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Center for Population Dynamics Quarterly Brief July 2016: Population Loss and Development Trends in Cleveland

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Center for Population Dynamics Quarterly Brief July 2016

Population Loss and Development Trends in Cleveland

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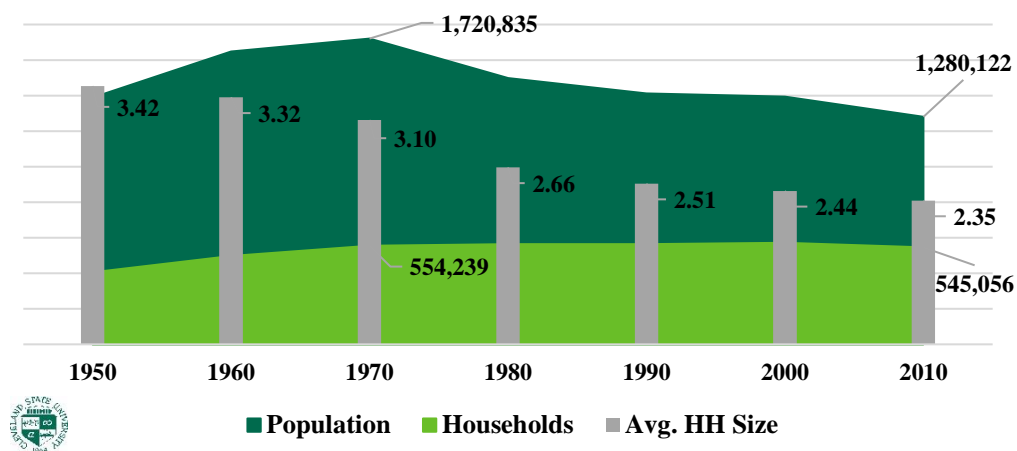
¹ Kyle Fee is a senior community development advisor at the Federal Reserve Bank of Cleveland. The view stated herein are those of the authors and are not necessarily those of the Federal Reserve Bank of Cleveland or of the Board of Governors of the Federal Reserve System.

Population Loss: Beyond People Leaving

When a place loses population, it's assumed that's because people leave. But it's not that simple. What's lost in translation is today's households have fewer people living in them than they did years prior. For instance, 40% of mothers aged 40 to 44 had four or more children in 1976. Today, it's 14%¹. Overall, the average American household contracted from 3.14 people in 1970 to 2.54 today². This can explain the apparent paradox of population loss in “shrinking” communities while the number of occupied households³ grows.

Such was the case in Cuyahoga County. There were 1.72 million residents in the county in 1970 (see Figure 1). By 2010 the population fell by 440,713, to just over 1.28 million. How much of that loss was due to change in family composition? If the average household size remained at 1970 levels (3.10 people per house), the population of Cuyahoga County would be 1,692,323 in 2010 given its current household totals—412,201 more than the actual number⁴. Taken together, 93.5% of Cuyahoga County's population loss since 1970 can be explained by change in household composition, not necessarily entire households leaving⁵.

Figure 1: Population, Households, and Avg. Household Size, Cuyahoga County. Source: Decennial Census.



Does this mean outmigration is not a factor locally? No. This is particularly so for the City of Cleveland. Cleveland's population approached its peak in 1950 with 914,808 residents. In 2010 the population was 396,830—a decline of 517,978 (See Figure 2 below). While the average household size dropped considerably from 1950 (3.44) to 2010 (2.37), the change in household composition accounted for only

¹ <http://www.pewsocialtrends.org/2015/05/07/family-size-among-mothers/>

² <http://www.statista.com/statistics/183648/average-size-of-households-in-the-us/>

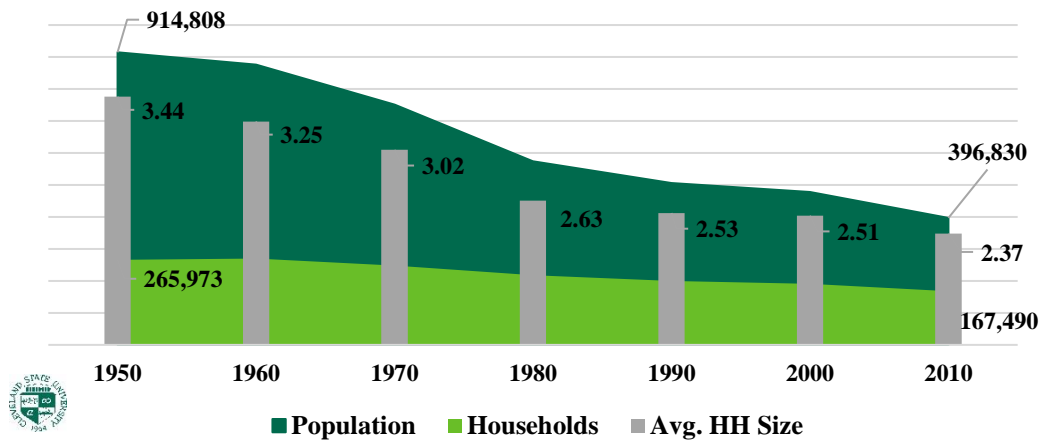
³ Note: Households are defined as the number of occupied housing units.

⁴ Note: The hypothetical 1,692,323 population figure for 2010 is calculated by multiplying average household size in 1970 (3.1) by the number of households in Cuyahoga County in 2010 (545,056).

⁵ Note: The 93.5% figure is calculated by taking the difference between the actual number of residents in Cuyahoga County in 2010 (1,280,122) and the hypothetical population in 2010 if household size remained constant (1,692,323), which equals -412,201. This figure is divided by the loss of population in the county from 1970 to 2010 (-440,713).

34.6% of the city's population losses since 1950⁶. The remainder was likely due to the decline in the actual number of households, which dropped by nearly 100,000. That is, people left, and not many people arrived, and this was manifested in the erosion of occupied residencies and net outmigration.

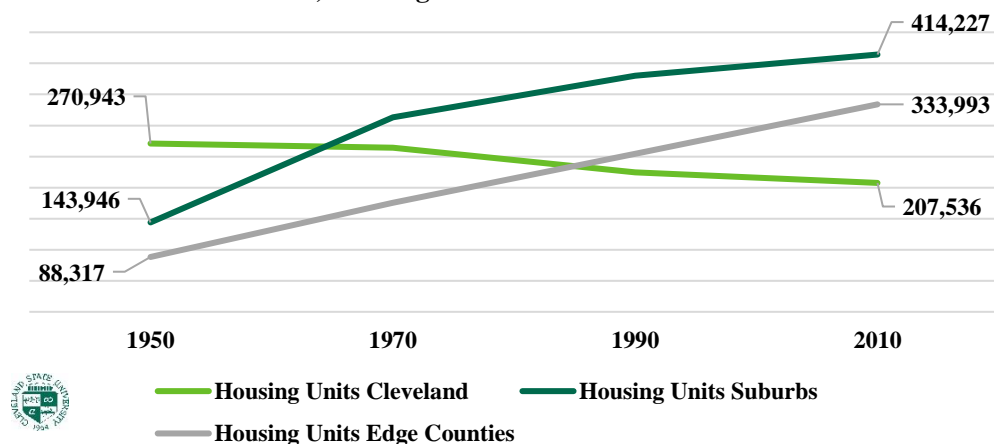
Figure 2: Population, Households, and Avg. Household Size, City of Cleveland. Source: Decennial Census.



Where did city residents go? To a large extent, Cuyahoga County suburbs. This is evident when examining the growth in the number of housing units⁷ in Cleveland proper versus the county suburbs from 1950 to 2010 (see Figure 3). The number of housing units decreased by 23% since 1950 in the city, whereas they increased by 188% in the suburbs.

Importantly, though, the increase of suburban units has slowed since 1990, corresponding with steady gains in the edge counties of Lake, Lorain, Geauga, and Medina. Just as Cuyahoga County suburbs were recipients of outmigrants from Cleveland proper, the edge counties are benefactors of the increasingly

Figure 3: Total Housing Units City of Cleveland, Cuyahoga County Suburbs, and Edge Counties. Source: Decennial Census.



⁶ Note: The 34.6% figure is calculated by taking the difference between the actual number of residents in Cleveland in 2010 (396,830) and the hypothetical population in 2010 if household size remained constant (576,078), which equals -179,248. This figure is divided by the loss of population in the county from 1970 to 2010 (-517,978).

⁷ Note: Housing units are defined as the number of housing structures that have separate occupancy.

“built-out” conditions of Cuyahoga County’s suburbs, according to recent analysis by Cleveland State’s Tom Bier and Charlie Post⁸. The issue now turns to the extent the decentralization will continue, and whether the geography of growth can pivot back to the region’s urbanized core.

“Backfilling” the Core

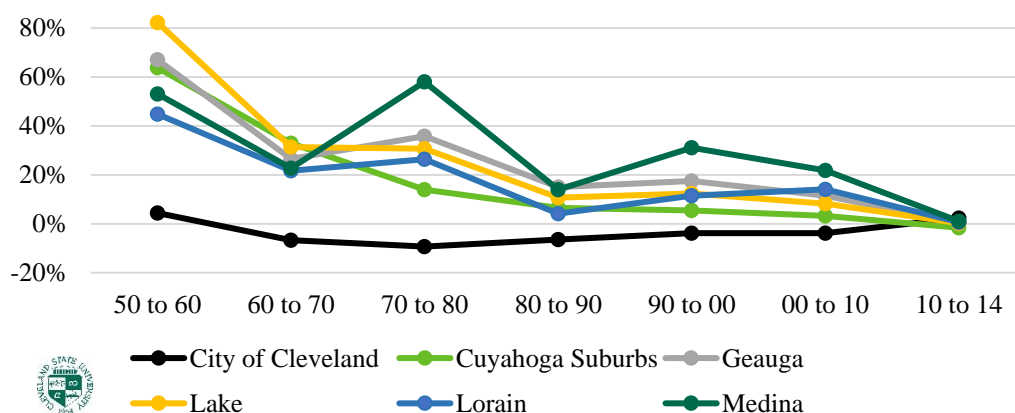
In 1925, scholar Lewis Mumford categorized the iconic migrations to date—that is, a “first migration” of pioneers to America, a “second migration” from farms to factory towns, and an ongoing “third migration” to great urban centers such as Cleveland and New York—all the while predicting a “fourth migration”, which was a decentralization of urban centers into their suburbs⁹. This proved true and is still proving true. More recently, a “fifth migration” has been proposed¹⁰. Urban planner Robert Fishman explains:

“Today if we take a longer view comparable to Mumford’s in the 1920s, I believe we can see that the fourth migration to suburbia and beyond is now ebbing, and a fifth migration is now underway. The fifth migration is most evident in what I call the reurbanization of those inner city districts...that had been most devastated during Mumford’s fourth migration. This new movement is crucially dependent on the recovery of the elite downtown office and residential districts that began 40 years ago, but it has spread far beyond them.”

The Center for Population Dynamics has charted Cleveland’s “fifth migration” in a recent report that shows an urban infill of college-educated residents and new economy firms is happening, but the infill is nascent, and not yet occurring at a scale to reverse the net losses of outmigration¹¹. Nonetheless, the convergence between decentralization and reurbanization is *beginning* to develop. What’s needed is a strategic housing plan that can facilitate the core’s “backfilling” while broadening its scope.

Figure 4 details the rate of housing unit change for Greater Cleveland. Note the rate of change in Cleveland proper has joined with formerly high-growth areas of Cuyahoga County suburbs and the counties of Lake, Geauga, Lake, Lorain, and Medina. This convergence largely happened over the last 5 years, and is likely due to the effects of the great recession on local real estate markets. Regardless, stopping the erosion of housing units that’s been ongoing over the last 50 years may indicate that the

Figure 4: Rate of Housing Unit Change, 1950 to 2014.
Source: Decennial Census and ACS 5-Year 2014



⁸ http://engagedscholarship.csuohio.edu/urban_facpub/1182/

⁹ <http://www.unz.org/Pub/TheSurvey-1925may01-00130>

¹⁰ <http://www.tandfonline.com/doi/pdf/10.1080/01944360508976706>

¹¹ http://engagedscholarship.csuohio.edu/urban_facpub/1338/

city's real estate market has turned the corner. Moreover, this may suggest that the regional real estate market has begun to pivot in favor of the central city as the gains in edge counties have slowed.

These trends are further illustrated in Table 1, which shows the number of housing units in Greater Cleveland from 1950 to 2014. Over the last 5 years the City of Cleveland gained housing units—the first time the city has done so since 1960. Cuyahoga County's suburbs lost housing units for the first time, and edge county housing units remained relatively flat.

Table 1: Number of Housing Units in Greater Cleveland. Source: Decennial Census, ACS 2014 5-Year.

	1950	1960	1970	1980	1990	2000	2010	2014
City of Cleveland	270,943	282,914	264,090	239,557	224,311	215,855	207,536	212,269
Cuyahoga Suburbs	143,946	235,768	313,393	357,080	380,227	401,048	414,227	407,594
Geauga	8,456	14,128	17,878	24,286	27,922	32,805	36,574	36,656
Lake	24,013	43,770	57,485	75,166	83,194	93,487	101,202	101,468
Lorain	43,044	62,349	75,916	95,953	99,937	111,368	127,036	127,901
Medina	12,804	19,595	24,058	38,021	43,330	56,793	69,181	69,919

What's going on?¹² Where in Cleveland proper is reemerging demand occurring? The answer is beyond the scope of this brief, yet a full emerging market analysis is currently underway by the brief's authors to shed light. Still, examination of trends in the city's urban core are illustrative.

Figure 5: Population Growth in Urban Cores Since 1960.
Source: Census via Transport Politic.

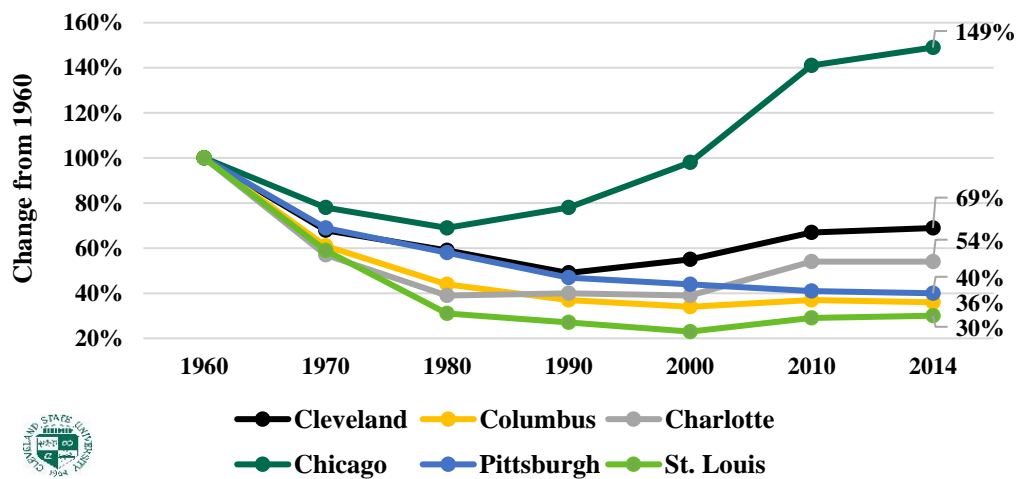


Figure 5 shows population trends of the urban cores for Cleveland and select comparison cities from 1960 to 2014. (The data used is from a recent analysis by the Transport Politic.)¹³ The chart shows the percent growth or decline of the population of the city's urban core (defined as within 1.5 miles of city hall) since

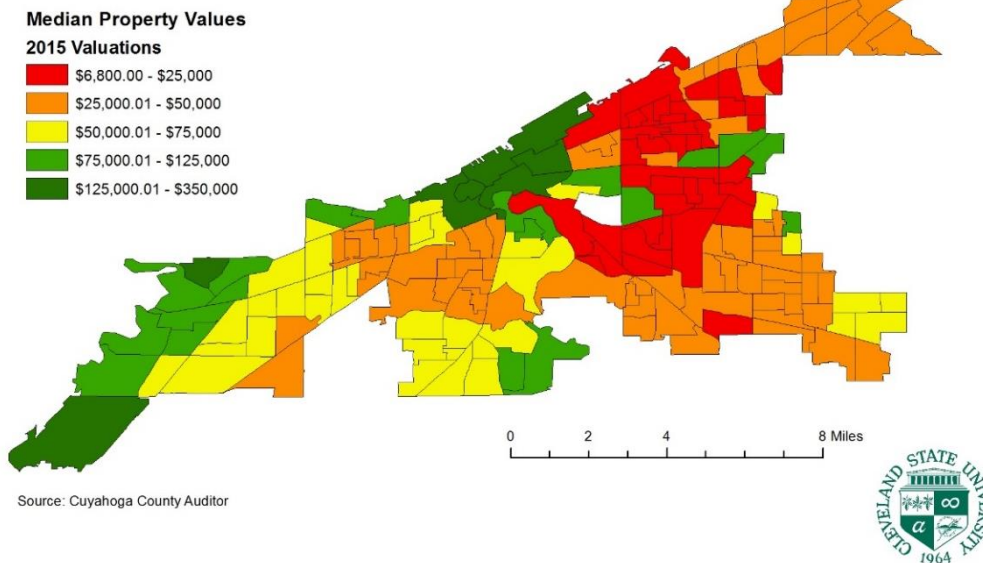
¹² Note: Housing unit growth is part and parcel with supply and demand trends. The City of Cleveland, for instance, has seen its rental vacancy rate decrease from 12% to 8% since the Great Recession, with the latter figures in line with national absorption rates. Homeowner vacancy rates have also halved, going from 6% to 3%. Also, the share of the city's rental stock priced below \$750 month decreased from 68% to 63% from 2010 to 2014, whereas rents over \$750 a month grew from 32% to 37% of city stock. Source: ACS 5-Year, 2010, 2014.

¹³ <http://www.thetransportpolitic.com/2016/07/06/reorienting-our-discussion-of-city-growth/>

the baseline year of 1960. Note the depopulation for each city. Cleveland, however, has regained nearly 70% of its peak population in the core, second to Chicago, which is now at 149% of its peak. Columbus—a city known for growth—is at 36% of its urban core peak.¹⁴

The repopulation has coincided with higher valuations in the core of city. Map 1 shows median assessed home values by neighborhood for the City of Cleveland in 2015. Note the highest sales valuations radiate out from the core, indicative of demand for city center living.

Map 1: Assessed Property Values by Neighborhood City of Cleveland 2015



The issue, then, goes to what extent the buildout of Cleveland’s urban core continues a la the path of Chicago. The housing product will largely entail vertical high-end rentals, for-sale condos, or townhomes on the edge of the core, particularly in the Cuyahoga Valley neighborhood and along the lakefront. (See Image 1 next page for a map of Cleveland’s urban core.)

Additionally pressing, however, is building from concentric circles outside of the urban core, or those areas that are between 1.5 to 3 miles from city hall. In Cleveland, these areas include Ohio City, Detroit Shoreway, St. Clair Superior, Clark Fulton, and Hough (See Image 2 next page). It was here that the city’s population loss since 1960 was centralized: Cleveland experienced the 6th largest loss in its population between 1.5 to 3 miles outside of its urban core in the nation, behind Philadelphia, St. Louis, Baltimore, Detroit, and New Orleans, and just ahead of Chicago.

Of course reaching scale in these neighborhoods—particularly on the Near West Side—would be difficult, requiring a piecemeal approach on single lots. There exists potential for building housing to scale on land cleared in the city’s Near East Side, however, especially along the Health Tech Corridor: Cleveland’s premier new economy area. Meeting this emergent demand requires a vast, coordinated public-private effort. Here, Cleveland can make its own fate, but this requires dismissing the oft-stated notion that there are parts of the city fated to decline.

¹⁴ Note: The study by Transport Politic found that Columbus’ developed land depopulated by nearly 175,000 from 1960 to 2014. Discussing Columbus, Indianapolis, Louisville, and Memphis the author writes: “What’s surprising is that these are cities often acclaimed for their dramatic growth over the past few decades. Yet their growth has been premised largely on annexation–suburbanization—even as their already-built up cores have declined.”

Image 1: Map of Cleveland's Urban Core (1.5 mile buffer). Made by City of Cleveland Planning.

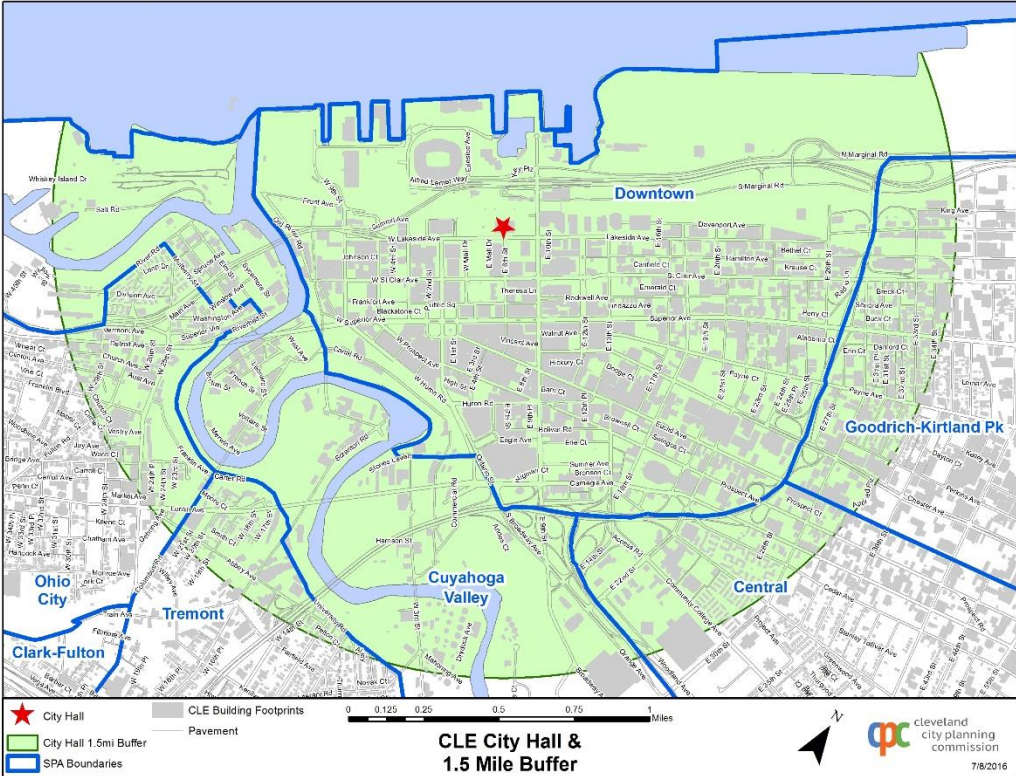


Image 2: Map of Cleveland's Urban Core (3 mile buffer). Made by City of Cleveland Planning.

