga
COUNTY PLANNING
Commission



2025 EDITION

DEVELOPMENT TRENDS

ON TOD CORRIDORS

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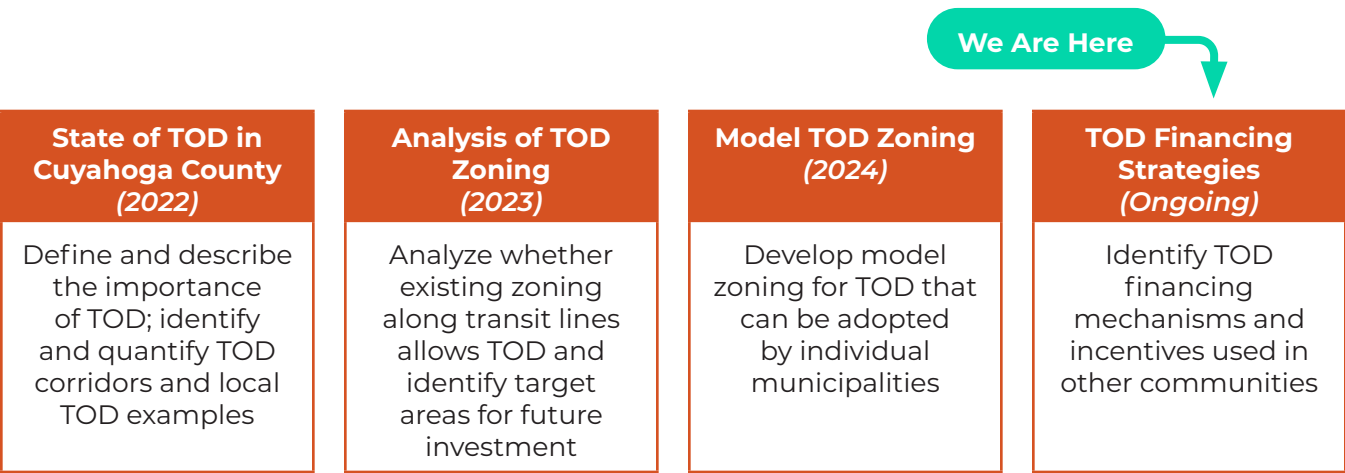
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INTRODUCTION

This document is a supplementary report released regularly as part of the *TOD Zoning Study*. This document details recent Transit-Oriented Development (TOD) projects in Cuyahoga County, the value these projects add, and the location of TOD investments. It is an update of our most recent report in 2024, and it includes an additional year of data and a new analysis determining whether investments meet basic TOD criteria.

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 local communities, agencies, and other 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 met transit-oriented design criteria, added more than \$1 million in building value over a one-year period, and were located along 22 TOD corridors in Cuyahoga County.

In the six years from 2019 to 2024, there were more than 150 major TOD developments—including new construction and renovation—constructed along these corridors. The following are major takeaways:

- There has been \$1.2 billion worth of investment in TOD in the past six years, averaging \$199 million annually.
- In 2024, \$298 million worth of TOD investment was added, the highest amount of investment in the last six years and \$150 million more than was invested in 2021.
- TOD investment accounted for 33.6% of total added building value in Cuyahoga County as a whole, indicating that a significant amount of TOD is being built while still less than half of all development in the County.
- Over 92% of new TOD investment has occurred in the City of Cleveland in the past six years with strong concentrations in Downtown, University Circle, and the Near West Side.
- Within the City of Cleveland, 36.8% of TOD development occurred in Downtown Cleveland.
- Of all communities along TOD corridors, only four of the 26 had a TOD project in the past six years, indicating ongoing need to support suburban TOD.
- While TOD has been concentrated in the City of Cleveland, multiple suburban communities are advancing TOD through zoning reforms, TOD planning, or incentives.

The low number of communities with TOD shows the ongoing need to reform zoning, plan for TOD, and build on vacant or underutilized sites; however, the 1.2 billion dollars invested in major TOD developments within TOD walksheds in the past six years is emblematic of increased interest in rebuilding walkable, mixed-use corridors and neighborhoods in Cuyahoga County. It underscores the continued demand for housing, retail, and employment and provides an opportunity for increasing the use of transit to get around.

DATA IN CONTEXT

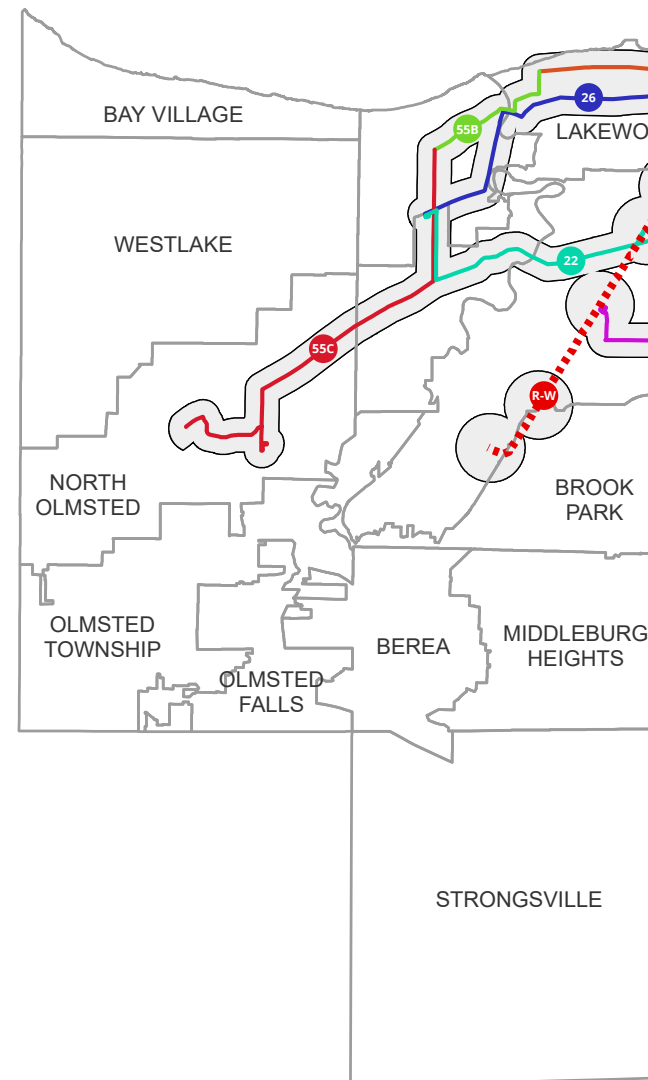
TOD CORRIDORS & WALKSHEDS

As part of the *TOD Zoning Study* 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.

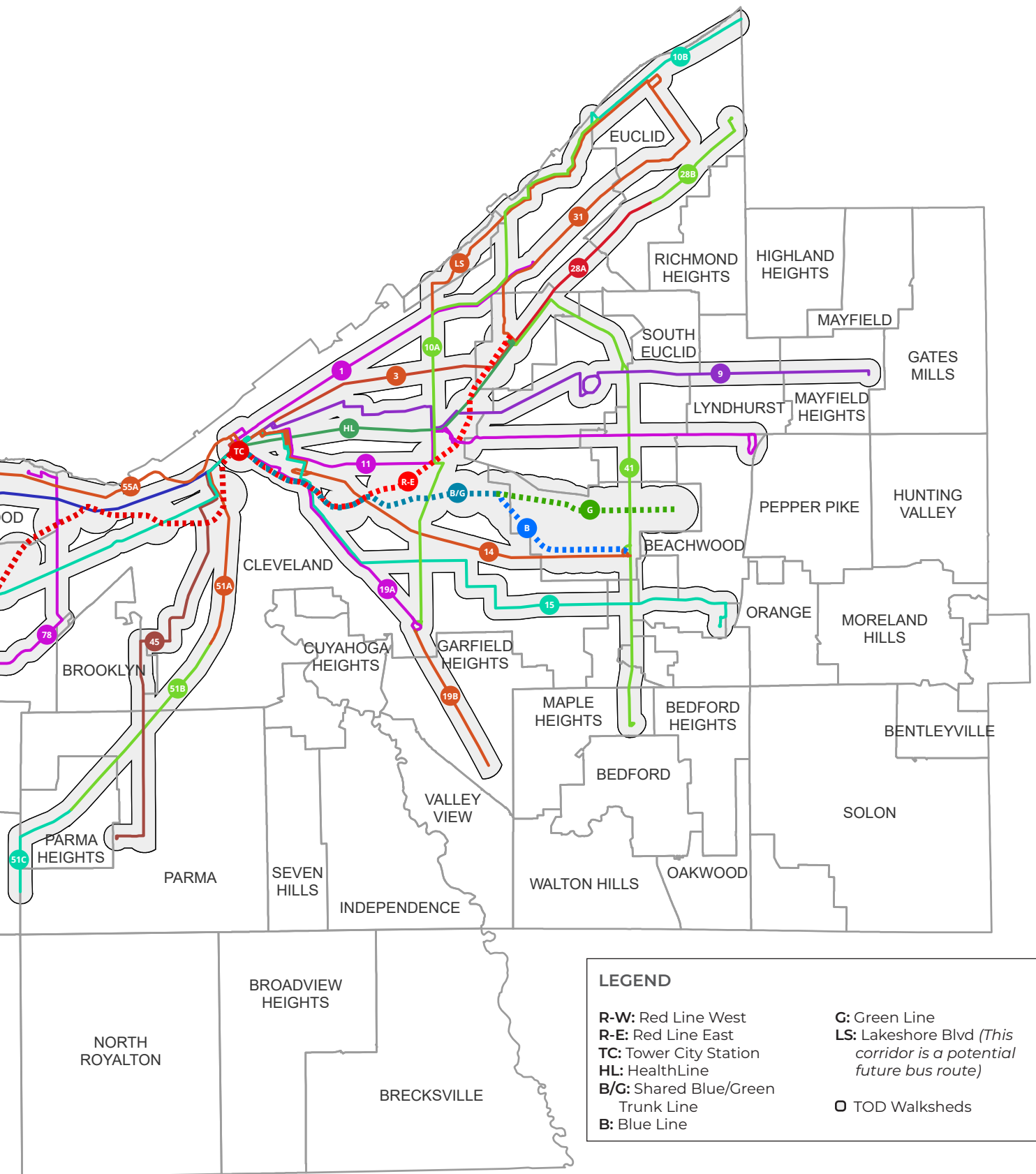
Additionally, 26 communities are located within defined TOD walksheds, which are shown in grey on the map. To determine TOD walksheds, a quarter mile buffer around each bus stop and a half mile buffer around each train station was mapped. This report details major developments located within these TOD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



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 one year, and the data may not include certain tax exempt projects for which significant portions of value are abated or exempt. This document does not account for changes in land value, and analyzes only the value added to the each new development during construction or renovation. 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.

Definitions

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.

TOD Developments, Major TOD Developments, and TOD Projects: These terms refer specifically to developments that meet the TOD design criteria below.

New This Year: TOD Review

For the 2025 Development Trends edition, County Planning is introducing a new analysis: TOD Review. Previously, all developments located within TOD walksheds were considered TOD developments. For this edition, County Planning visually reviewed developments to determine whether they conform to criteria for transit-oriented design.

"TOD projects" refers specifically to developments within TOD walksheds and that conform to the following design criteria:

1. Close to the street
2. Multiple stories
3. Parking located to the side/rear
4. TOD-friendly use/mixed-use
5. Front-facing building entrance

See the images on page 10 for examples of projects that do and do not conform to these design criteria.

TIME FRAME & TRANSIT CHANGES

This report includes data on major developments beginning in 2019 and ending in 2024 that are located within identified TOD walksheds. During or shortly before this time frame, a number of significant transit changes occurred, which are important to consider.

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.

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. On September 8, 2021 GCRTA announced that the line would be suspended indefinitely due to safety concerns related to a Waterfront Line Bridge. As of August 2024, the Waterfront Line reopened for Saturdays, Sundays, holidays, for Browns home games, and for special events at Huntington Bank Field.

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.

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.



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

ADDITIONAL MAJOR PROJECTS

- Brookpark Station (2017)
- E. 116th St. - St. Luke's Station (2018)
- E. 105th Street Station (2019)
- E. 79th Street Red Line Station (2021)

DEVELOPMENT TRENDS

QUICK FACT

There was \$298 million invested in TOD in 2024, the highest of any year since 2019.

ADDED BUILDING VALUE OF MAJOR DEVELOPMENTS

Figure 1 on page 11 shows the added building value of major TOD developments in Cuyahoga County between 2019 and 2024. The data illustrates the significant level of investment happening in TOD projects, with \$1.2b of investment from 2019 to 2024, and \$298m worth of investment in 2024 alone—the most in the last six years. The increasing investment is a positive sign of demand for this type of investment and the positive market response to this demand.

Figure 2 on page 11 shows the added building value of all major developments in Cuyahoga County in the past six years, both within and outside TOD walksheds. The bars in teal represent developments within TOD walksheds that do not meet TOD design criteria, while the bars with green hash marks represent those projects that do meet TOD design criteria. The bars in pink represent developments outside of TOD walksheds.

Total investment in the County has rebounded since the start of the COVID-19 pandemic, reaching a high of \$789m in 2024. In general, investment in TOD projects has averaged a third of the total added value of all investment in Cuyahoga County.



The Welleon in Gordon Square meets the design criteria to qualify as a TOD project.



This building would not be considered a TOD project due to its front parking lot.

FIGURE 1
ADDED BUILDING VALUE OF MAJOR TOD DEVELOPMENTS,
2019-2024

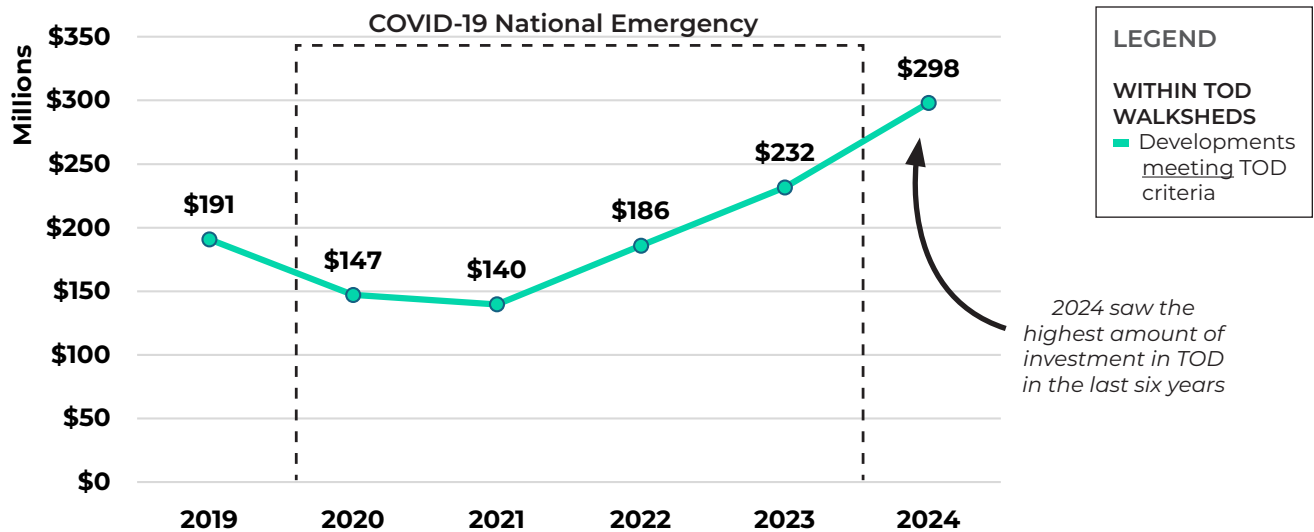
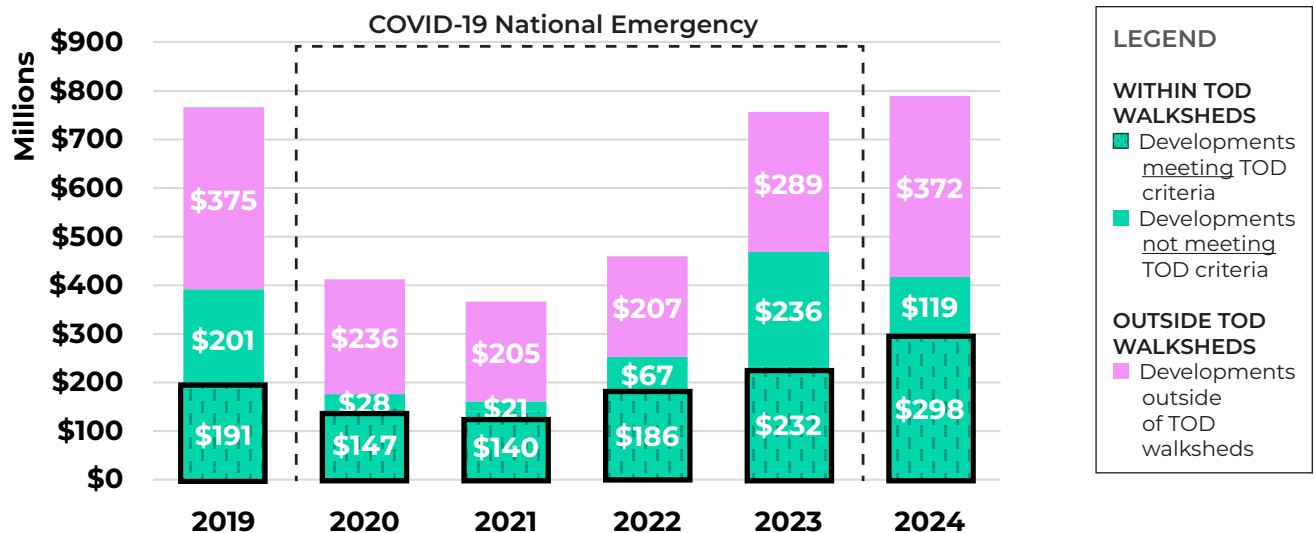


FIGURE 2
ADDED BUILDING VALUE OF ALL MAJOR DEVELOPMENTS IN
CUYAHOGA COUNTY, 2019-2024

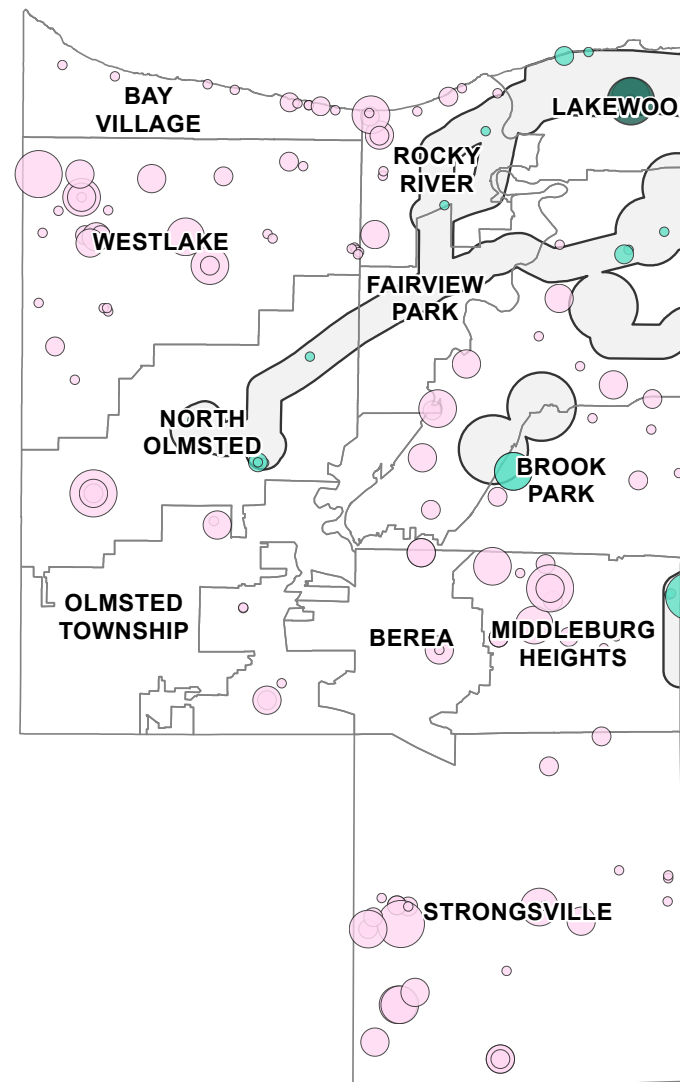


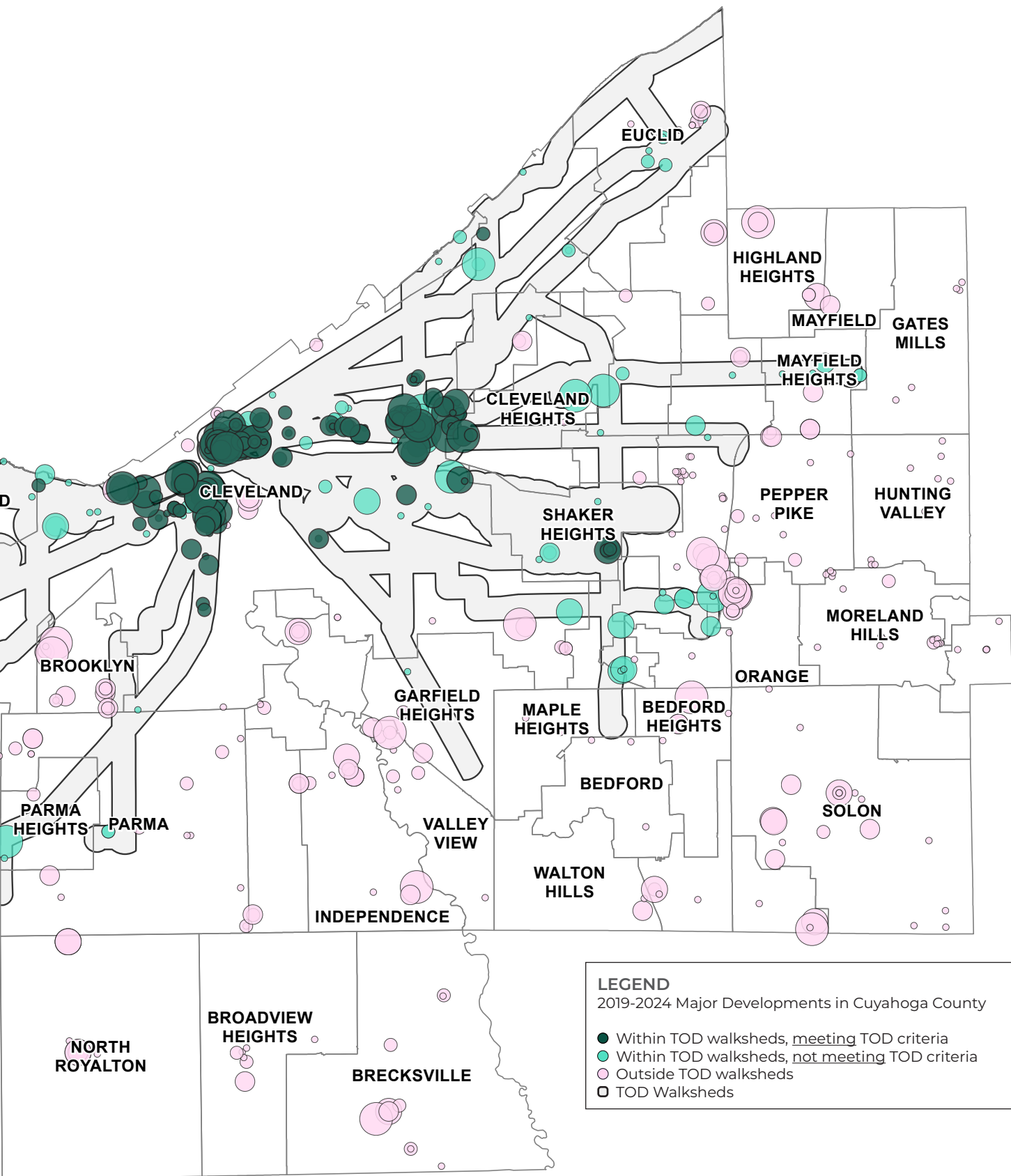
ADDED BUILDING VALUE BY LOCATION

The map below showcases developments in Cuyahoga County between 2019 and 2024, with larger dots indicating larger added building value. In dark green are developments within the TOD walksheds that meet the criteria for being TOD, in teal are developments located within TOD walksheds that do not meet the criteria to be TOD, and in pink are developments outside of TOD walksheds in Cuyahoga County. The map illustrates that many of the major investments over the past six years have been concentrated within TOD walksheds in or near Downtown Cleveland, Ohio City, and University Circle and meet the criteria for TOD.



(From top to bottom) Intro in Ohio City, The Dexter in Ohio City, and The May in Downtown are all examples of local TOD.





RECENT PROJECTS

QUICK FACT

New TOD in Cuyahoga County has been heavily concentrated in the City of Cleveland, with all but one development in 2024 located in the suburbs (The Ascent in Cleveland Heights).

Recent projects include those completed in 2024 and unfinished projects that have seen substantial construction in 2024. 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 TOD BUFFERS

Figure 3 on page 15 displays every project within TOD buffers that meets TOD criteria and has greater than \$1,000,000 in added building value in 2024. Combined, these projects brought a total of approximately \$454.6m in added value to the region. These projects were scattered throughout Cleveland along TOD walksheds, but many of the larger investments were located in Downtown, which saw over \$135m of added investment, including the new Sherwin Williams HQ, 55 Public Square, 75 Public Square, The Bell, Skyline 776, and Innovation Landing. The largest project in Cuyahoga County with significant development in 2024 was the Artisan, a 24-story, 298-unit mixed-use building located in Cleveland's University Circle neighborhood, which saw a total added building value of \$54.5m.

Other notable developments include Fairfax Market (Fairfax), Station 73 at Battery Park (Detroit Shoreway), Noyse House (University Circle), Waterford Bluffs (Tremont), and The Ascent in Cleveland Heights—the building with the third highest added value in 2024 at \$40.6m. The Ascent was the only suburban TOD project with substantial added building value in 2024.

The Total Value Added column displays the estimated value added by the renovation or construction of buildings as determined by the County Fiscal Office over the course of a project. All projects listed here had significant construction in 2024. Some multi-year projects included significant construction in previous years, which is also included in this column.

Note: Added building value corresponds to developments within TOD walksheds that meet the criteria to be counted as Transit-Oriented Development (TOD). County Planning used the criteria found on page 8 to determine if developments are classified as TOD.

FIGURE 3
TOD DEVELOPMENTS, 2024

TOD Project	Location	Land Use(s)	Total Value Added
1. The Artisan	University Circle	Residential, Retail	\$54.5m
2. Sherwin Williams HQ	Downtown	Office	\$46.9m
3. The Ascent	Cleveland Heights	Residential, Retail	\$40.6m
4. Fairfax Market	Fairfax	Residential, Retail	\$32.2m
5. Station 73 at Battery Park	Detroit Shoreway	Residential, Retail	\$29.4m
6. 55 Public Square	Downtown	Residential, Retail	\$27.0m
7. The Bell	Downtown	Residential	\$24.5m
8. Noyse House	University Circle	Residential	\$20.0m
9. Waterford Bluffs	Tremont	Residential	\$19.2m
10. The Welleon	Detroit-Shoreway	Residential, Retail	\$17.4m
11. 75 Public Square	Downtown	Residential, Retail	\$17.1m
12. Skyline 776	Downtown	Residential, Retail	\$16.0m
13. The Abbey Townhomes and Flats	Tremont	Residential	\$15.5m
14. Foundry Lofts	Fairfax	Residential, Retail	\$12.9m
15. 41 West	Ohio City	Residential, Retail	\$9.8m
16. Fairfax Innovation Square	Fairfax	Residential	\$9.3m
17. Addis View	Hough	Residential	\$9.2m
18. Woodhill Station West	Buckeye-Woodhill	Residential	\$6.5m
19. Park Lamont Townhomes	Hough	Residential	\$6.5m
20. 5115 The Rising	Broadway-Slavic Village	Residential, Retail	\$6.1m
21. LG Blanket Mill	Clark-Fulton	Residential	\$4.6m
22. Park Lamont Apartments	Hough	Residential	\$4.0m
23. The Davis	Glenville	Residential	\$3.9m
24. West 25th Street United Bank	Ohio City	Residential, Retail, Office	\$3.6m
25. Treo	Tremont	Residential, Retail	\$3.3m
26. Innovation Landing	Downtown	Residential, Retail	\$3.3m
27. Breakwater Lofts	Detroit Shoreway	Residential	\$3.1m
28. Louis C. Stokes Scholar House	Central	Residential	\$3.0m
29. Lofts on Pearl	Brooklyn Centre	Residential, Retail	\$2.0m
30. The Monroe	University Circle	Residential	\$1.9m
Total			\$454.6m

COMMUNITY TRENDS

QUICK FACT

Since 2019, 36.8% of new TOD has been built in Downtown Cleveland, followed by 29.1% on Cleveland's west side, 19.2% on Cleveland's east side, and 15% in University Circle.

ADDED BUILDING VALUE OF TOD BY COMMUNITY

Figure 4 on page 17 displays the added building value of TOD projects 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 typically have more walkable business districts, a grid pattern of streets, a mix of land uses and are usually 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 92.8% of the total added building value of TOD projects between 2019 and 2024. This was followed by the Inner Ring East (5.9%), and the Inner Ring West (1.3%). Of note, there were no developments between 2019 and 2024 that met TOD criteria that are located in the Outer Ring East and Outer Ring West communities, but these communities are experiencing development inside and outside of TOD walksheds not meeting TOD criteria, which is not captured in this data.

While the data may not show significant TOD within many suburbs, there are a number of ongoing projects advancing suburban TOD. These include TOD planning for Southgate (Maple Heights) and along Turney Road (Garfield Heights); TOD zoning updates in South Euclid, Fairview Park, Shaker Heights, and North Olmsted; and the redevelopment of Southland in Middleburg Heights, among others.

ADDED BUILDING VALUE BY CITY OF CLEVELAND NEIGHBORHOODS

Figure 5 on page 17 displays the added value of TOD developments by Cleveland neighborhoods, grouped into four categories: Downtown, East Side, University Circle, and West Side. Downtown has attracted the largest amount of investment in Cleveland, with 36.8% of all added value occurring there. This was followed by the West Side neighborhoods (29.1%), East Side neighborhoods (19.2%), and University Circle (15.0%).

FIGURE 4
ADDED BUILDING VALUE OF MAJOR TOD DEVELOPMENTS WITHIN TOD WALKSHEDS BY COMMUNITY, 2019-2024

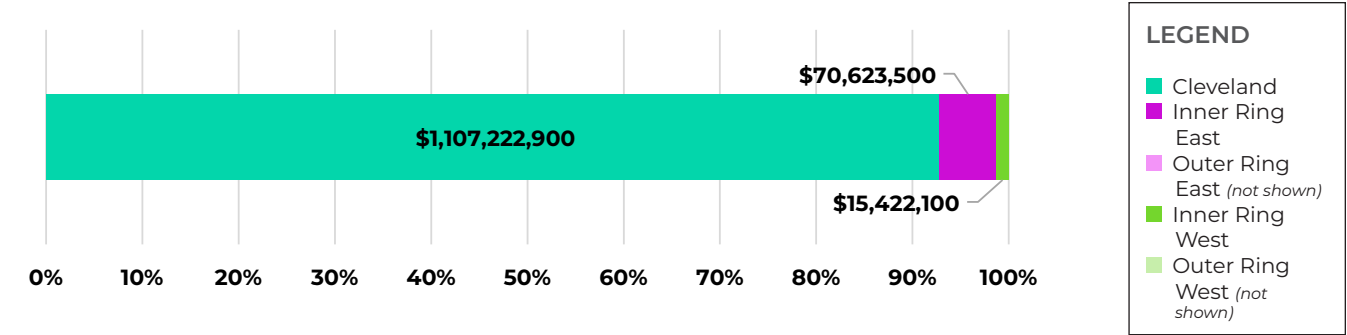
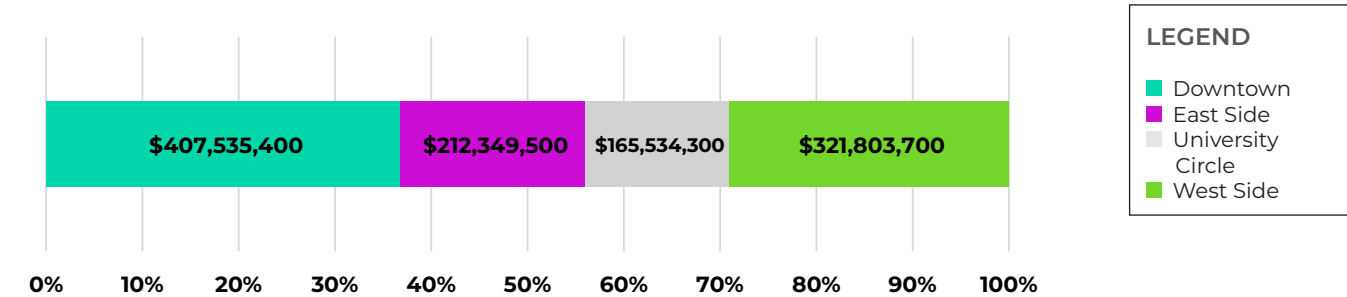


FIGURE 5
ADDED BUILDING VALUE OF MAJOR TOD DEVELOPMENTS WITHIN TOD WALKSHEDS BY CLEVELAND NEIGHBORHOODS, 2019-2024



Note: In a departure from previous Development Trends documents, the charts above only reflect added building value of projects meeting TOD criteria between 2019 and 2024. County Planning used the criteria found on page 8 to determine if developments are classified as TOD.

FIGURE 6
DATA BY COMMUNITY, 2019-2024

The following list displays the total amount of added building value of all developments within TOD walksheds and for developments that meet TOD criteria, by community.

Note Regarding Data

The values listed under the "Total Investments" column correspond to total investments within TOD walksheds regardless of whether they meet TOD criteria. The values listed under the "TOD Investments" column correspond to those projects which meet TOD criteria. Communities may be experiencing development outside of TOD walksheds which would not be listed in this chart.

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

Cuyahoga Communities	2019-2024 Total Investments	2019-2024 TOD Investments	Percent Meeting TOD Criteria
Beachwood	\$156,188,400	\$0	0.0%
Bratenahl	\$4,155,300	\$0	0.0%
Brook Park	\$22,374,500	\$0	0.0%
Brooklyn	\$0	\$0	0.0%
Cleveland	\$1,319,353,300	\$1,107,222,900	83.9%
Cleveland Hts.	\$81,657,900	\$46,028,400	56.4%
East Cleveland	\$1,165,400	\$0	0.0%
Euclid	\$15,262,200	\$0	0.0%
Fairview Park	\$0	\$0	0.0%
Garfield Hts.	\$1,360,700	\$0	0.0%
Highland Hills	\$4,350,000	\$0	0.0%
Lakewood	\$34,199,200	\$15,422,100	45.1%
Linndale	\$0	\$0	0.0%
Lyndhurst	\$6,038,400	\$0	0.0%
Maple Hts.	\$0	\$0	0.0%
Mayfield Hts.	\$14,124,300	\$0	0.0%
Middleburg Hts.	\$2,543,300	\$0	0.0%
North Olmsted	\$8,149,200	\$0	0.0%
North Randall	\$107,163,300	\$0	0.0%
Parma	\$5,026,900	\$0	0.0%
Parma Hts.	\$14,040,900	\$0	0.0%
Rocky River	\$2,492,100	\$0	0.0%
Shaker Hts.	\$36,478,300	\$24,595,100	67.4%
South Euclid	\$4,232,900	\$0	0.0%
University Hts.	\$0	\$0	0.0%
Warrensville Hts.	\$25,082,700	\$0	0.0%
Total	\$1,865,439,200	\$1,193,268,500	64.0%

FIGURE 7
DATA BY CLEVELAND NEIGHBORHOOD, 2019-2024

The following list displays the total amount of added building value of all developments within TOD walksheds and for developments that meet TOD criteria, by Cleveland neighborhood.

Cleveland Neighborhoods	2019-2024 Total Investments	2019-2024 TOD Investments	Percent Meeting TOD Criteria
Broadway-Slavic Village	\$6,122,600	\$6,122,600	100%
Brooklyn Centre	\$12,199,600	\$12,199,600	100%
Buckeye-Shaker Square	\$24,407,100	\$11,033,700	45%
Buckeye-Woodhill	\$9,133,200	\$6,590,700	72%
Central	\$13,158,200	\$8,014,400	61%
Clark-Fulton	\$21,922,500	\$21,922,500	100%
Collinwood-Nottingham	\$20,632,900	\$2,785,000	13%
Cudell	\$17,675,700	\$0	0%
Cuyahoga Valley	\$1,775,400	\$0	0%
Detroit Shoreway	\$64,217,000	\$64,217,000	100%
Downtown	\$454,415,800	\$407,535,400	91%
Edgewater	\$10,260,900	\$3,373,200	33%
Euclid-Green	\$4,192,500	\$0	0%
Fairfax	\$59,200,500	\$56,502,100	95%
Glenville	\$12,559,500	\$9,091,100	72%
Goodrich-Kirtland Park	\$8,919,400	\$7,852,400	88%
Hough	\$117,494,700	\$104,357,500	89%
Jefferson	\$1,276,200	\$0	0%
Kamm's Corners	\$5,604,400	\$0	0%
Kinsman	\$11,097,600	\$0	0%
Lee-Harvard	\$11,697,600	\$0	0%
North Shore Collinwood	\$1,917,000	\$0	0%
Ohio City	\$152,642,900	\$147,998,000	96%
Old Brooklyn	\$1,057,000	\$0	0%
Stockyards	\$1,720,200	\$0	0%
Tremont	\$72,093,400	\$72,093,400	100%
University Circle	\$201,959,500	\$165,534,300	82%
Cleveland Total	\$1,319,353,300	\$1,107,222,900	84.0%

Note Regarding Data

The values listed under the "Total Investments" column correspond to total investments within TOD walksheds regardless of whether they meet TOD criteria. The values listed under the "TOD Investments" column correspond to those projects which meet TOD criteria. Communities may be experiencing development outside of TOD walksheds which would not be listed in this chart.

**The Lee-Seville, neighborhood in Cleveland is not listed here because no TOD walksheds intersect with the neighborhood. Bellaire-Puritas, Hopkins, Mount Pleasant, Saint Clair-Superior, Union Miles, and West Boulevard neighborhoods are not listed as they did not have any investments of greater than \$1,000,000 during this period.*

TRANSITWAY TRENDS

QUICK FACT

Since 2019, most TOD value has been added along frequent bus lines.

ADDED BUILDING VALUE BY TRANSIT TYPE

Figure 8 on page 21 shows the added value of major TOD developments by three transit types within the past six years:

- **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 8 on page 21 shows that the most value was added in developments located along frequent bus corridors each year between 2020 and 2024. Only in 2019 was the highest amount of investment located along bus rapid transit corridors, which typically had the second most investment. Developments around rapid rail stations fluctuated greatly and in some years was half that of bus rapid transit; however, in 2024, more than \$200m was invested near rapid rail.

In total from 2019 to 2024, \$1.0b was invested along frequent bus corridors, \$851m was invested along bus rapid transit corridors, and \$678m was invested near rapid rail stations. When controlled for area, however, a slightly different picture emerges. Between 2019 and 2024, there was \$50.3m per square mile invested around bus rapid transit corridors, \$31.9m per square mile invested around rapid rail stations, and \$15.5m per square mile invested around frequent bus corridors.

FIGURE 8

ADDED BUILDING VALUE OF MAJOR TOD DEVELOPMENTS WITHIN TOD WALKSHEDS BY TRANSIT TYPE, 2019-2024

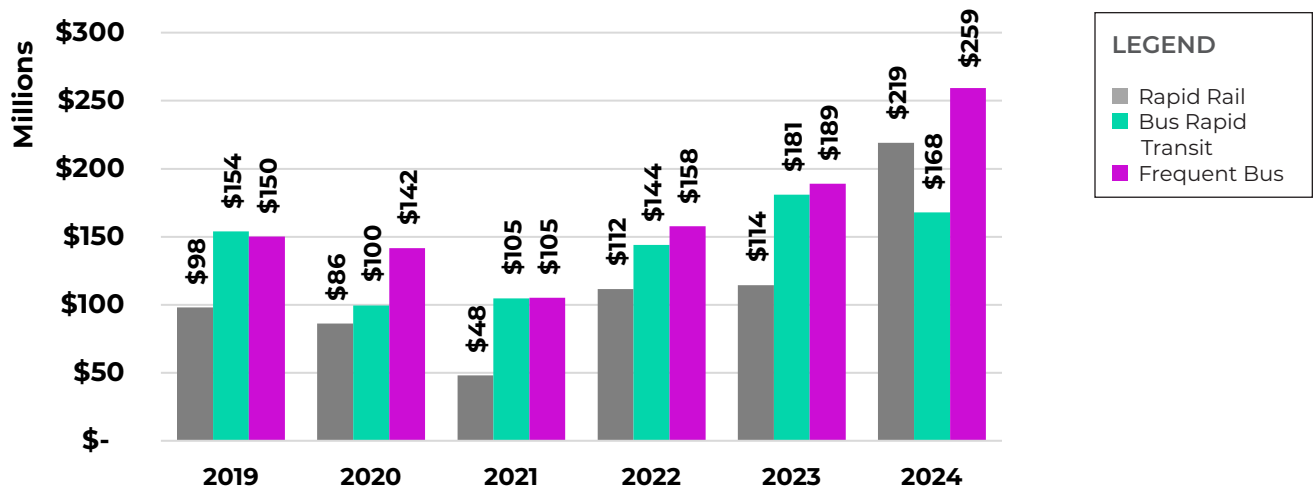
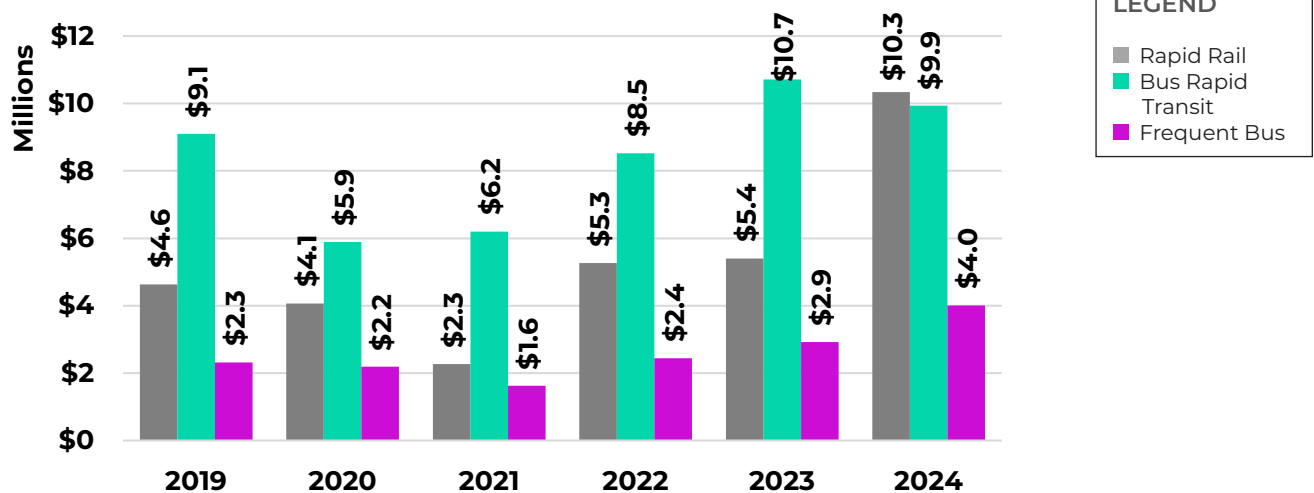


FIGURE 9

ADDED BUILDING VALUE OF MAJOR TOD DEVELOPMENTS WITHIN TOD WALKSHEDS PER SQUARE MILE BY TRANSIT TYPE, 2019-2024



Note: In a departure from previous Development Trends documents, the charts above only reflect added building value of projects meeting TOD criteria between 2019 and 2024. County Planning used the criteria found on page 8 to determine if developments are classified as TOD.

