

# Leveraging the Lakefront

*Spurring Inclusive Growth in Cleveland, Ohio  
Through Urban Redevelopment*

**Data Pack**

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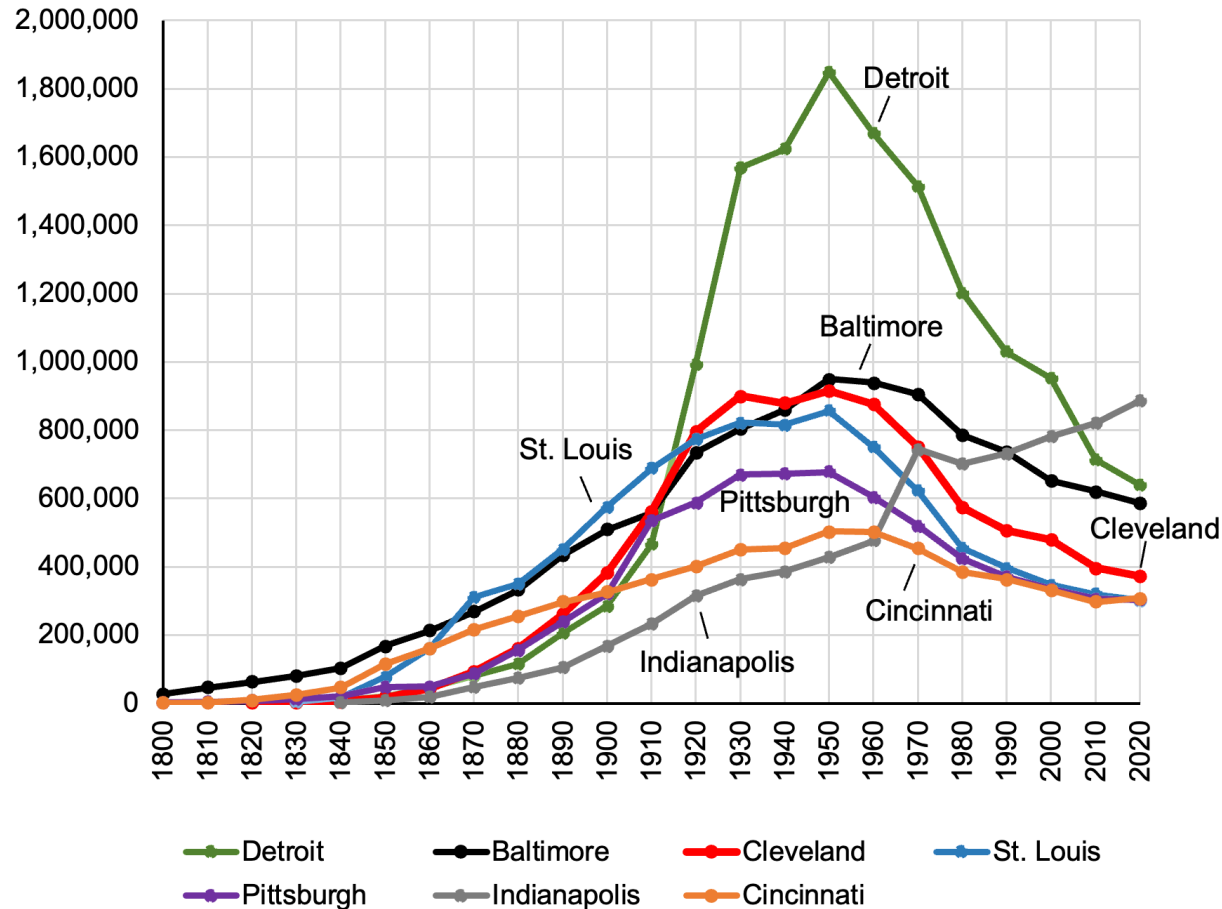
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# **Five Stylized Facts**

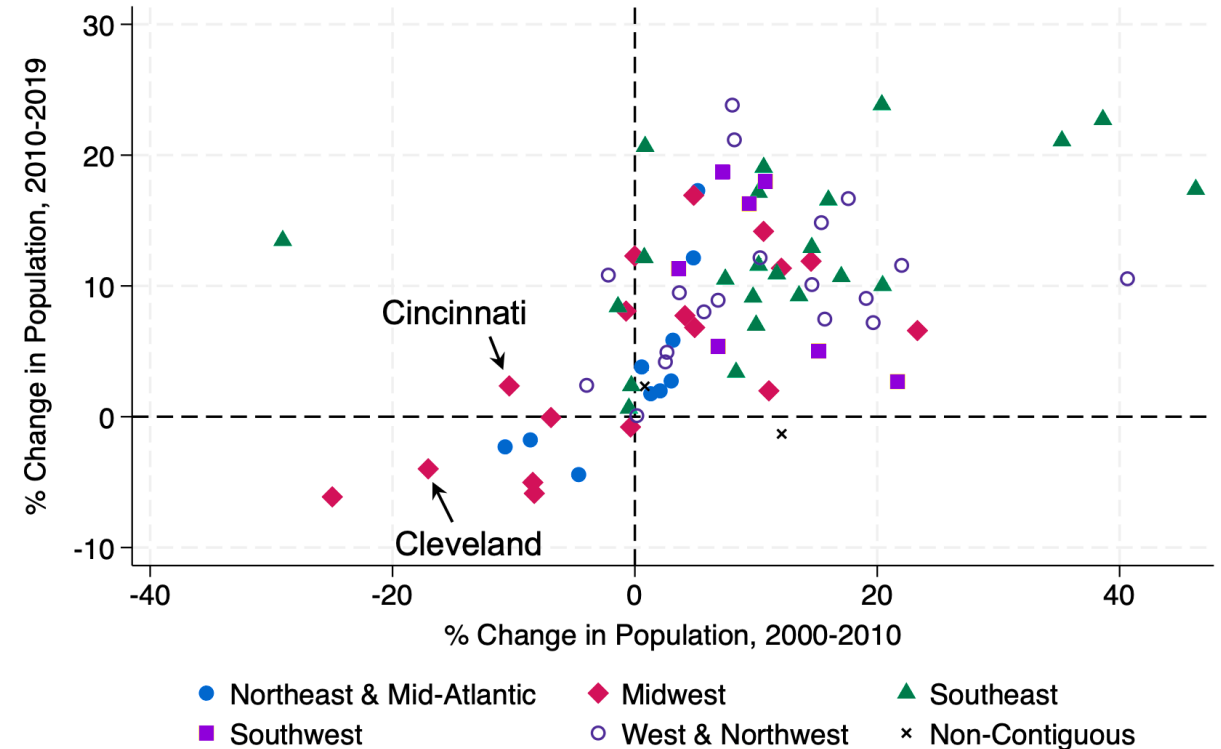
## **(for the reader with only five minutes to spare)**

# 1. Cleveland is among a small group of large US cities that have continuously lost population from the mid-1900s through 2020.

Population Over Time

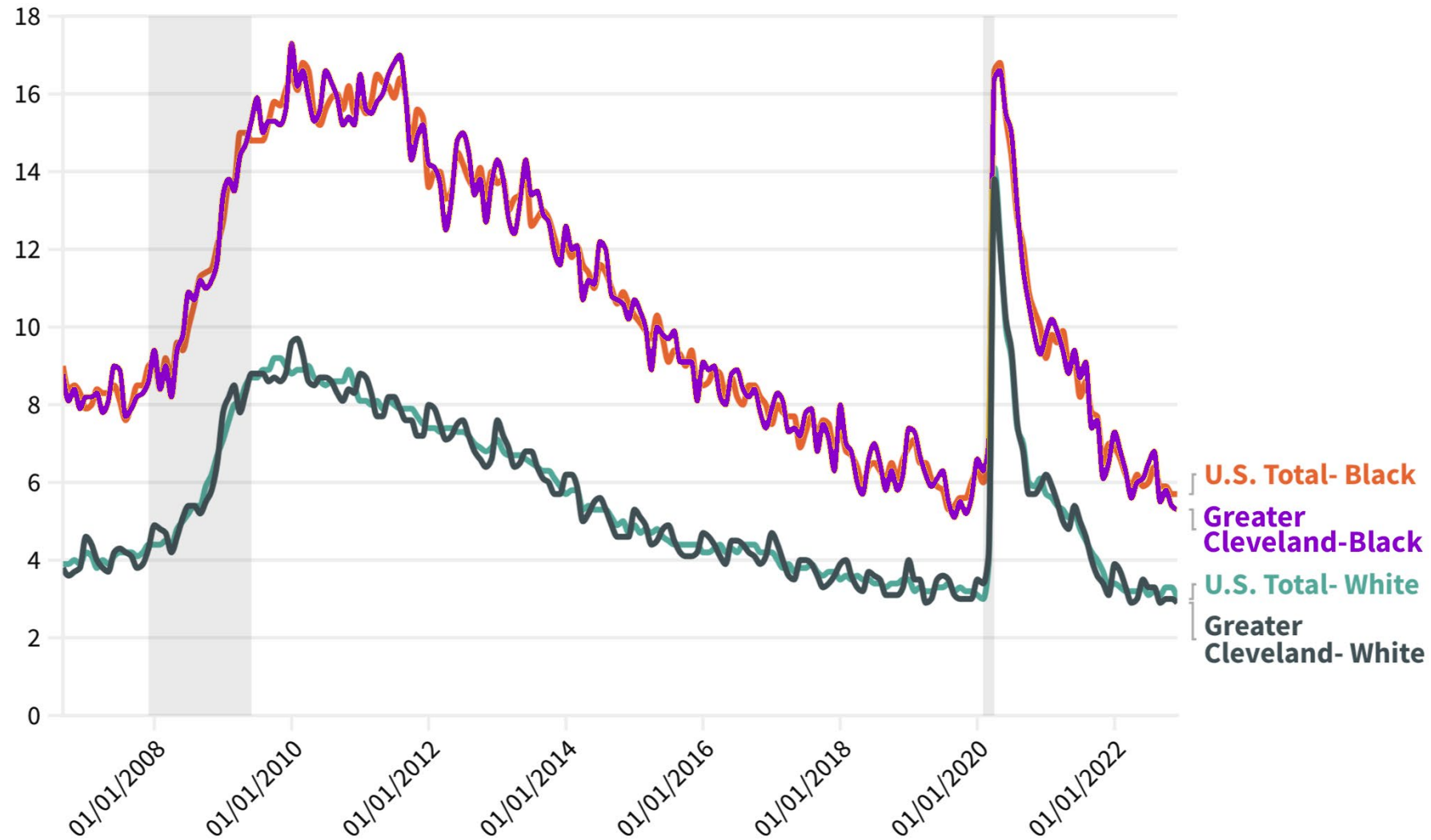


Population Growth in 2010s vs. 2000s





2. Cleveland's unemployment trends track national unemployment closely. Black unemployment is consistently higher than white unemployment.



Source: Olivera Perkins and April Urban, "This is what Greater Cleveland's economy looks like during the pandemic recovery," *Signal Cleveland*, March 21, 2023, <https://signalcleveland.org/this-is-what-greater-clevelands-economy-looks-like-during-the-pandemic-recovery/> (colors altered for accessibility)

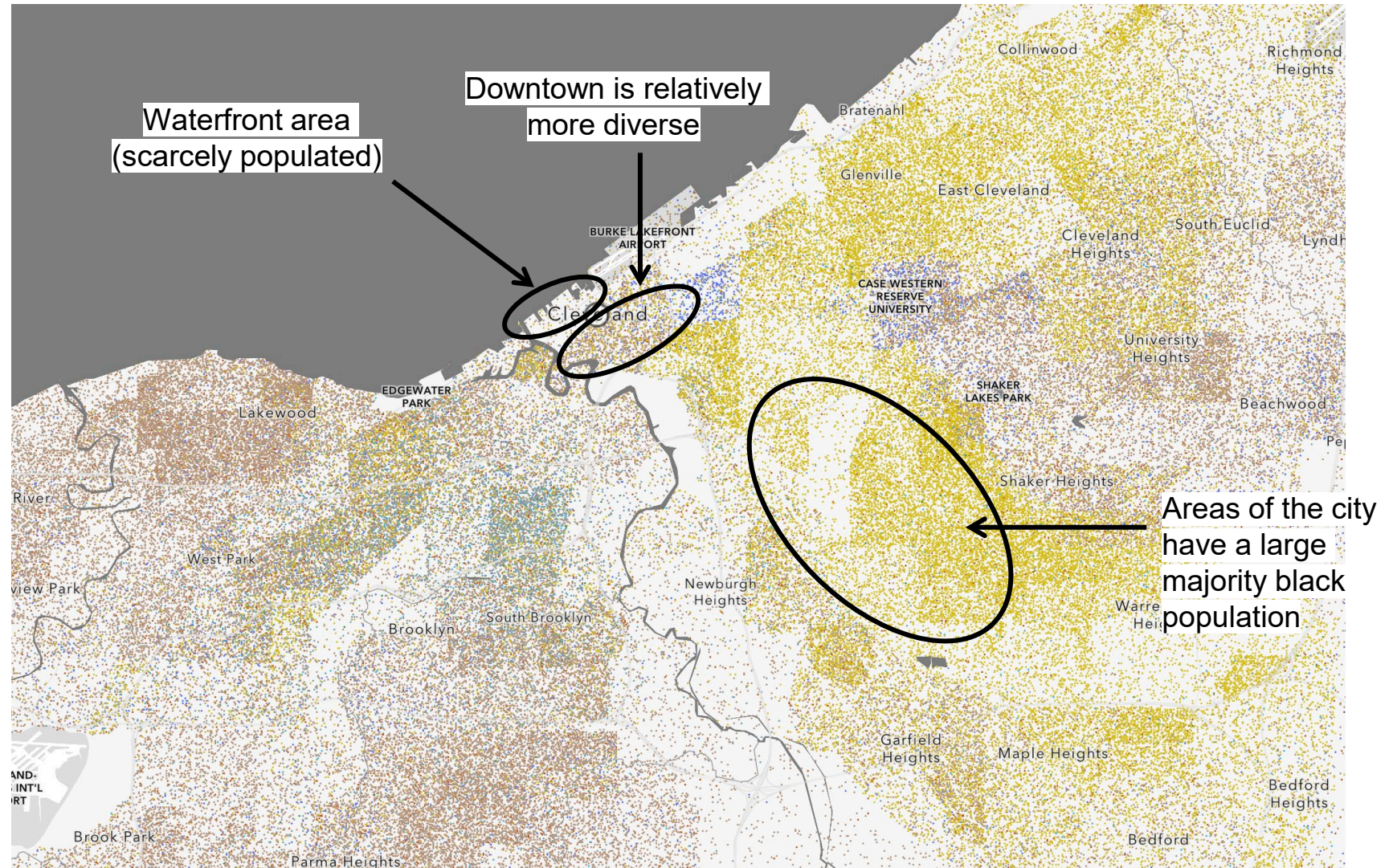


### 3. Cleveland is a highly segregated city. Though it is diverse as a city, most of its neighborhoods are not. Downtown is somewhat more diverse.

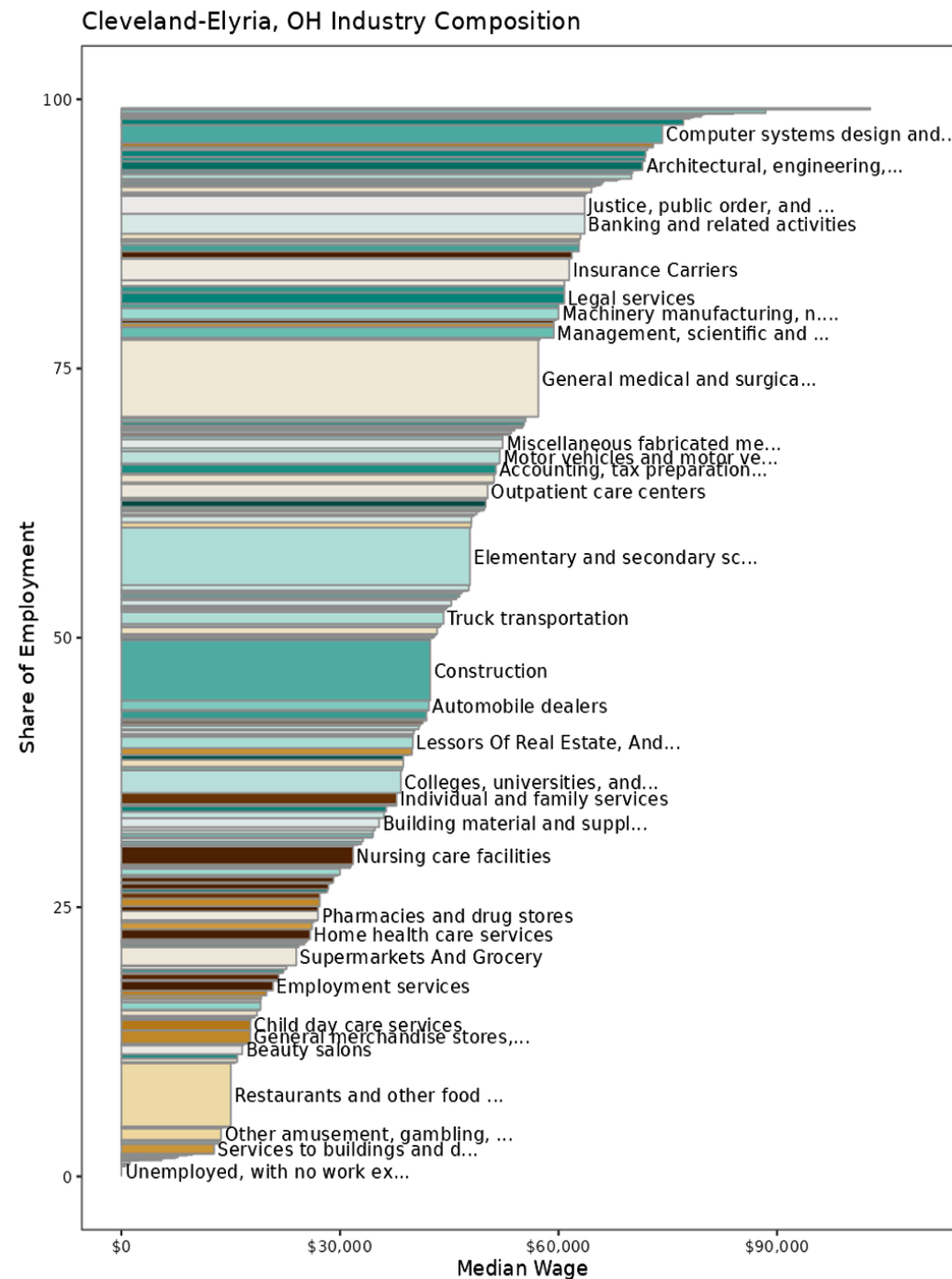
#### USA Census 2020 Redistricting Tracts

1 Dot = 6 people

- Non-Hispanic or Latino Population: American Indian and Alaska Native alone
- Non-Hispanic or Latino Population: Asian alone
- Non-Hispanic or Latino Population: Black or African American alone
- Hispanic or Latino Population
- Non-Hispanic or Latino Population: Native Hawaiian and Other Pacific Islander alone
- Non-Hispanic or Latino Population: Some Other Race alone
- Non-Hispanic or Latino Population: Population of two or more races
- Non-Hispanic or Latino Population: White alone



4. Like the rest of the US, Cleveland's labor market is segregated by race, and Black workers are underrepresented in higher paying industries and overrepresented in lower paying industries.

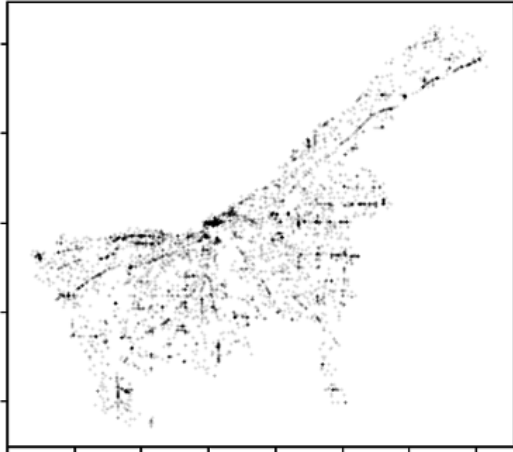


Source: Growth Lab using  
IPUMS ACS 2021 5% sample



5. Industries and jobs are not evenly distributed across the city of Cleveland. Certain industries cluster more downtown than others (esp. food and finance).

Food



Basic Materials



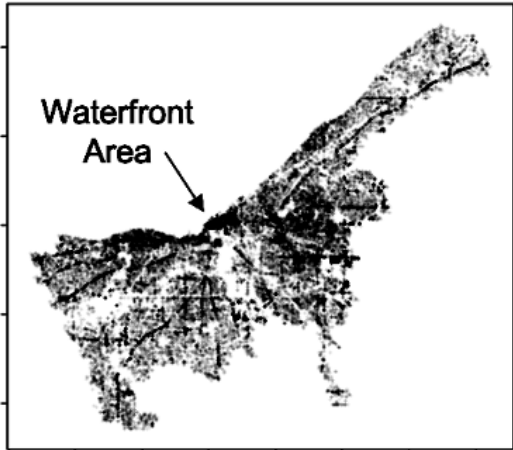
Household Retail



Basic Services



Services



Manufacturing



Finance



Note: Each dot on the maps represents a business establishment in the sector.

# About the Waterfront Redevelopment Plan



Existing Lakefront

Possible North Coast Connector

Cleveland Browns Stadium

Great Lakes Science Center

Rock & Roll Hall of Fame



# Existing Lakefront

## North Coast Lakefront



## Master Plan Site





# The Haslam Proposal (2021)





## Current Concept Plan (October)

Multi Modal Hub rescaled  
based on precedents  
Strengthened connection  
to GLSC and the Rock Hall

Latest Shoreway Blvd  
alignment incorporated

Development areas  
further articulated

Ongoing conversations  
with the Port of Cleveland  
regarding cruise ship  
operations and servicing

Refinement of Boutique  
Hotel & Food Hall

Beach and Wetlands  
reconfigured to to increase  
safety and ecological impact



# Community Input & Design Principles

## 296

Spring 2023 **Community Visioning Workshop** attendees

## 122

**Focus Group** participants led by Compass Consulting

## 116

July 2023 'Community Conversation with Mayor Bibb' attendees at GLSC

## 1700+

**Comment Cards** submitted at 100+ community event; 175+ students & salon participants

## 4000+

**Survey** responses since May 2023

## 100+

Third Space 'Intergenerational Lunch + Salon' participants and CMSD student participants in **Discussion Groups**

**Embrace the Bluff**



**Embrace the Skyline**



**Vary the Shoreline**



**Celebrate the Working Waterfront**



**Integrate Thoughtful & Equitable Development**



**Center Equitable & Multi-Modal Transit**



**Expand Water Access**



**Connect Core to Shore**



**Foster Joy & Activation**





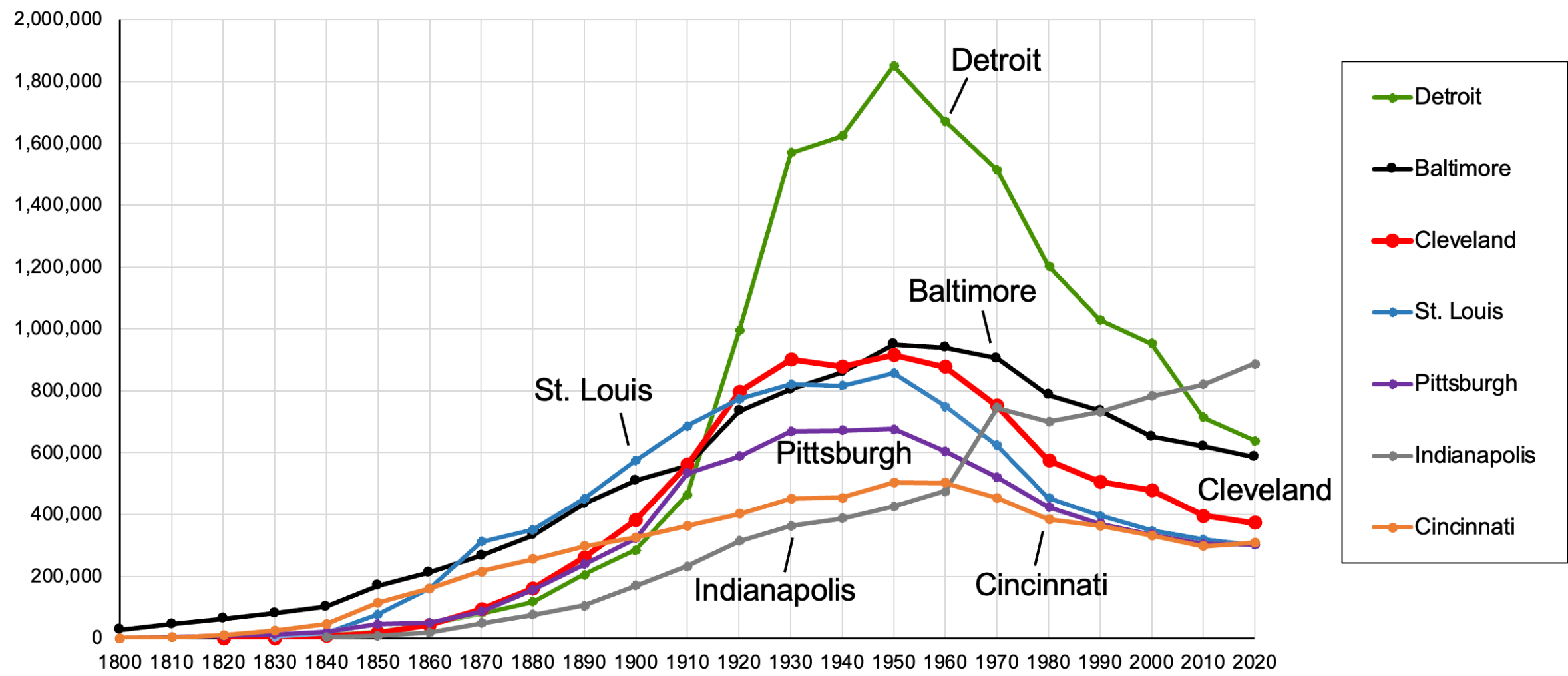
# Cleveland's Economic Trajectory and Economic Geography

# Population Trajectory and Migration

Think about: What is Cleveland's biggest economic problem?

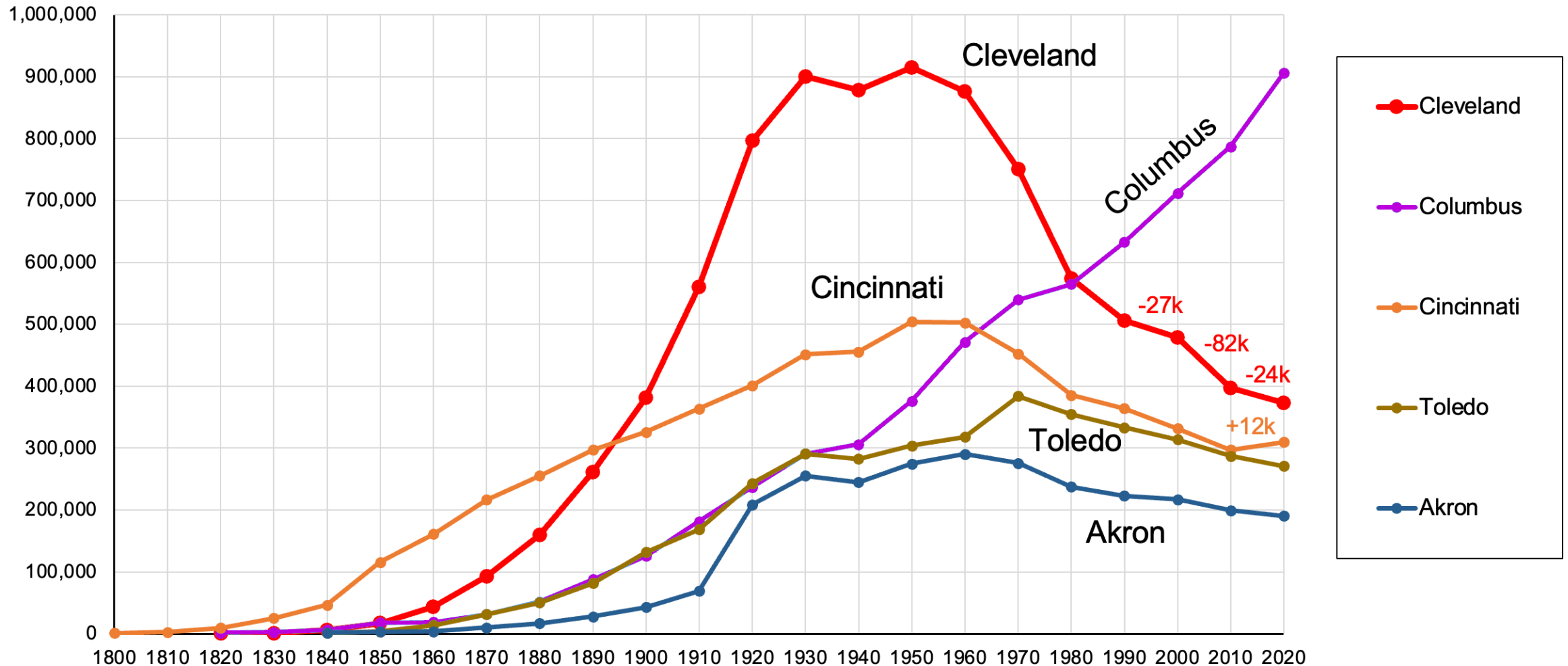
Long-term: People vote with their feet. Cleveland's population pattern resembles decline faced by many mid-sized, industrial cities. (Indianapolis is an exception.)

Population Over Time



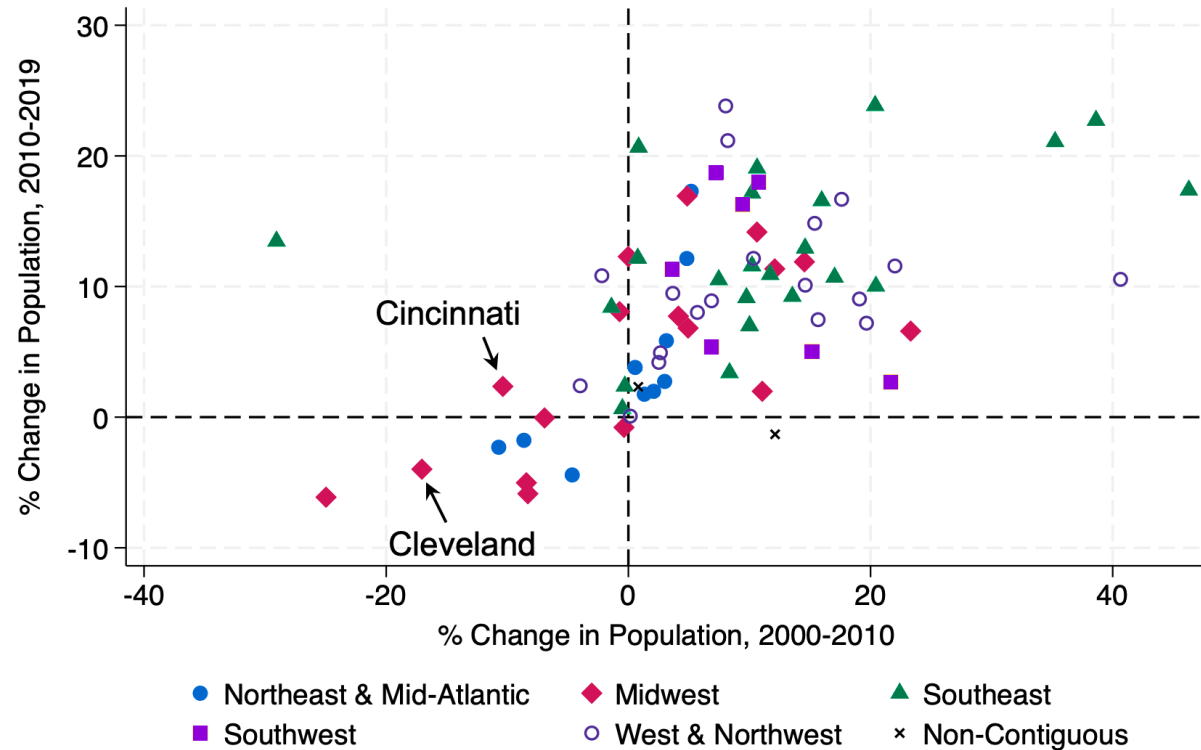
Cleveland follows a similar arc to other Ohio cities (exception: Columbus), but growth and decline are more extreme. People were still leaving Cleveland in 2020.

Population Over Time

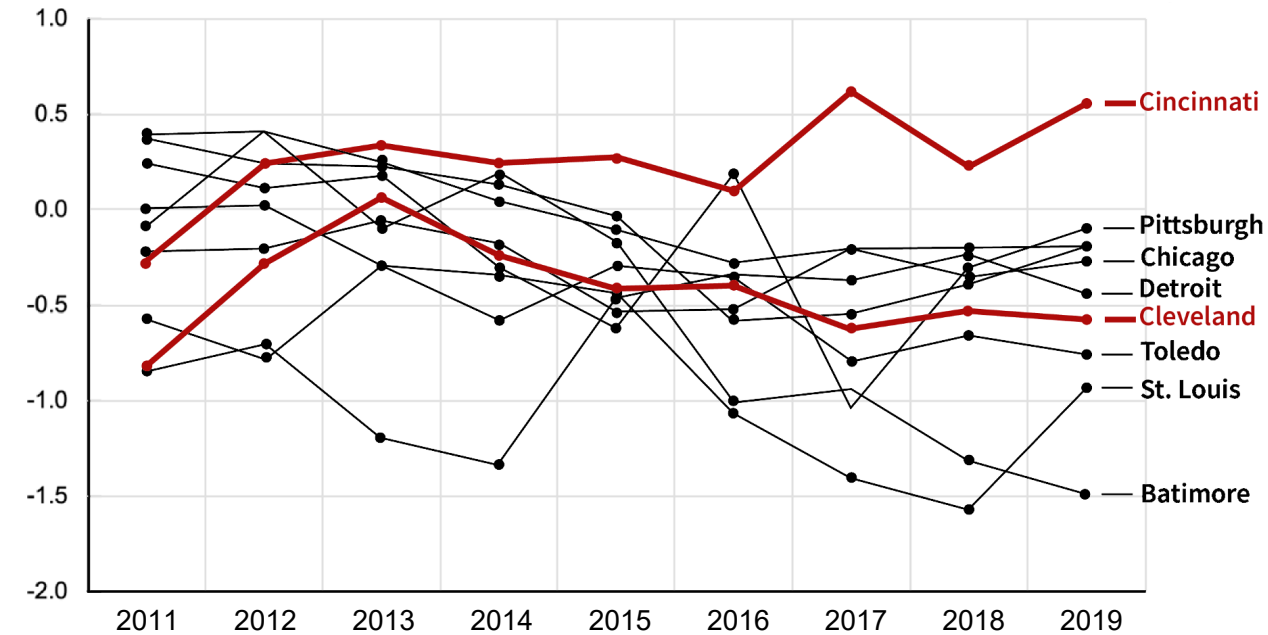


Cincinnati is an interesting point of comparison. Among a group of cities that were losing population early in the 2000s, it stood out for growth starting in 2016.

Population Growth in 2010s vs. 2000s



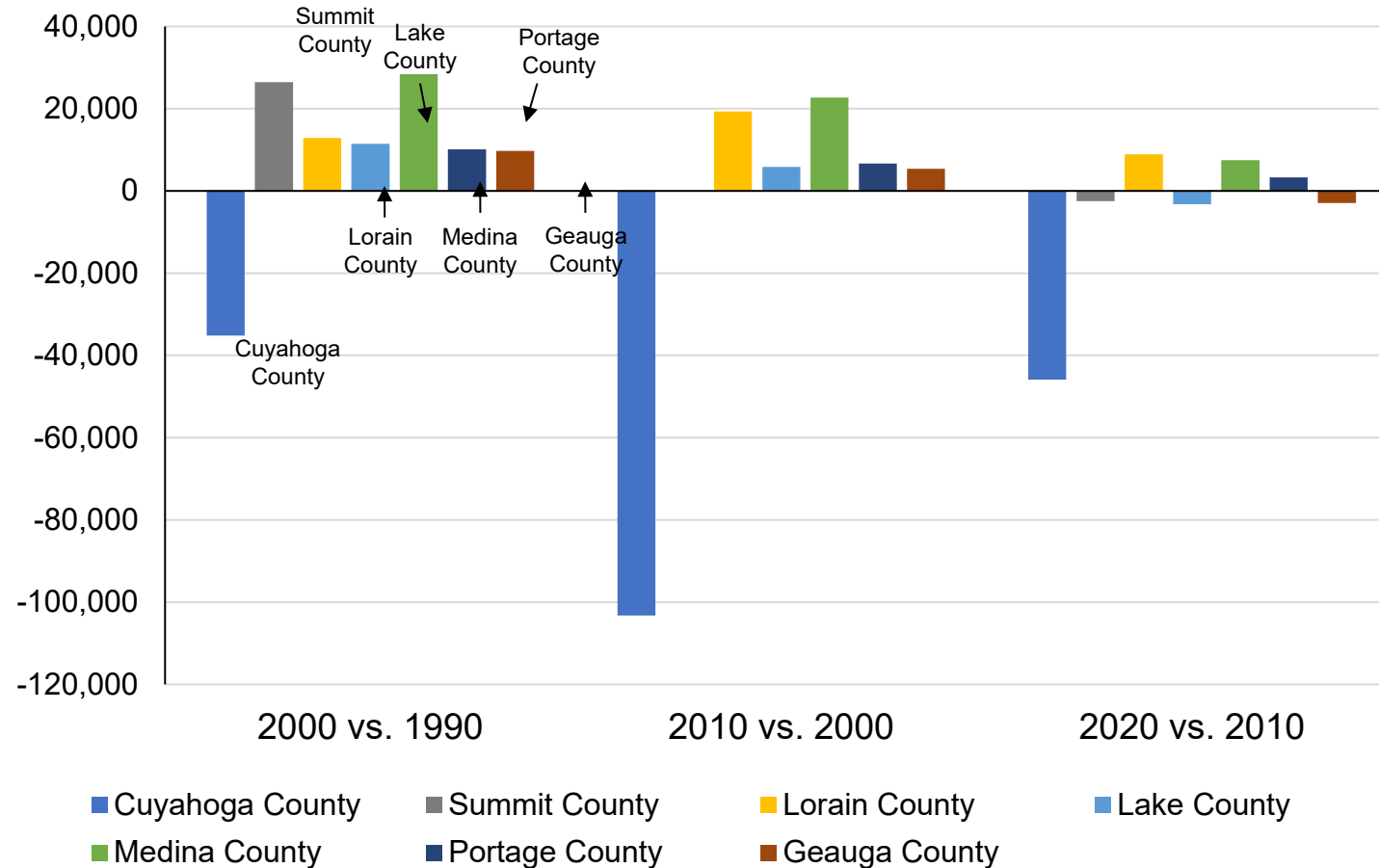
Population Growth Over Time



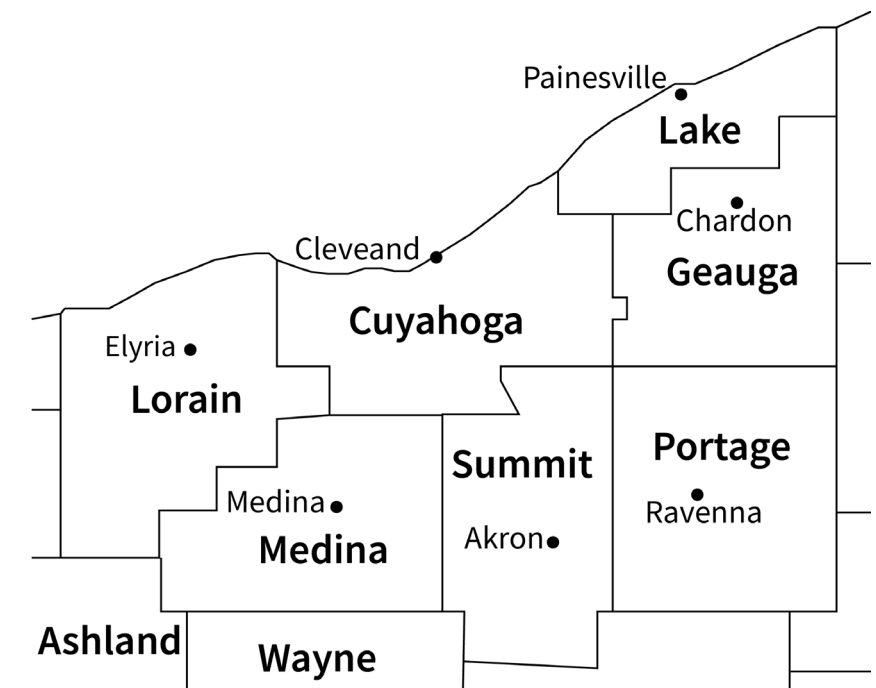


The whole of the county has been losing population in contrast to surrounding counties. But 2010-2020 was weaker for the surrounding counties as well.

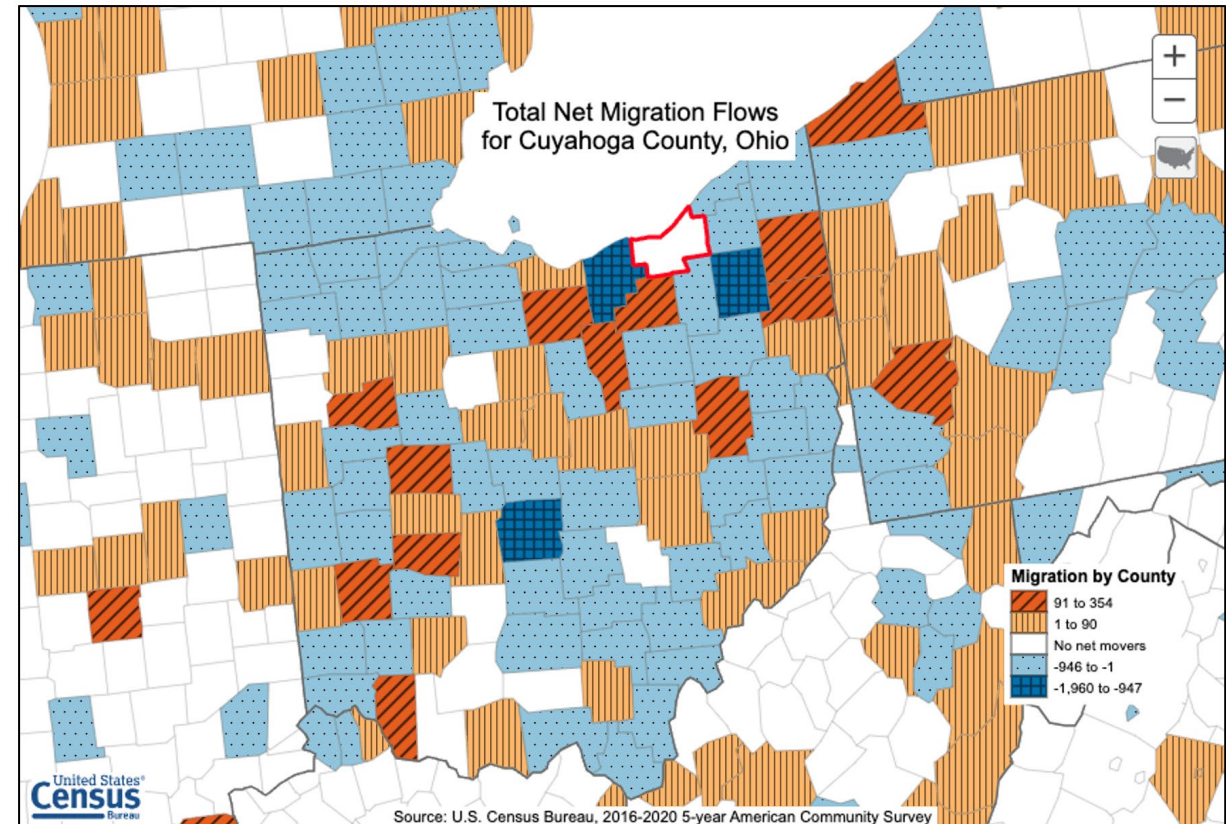
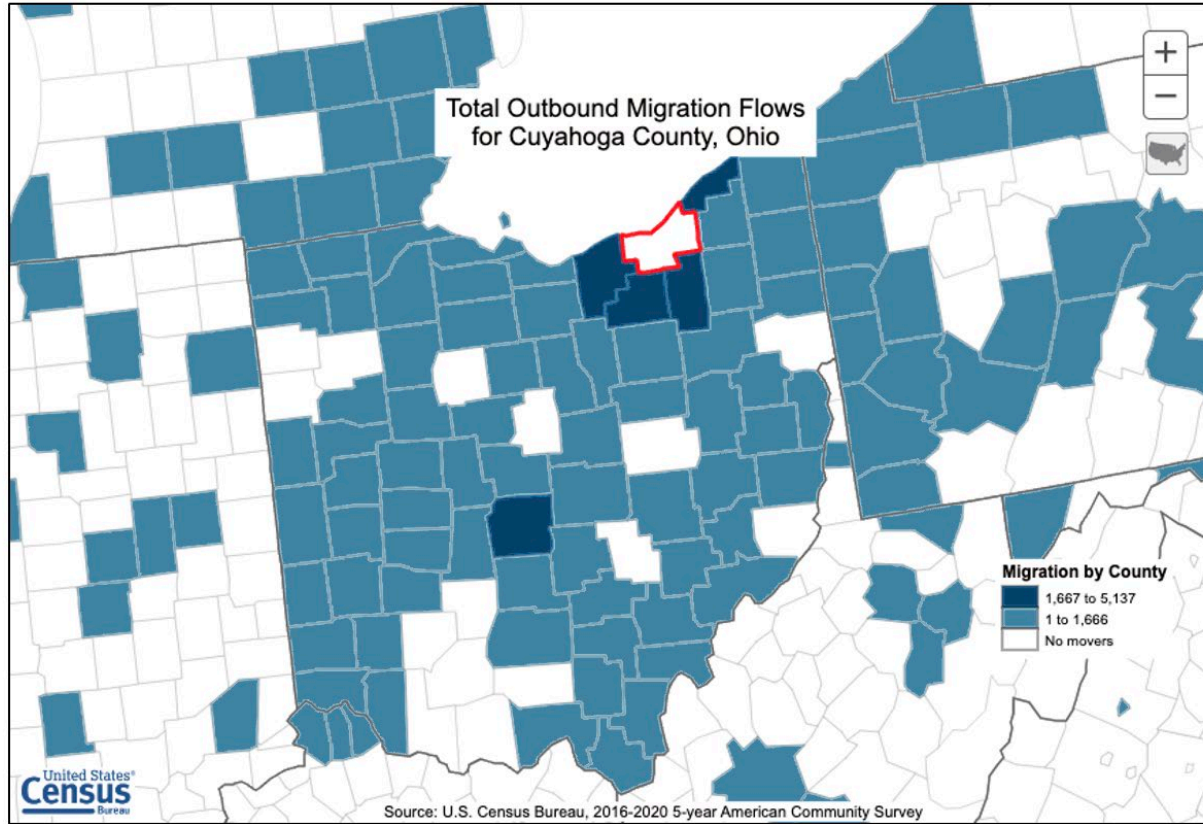
County Population Change by Decade



Cuyahoga & Surrounding Counties

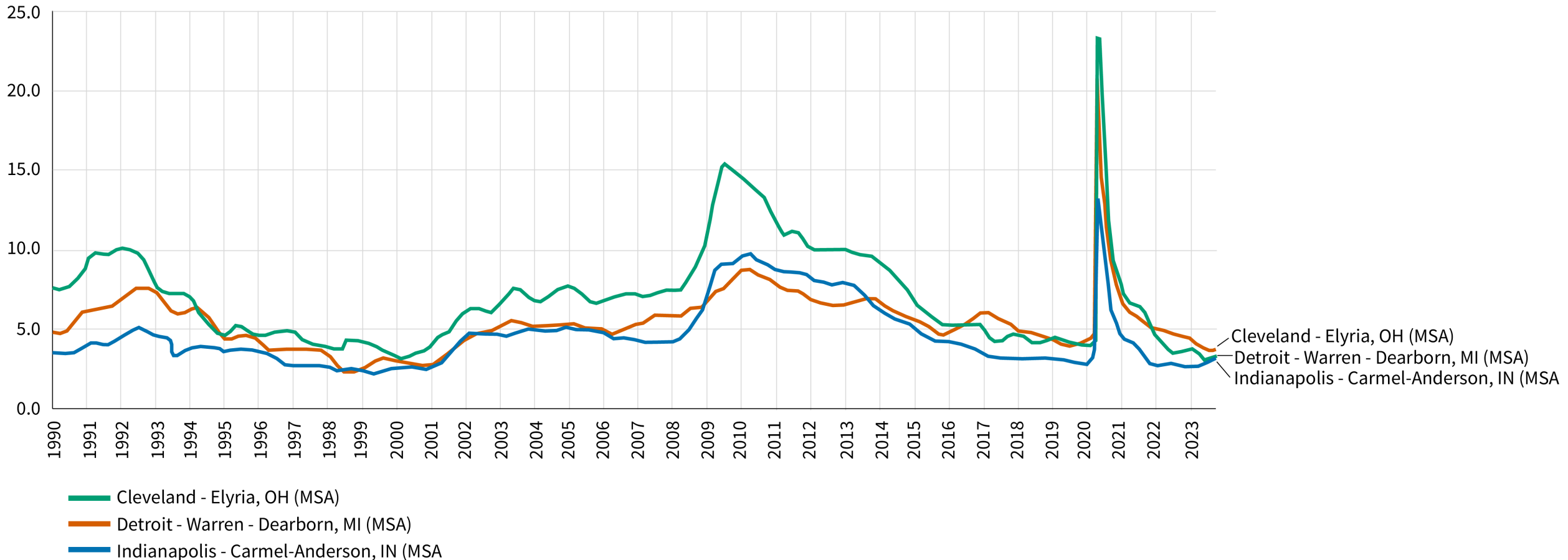


Where are people moving? Often to surrounding counties and Franklin County (incl. City of Columbus). Cuyahoga is receiving people (on net, in smaller numbers) from other counties. High outflow flows (on net) went to Lorain and Portage counties.

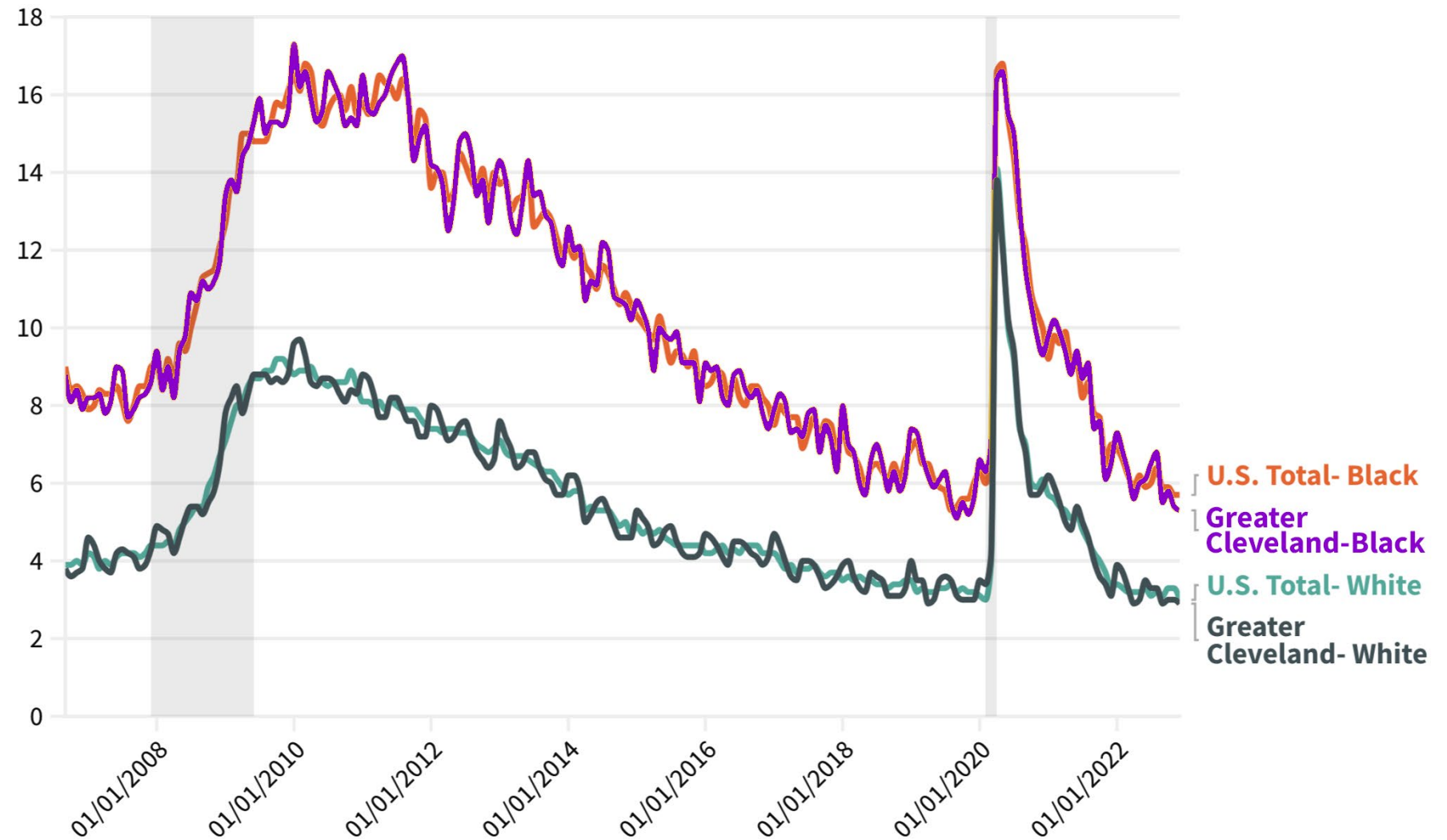


Unemployment? Less dramatic than population change because people migrate.  
Observe a band between Indianapolis (low) and Detroit (high). Cleveland is above the band and diverging from Cincinnati since 2016.

Seasonally Adjusted Unemployment Rates by MSA since 1990



Black unemployment is consistently higher than white unemployment by a minimum of ~3 percentage points (see 2020 and 2022) and with a maximum difference of ~8 percentage points in 2010-11.



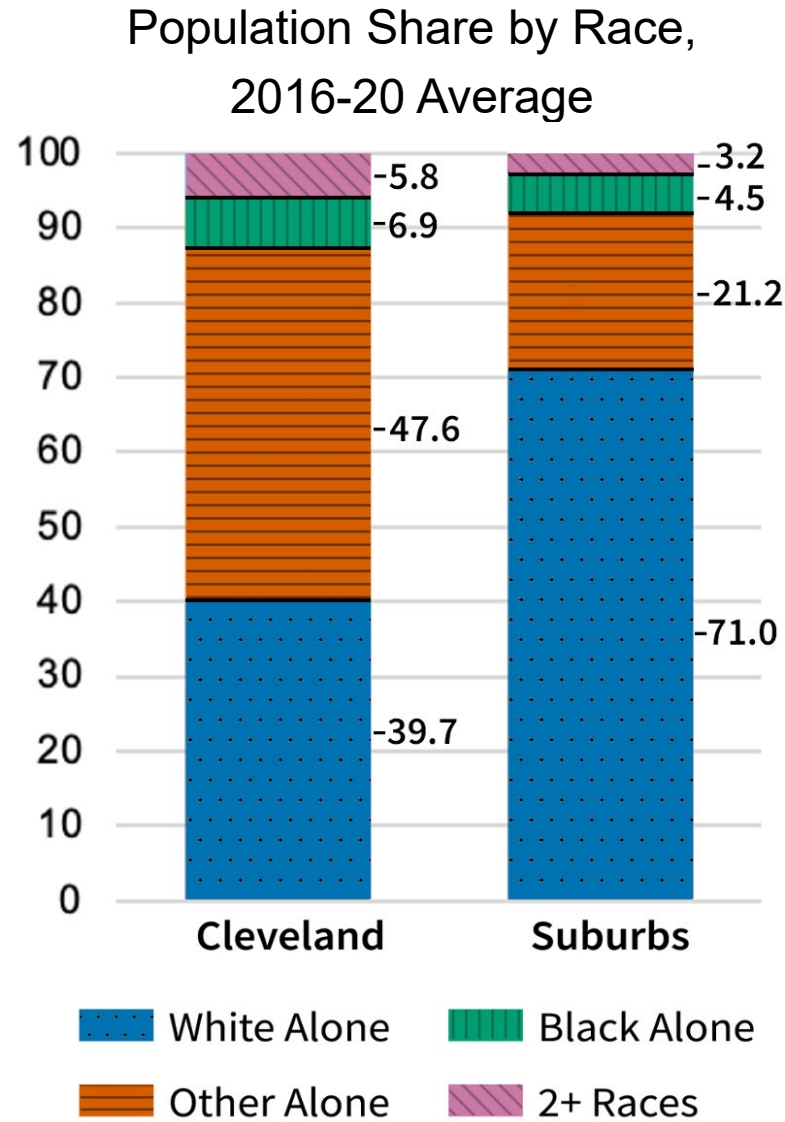
Source: Olivera Perkins and April Urban, "This is what Greater Cleveland's economy looks like during the pandemic recovery," *Signal Cleveland*, March 21, 2023, <https://signalcleveland.org/this-is-what-greater-clevelands-economy-looks-like-during-the-pandemic-recovery/> (colors altered for accessibility)

# Segregation and Economic Exclusion Across the City

Think about: What is Cleveland's biggest economic problem? Who would benefit from the waterfront project?



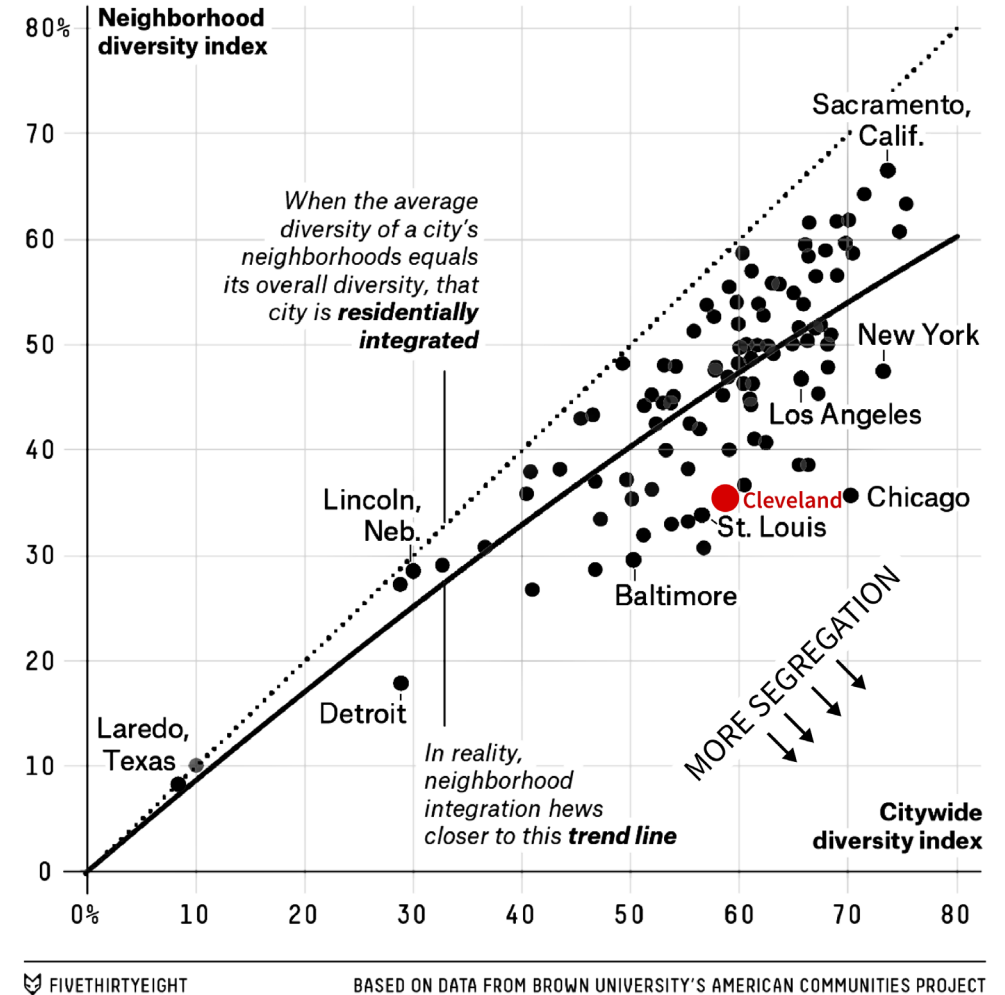
Cleveland has a significantly higher share of its population that is Black and other minorities than its suburbs, while the city is highly segregated at the neighborhood level.



Note: Hispanic/Latino Ethnicity can fall under any race

## A Two-Dimensional View Of Urban Diversity

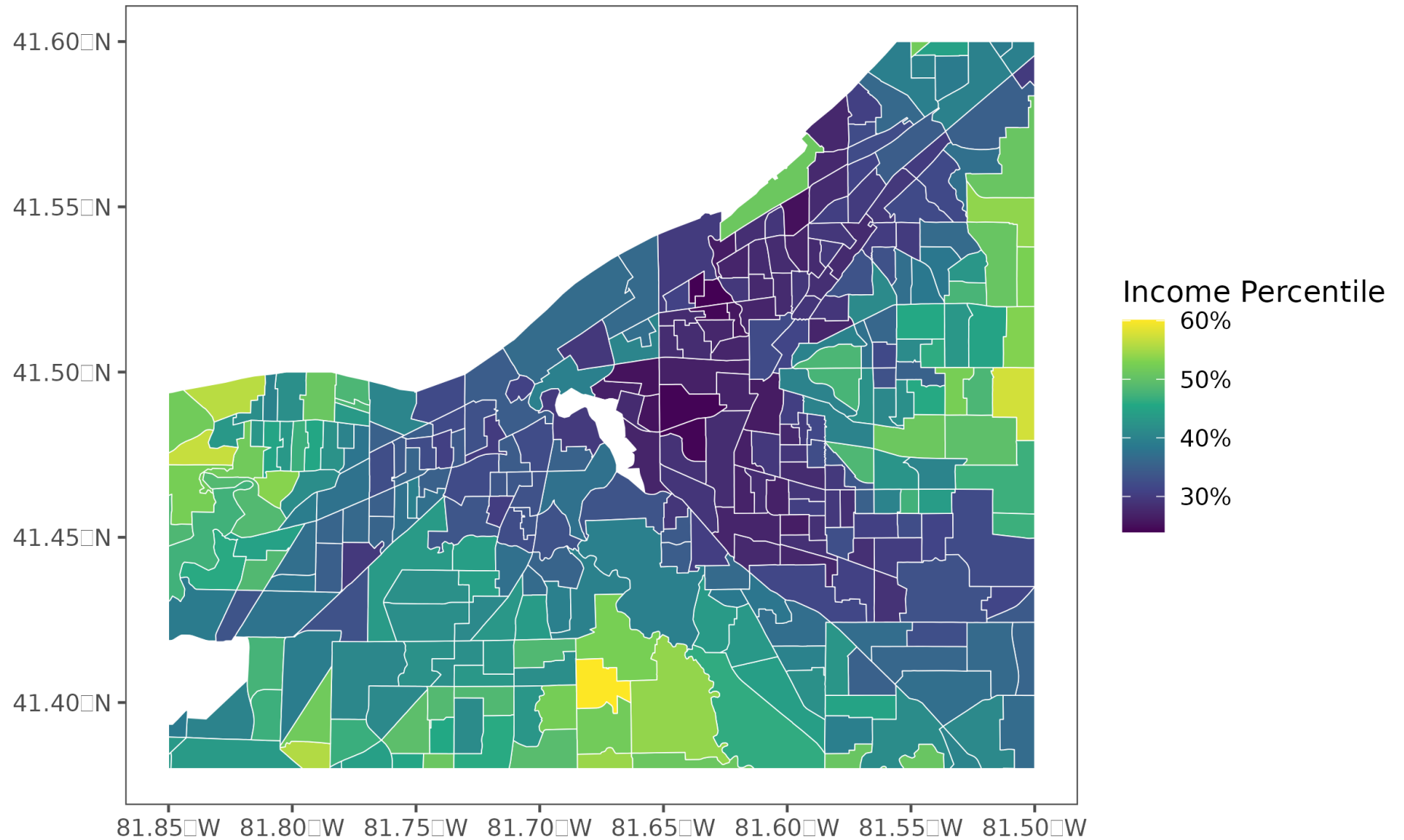
City and neighborhood diversity indices for 100 largest U.S. cities



Upward mobility  
is very low across  
almost the entire  
city, including  
around the  
waterfront area.

## Upward Mobility in Cleveland Tracts

Percentile Rank of Children Whose Parents Were in the 25<sup>th</sup> Percentile of Income



Source: Opportunity Atlas

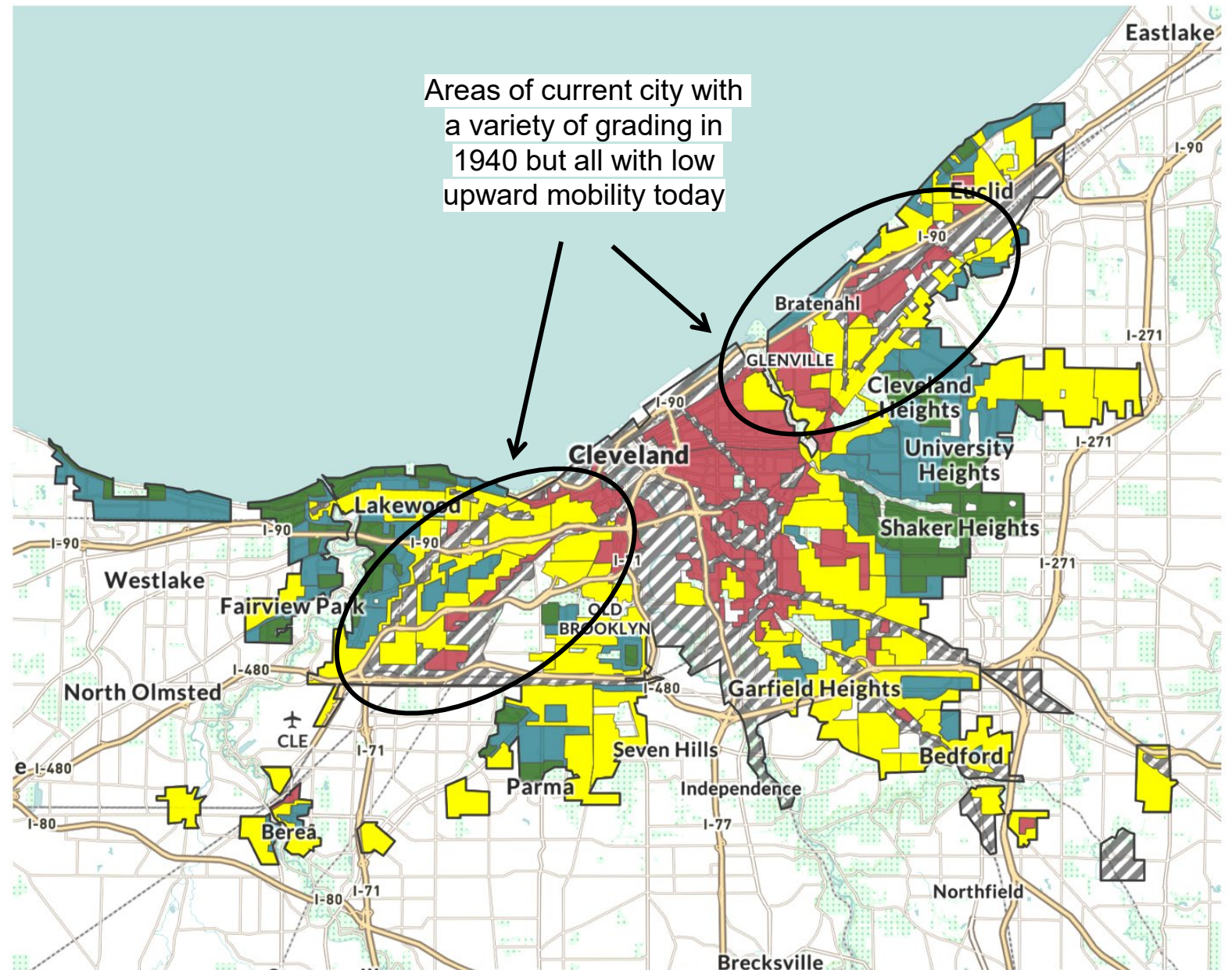
Many attribute overall inequities directly to the long historical shadow of redlining.

## RESIDENTIAL SECURITY MAP

### LEGEND

- A FIRST GRADE
- B SECOND GRADE
- C THIRD GRADE
- D FOURTH GRADE
- SPARSELY BUILT UP  
(COLOR INDICATES GRADE)
- INDUSTRIAL
- COMMERCIAL (IMPORTANT RETAIL AND WHOLESALE AREAS)
- UNDEVELOPED OR FARMLAND  
(NO PROBABLE CHANGE WITHIN 5 YEARS)

PREPARED BY  
DIVISION OF RESEARCH AND STATISTICS  
FEDERAL HOME LOAN BANK BOARD  
WITH THE CO-OPERATION OF THE  
APPRAISAL DEPARTMENT  
HOME OWNERS' LOAN CORPORATION  
MARCH 15, 1940



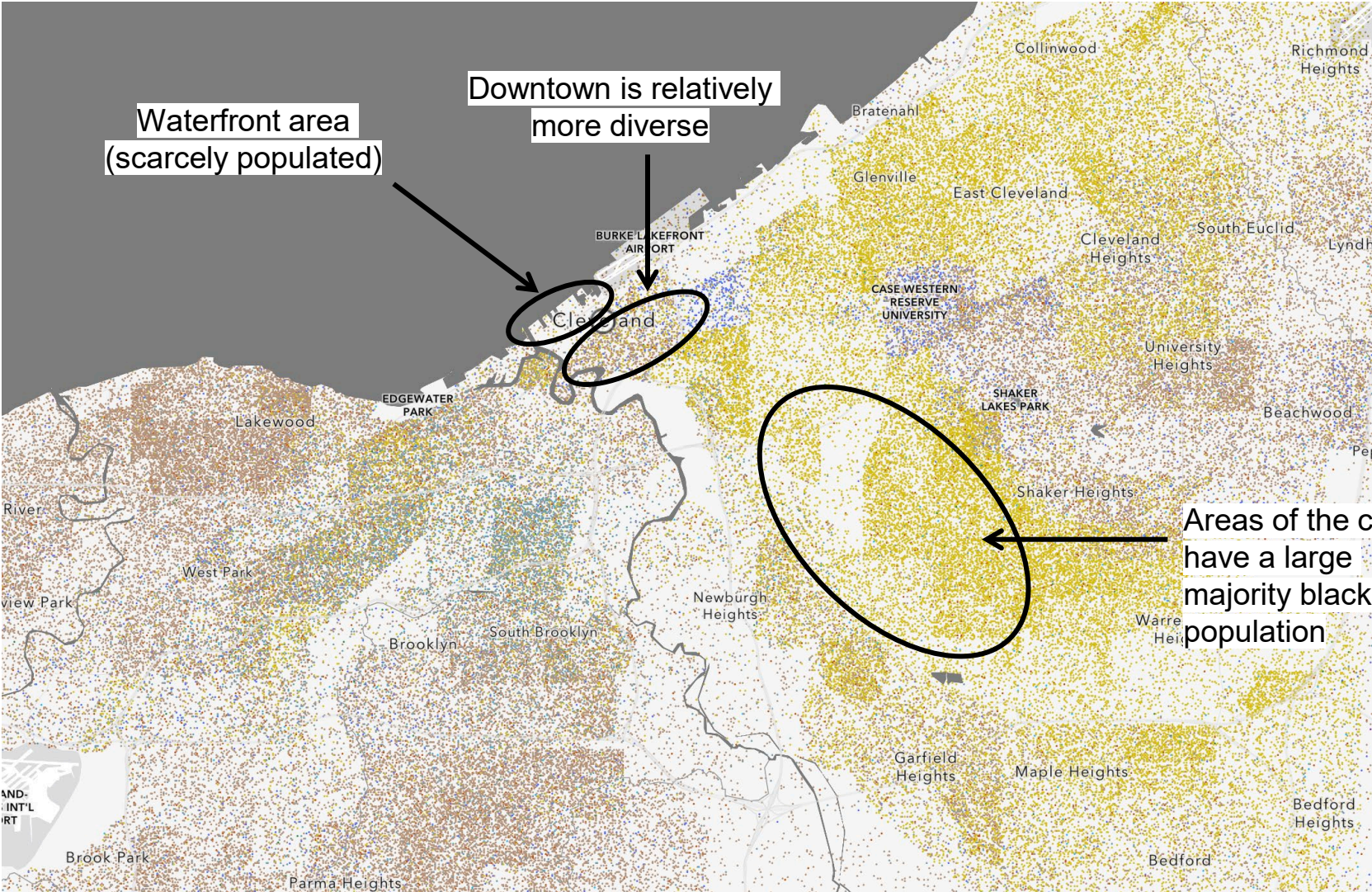


Let's have a look at the **people** located near the waterfront. The immediate vicinity is primarily white, but more racially integrated than much of the city.

USA Census 2020 Redistricting Tracts

1 Dot = 6 people

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- Non-Hispanic or Latino Population: White alone











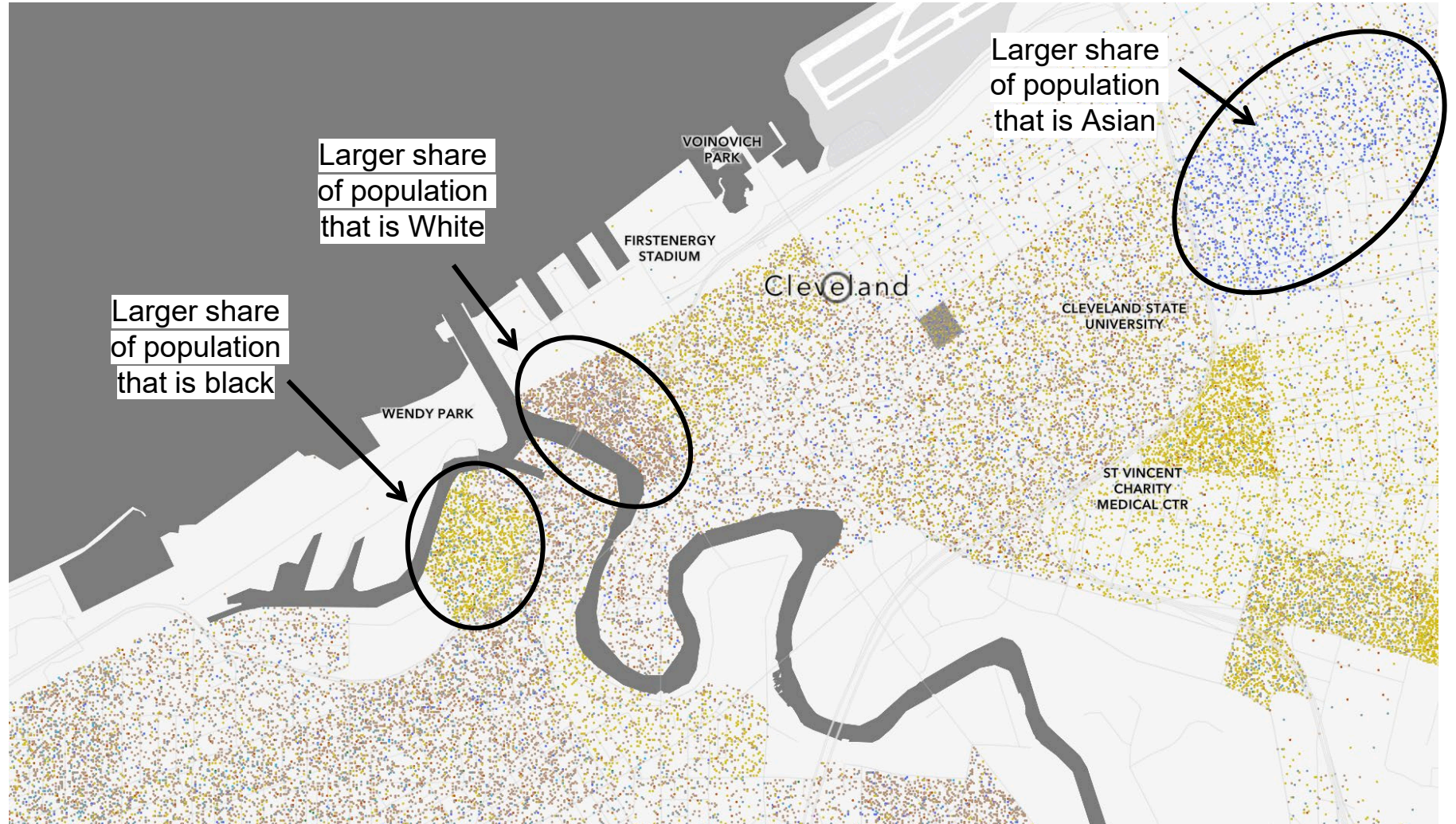


Zooming in on the waterfront and downtown, note that this is a small share of Cleveland's overall population.

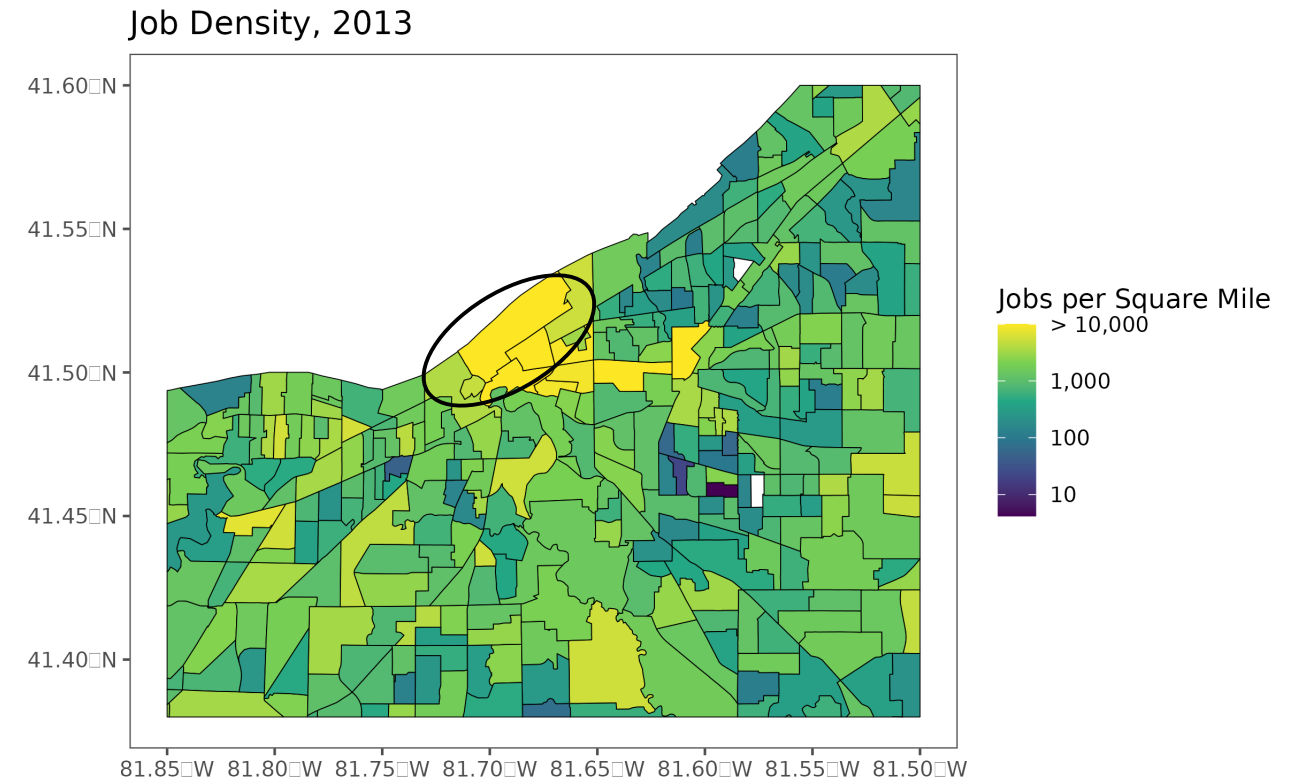
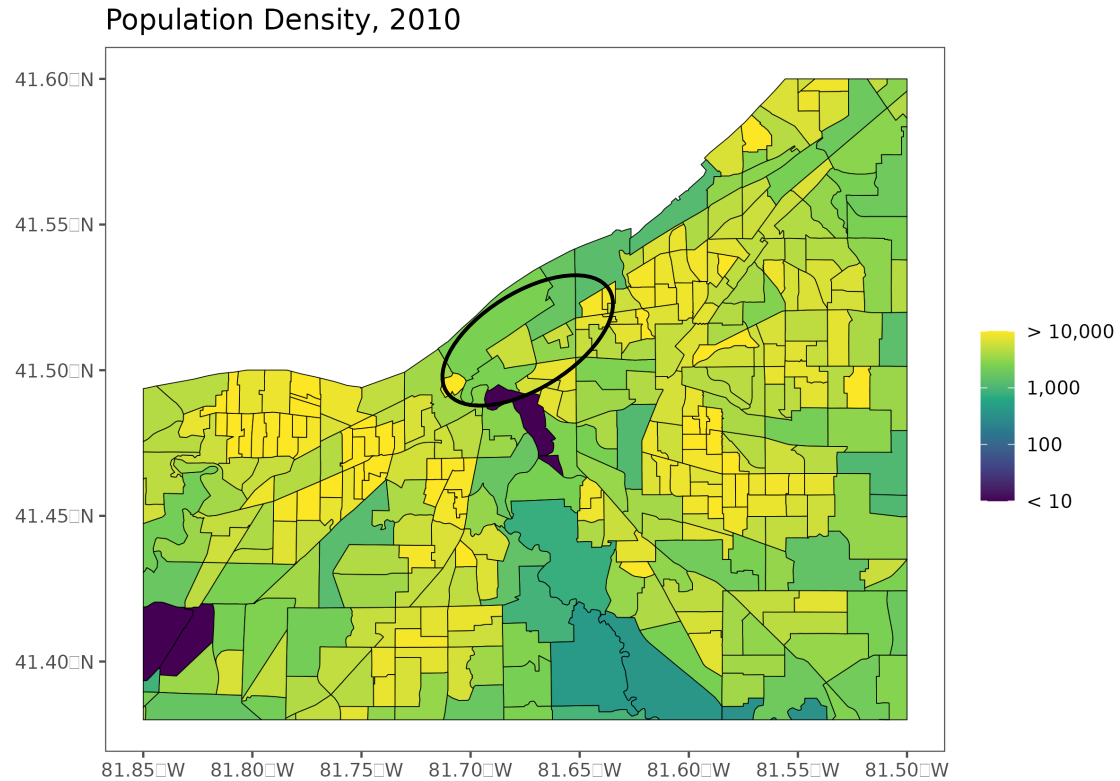
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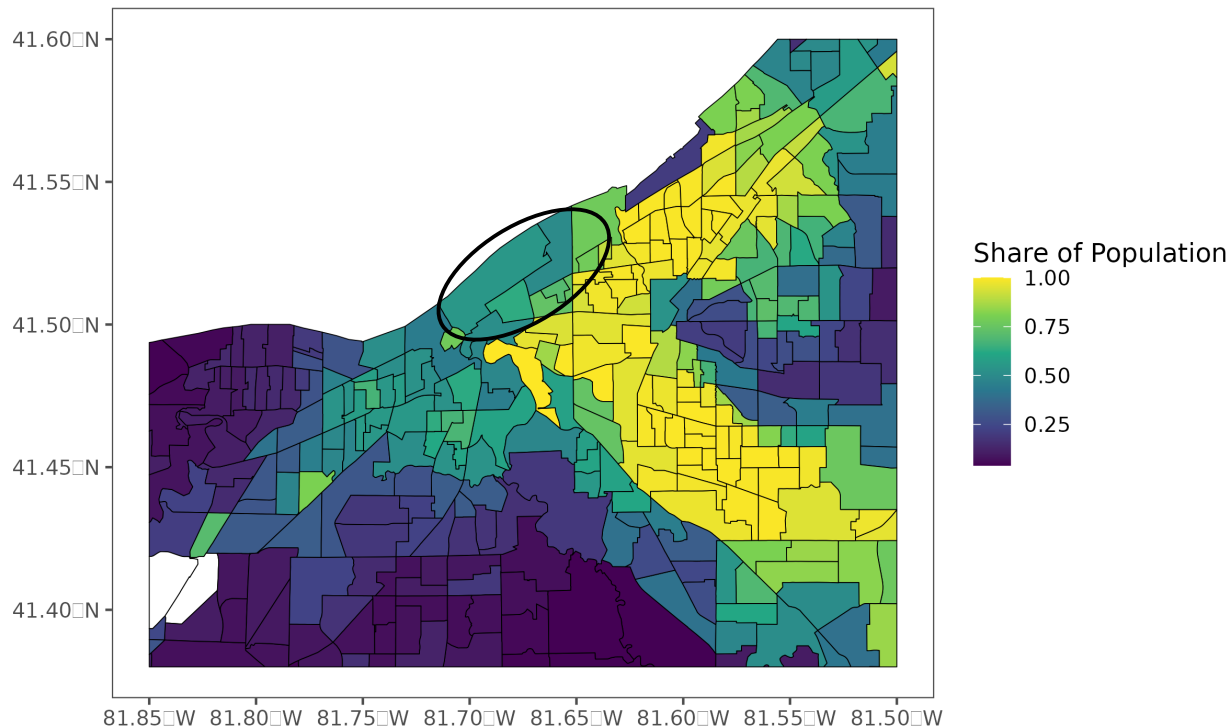


Close to the waterfront, population density is average, but job density is higher.

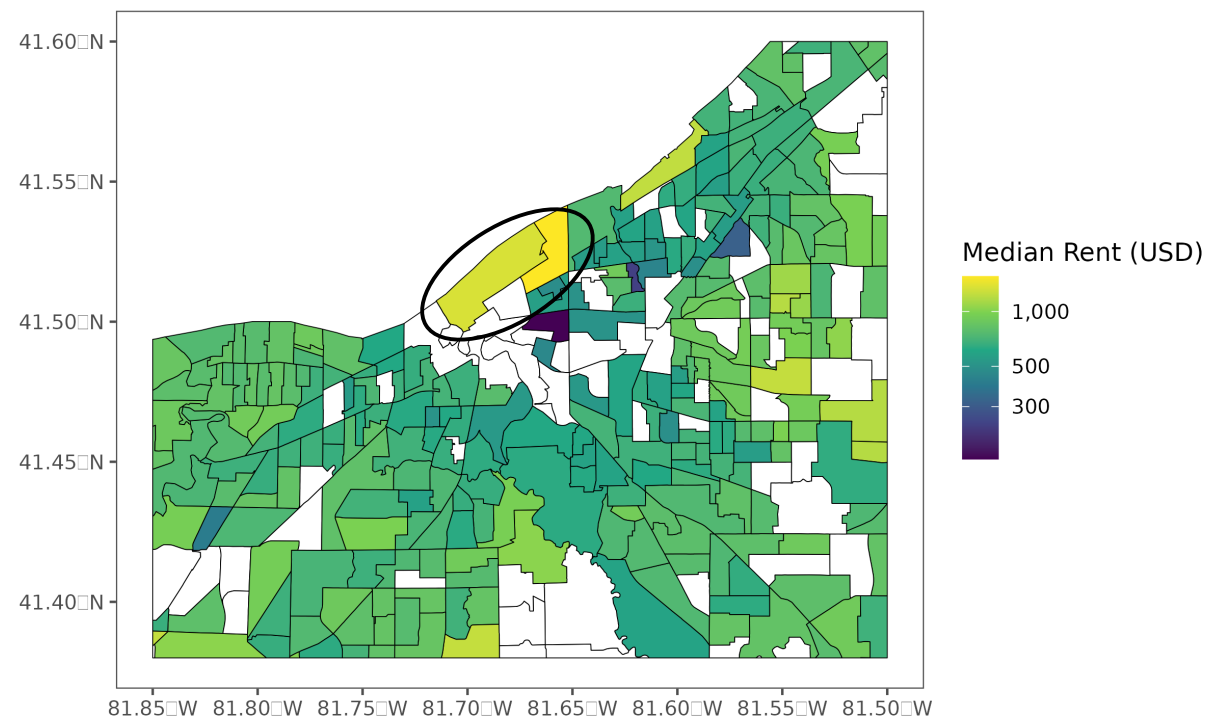


Waterfront area is *not* among the most segregated. Median rents are relatively high.

Share of Population that is Non-white, 2010



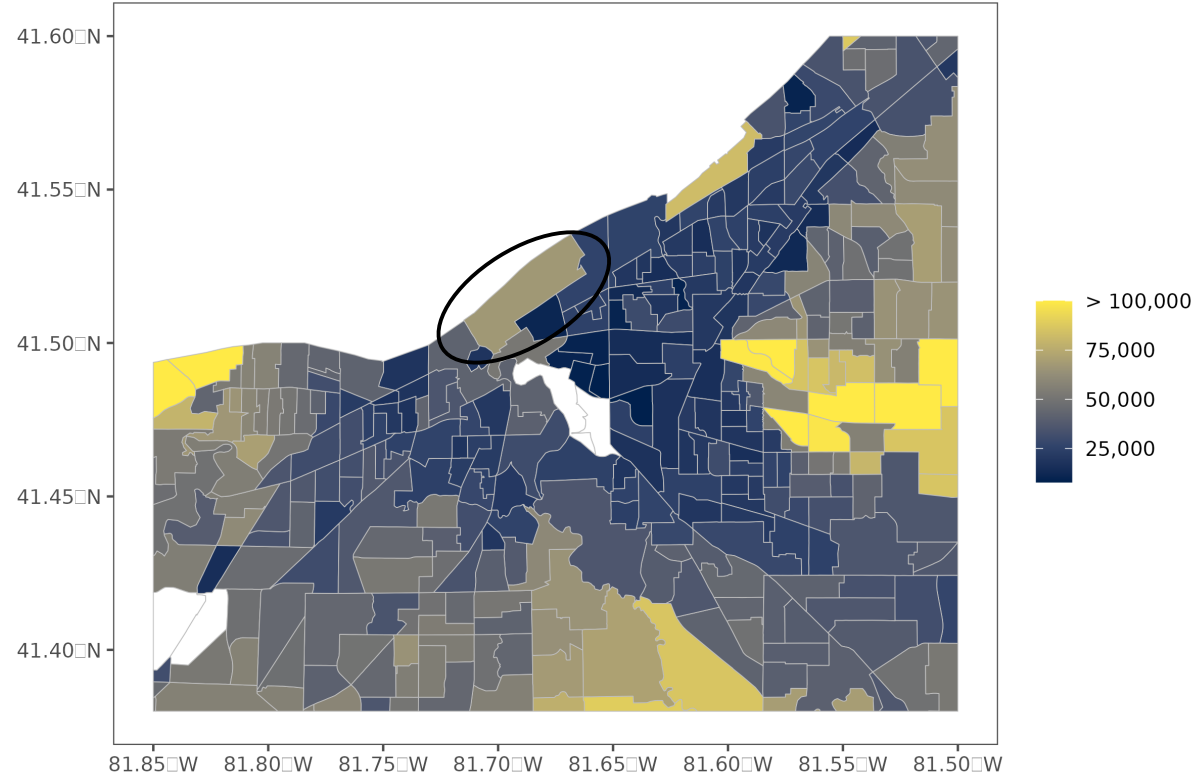
Median Rent for a Two Bedroom Apartment, 2012-14 Avg



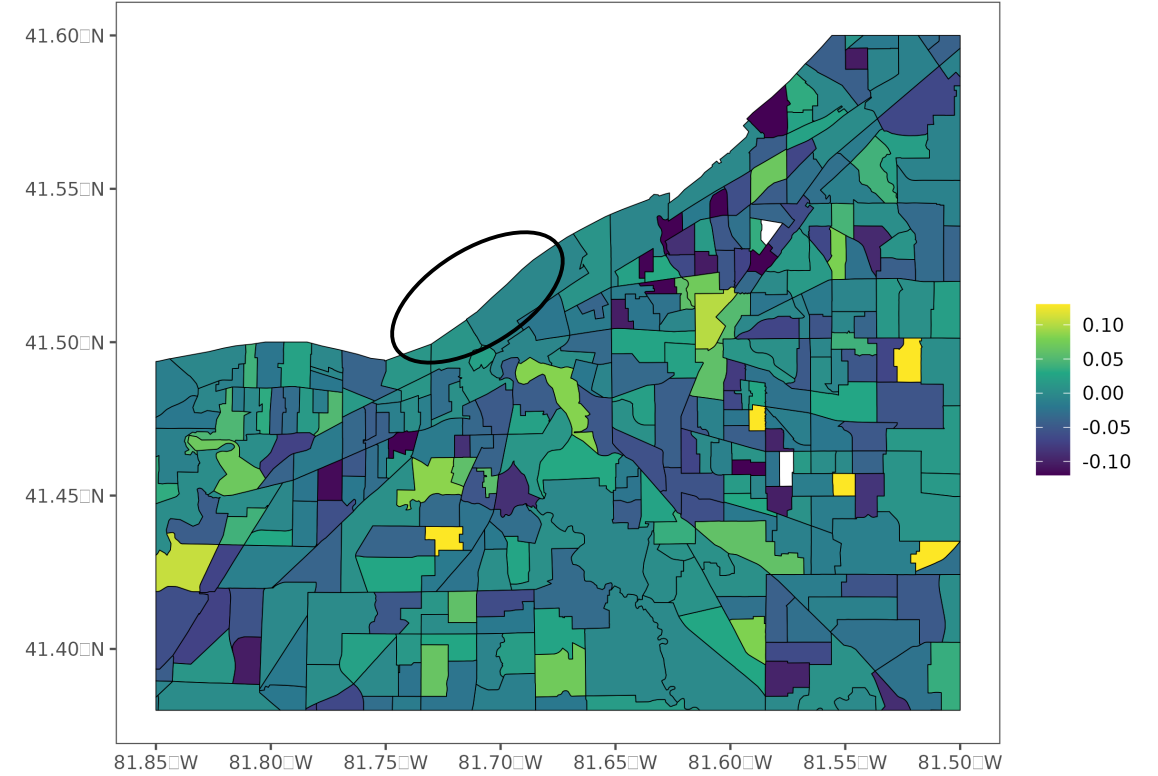


Median income is relatively high, but job growth has been weak.

Median Household Income, 2012-16



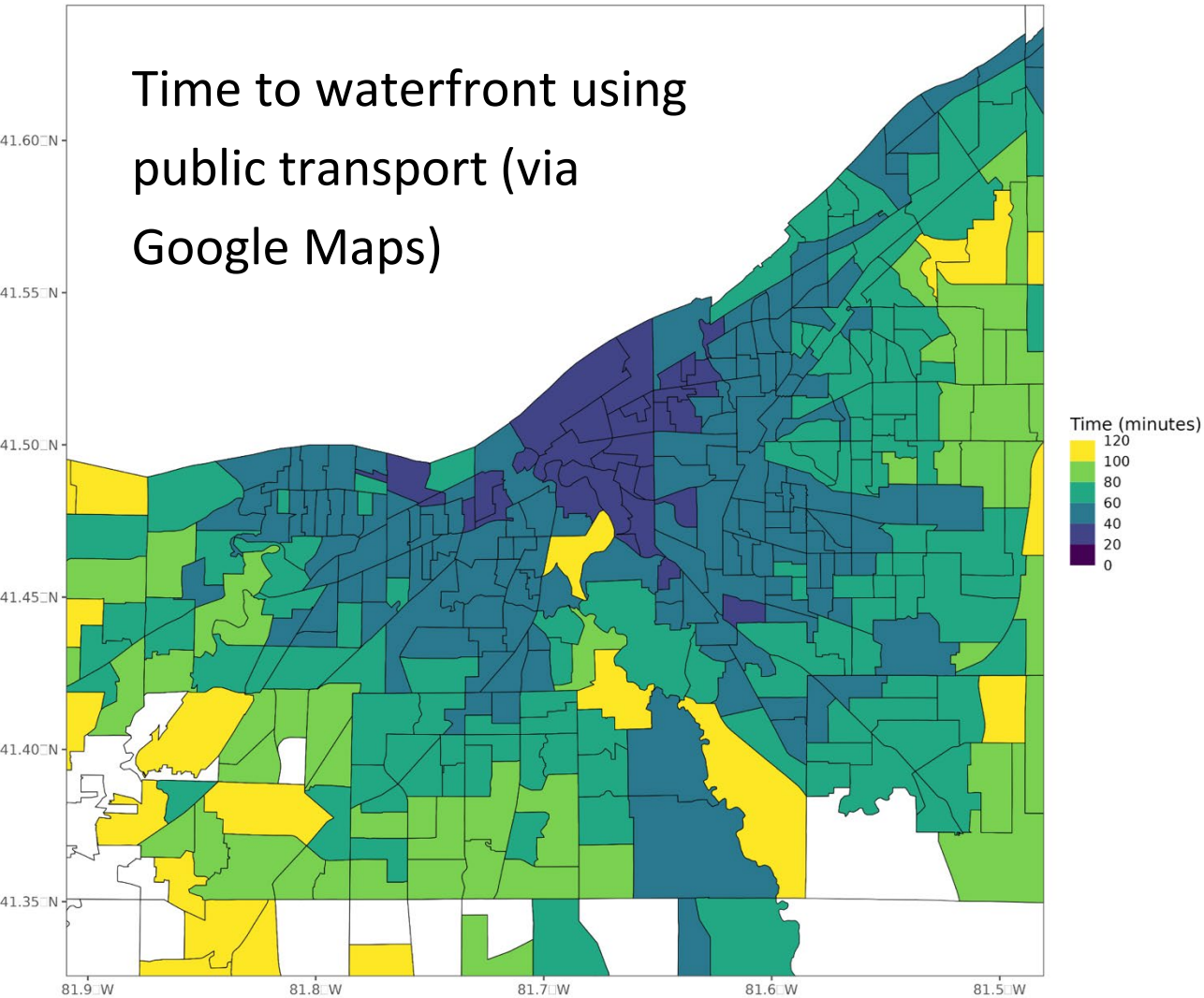
Annual Average Job Growth, 2004-2013



# Who Has Access to the Waterfront?

Think about: Who would benefit from the waterfront project?

Many Clevelanders rely on public transportation. Areas with higher Black populations have relatively good access to the waterfront.



DATA



Cleveland and East Cleveland top Ohio cities with highest percent of households without access to a car - census estimates

Updated: Jan. 17, 2023, 2:39 p.m. | Published: Jan. 17, 2023, 9:33 a.m.

Ohio households by percent of vehicles owned

Click on the column headers to sort the chart, or search for a city in the box below.

Search in table

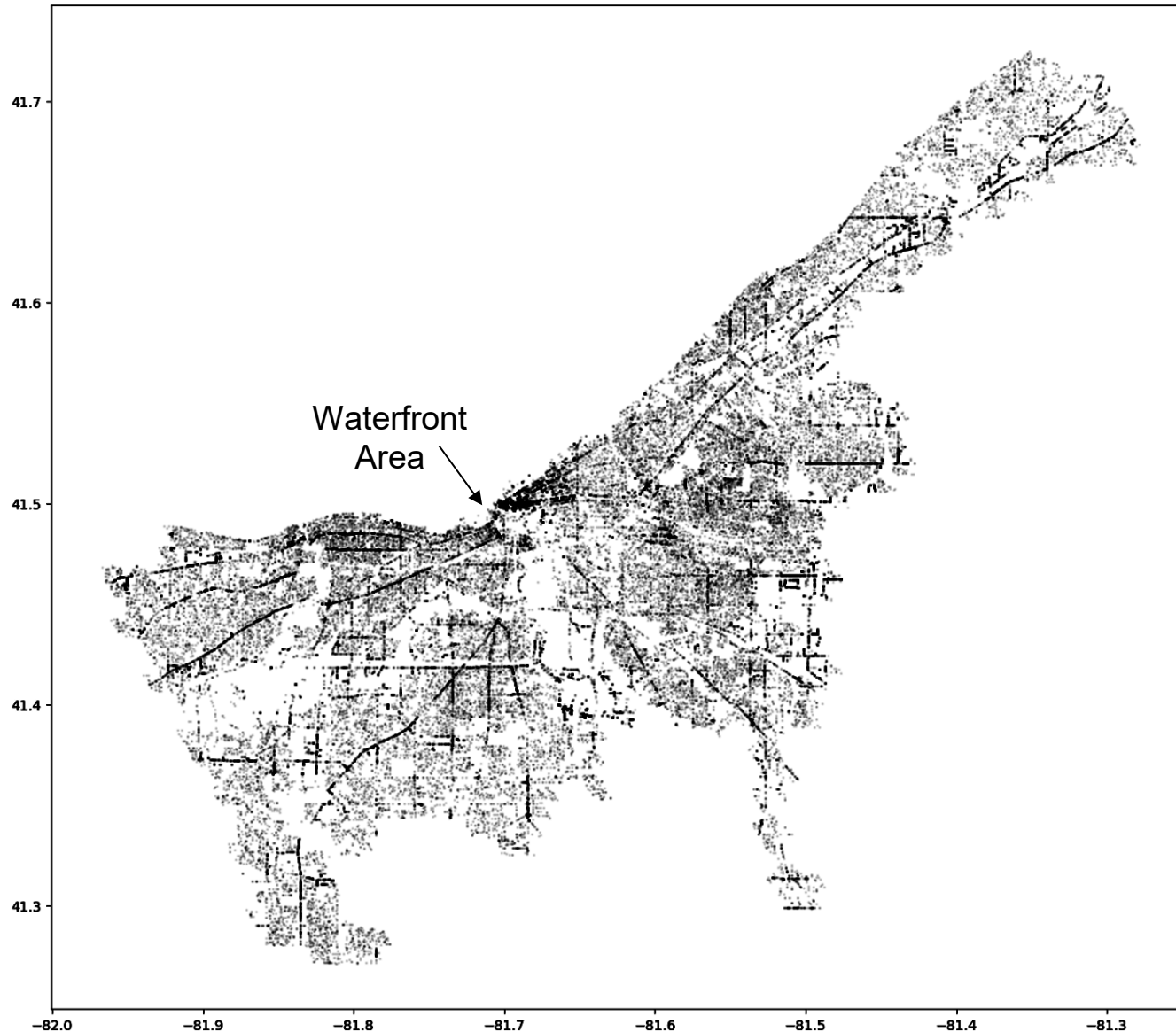
Page 1 of 3 >

	City	0 Cars	1 Cars	2 Cars	3+ Cars
1	East Cleveland	35.0%	43.0%	16.8%	5.1%
2	Cleveland	22.4%	45.5%	23.1%	8.9%
3	Cincinnati	17.9%	43.4%	28.7%	10.0%
4	Dayton	17.8%	41.2%	28.5%	12.5%
5	Youngstown	17.5%	43.3%	27.6%	11.6%
6	Euclid	17.5%	45.2%	27.3%	9.9%
7	East Liverpool	17.1%	39.8%	28.6%	14.5%
8	Hillsboro	16.5%	37.8%	26.9%	18.9%
9	Steubenville	15.7%	38.4%	33.8%	12.1%
10	Ravenna	15.6%	39.2%	29.7%	15.5%

# **Economic Geography: What Jobs Are Where in Cleveland?**

Think about: What type of jobs would you expect to grow because of the waterfront project?

Let's have a look at the **industries** that are located near the waterfront.

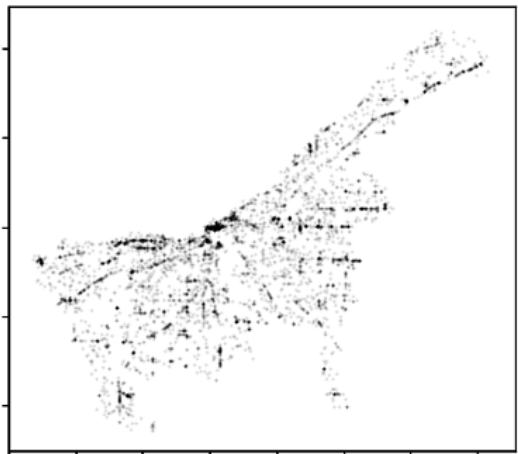


Note: This map and those on the following slides show business establishments in Cleveland in an available dataset (Dun & Bradstreet). Each dot represents an establishment. Just looking at business locations reveals spatial patterns of the city. The following slides use the same approach for individual sectors and industries.



# Clearest downtown concentrations in the food and finance clusters:

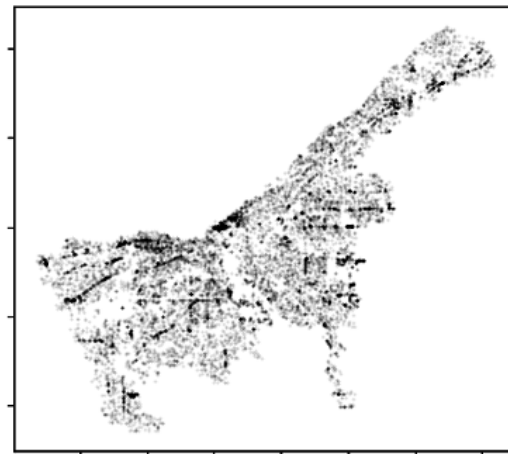
Food



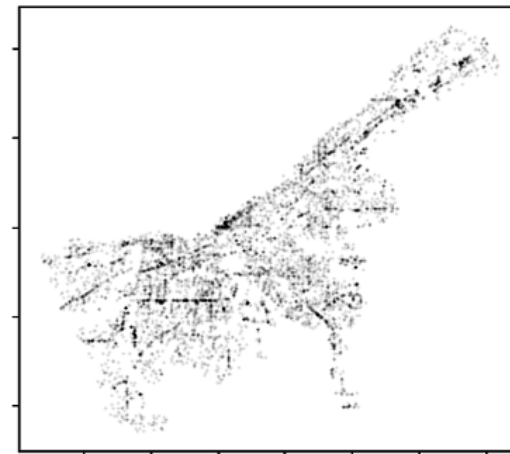
Basic Materials



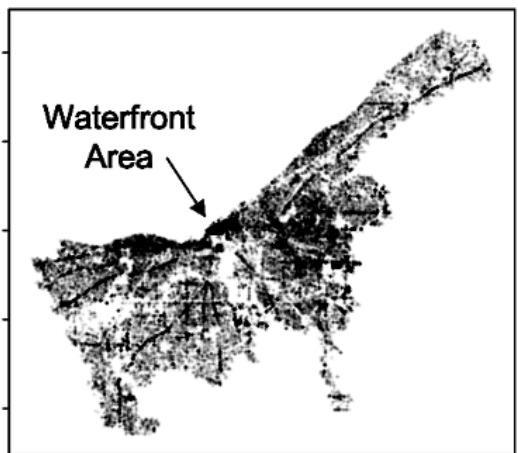
Household Retail



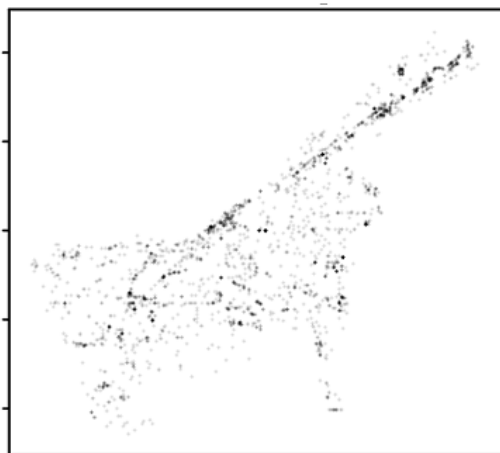
Basic Services



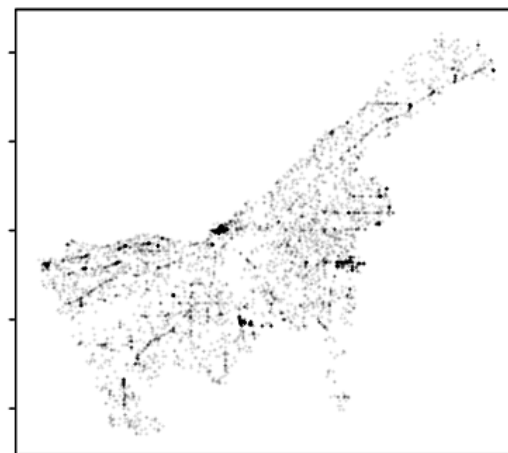
Services



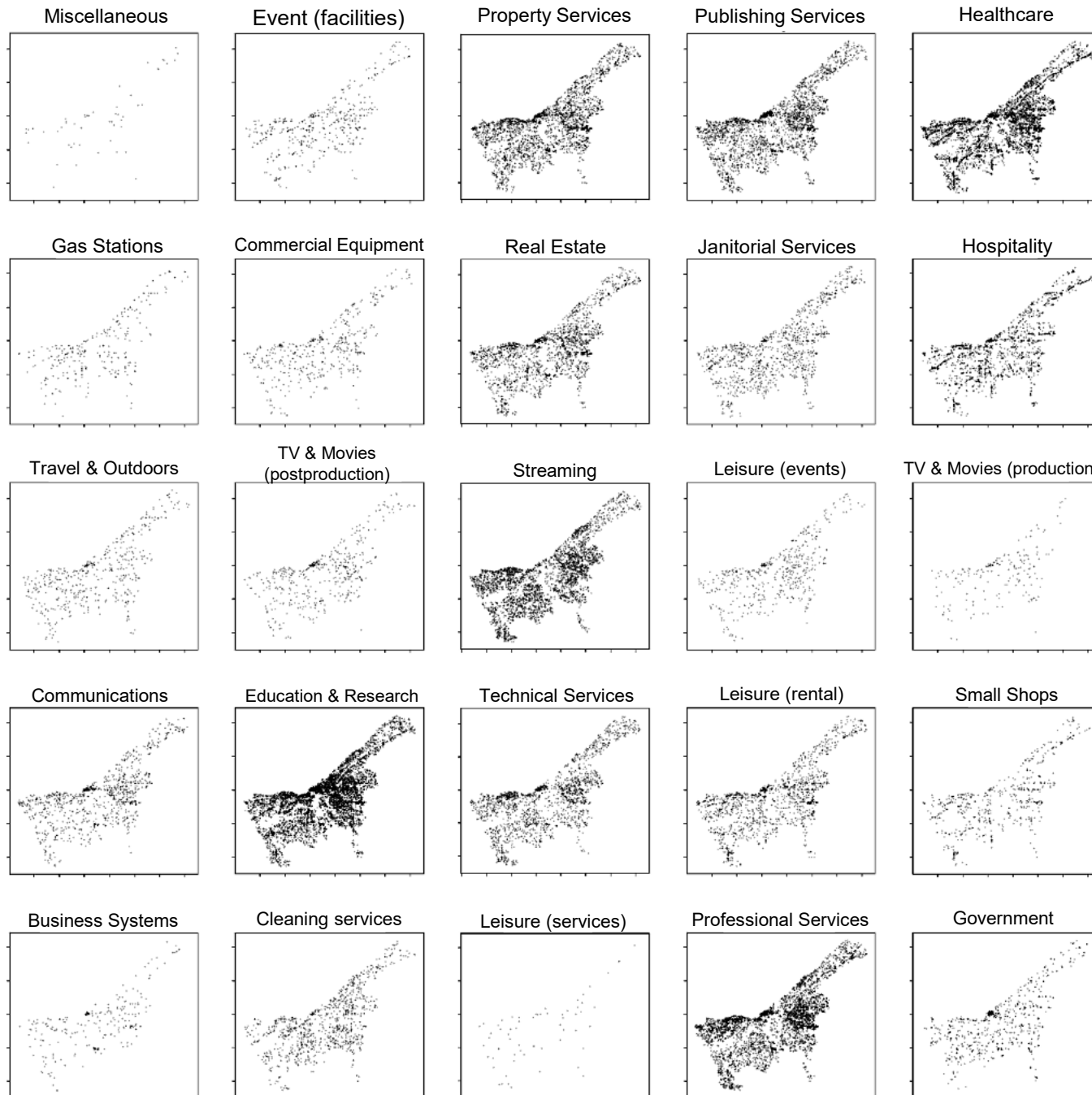
Manufacturing



Finance



Note: Each dot on the maps represents a business establishment in the sector.



Breaking out all service industry categories:

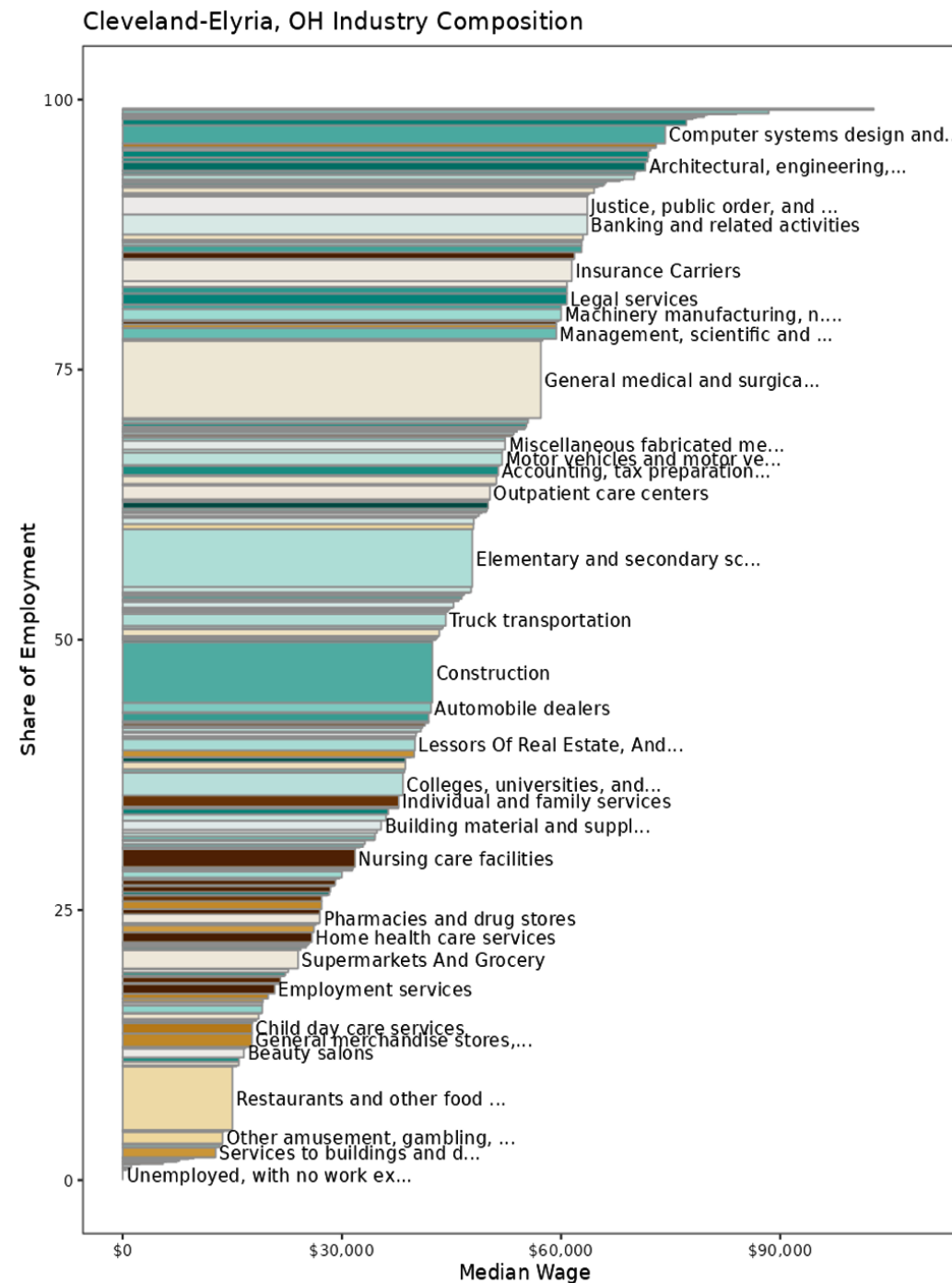
- Property Services
- Real Estate
- Publishing
- Hospitality
- Leisure
- Communications
- Technical Services
- Professional Services
- TV & Movies (postproduction)
- Government

# Who Is Employed in Cleveland's Industries?

Think about: Who would benefit from the waterfront project?

What is the racial composition of jobs in Cleveland's industries?

→ Black workers are underrepresented in higher-paying industries and overrepresented in lower paying industries. This is true not only in Cleveland but also nationwide (not shown).



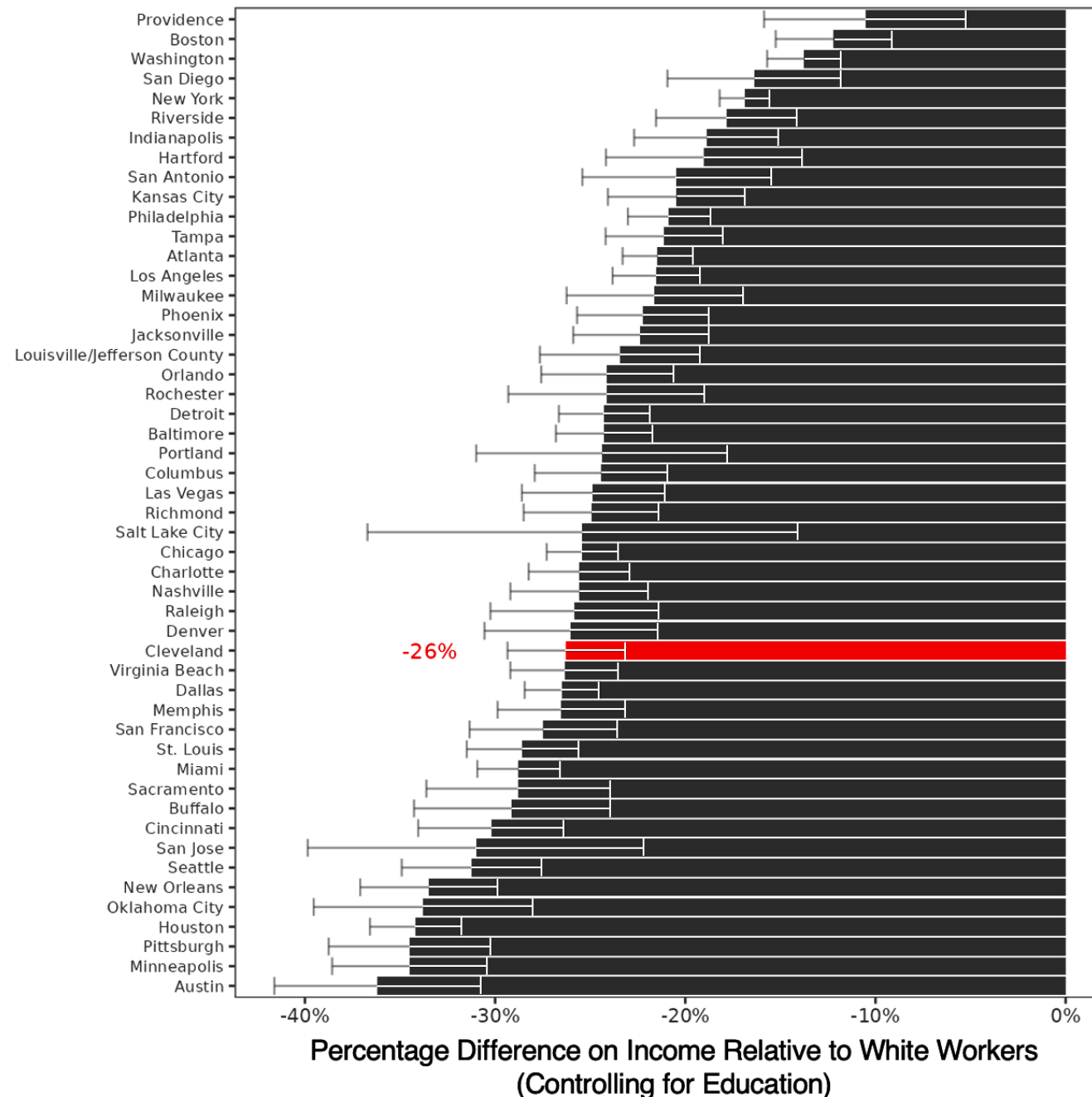
Source: Growth Lab using  
IPUMS ACS 2021 5% sample

Overall, what is the “race penalty” on wages in Cleveland and how does it compare with other metropolitan statistical areas (MSA)s?

→ After controlling for education levels, Black workers without a bachelor’s degree make 26% less than white workers without a bachelor’s degree.

Difference in Income between White and Black Workers  
Top 50 MSA's by Population. Workers without Bachelors Degree

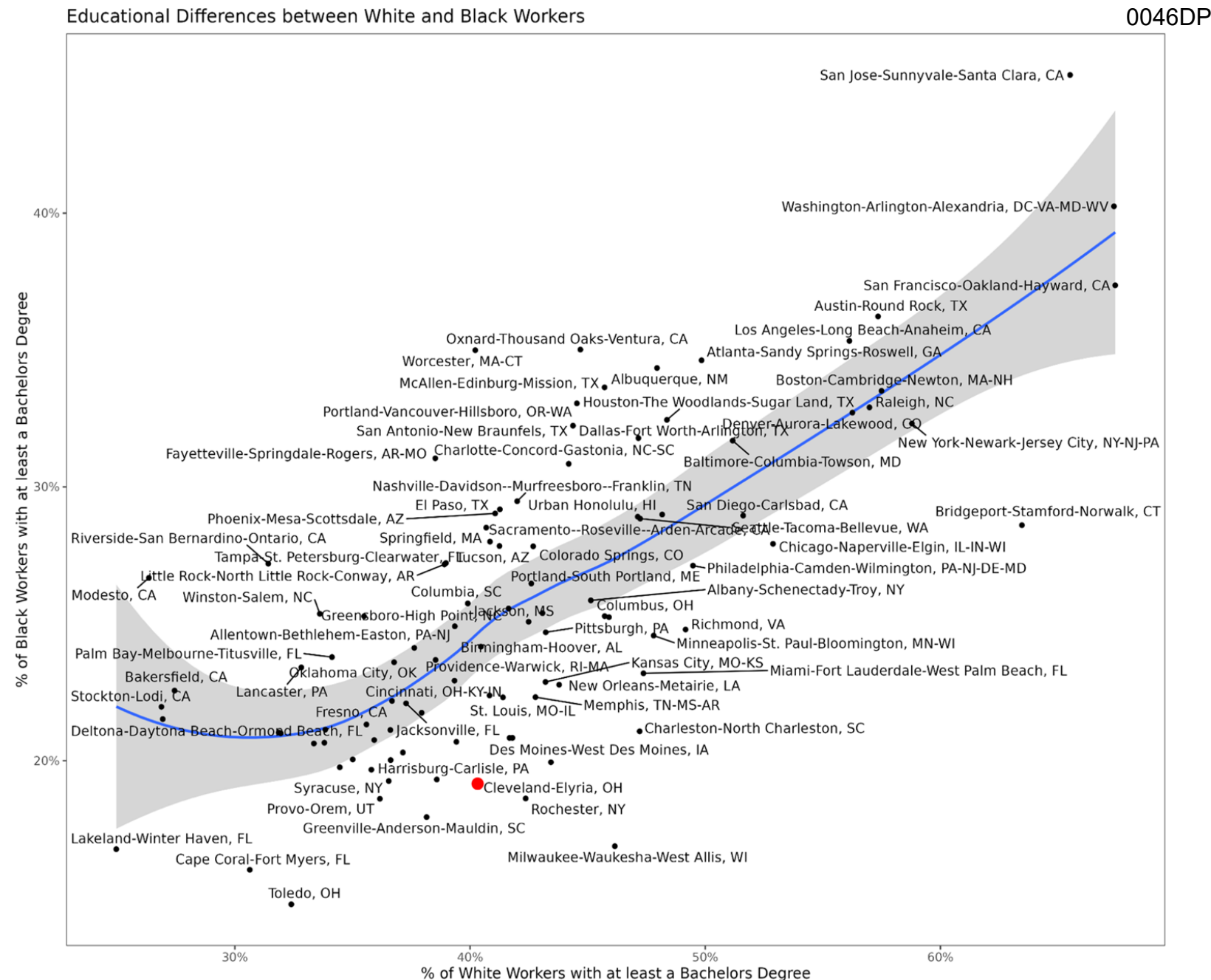
0046DP



Source: Growth Lab  
using IPUMS ACS  
2021 5% sample



Black workers also have significantly lower rates of tertiary education than white workers in Cleveland.



Source: Growth Lab using 5-year American Community Survey data, 2021

# ***Metroverse* Exploration of Potential Growth Drivers**

See <https://metroverse.hks.harvard.edu> for interactive visualizations.

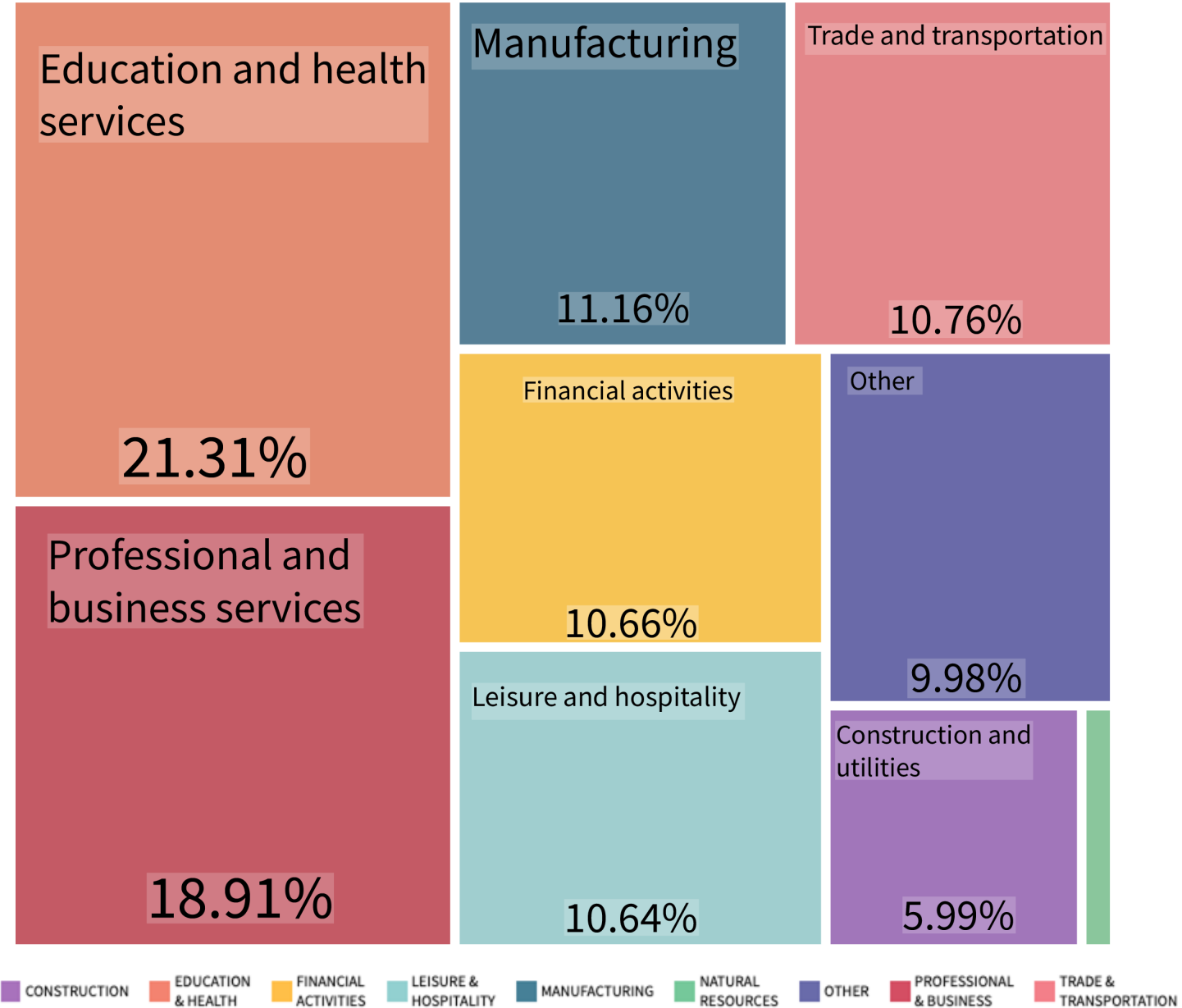
Think about: What type of jobs would you expect to grow because of the waterfront project? Who would benefit?

# Can economic composition explain weak growth? (Cleveland in *Metroverse*)



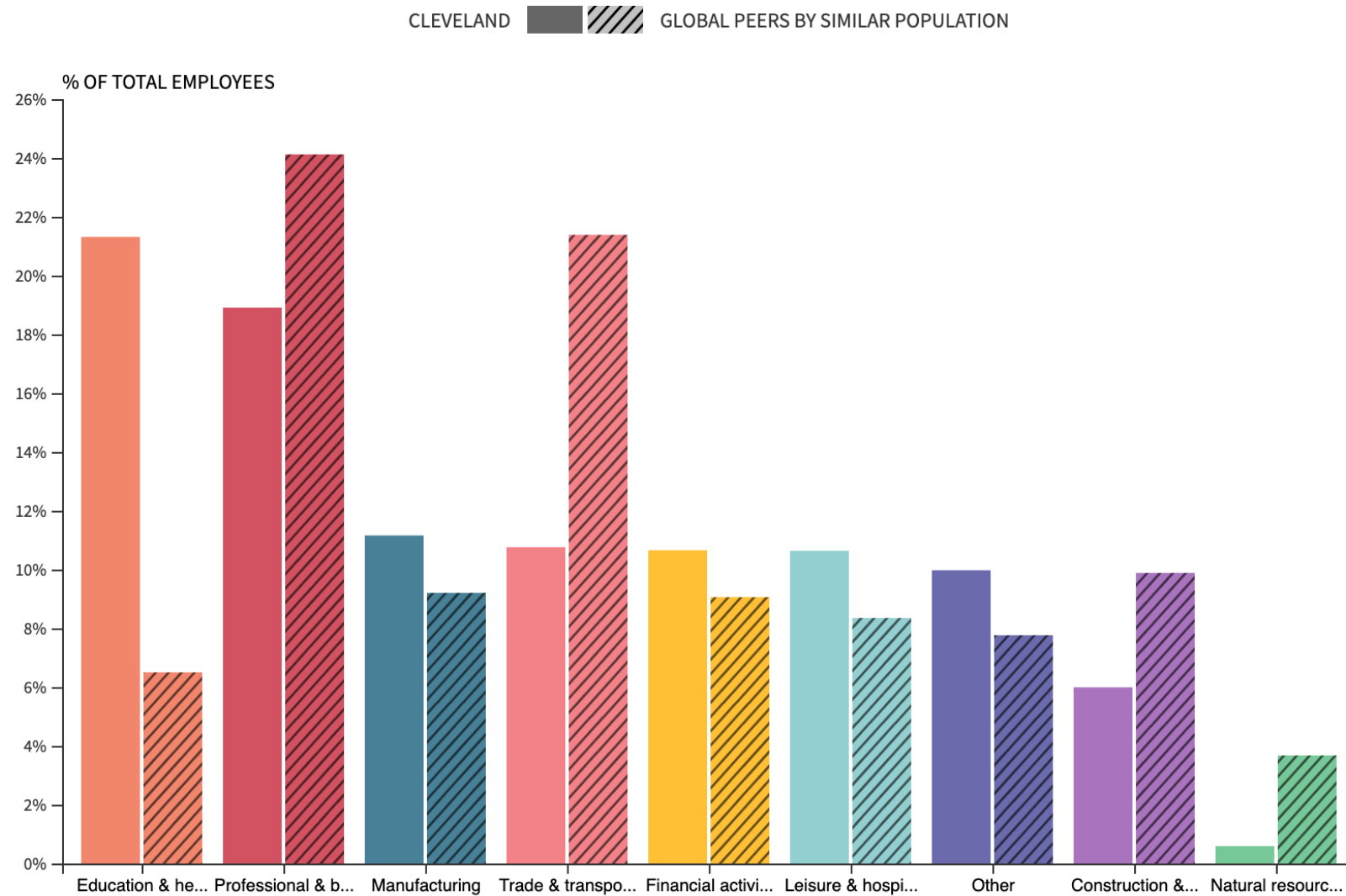
\* The urban boundary used on the website covers most of Cuyahoga County.

## Estimated Breakdown of Jobs by Industry





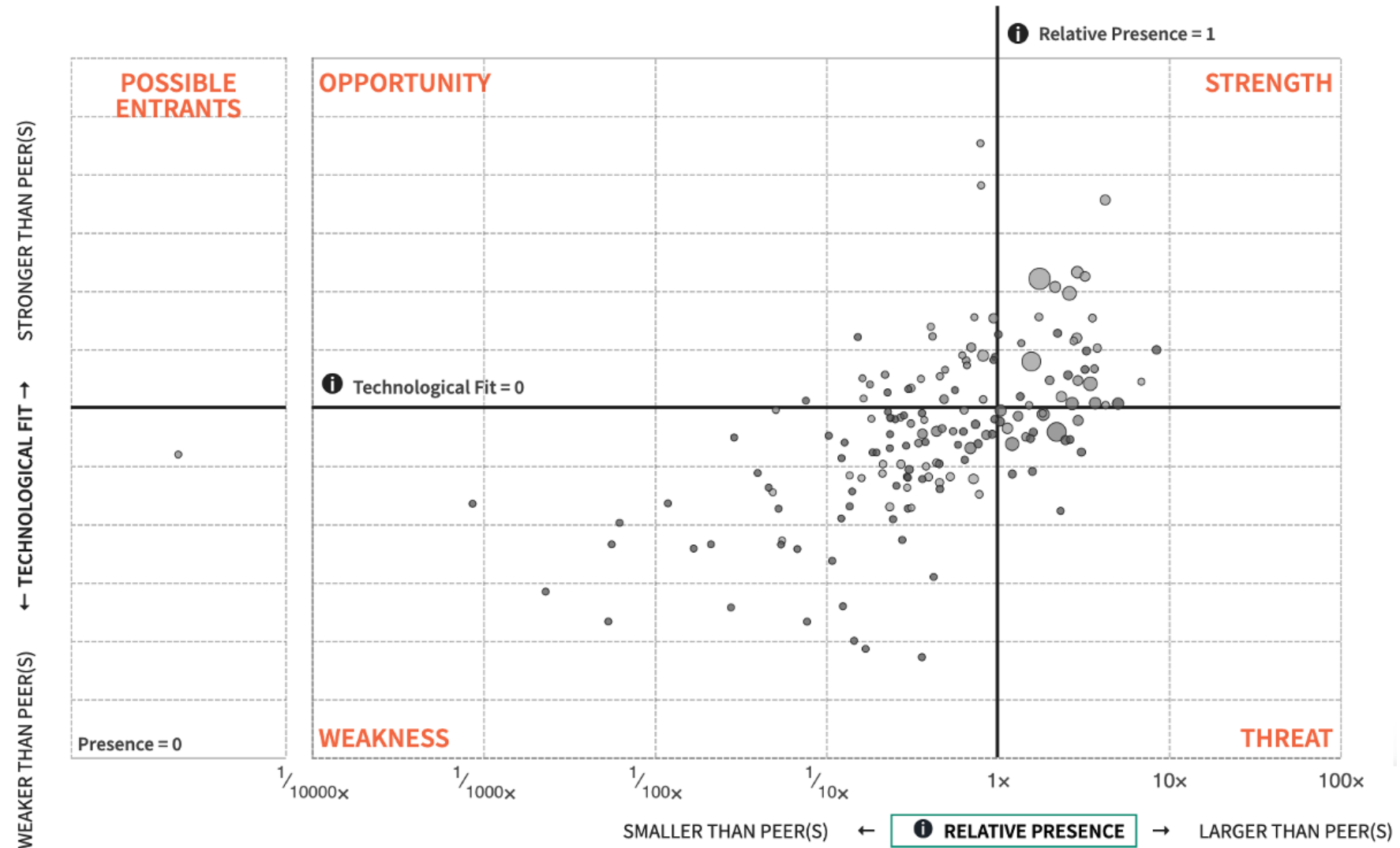
Compared with 79 peer cities, Cleveland has high job shares in the categories of education & health, and manufacturing. The city has low shares in trade & transportation, and professional & business services.



What industries might be likely to emerge/grow in Cleveland?

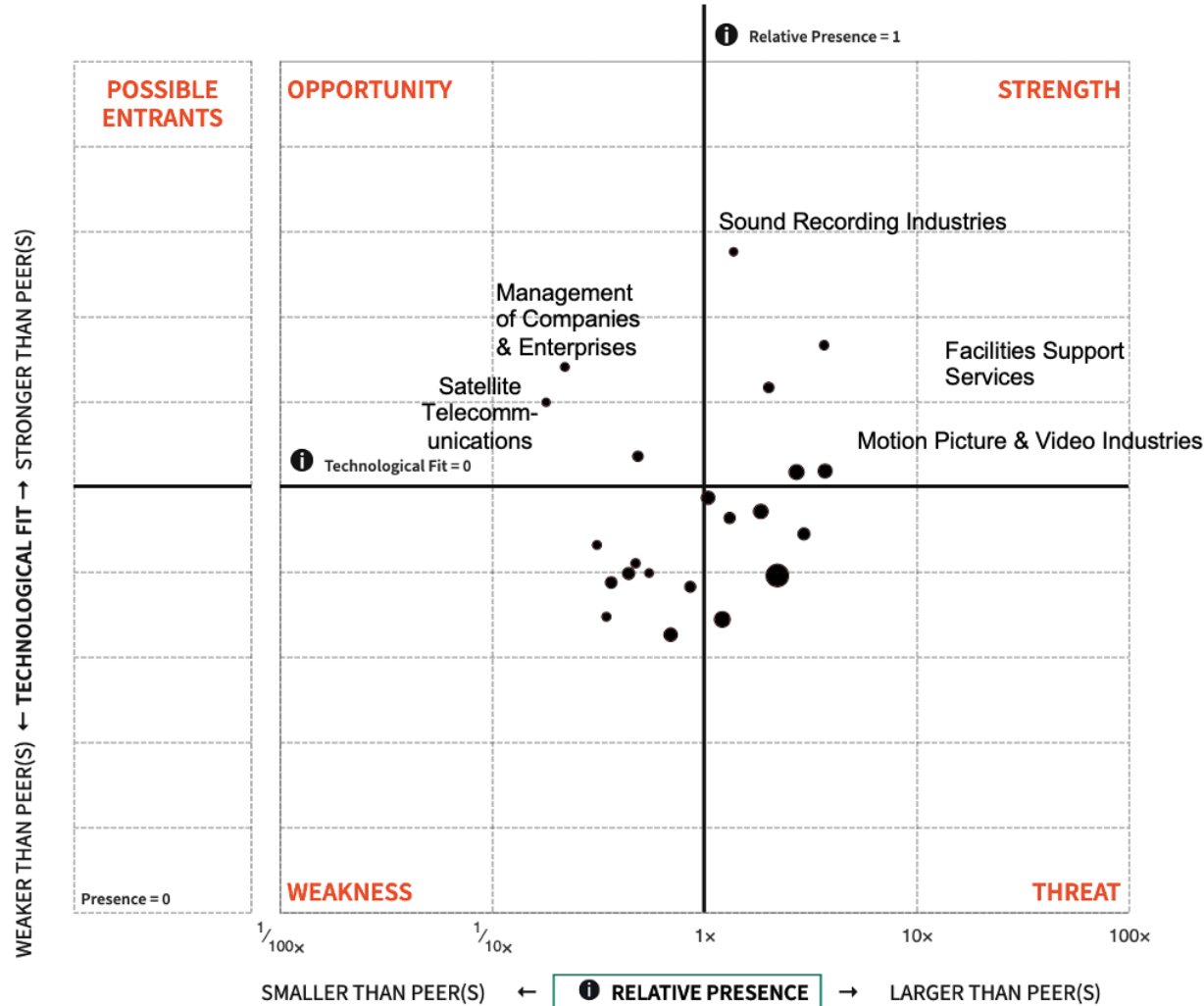
([Explore interactively using Metroverse.](#))

Top-left “Opportunity” quadrant shows industries that are consistent with Cleveland’s economic capabilities but that are underrepresented and thus may be positioned to grow.

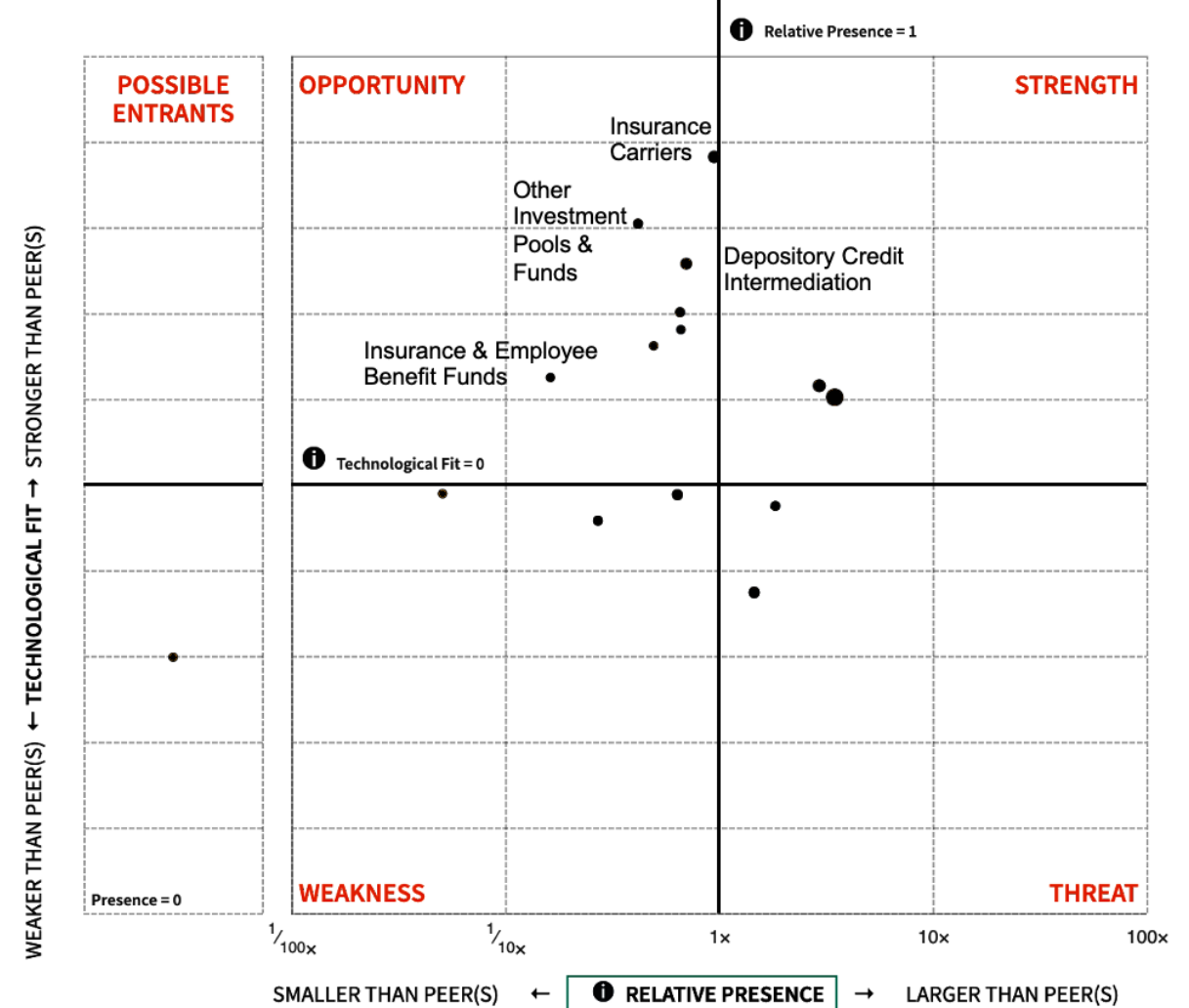


# Some possibilities in industries with a clear clustering downtown:

## Professional & Business



## Financial Activities



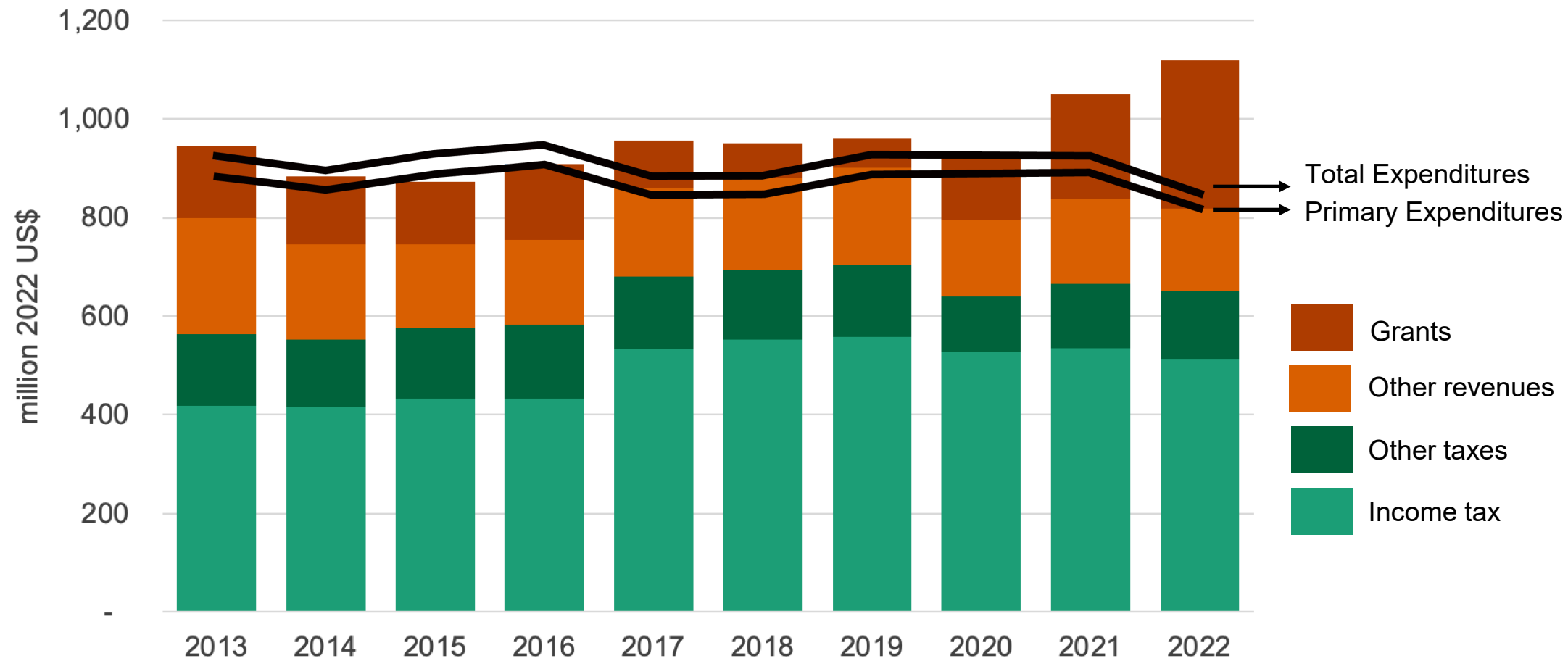
# **Cleveland City Finances and Financing of Similar Projects**



# Cleveland's Finances

Think about: What are the financing and funding implications of the project?

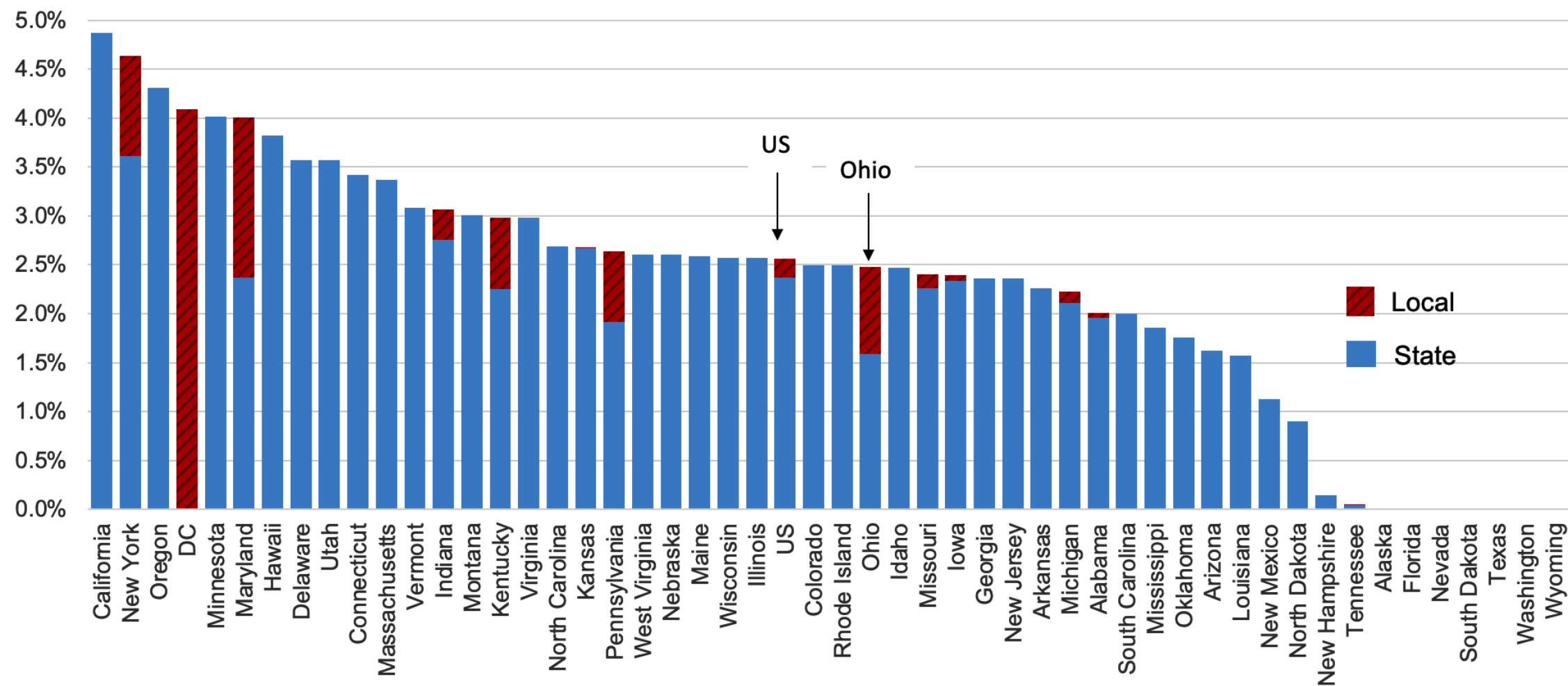
Recurring fiscal deficits over 2014-2016 led to a need for fiscal adjustment measures. Since 2020, an increase in grants has led to relatively large recent surpluses.



Note: The income tax rate jumped from 2 to 2.5 percent in 2018.

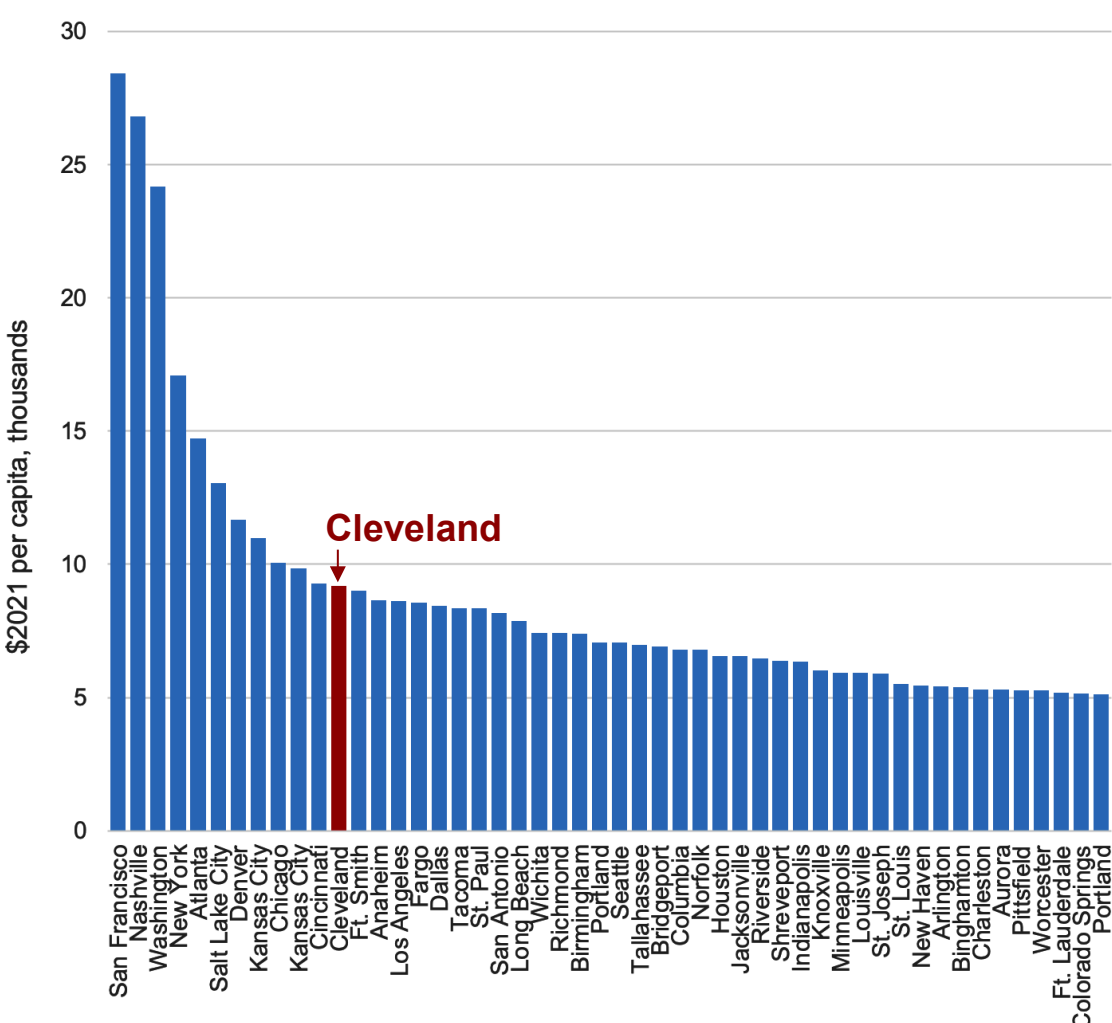
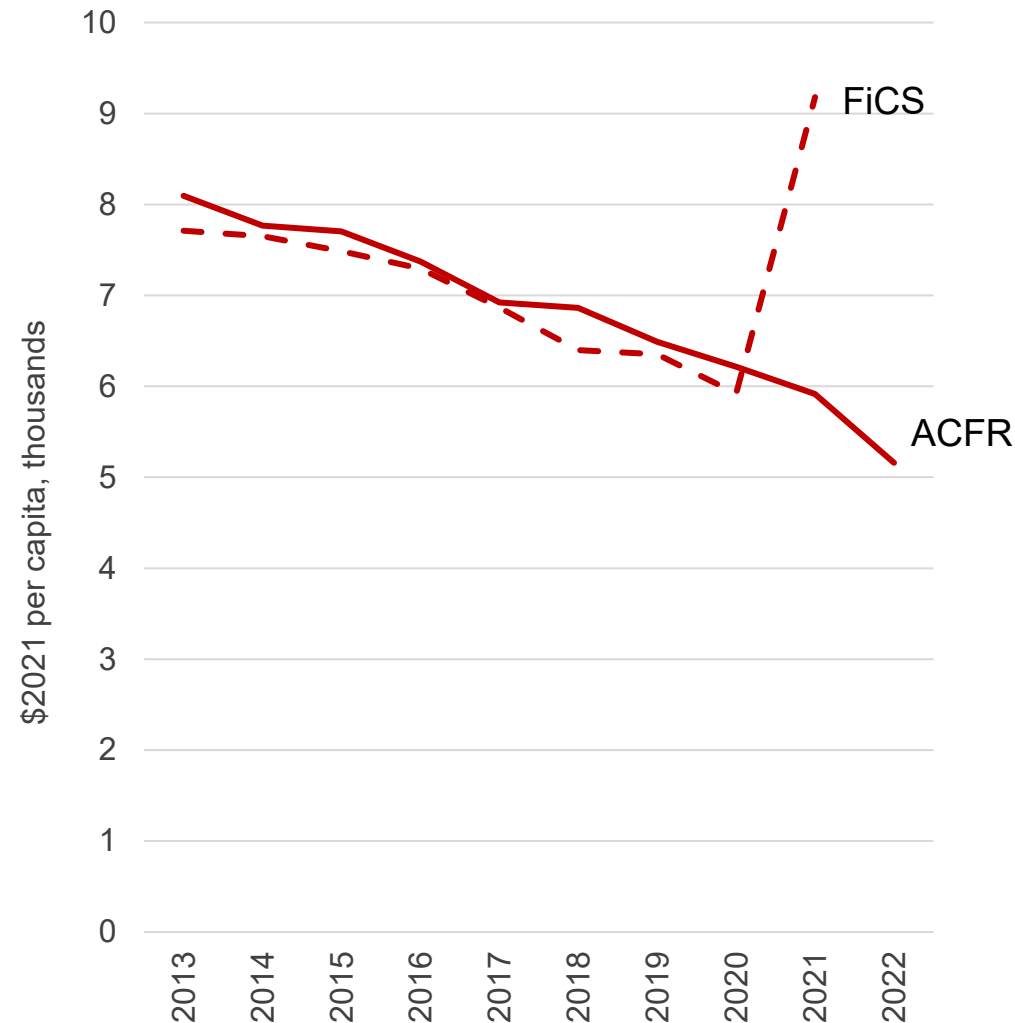
“Ohio’s municipal income tax system is the most poorly structured local income tax in the United States.” (Scott Drenkard, Tax Foundation)

Effective Income Tax Rates by State



Sources: US Census Bureau; Bureau of Economic Analysis; Tax Foundation: <https://taxfoundation.org/blog/testimony-simplicity-ohio-municipal-income-tax/>

According to the FiSC database, Cleveland's debt spiked to an all-time high in real per capita terms in 2021 and ranked as 12th highest among the 212 largest US cities.





# Waterfront Comparisons in Other Cities

Think about: What are the financing and funding implications of the project?

# Waterfront Development Authority Case Studies

## Waterfront Development Authority Case Studies

### SEATTLE CENTRAL WATERFRONT

Transformation of the Seattle Waterfront; creating a park promenade and new pier public spaces, removing major infrastructure barriers, and reconnecting Downtown to the Waterfront.



### LOUISVILLE WATERFRONT PARK

Once an industrial wasteland, now an 85-acre "front door" to the city, reconnecting downtown to the Ohio River with welcoming and inclusive public space and programming.



### ST. LOUIS GATEWAY ARCH PARK

Connecting the National Park and Monument with a land bridge, park and cultural institutions.



### THE BANKS, CINCINNATI

Mixed-use redevelopment of the Ohio River waterfront anchored by two professional sports teams.

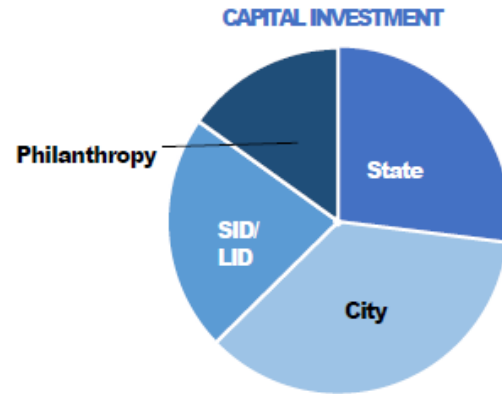


# Key aspects of cases, including varying funding/financing channels:

Timeline: 15+ years. Project launched in 2010; Alaskan Way Viaduct highway removed in 2022; anticipated construction completion in 2025.

Construction Cost: \$750M+

Governance: 10 full time staff of the City of Seattle Council and Administration; a not-for-profit **Friends of Waterfront Seattle** established to fund activities, events, and park programs



\$1.2 million from the nonprofit "Friends of Waterfront Seattle"

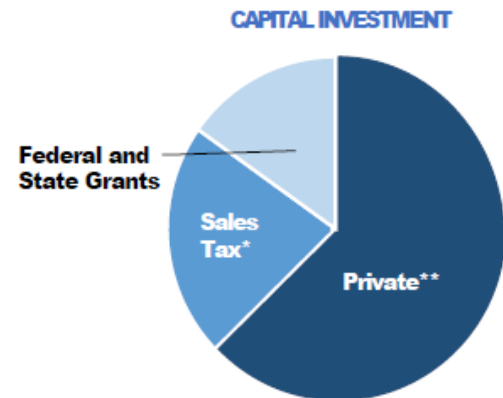
## SEATTLE CENTRAL WATERFRONT

*"I was willing to make this the first thing I did in the morning and the last thing I did at night, every day."*  
– Walter Metcalfe

Timeline: 2007 Vision established; 2018 construction completed.

Construction Cost: \$380M+

Governance: 6-agency partnership to oversee construction (City, MoDOT, Gateway Arch Park Foundation, Bi-State Development, National Park Service, Great Rivers Greenway)



\* 3/16th of one-cent sales tax

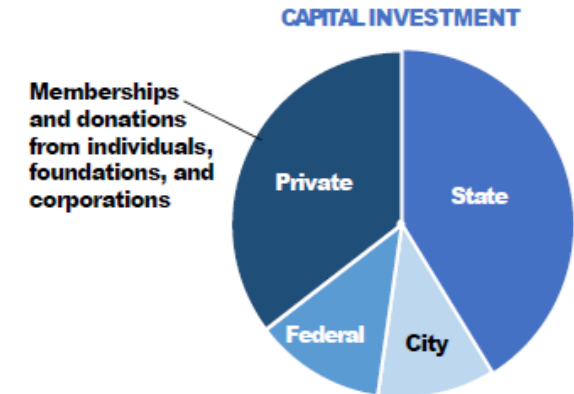
\*\* \$250 million, incld. 26 individuals, corporations, and foundations gave more than \$1 million apiece, raising \$90 million for the project.

## ST. LOUIS GATEWAY ARCH PARK

Timeline: 41+ years. Riverfront Plan created in 1981, Phase I ground-breaking in 1994; Phase IV construction began in 2022 and continues today.

Construction Cost: ~\$160M+

Governance: 15 board members of non-profit with 6 full-time and 7 part-time staff (Mayor is ex-officio board member; 9 members appointed by Metro Government, 6 by the State of Kentucky)



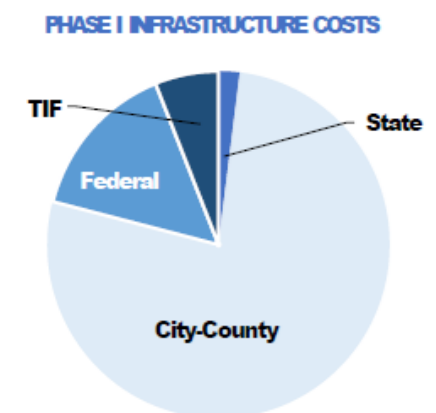
\$2M raised by three business leaders to fund the master plan

## LOUISVILLE WATERFRONT PARK

Timeline: 25+ years. Master Plan approved in 1997; Paul Brown Stadium constructed in 2000; **Banks Public Partnership created 2006**; multi-phased construction begins in 2008 and continues today.

Construction Cost: \$128M

Governance: 1 full-time employee with a quasi-governmental (**Banks New Community Authority**) + Government (**Banks Public Partnership** is a joint partnership between Hamilton County and City of Cincinnati)



New Community Authority (NCA) created in 2019 collects a 1% amenity fee from every Banks purchase.

## THE BANKS, CINCINNATI

# Waterfront Development Cost and ROI Comparisons

Project, Date	Size	Cost	Projected ROI	Outcomes	Resources
<b>Seattle Central Waterfront</b> 2010 – 2025 est.	20 acres	\$806m (updated from 2023)	One-time economic impact or \$1.1B, 6,240 FTE jobs, \$376m in wages and \$30m in local taxes.  Ongoing economic impact of \$288m 2,385 FTE jobs, \$103m in wages and \$10m local taxes	4 of 12 sub-projects complete, all but one have begun construction.	<a href="#">Study of the economic, fiscal, and community benefits of Seattle's new regional waterfront</a>
<b>Louisville Waterfront Park</b> 1994 – 2013 (phase I-III) 2022 – 2024 (phase IVA, remainder TBD)	85 acres (PI-III) 107 acres (PI-IV)	\$114m (phase I-III) \$160m+ (incl phase IV of est. \$50m)	PI-III: \$1.3bn investment in park and residential/commercial areas  PIV: \$50m, 22 acre planned expansion	PI-III: 2.2m annual visitors, \$40m annual economic impact, supports 707 jobs  PIV: \$50m, 22 acre planned expansion	<a href="#">Award information and impact report</a>
<b>St. Louis Gateway Arch Park</b> 2007 - 2018	91 acres	\$380m+		Economic impact of \$367 million from project and 4,400 permanent jobs to the region, as well as 530 construction jobs throughout the project	
<b>The Banks, Cincinnati</b> 1997 – ongoing	120 acres	\$215.1m (to date), additional \$350m current + \$240m future private investment	Annual economic impact estimated at \$1.2bn once completed  2012 Economic Impact Study: Construction will produce nearly \$574 million in economic activity in Hamilton County, including \$490.8 million in the City of Cincinnati. Ongoing economic impact of \$276 million a year and 2,400 direct jobs.		<a href="#">Partnership Story and Impact Report</a>



# Comparison: Cincinnati

Recall that Cincinnati is now growing as of 2024. Its riverfront development is a very relevant point of comparison.

Last year Western & Southern Financial Group opened a \$322 million, 800,000-square-foot office tower that now dominates the city’s skyline, with the [Great American Insurance Group](#) as primary tenant. Two blocks in front of the 41-story building, the city and Hamilton County are constructing a \$120 million riverfront park. It steps up from the shoreline in tiers of grass and stone to meet [the Banks](#), a \$600 million, 18-acre mixed-use retail, residential and entertainment development.

### An Ohio River City Comes Back to Its Shoreline

Share full article



The Banks is a mixed-use residential and entertainment development in downtown Cincinnati. Mark Lyons for The New York Times

By **Keith Schneider**  
June 5, 2012

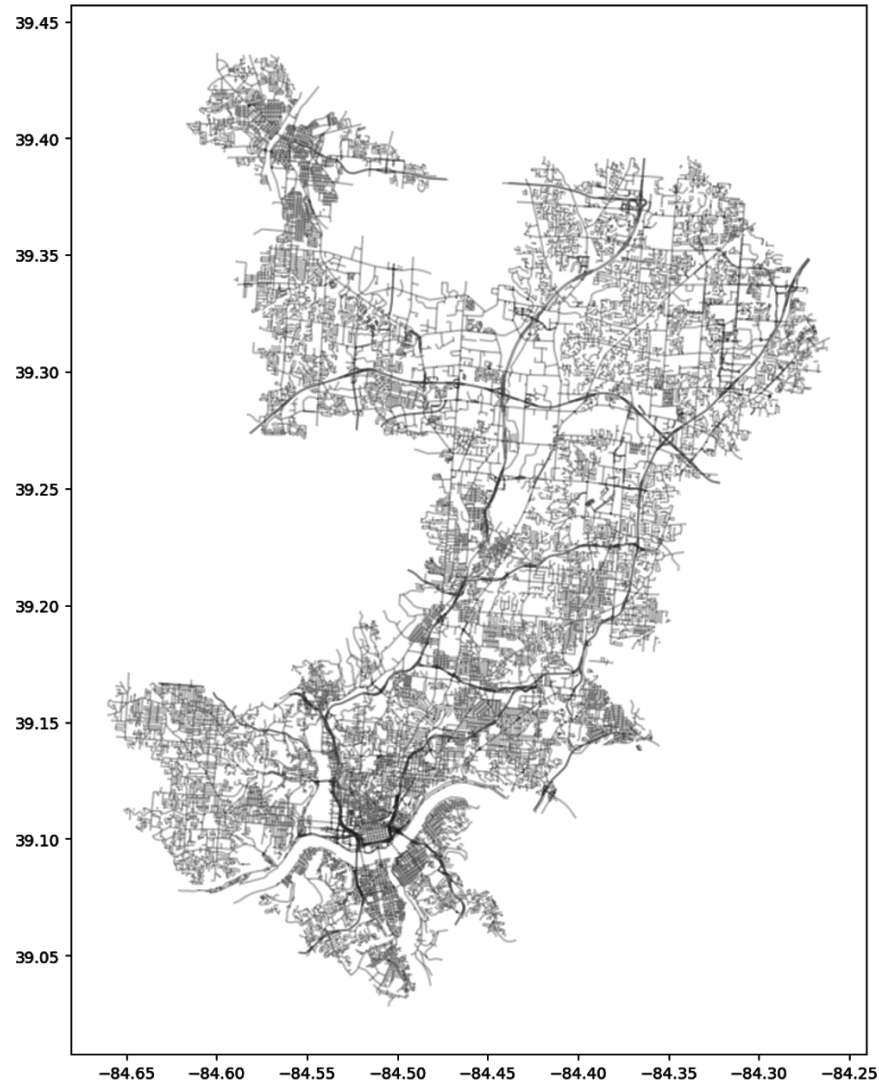
The construction of the Banks and the 45-acre shoreline park comes after more than a decade of significant infrastructure investment along Cincinnati’s riverfront, much of it financed by a half-cent sales tax approved by the city and Hamilton County voters in 1997. Revenue from the tax supported a \$322 million highway modernization that narrowed the Fort Washington Way expressway between the river and the central business district. Engineers shortened the overpasses over the sunken freeway, making it much easier for pedestrians to reach the river from downtown.

Still, with 80,000 downtown jobs, Cincinnati’s business core is thriving. And with nearly 300,000 residents, 10,000 of them living downtown and now on the waterfront, it remains the third-largest city along the six-state, 981-mile Ohio River, behind Louisville and Pittsburgh. Like its bigger neighbors, and several smaller river cities — including Marietta, Ohio; Owensboro, Ky.; and Evansville, Ind. — Cincinnati is experiencing a strong revival in urban core business and residential growth, much of it prompted by development along a scenic river that state and federal water quality data show is cleaner and more ecologically vital.

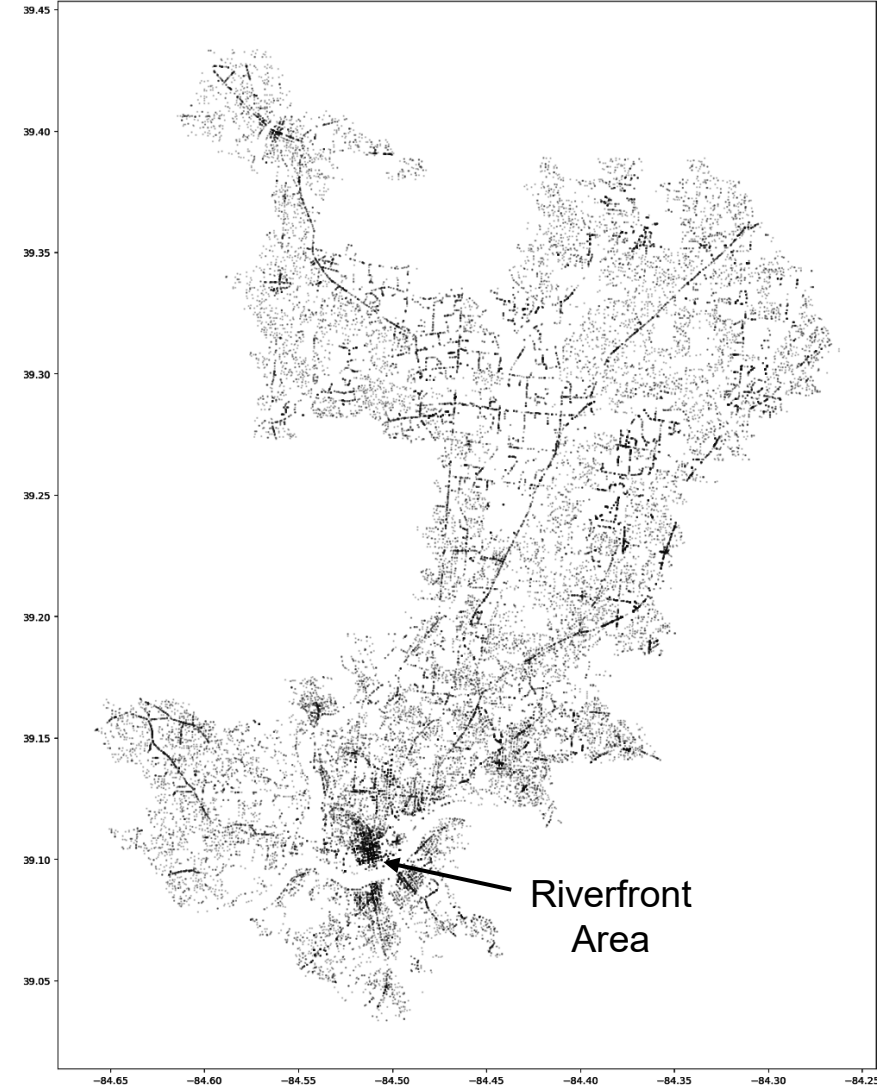
“We’re seeing a new Cincinnati coming from all of this,” said Mayor Mark Mallory, a two-term Democrat elected in 2005. “We have a new set of activities, new places to live, new places to work. We are investing in things that grow a city.”

Let's compare with Cincinnati's riverfront: a larger downtown concentration overall?

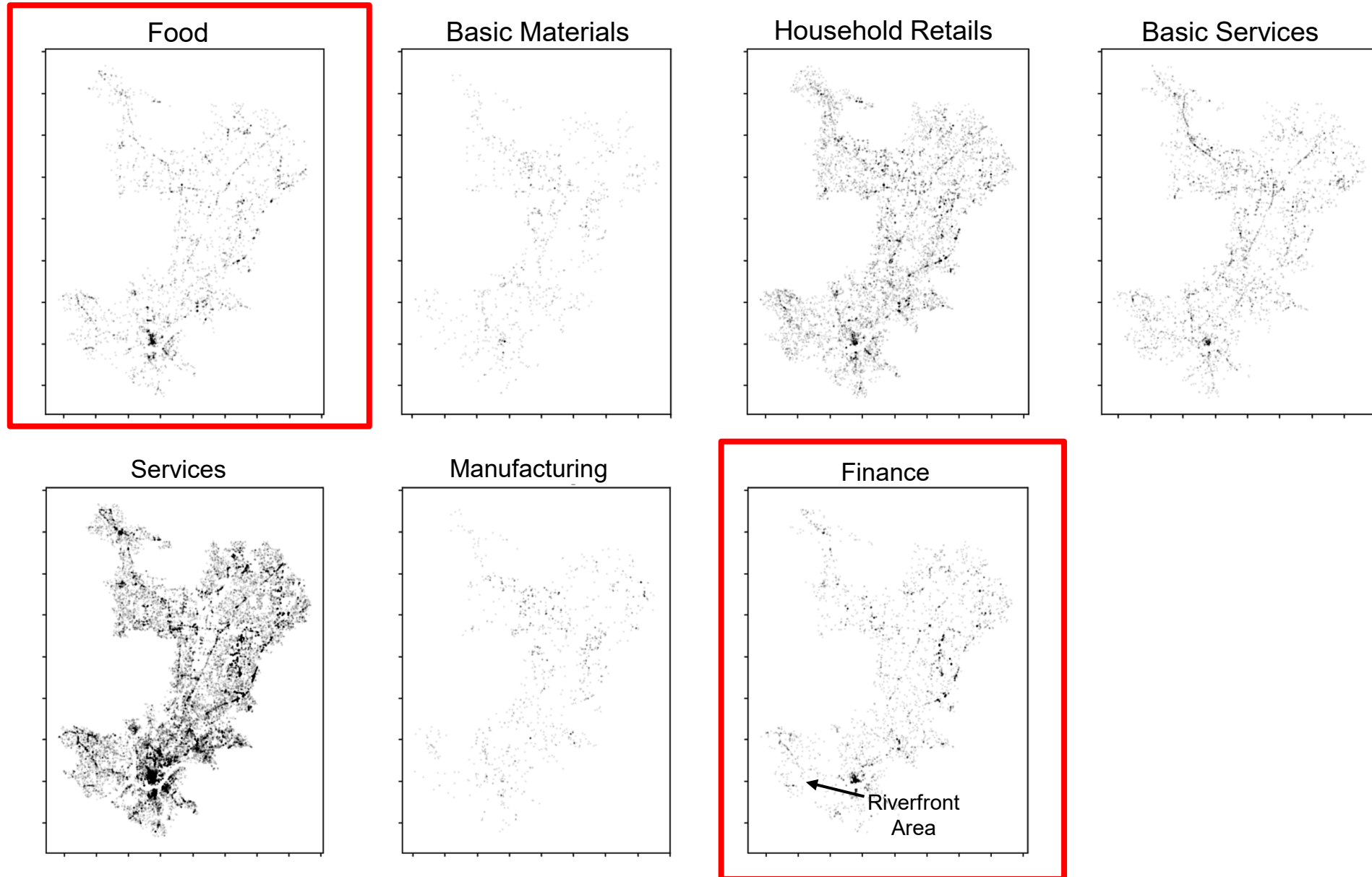
Cincinnati's Street Network



Cincinnati's Business Locations

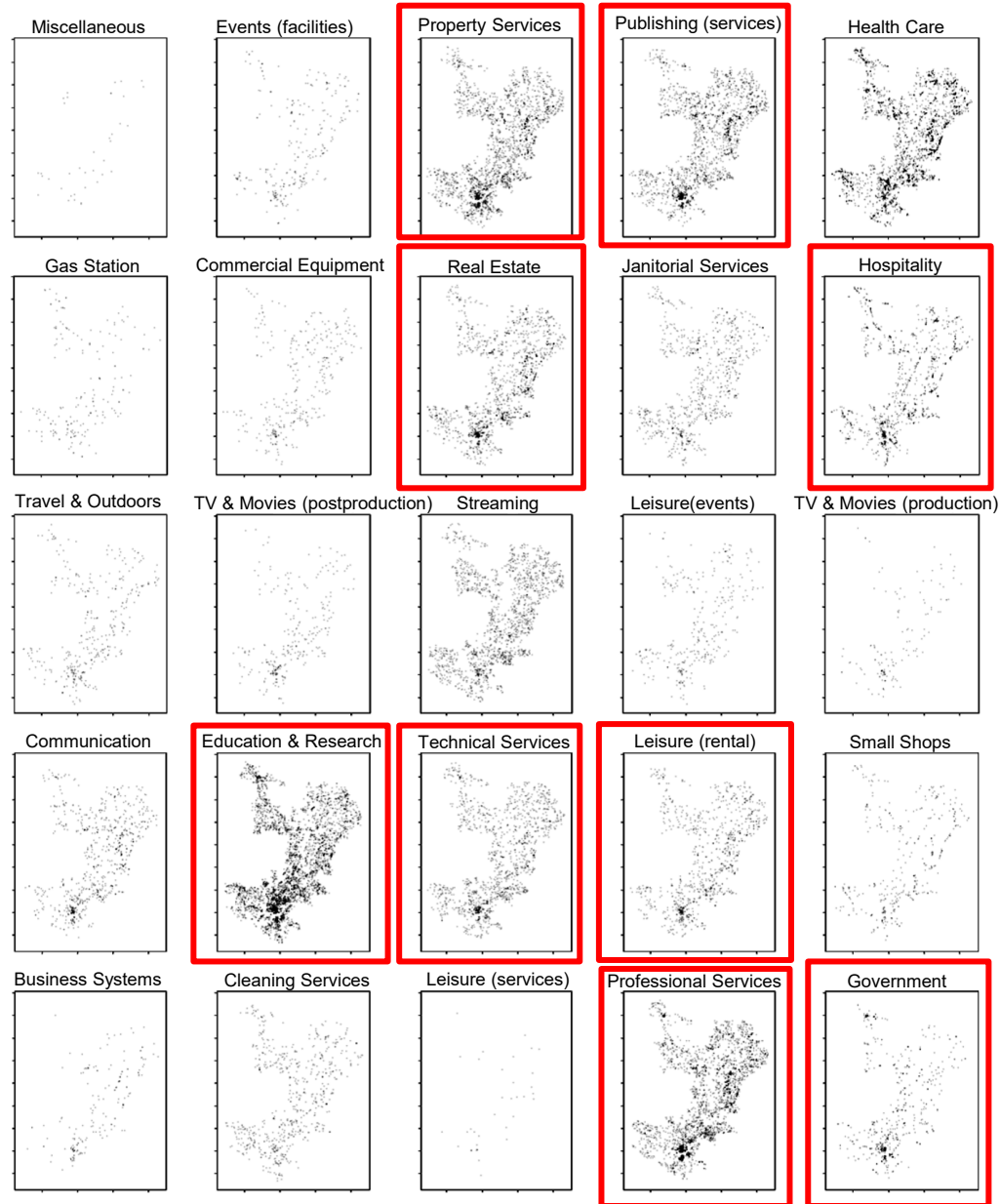


Cincinnati's industry clustering patterns are similar to Cleveland's.





# Industry clustering patterns are similar to those in Cleveland



... with a **possible exception:**

- Property Services
- Real Estate
- Publishing
- Hospitality
- Leisure
- Technical Services
- Professional Services
- **Education & Research**
- Government

# Key Questions (title slide)

- What is Cleveland's biggest economic problem?
- What type of jobs would you expect to grow because of the waterfront project?
- What type of workers would expect to benefit?
- What would you expect be the main impacts for residents in different areas of the city?
- Would you expect the project to be good for economic growth? What would be the key mechanisms?
- Would you expect the project to be good for equity? Why?
- What priorities might be key alongside the waterfront project to increase the benefits on growth? On equity?
- What are the financing and funding implications of the project?

<b><i>Analytic Lens from “<u>Inclusive Growth for Cities</u>” Guide</i></b>	<b>How does Cleveland currently perform through each lens?</b>	<b>How would the waterfront project affect outcomes?</b>	<b>What other information would you need to know?</b>	<b>What other actions could improve outcomes?</b>
<b>Shared?</b>				
<b>Accessible?</b>				
<b>Skilled?</b>				
<b>Dynamic?</b>				
<b>Connected?</b>				

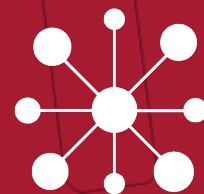
Source: “Inclusive Growth for Cities,” Bloomberg Harvard City Leadership Initiative, December 2024, <https://cityleadership.harvard.edu/wp-content/uploads/2025/01/bhcli-inclusive-growth-for-cities-guide.pdf>.



The background of the entire slide is a dark red map of Cleveland, Ohio, showing the city's street grid and building footprints in a lighter red outline.

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**Growth Lab**

This data pack, accompanying the case study “Leveraging the Lakefront, Spurring Inclusive Growth in Cleveland, Ohio Through Urban Redevelopment,” was created as an instructional aid by the Growth Lab and Bloomberg Harvard City Leadership Initiative, a collaboration between Harvard Kennedy School, Harvard Business School, and Bloomberg Philanthropies. It is not intended to serve as an endorsement, source of primary data, or illustration of effective or ineffective management. Copyright © 2024, 2025 President and Fellows of Harvard College. (Revised 12/2025.)



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