THE FIFTH MIGRATION

A Study of Cleveland Millennials

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CLEVELAND
Foundation

PREFACE

Established in 1914, the Cleveland Foundation is the world's first community foundation and one of the largest today. The foundation improves the lives of Greater Clevelanders by providing leadership on vital issues of our times. In addition to grantmaking and proactive initiatives, the foundation regularly provides thought leadership on emerging trends in the community. We decided to undertake this study to provide a context for rapid changes occurring in Cleveland and put forth proactive ideas for harnessing the power of the "fifth migration" to cities in America.

Many studies and reports about the "millennial" generation have been conducted at the national level in the past few years. However, little has been done to look at the effects the members of this generation have at the local level. Framed in what has been termed "the fifth migration" or "re-urbanization" this project looks at trends surrounding the millennial generation both nationally and locally. This project not only examines where young people are living, but also dives into trends and changes surrounding mobility, housing, public transit, civic engagement, the changing workplace, and the sharing economy. Across these topics this project explores issues of equity and access by studying the opportunities and gaps in each area by breaking data down by income, education level, race, and gender when possible. The Cleveland Foundation would like to thank the

Millennial Study Advisory Committee (page 28) who provided input and guidance throughout the process of creating this report. This group was instrumental in integrating a diversity and inclusion lens throughout the study.

This study aims to use data not only to understand current trends in Cleveland and how they compare to other cities across the country, but to inform future investment and policy so those efforts can be strategically implemented to make this influx of young people sustainable. The goal of this project is to help Cleveland understand what needs to be done in order for the city to capture and retain more than its share of the largest generation in the United States. Finally, the purpose of this project is not to be a marketing campaign used to generalize the "Cleveland Millennial," but to understand how Cleveland's young people are impacting the city and the potential negative and positive consequences that may come as a result.

A few key takeaways we hope you find by reading this report:

→ From 2010-2013, the migration of millennials to the core city of Cleveland was sizable and outpacing some of our peer cities. In fact, the impact can be seen not only in the downtown central business district—but also throughout the city.

→ The study shows that we need to take note of the impact of both millennials with college degrees and those with high school degrees—it's a diverse group with diverse needs to anticipate.

→ Due to the pace of change happening with this generation, Cleveland will have to act nimbly to leverage those opportunities that could come from harnessing the re-population power of millennials. We can see significant changes in the impacts of technology (the sharing economy), desires for new and multiple modes of transportation, very different patterns of housing (rental versus home ownership), and a generation that will change the future of work and work environments. All of these changes will have both policy and physical implications for Cleveland.

Lillian Kuri
Program Director
for Arts & Urban Design

Hannah Vaughn
Summer Intern

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"In the midst of the present,

we are marked by the past.

We bear it everywhere we go.

But mostly we bear it here

at home."

Dave Lucas
From *Rust Belt Chic: A Cleveland Anthology*

EXECUTIVE SUMMARY

Today, Cleveland, like other Rust Belt regions, is largely demographically reflected from its past. But this is changing. The Cleveland metro's gains of college-educated, young adults since 2007 is quickening at a faster pace than the nation as a whole. Importantly, these young adults are choosing to live in Cleveland's urban core. Today, 16% of the region's college-educated young adults live in the City of Cleveland, up from 10.6% in 2006.

Moreover, it is not just college-educated young adults having higher concentrations in the city proper, but young adults in general. In 2006, only 20% of Greater Clevelanders aged 18 to 34 lived in the city, compared to 24% in 2013.

What these demographics mean to the social and physical landscape of the city going forward largely relates to the changing valuations millennials have related to inclusivity and connection, as well as the "bricks and mortar" factors of housing, transportation, and changes in the workforce.

Commonly, these factors are intertwined: the rhythm of people and place.

"Living in the city brings with it class, race, and social difference," says Millennial Advisory Board member and writer/urban planner Justin Glanville. "But people are wanting to feel more a part of a community...and part of the appeal of cities is they provide a way of having those face-to-face interactions."

For Glanville, capitalizing on fifth migration trends that run counter to the trends of the past means altering the policies that directly affect the built environment. "I want to see the way that we use land and resources change," he says. "That money could be used in much better and more equitable ways. We have such an opportunity to be a place for everybody. The question is how does our current trajectory end without becoming a San Francisco or Portland system? That's a long way off for us but we should really be thinking about it now."

The goal of the current analysis is to help bring that future into focus. As the future is getting here fast.

"What I have called the fifth migration is at least the beginning of a beneficent spiral in which the feedback from the fourth migration (the broad opposition to sprawl and urban disintegration) has finally led to ever-broadening mobilization of the powers inherent in traditional urbanism."

Robert Fishman, scholar
From "Longer View: The Fifth Migration"

BACKGROUND

There has been no lack of ink spilled on millennials, the generation born between 1982 and 2000[1]. Part of the inquiry is about finding out who the millennials are as a group. "The Me Me Me Generation" implies a 2013 *Time* piece, with the subtitle suggesting "[Millennials] are narcissistic, overconfident, entitled and lazy, but they just might be new Greatest Generation".

Other inquiries are more marketing driven. Specifically, the millennials—numbering over 83 million as of 2014[2]—are the largest generation in the United States, and so their purchasing power is vast. Figuring out what this cohort's thoughts, behaviors, and lifestyles are has become a preoccupation for industry, be it real estate, restaurants, or recreation.

In reality, though, millennials are more than a uniform personality group whose importance is dictated by what they can (and will want to) buy.

Like previous generations, they are individuals, albeit ones tied by shared experiences, particularly 9/11 and the Great Recession. The current analysis attempts to paint a fuller picture of millennials, particularly for Cleveland, Ohio—a scrappy, Rust Belt city whose future is indeed tied to its youth. In doing so, the lens of inquiry is two-ways; that is, the effect that Cleveland-as-a-collective has on its youth, and the effect that young Clevelanders have on the city as a collective.

Part of these effects have to do with a movement of young people into Cleveland's core. Termed the "fifth migration" by scholar Robert Fishman, reurbanism is arguably the next great migration in the history of modern America, after the "first migration" of settlers into North America, the "second migration" from agricultural to factory towns, the "third migration" into metropolises like Cleveland, and the "fourth migration" that was the suburbanization of those urban centers.
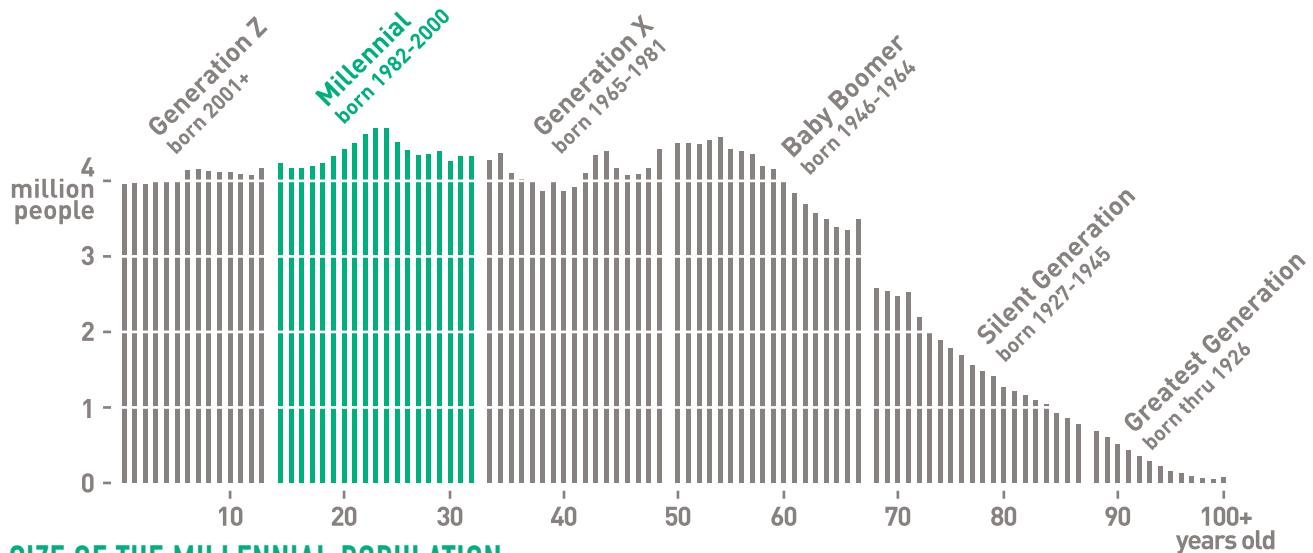
SIZE OF THE MILLENNIAL POPULATION

United States population by age, 2014
Source: ACS Annual Estimates of Resident Population, July 1, 2014

Whether Cleveland rides the wave of the fifth migration depends on whether or not the region can prepare for the likelihood of growth. Whether it can move past the history of exodus. Creating this vision will fall heavily on the next generation of Clevelanders, particularly its millennials.

CLEVELAND'S DEMOGRAPHICS: A SHIFTING OF SANDS

In the United States, 26.2% of the nation is a millennial[3]. By contrast, 23.4% of the country is a baby boomer, while Generation Xers make up 22.7% of the country. The largest urban centers with the highest concentration of millennials include Austin (29.6%), San Diego (29.3%), Virginia Beach (28.9%), Riverside, CA (28.9%), and Los Angeles (28.2%), whereas the urban areas with the lowest concentrations of millennials include the retiree destinations of Tampa (23.3%) and Miami (24.4%), and the Rust Belt metros of Pittsburgh (23.6%), Cleveland (23.7%), and Detroit (24.3%).

The demographic profile of Cleveland is related to the region's historic settlement patterns. Cleveland's population peaked around 1950, coinciding with a rise in manufacturing employment. Those generations that covered this era are thus overrepresented in Cleveland. Specifically, the Cleveland metro has the 4th highest concentration of the silent generation members (12.7%) and the 2nd highest concentration of baby boomers (25.8%).

Now, what do such figures mean for Cleveland's millennials from a social context?

	Generation Z born 2001+	Millennial born 1982-2000	Generation X born 1965-1981	Baby Boomer born 1946-1964	Silent/Greatest Generation born thru 1945	
		29.6%				Austin
		29.3%				San Diego
		28.9%				Virginia Beach
		28.9%				Riverside, CA
		28.2%				Los Angeles
	17.0%	26.2%	22.7%	23.4%	10.8%	United States
		24.4%				Miami
		24.3%				Detroit
	15.9%	23.7%	21.9%	25.8%	12.7%	Cleveland
		23.6%				Pittsburgh
		23.3%				Tampa
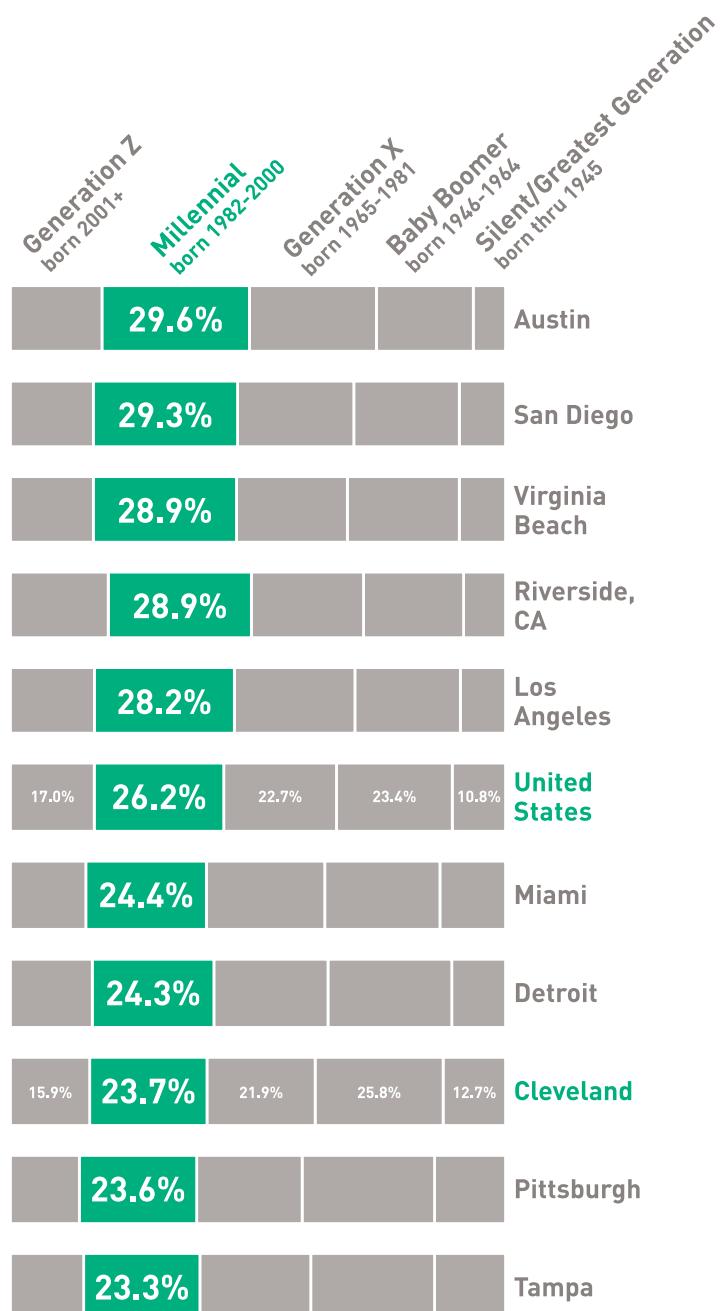
BENCHMARKING CLEVELAND'S SHARE OF MILLENNIALS

Counts of persons, by generation and metro area
Source: ACS 5-Year 2013

Millennials and Civic Participation: The Passion of Young Cleveland?

Millennials have been described as being a civically-minded, "do good" generation, but Jean Twenge, author of "Generation Me", found that millennials are in fact less trusting of institutions, particularly government, than past generations.

In an *Associated Press* article entitled "Millennials Are 'Alienated' And Less Trusting Than Generation X Was," Twenge detailed findings from a study in *Psychological Science* that found that millennials' approval of major institutions dropped more sharply than other generations in the decade that followed the terrorist attacks of Sept. 11, 2001.

"Young people today feel disconnected and alienated," explained Twenge, a professor at San Diego State University. The results were counterintuitive, according to the author, especially for a generation that had been expected to be more trusting of government.

Perhaps not coincidentally, a new study by the non-partisan Partnership for Public Service found that young adults employed by the federal government are at historical lows, with only 6.6% of federal employees under the age of 30, down from 9.1% in 2010. According to the *Washington Post* piece "Millennials exit the federal workforce as government jobs lose their allure," a few reasons millennials are snubbing government work are a lack of advancement opportunities and job security, with

the latter tied to constant threats of sequestration and pay and hiring "freezes" due to political infighting, particularly in Congress.

Does the institutional mistrust mean less civic engagement for millennials, especially voting participation? Not necessarily. In the Census study "Young-Adult Voting: An Analysis of Presidential Elections, 1964–2012", adults aged 18 to 29 voted at higher rates in the 2008 and 2012 elections (50% and 45%, respectively) than the 1996 and 2000 elections (39.6% and 40%, respectively).

Looking at the most recent elections for Cleveland (i.e., November 2014), there's strong evidence that millennials are not civically disengaged despite being disillusioned. Specifically, while the nation as a whole had lower rates of voting participation for 25- to 34-year-olds (34%) than 35- to 44-year-olds (45%), 45- to 54-year-olds (54%), 55- to 64-year-olds (63%), and those 65 and up (69%), Cleveland's millennials voted at higher rates (43%) than both Clevelanders aged 35 to 44 (38%) and 45 to 54 (38%)[1].

Moreover, Clevelanders aged 25 to 34 voted at a 9% higher rate than their peers nationally, suggesting that while the generation is still disproportionately represented in the region, Cleveland's millennials "punch above their weight" when it comes to consolidating a civic voice. Whether that translates into generational turnover in leadership soon remains to be seen.

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1 Source: Current Population Survey, November 2014, Voting and Registration Use file.

CHANGE IN DIVERSITY OF MILLENNIAL POPULATION

UNITED STATES 1980 15–34 years old

78% White, non-Hispanic

7% Hispanic

13% Black

2% Asian/Pacific Islander
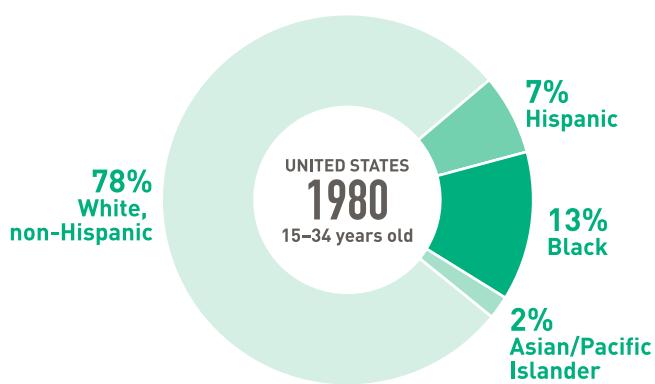
**Race and ethnicity, United States
1980, 15–34 years old**
Source: U.S. Census, Millennial White House Report

UNITED STATES 2013 15–34 years old

57% White, non-Hispanic

21% Hispanic

14% Black

5% Asian/Pacific Islander

3% Other
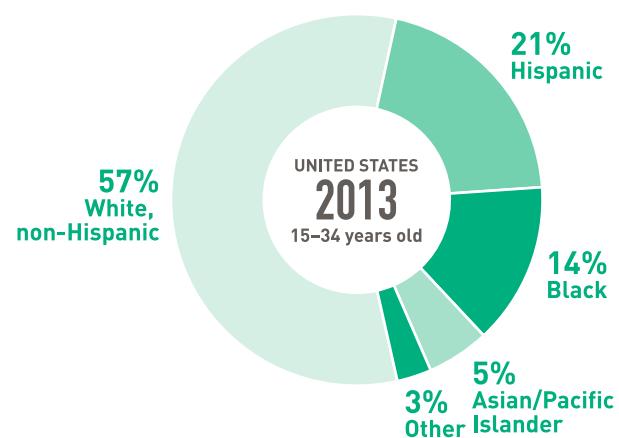
**Race and ethnicity, United States
2013, 15–34 years old**
Source: ACS 5-Year 2013

Simply, the tenure of a region's citizenry has impacts on its civic and economic culture. In his report "Regenerating America's Legacy Cities," Brookings scholar Alan Mallach used the term "path dependency" to denote the behaviors and attitudes that can form when a society disproportionately ages in place, or experiences less generational turnover. In the case of Rust Belt cities, according to Mallach, the dominant outlook was formed in the industrial heydays, and it is one of looking back as opposed to forward.

"Those who have never experienced anything but decline may have difficulty even conceptualizing a different reality," notes Mallach. This collective tendency, then, to make the possible impossible can make it harder for young thought leaders to "break in," and for a struggling city to "break out."

Beyond age, another measure of "demographic dynamism," or the presence in a given metro of group differences, can be found in racial and ethnic diversity. Nationally, younger generations are more

diverse than ever. In 1980, 78% of U.S. residents aged 15 to 34 were white, whereas 13% were black, 7% Hispanic, and 2% Asian. Today's millennials are far more diverse: 57% white, 21% Hispanic or Latino, 14% black, and 5% Asian[5]. Also, 6% of young adults were foreign born in 1980, compared with 15% today[6].

Cleveland has less racial and ethnic diversity than the country, even for millennials. Nearly 66% of Clevelanders aged 15 to 34 are white, followed by 23% black, 7% Hispanic or Latino, and 3% Asian[7]. Note the high concentrations of Cleveland's legacy demographics (white and black), and lower concentrations of fast-growing groups (Hispanic/Latino and Asian)—a characteristic again tied to the region's historic settlement patterns. As well, Cleveland's young adult foreign-born population barely moved from 4% in 1980 to 6% today[8].

Importantly, stagnant levels of racial, ethnic, and birthplace diversity can serve to block emergent groups from joining the regional discussion, thus

DIVERSITY OF CLEVELAND'S MILLENNIAL POPULATION
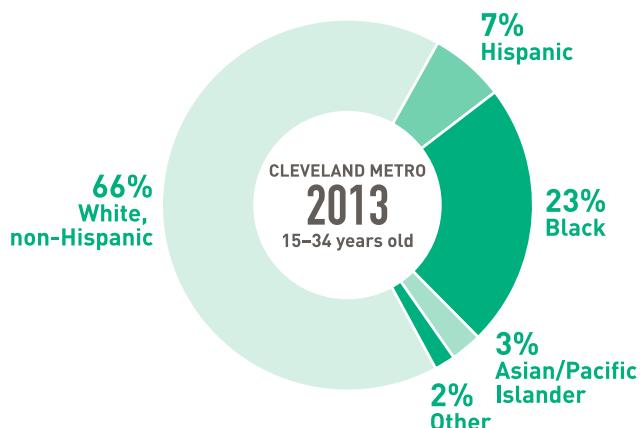
7%
Hispanic

CLEVELAND METRO
2013
15–34 years old

66%
White,
non-Hispanic

23%
Black

3%
Asian/Pacific
Islander

2%
Other

**Race and ethnicity, Cleveland Metro
2013, 15–34 years old**
Source: ACS 5-Year 2013

2%
Hispanic

CLEVELAND METRO
2013
55+ years old

80%
White,
non-Hispanic

16%
Black

1%
Asian/Pacific
Islander

1%
Other
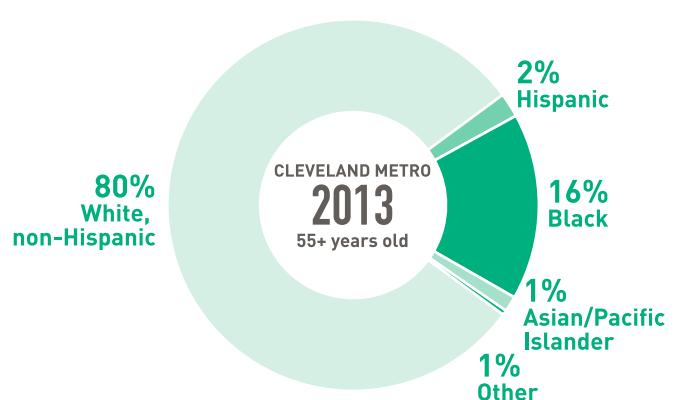
**Race and ethnicity, Cleveland Metro
2013, 55+ years old**
Source: ACS 5-Year 2013

acting as a force against change. Notes Youngstown native Evelyn Burnett, a Millennial Advisory Team member who came to Cleveland via New York City:

"I would really like to see Cleveland embrace diversity. There's just too many organizations, businesses, etc. that lack any level of diversity. And you really have to embrace diversity and inclusion in meaningful, thoughtful ways."

Burnett also questions the oft-stated assumption that millennials are more open to diversity simply due to the trending demographics of young people. States Burnett:

"I think issues with diversity and inclusion are holding our city back a lot and I think that—the one thing I will certainly say on record—is that [sic] there's often a perception that millennials embrace diversity and inclusion so much more than their parents and predecessors and I actually think that's not only a false assumption but a dangerous assumption."

Ms. Burnett refers to the reality that diversity does not necessarily lead to integration—a fact found in a study by scholar Robert Putnam called "E Pluribus Unum: Diversity and Community in the Twenty-first Century," which showed that increased diversity at the neighborhood level was associated with lower levels of social trust. "People living in ethnically diverse settings appear to 'hunker down'—that is, to pull in like a turtle," stated Putnam.

This is food for thought for policy and community leaders going forward, particularly as it relates to the intentionality of bridging the racial and class divides that continue despite the evolving diversity not only inherent in younger generations, but also in the inner-city communities where millennials are increasingly choosing to live.

Nonetheless, increased diversity is a necessary first step in the evolution of cities, and there are some data points indicating change is happening in Cleveland. For instance, while Cleveland millennials are less diverse than their national peers, they are much

more diverse than older Clevelanders. For example, nearly 80% of Clevelanders aged 55 and up are white, while 16% are black, 2% Hispanic and Latino, and 1% Asian[9].

More telling, the region's growth of millennials is converging with national trends—particularly 25- to 34-year olds with at least a bachelor's degree—suggesting the underpinnings of status quo are loosening as generational turnover occurs.

The analysis looked at the growth of young adults with at least a bachelor's degree for the nation's largest 40 metros over three time periods: 2000 to 2007, or pre-recession; 2008 to 2010, the Great Recession;

and 2011 to 2013, or post-recession. The rationale for the three time intervals relates to the fact that migration is affected by economic circumstances, with recessions in particular acting as a "great reset" to the growth (or decline) of a given economic geography.

The findings revealed that from 2000 to 2007, the Cleveland metro lost 9,842 millennials with a college degree, ranking 38th (See Appendix A). Surprisingly, San Francisco experienced the highest "brain drain" (-44,811), along with San Jose (-20,674), Boston (-20,505), and Detroit (-19.791). Conversely, the Sun Belt metros of Riverside, CA (47,457), Los Angeles (33,109), Sacramento (27,170), Phoenix (25,629), and San Diego (22,074) led the way in growth.

Pre-Recession	Great Recession	Post Recession
2000–2007	2008–2010	2011–2013

GROWTH IN ATTRACTING EDUCATED MILLENNIALS
Growth of young adults with at least a Degree over three time periods
Source: 2000 Census; ACS 3-Year, 2007, 2008, 2010, 2011, 2013

+150,000

+100,000

+50,000

0

−50,000

+7,231

+6,675

−9,842
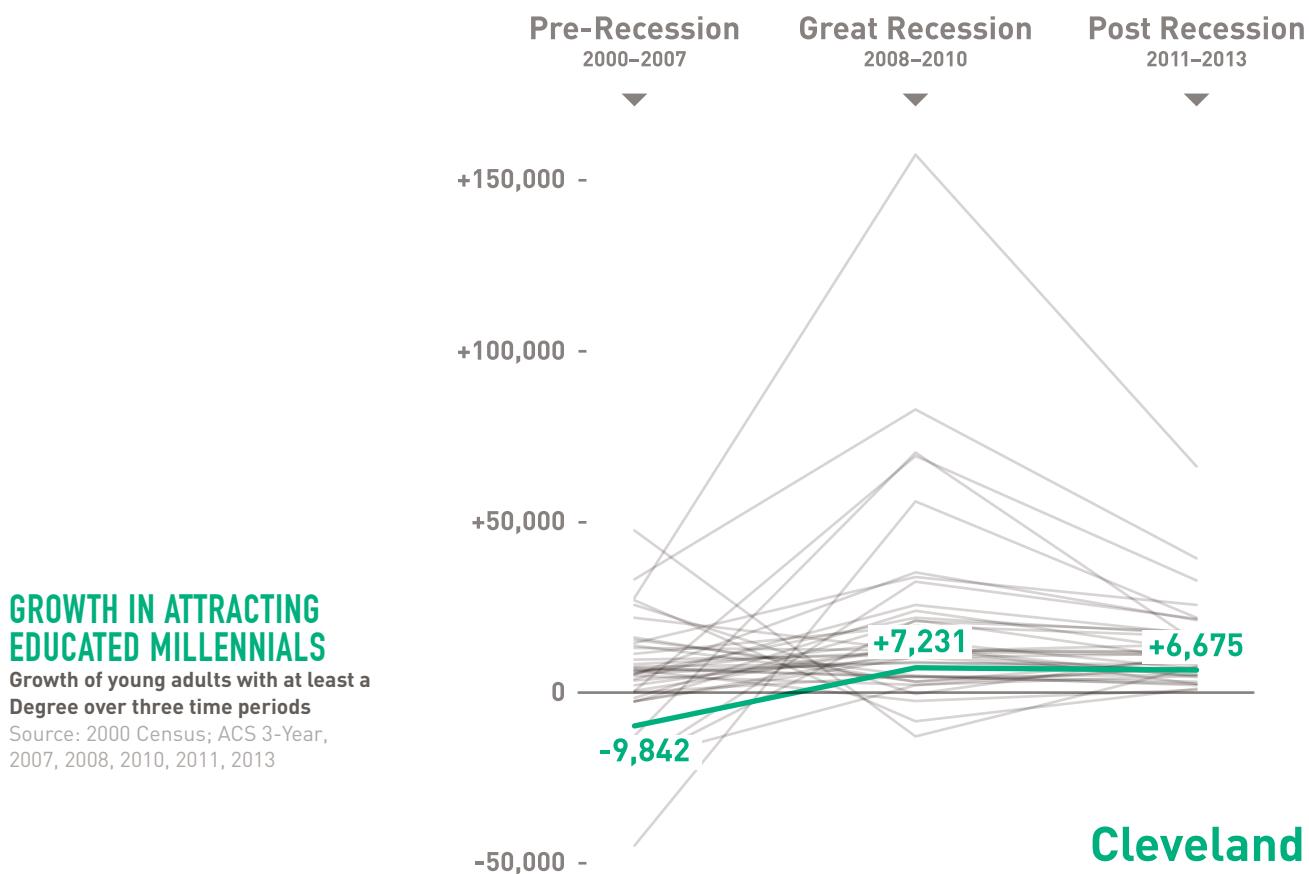
Cleveland
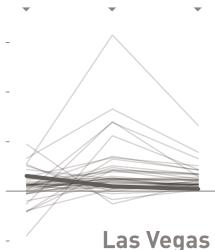
SUN BELT METROS

Las Vegas
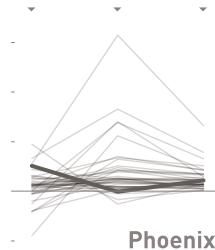
Phoenix

Riverside, CA
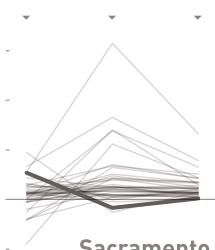
Sacramento
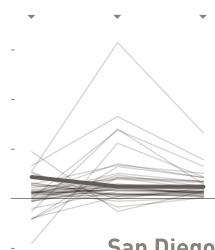
San Diego

San Jose

GLOBAL CITY METROS
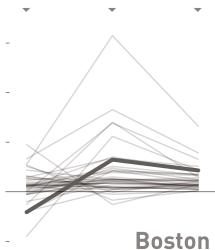
Boston
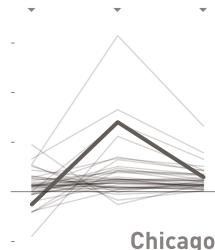
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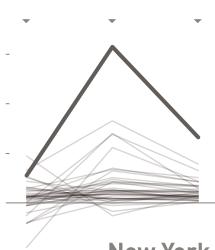
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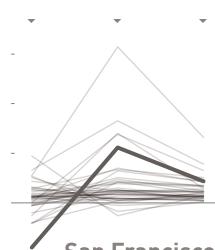
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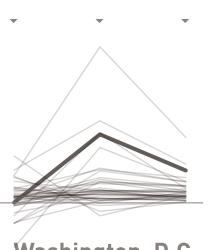
Washington, D.C.

RUST BELT METROS
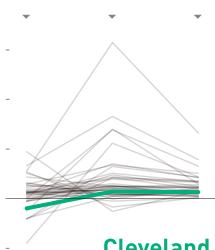
Cleveland
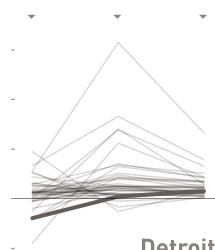
Detroit

Pittsburgh

This pattern changed with the Great Recession. The nation's largest metros saw the greatest total growth in 25- to 34-year-olds with college degrees, headed by New York (157,575), Los Angeles (82,805), Chicago (70,193), Washington, D.C. (69,270), and San Francisco (56,039), whereas the Sun Belt metros of Riverside (-12,930) and Sacramento (-8,219) experienced the largest declines. Cleveland's trajectory, too, shifted, going from a "brain drain" to a "brain gain" of 7,231.

Cleveland's momentum continued into the post-recession years of 2011 to 2013. The region gained nearly 7,000 more millennials with a college degree. Cleveland was tied for 8th in the nation with Seattle and Miami in the percent gain of college-degreed young adults, with an 8.3% increase. Joining Cleveland's rise was Rust Belt peer Pittsburgh, which ranked 2nd in the percent gain of 25- to 34-year-olds with a college degree.

What's going on here? Will these regional trends hold?

A thorough, if speculative, answer is beyond the scope of this report. But insight can be had as to why Cleveland is gaining a larger share of college-educated millennials since 2007. Part of this insight deals with macroeconomic shifts that have taken place over the last decade plus.

To wit, note the geographic "winners" for college-educated millennials during the pre-recession years. They heavily favored Sun Belt boomtowns (e.g., Sacramento and Las Vegas), or areas that fueled the "housing bubble." Geographic losers between 2000 and 2007 included victims of the "tech bubble"—or San Jose, San Francisco, and Boston—and areas like Cleveland and Detroit that were experiencing the realities of industrial decline.

In short, as one bubble "popped" another began, shifting migration and investment into "greenfield" areas, particularly in the Sun Belt. In fact, between 2000 and 2007 the top 40 metros gained about 219,000 college-educated millennials. Shockingly, over one third (34%) of that gain was driven by the increases in two metros: Riverside-San Bernardino, CA and Sacramento, CA—hardly bastions of dense, urban living.

With the Great Recession, however, came reconsolidation into historic urban cores. The top 40 metros gained nearly 832,000 college-educated millennials from 2008 to 2010—four times that over the previous seven years. Over 50% of this gain was accounted for by five regions: New York, Los Angeles, Washington, D.C., Chicago, and San Francisco, or America's global outposts. Conversely, those same winners of the "housing bubble" era were economic losers during the Great Recession.

Then, as the economy stabilized, the growth in educated millennials began diffusing from the country's largest urban centers into "flyover country", such as Cleveland, Pittsburgh, San Antonio, and Nashville. Each metro ranks in the top 10 in percent gain of college-educated millennials from 2011 to 2013.

Moreover, Cleveland's "brain gain" since 2007 was associated with a rise in the concentration of 25- to 34-year-olds in the *workforce* that were highly-educated[10]. Specifically, 7.9% of Cleveland's young adult workforce had a graduate degree in 2007, ranking the region 29th out of the top 40 metros (See Appendix B). Things changed drastically by 2010, in which 14.9% of Cleveland workers aged 25 to 34 had an advanced degree, ranking the metro 7th. Cleveland's gain in concentration of highly-educated workers continued into 2013: 15.9% of millennial workers had an advanced degree, good for 8th in the nation.

Pittsburgh's 19.3% ranked third, behind knowledge economy powerhouses Washington D.C., and Boston.

Taken together, the talent landscape in Rust Belt Cleveland is changing rapidly, driven by young adults. In helping explain these trends, the analysis will discuss three factors with a focus on millennials: the new geography of tech start-ups, the "push" of cost, and the "pull" of being able to affect change.

THE "RISE OF THE REST"

Before Silicon Valley ruled tech and innovation, Pittsburgh ruled steel and Detroit was the place to be for automobiles. Today, steel and cars are produced everywhere. Increasingly, so are tech start-ups. Steve Case, former co-founder of AOL and head of venture capital firm Revolution, has recognized this. Case uses the term "the Rise of the Rest" to

Millennials and the "On Demand" Economy: Security Versus Flexibility

Today's smartphones have more computing power than all of NASA did in 1969, according to physicist Michio Kaku. "Seems hard to believe, we know, but it is actually true," opines the blog *Phone Arena* in the piece "A modern smartphone or a vintage computer: which is more powerful?", "a hand-held apparatus...has greater computational capabilities than the arsenal of machines used for guiding crafts through outer space some 45 years ago."

This handheld power has altered the marketplace, for both consumers and workers alike. For instance, Uber is a "ride-sharing" service that connects those who want a ride with those who have one via a smartphone application. Its service has grown 300% from 2013 to 2014, and the company is currently valued at $51 billion—seven times that of Hertz. Importantly, Uber drivers are not employees but independent contractors. This absence of overhead has kept down costs and increased efficiency, all the while raising concerns about a lack of regulation and consumer and service-provider protections.

Industry concerns notwithstanding, it's important to discuss how the technology-savvy millennial generation is enabling a relatively new model dubbed the "on demand" or "sharing" economy that's blurring the lines between consumer and producer, and between "on" and "off" the clock.

The mechanics of Uber's business model skews younger and urban. An estimated 70% of Uber's users are 34 and under and over 50% live in principal cities. Also, the highest proportion of Uber's drivers are between 30 and 39 years of age. Why do demographics matter in deciphering what the "sharing" economy is about? Because millennial experiences shaped by the "old" economy are driving behaviors that are shaping the "new".

Sixty-five percent (65%) of Americans age 18 to 34 are employed[1]. These are historic lows. Job security— particularly the idea of being a company "lifer"—is rare, especially

1 See: Source: US Census Bureau, Social Explorer "Young Adults Then and Now"

denote a new era for entrepreneurship in which high-growth companies can now start and scale anywhere, not just in a few coastal cities.

In a recent op-ed for the *Washington Post* entitled "Why innovation and start-ups are thriving in 'flyover' country," Case is seeing "rustbelt cities reemerge as vibrant innovation hubs." Why? Most simply, advancements in tech are lowering the bar-

rier of entry and access to venture capital is expanding geographically.

But Case gives more targeted reasons for geographies like Cleveland that are related to mobility and cost. "Increased mobility enables 'Rise of the Rest' start-ups to more easily attract talent," writes Case, "often by luring people back to Midwestern cities for lifestyle reasons." Case continues: "Lower cost of

for millennials. That's the downside of today's economy. The upside? In a word: "flexibility."

"On-demand" implies satisfaction for the consumer, but that's only half the story, according to tech entrepreneur Matt Bencke. "On-demand" is from the perspective of those who can get their driver, groceries and dog sitter with a few app taps," writes Bencke in the *Tech Crunch* piece "The 'Do It When I Want Economy' Is Here To Stay." He continues: "The level of convenience is new, but "on-demand" is not. What is new is that services such as Uber, Lyft, Rover, Airbnb and Spare5 enable people to make money doing what they choose, when they choose. When they don't want to work, they can turn off their app."

A study called "An Analysis of the Labor Market for Uber's Driver-Partners in the United States" by Jonathan Hall and Alan Krueger of Princeton proves this point. Over 50% of Uber drivers have another job. 50% of drivers also work for Uber less than 15 hours a week, and over 80% less than 35 hours a week. By contrast, 33% of taxi drivers—also independent contractors—work over 50 hours a week, as the industry incentivizes those who work long hours. Importantly, nearly 9 out of 10 Uber drivers report that being able to set their own schedule and be their own boss was a primary reason they opted to drive with the company. That said, in a macroeconomic world of fewer

long-term choices, millennials are increasingly deciding to opt for a live-work model prioritizing choice.

What do such valuations mean for the future of work? Part of the answer is in the *Governing* article "The Uberizing of the Government Workforce". In it, the author details that governments are "Uberizing" with an increase focus of contract workers in the face of budget cuts.

That's not the only change. "There's a larger picture, however, that points to a need for governments to change their culture and develop a capacity for workplace flexibility," writes Elizabeth Kellar, president and chief executive officer of the Center for State and Local Government Excellence. "Some governments are already adjusting," she continues, citing the case of Boulder, Colorado, that "now offers fixed-term assignments, part-time hours, flexible scheduling, or combinations of these approaches" in their model to attract and retain young talent.

Taken together, it's not so much that millennials are resigned to workplace flexibility due to a lack of job security. Rather, in their experience they have come to value flexibility as much (or more) than job security. Ironically, less secure are traditional industries who now must adapt to a new workforce order.

living enables investment capital and paychecks to go much further. The major start-up expenses such as salaries and office space cost less, and the cost of living is considerably lower for employees."

The graphs below detail how mobility and cost further tilt the landscape of talent.

Young adults have been dubbed "the young and the restless" due to their tendency to move across state lines compared to other age cohorts. Specifically, the highest percentage of adults who made interstate moves between 2009 and 2013 were those aged 18 to 24 (5.3%) and 25 to 34 (3.9%)[11]. This was the case for Cleveland as well. Of all the household moves within the Cleveland metro from 2009 to 2013, 10% were done by people moving into the region from other states. Nearly 50% of those inter-

state migrations were made by Clevelanders aged 18 to 34[12].

Where are these interstate migrants moving to Cleveland from? Gaining insight into this can infer the "push and pull" factors into the region.

From 2008 to 2012, the out-of-state counties that sent the most movers into Cuyahoga County were: Cook County (Chicago), Allegheny County (Pittsburgh), Clark County (Las Vegas), Wayne County (Detroit), Los Angeles County, and Kings County (Brooklyn, New York)[13]. When looking at net migration—calculated as the difference between an inflow into Cuyahoga County from a given county minus the outflow from Cuyahoga County to that same county—Kings County, or Brooklyn, New York, has the highest net migration into Cleveland's core county.

United States
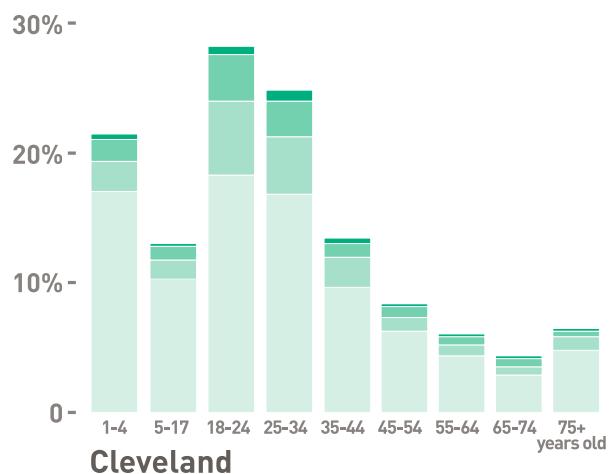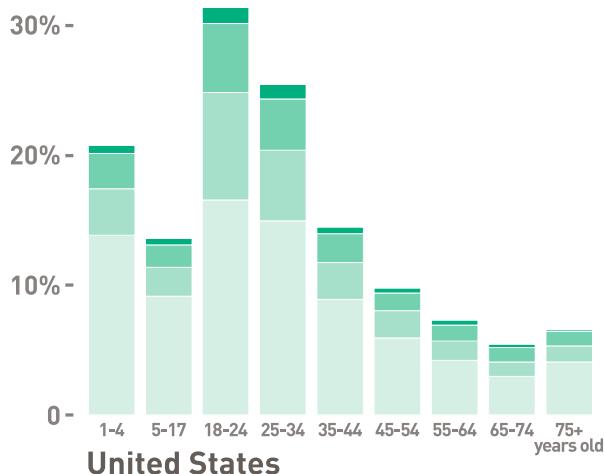
Cleveland

MOBILITY OF MILLENNIALS
People who moved by age, 2009–13
Source: ACS 5-Year 2013

- Moved from abroad
- Moved from different state
- Moved from different county, same state
- Moved within same county

Cost is a factor. For example, the median rent in Kings County is $2,583 dollars, compared with $1,088 in Cuyahoga County and $1,488 in the United States[14]. A millennial living alone with a median income in Kings County ($40,440) would expect to pay 77% of their salary on a place at the median rent, compared with 38% in Cuyahoga County, and 52% in the United States[15]. Outside of Cleveland, then, millennials need roommates to survive.

As for home purchasing, the median listing price from May to August 2015 was $109,900 in Cuyahoga County compared with $579,000 in Brooklyn, New York[16]. This stark difference has been noticed by the blog "Brokelyn" in the piece "It's cheaper to commute from Cleveland than buy a BK condo." The writer opined on the "sheer lunacy" of buying a half-million dollar 533 square-foot studio in Brooklyn, compared to purchasing a 768 square foot Ohio City condo for $128,000. While researching Cleveland's real estate scene, the New Yorker also noticed that "finding a 500-square-foot studio was nearly impossible—it's as if people in Cleveland appreciate 'living space' and 'bedrooms.'"

When taking into account costs beyond housing (e.g., nightlife, shopping, etc.), the differences are also measurable. While the millennial income is larger in Kings County ($40,440) than Cuyahoga County ($34,597), the pay when adjusted for cost of living is $5,590 higher in Cuyahoga County ($38,656) than Kings County ($33,066)[17]. This is to say, then, that costs in the likes of Brooklyn are making it hard for younger generations to survive, or for start-ups to "start-up".

The issue goes beyond New York City and affects global cities worldwide. One recent study by the Supper Club—a London-based entrepreneur group—noted that 40% of the city's largest start-ups

Anchorage Municipality, AK +158

MEDIAN GROSS MONTHLY RENT
(not adjusted dollars)
Source: Zillow Rent Index

$2,583
Kings County
(Brooklyn)

$1,488
United States

$1,088
Cuyahoga County
(Cleveland)

+181 Middlesex County, MA

Wayne County, MI (Detroit) +303

Kenosha County, WI +175

+127 Queens County, NY (Queens)
+349 Kings County, NY (Brooklyn)
+146 Middlesex County, NJ

Douglas County, NE (Omaha) +190

Sandusky County, OH +128

Huron County, OH +171

+143 Trumbull County, OH

+298 Allegheny County, PA (Pittsburgh)

+148 Washington County, PA

Clark County, OH +198

Fayette County, OH +292

Knox County, KY +128

Gwinnett County, GA +165

Bossier Parish, LA +145

+154 San Juan Municipio, PR

+151 Yauco Municipio, PR

WHERE CLEVELAND'S MILLENNIALS ARE MIGRATING FROM
Net Migration to Cuyahoga County: Top twenty
Source: ACS 5-Year 2012

are considering leaving the region due to cost of living.

"Several businesses have already left the capital to take advantage of cheaper house prices elsewhere in the UK," writes the author of the article "London's entrepreneurs threaten to leave Capital to avoid 'brain drain.'" The piece continues: "Supper Club member Adam Greenwood, founder of the digital agency IADigital, recently relocated to Bournemouth. 'With its proximity to the beach and an amazing university we have certainly attracted a better quality of staff,' [Greenwood] said."

So, instead of asking if Cleveland is "the next Brooklyn," the more operative question is whether or not Cleveland is "the next Bournemouth." Here, the answer is increasingly "yes."

For instance, Millennial Advisory Team Member Marika Shioiri-Clark—an entrepreneur who has lived in San Francisco, Boston, and Paris—was quoted in the *City Lab* piece "The Passion of Young Cleveland," saying: "it's much easier to be an entrepreneur here. There's a much lower threshold in terms of risk and price."

The piece details how a "critical mass of diehard young Clevelanders are either staying or coming back to turn the place around" as the city has become an ideal place "to start a business or a new project, given the low overhead and unusually strong, cohesive community support."

In fact, this migratory formula of the "push" of cost and the "pull" to affect change is what brought Millennial Advisory Team member Evelyn Burnett back from New York. A local economic development policy leader, Burnett answered the question why she returned to Cleveland this way:

"It's a couple of factors. I think primarily was this position that I'm in now to lead a body of work would have been far off in New York City, because Cleveland is certainly a big fish small pond place... Also the cost of living was becoming a little difficult to digest. It very much was beginning to feel like a rat race to me."

Reiterates Millennial Advisory Team member Stephen Love, answering a question about the uniqueness of Cleveland:

"It's a place where people who want to be involved really have that opportunity to do it and really have that access which isn't as achievable in a larger city. I had the option to go to Washington D. C. and pursue a job there and it would be a totally different life. You know, you don't have the ability to be invested in the community you live in anywhere near as much, there's just so many other people in the same space."

The idea of being a "big fish small pond" is an increasingly attractive option for millennials. It is about the pull of opportunity to "make waves" in a place like Cleveland that could use them, as opposed to drowning in the anonymity of New York City where success can mean making rent.

Still, inherent in the idea of wanting to affect a Rust Belt city's trajectory is the desire to reside in the community one becomes emotionally, civically, and professionally invested in. Here, the analysis examines the extent Cleveland's metropolitan growth of college-educated millennials is occurring in the City

Millennials and Home Ownership: Generational Differences or Situational Realities?

Assumptions abound about Millennial lifestyle preferences, particularly related to housing and household formation. Where do they live? Are they marrying? Are they buying?

Yes, millennials are delaying marriage at far greater rates than previous generations. The percentage of 18- to 34-year-old U.S. residents that *have never* been married has gone from 41.5% in 1980, to 52.5% in 2000, to 65.9% in 2013. Cleveland millennials have been delaying marriage at even greater rates, going from 44.4% in 1980, to 57.2% in 2000, to 71.7% today[1].

The postponement of marriage has coincided with a change in household formation. Millennials are living with their parents in greater numbers than ever before. The percent of U.S. residents aged 18 to 34 that lived with their parents was 22.9% in 1980, increasing to 30.3% today. The percent of Greater Cleveland millennials currently living with their parents is 35.2%, up from 29.6% in 1980[2].

Not surprisingly, then, the homeownership rates of millennials are at historic lows. An analysis of the Census' Housing Vacancies and Homeownership surveys shows that the percentage of young Midwestern adults under 35 who own a home was 45.8% in 1982, before rising to 47.7% in 2000. By 2014, the rate dropped to 42%[3].

Of course one explanation of the low homeownership rates is that millennials prefer renting the city condo over purchasing the single-family house. Here, millennials are a qualitatively different generation than past generations, shaped by the times.

"[Millennials have] seen people really get hurt by home-

ownership," said a luxury condo developer in the *New York Times* piece "No Picket Fence: Younger Adults Opting to Rent." "The petal has really fallen off the rose as it pertains to homeownership," the developer continues. "People don't want to be tied down to a mortgage they can't get out of quickly."

For Mark Zandi, a chief economist at Moody's Analytics, the explanation for low millennial homeownership rates is less generational than situational. "They're not going to go from living with their parents to buying a home," said Zandi in the *Times* piece. "They're going to rent an apartment."

This is especially so since young adults today have historically low median incomes paired with high student loan debt. The median income for full-time workers aged 18 to 34 went from $35,845 in 1980 to $33,883 in 2013[4], while the number of young adults graduating with debt increased from 1.6 million in 2003 to 2.4 million in 2012. This is not a recipe for increased numbers of people taking on a mortgage[5].

So, do millennials want to buy as economic circumstances brighten? A new survey called "Millennials and their homes" by the non-advocacy organization Demand Institute sheds light. The study found that 24% of their sample owns a home, while 60% plan to buy. Also, over 70% of millennials surveyed stated that home ownership is both "an important long-term goal" and "an excellent investment".

"Based on stated aspirations," the study concludes, "there is no indication that this generation will be any less likely than previous generations to own their homes."

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[1] Source: US Census Bureau, Social Explorer "Young Adults Then and Now"
[2] Ibid
[3] Source: Current Population Survey, 2014, Housing Vacancies and Home-ownership file.

[4] Source: US Census Bureau, Social Explorer "Young Adults Then and Now"
[5] See: https://www.newamerica.org/downloads/Millennials_and_Student_Debt.pdf

of Cleveland—a geography defined by decades of disinvestment and outmigration.

CLEVELAND'S FIFTH MIGRATION

"Millennials prefer cities to suburbs, subways to driveways," reads the title of a recent Nielsen survey which showed that 62% of their sample of millennials preferred to live in mixed-use communities found in urban centers versus rural and suburban geographies.

Demographically, the data is mixed as to whether or not millennials prefer urban living compared to past generations, such as Gen Xers. In the *FiveThirtyEight* article "Why millennials are less urban than you think," economist Jed Kolko recently found that 25- to 34-year olds today are slightly less likely to live in cities than 25- to 34-year-olds in 2000. However, college-educated young adults are slightly more likely to live in the city compared with college-educated adults in 2000.

The pattern of increased urban living was most pronounced for high-density neighborhoods, termed "hyper-urban" neighborhoods. The share of college-educated millennials living in high-density neighborhoods increased by 17% since 2000, leading Kolko to conclude that millennials overall "are not increasingly living in urban neighborhoods," but that "the most educated one-third of young adults are increasingly likely to live in the densest urban neighborhoods."

Does the same pattern hold for Cleveland?

To answer this question, the percentage of 25- to 34-year old Greater Clevelanders living in the city proper was compared from 2000 to 2013. As with the national analysis, millennials are *less likely* to live in the city proper compared to Gen Xers. Today, 23% of 25- to 34-year olds live in Cleveland versus 25.5% in 2000[18].

However, today's college-educated young adults are urbanizing at higher concentrations than in the past. Only 14.5% of Greater Cleveland's college-educated 25- to 34-year olds lived in the city in 2000. By 2006, that number dipped to 10.7%. Cleveland's "brain sprawl" reversed, however, to where 16% of the region's college-educated young adults now reside within the city limits[19]. This, coupled with the outmigration of non-college educated millennials to the suburbs, has created for a higher concentration of talent in Cleveland proper; that is, 17.4% of Cleveland residents aged 25 to 34 had a bachelor's degree or higher in 2000, compared with 24.8% in 2013[20].

What's occurring, then, is a reversal of migration patterns that is starting to reset the course of the city. Young adults raised in the city are still suburbanizing, while college-educated millennials raised in the suburbs are seeking the aspiration of urban life. For the sons and daughters of the Rust Belt, hearing of Cleveland's "glory years" brings less longing for what was and more yearning for what could be. Notes entrepreneur and small business owner Justin Carson, a Millennial Advisory Team member on why he reversed course from exurbia to Ohio City:

"I moved my business and about 40 jobs to Cleveland because I always wanted to be part of the city.

2013

City of Cleveland

2000
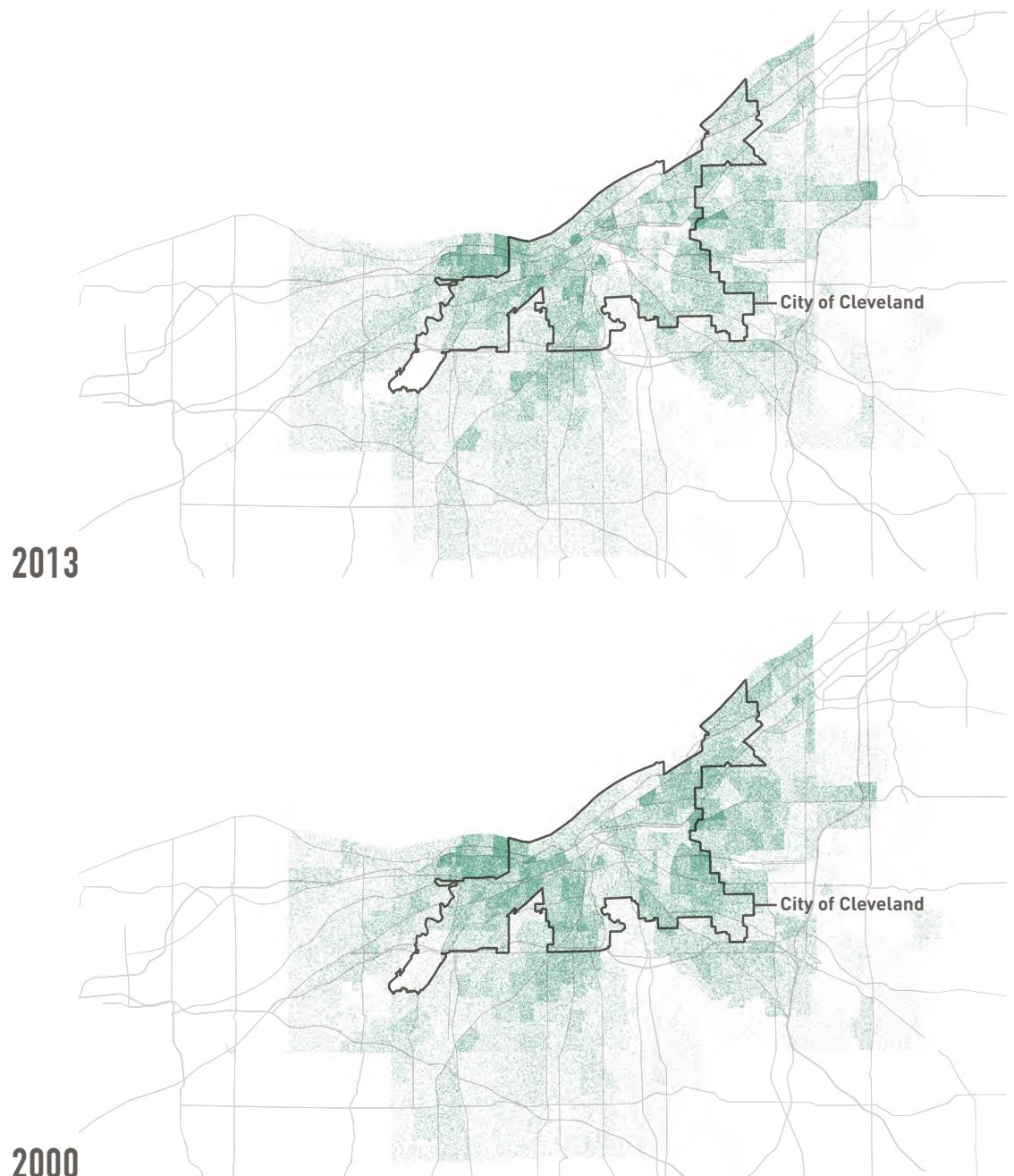
City of Cleveland

CHANGE IN YOUNG ADULT POPULATION OF CLEVELAND AND CUYAHOGA COUNTY

Millennials by census tract

Each dot = 25–34 year old

Source: 2000 Census, ACS 5-Year 2013

Growing up my grandmother lived in the city and went to Cleveland Bible College… She talked about all of the Millionaire's Row houses, she talked about all of the business and all of the department stores—and just had this glamorization of the city and growing up I heard about that through her stories…So I always knew that if I had the opportunity I would want to be a part of the city."

Mr. Carson, 33, went on to note that this change in cultural aspirations is particularly pronounced for younger millennials:

"I'm right on the edge of generation x and millennial. In my age group it was much more the white picket fence, suburbs and mini-mansion house and that's what people aspired to do. Me experiencing that in Medina and then coming here, it was very quickly a shock in how the culture's changed drastically amongst younger millennials. I've called it a mini-revolution in previous conversation."

DIVERSITY OF MILLENNIAL POPULATION IN CLEVELAND

Millennials by census tract, 2013

● = 25–34 year old <u>with</u> a BA or higher

● = 25–34 year old <u>without</u> a BA or higher

Source: ACS 5-Year 2013
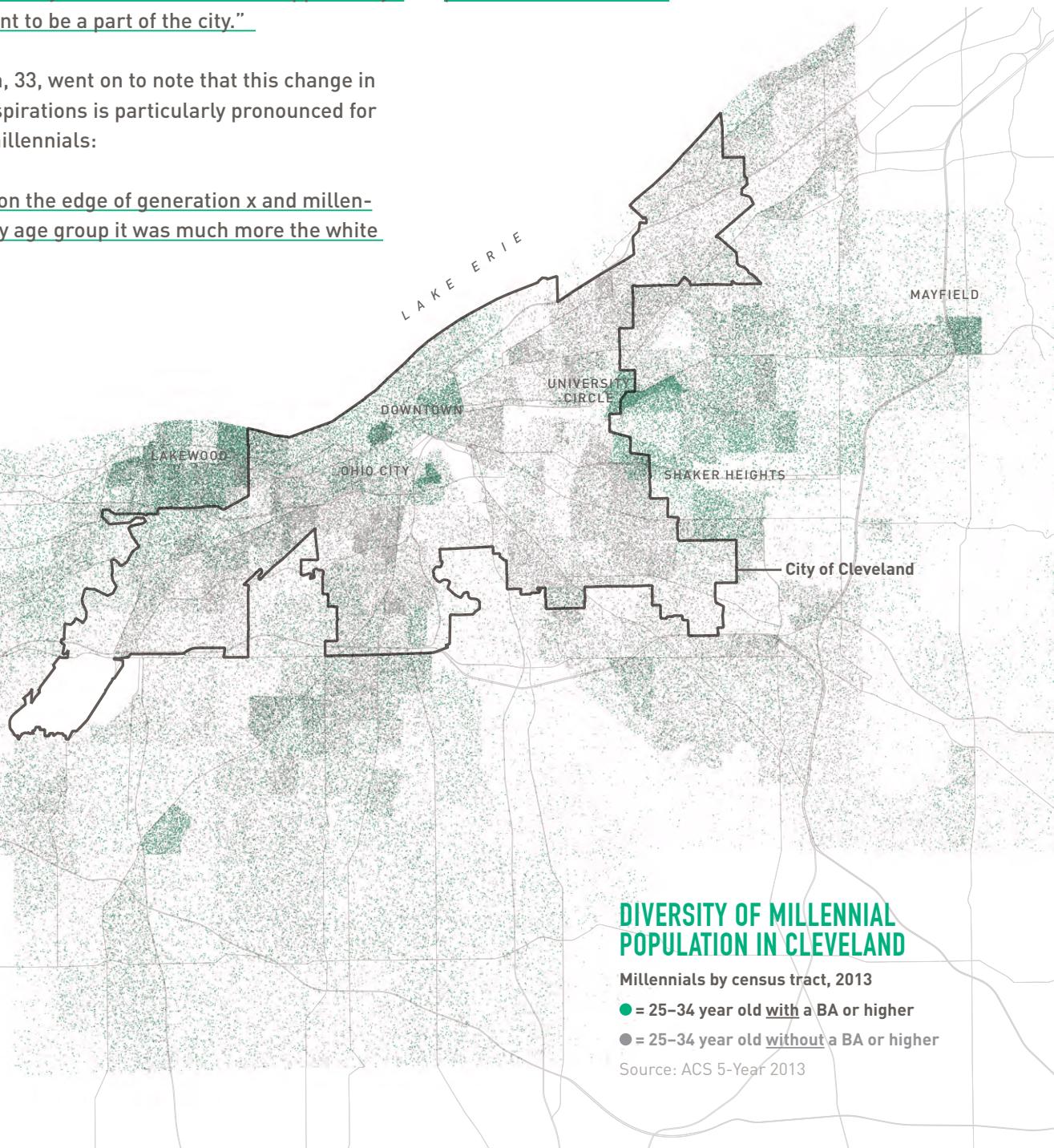
Millennials and Transportation: Driving Less But Going Nowhere?

Millennials are driving less than past generations, according to a new study called "Are Millennials Really the "Go-Nowhere" Generation?" by transportation scholar Noreen McDonald in the *Journal of the American Planning Association*. Specifically, "automobility," or the amount of miles traveled by car, declined significantly for millennials compared to past generations. This drop resulted from a decrease in trips taken, not less miles driven per trip.

Why? McDonald found that lifestyle-related changes account for 10% to 25% of the decrease, especially a decline in young adult employment and delays in marrying and having kids; whereas 35% to 50% of the decline was due to millennial-specific factors such as "changing attitudes [toward driving] and use of virtual mobility (online shopping, social media)." "Taken together," the author concludes, "these trends lend credence to the idea that millennials are increasingly "going nowhere"; that is, having less of a need for car trips. McDonald also found little difference in the rates of multi-modal travel for millennials compared to past generations, leading *City Lab*'s Eric Jaffe to write "if millennials really prefer [walking, biking, and public transportation] more than Gen X, it isn't showing up clearly in these numbers."[1]

More exactly, 85.8% of Americans commuted to work by car in 2013, according to the U.S. Census. By contrast, the percent of U.S. workers age 18 to 34 years who commuted by car was 84.5%, unchanged from 1980 (84.4%)[2]. In Greater Cleveland, the pattern of commuting by car actually increased for millennials: 88.4% in 2013 versus 84.4% in 1980.

Does this mean that millennials do not prefer multi-modal transit and walkability as is commonly advertised? While millennials as a whole are not more multi-modal than previous generations, a subset of millennials are. In the Census report "Who Drives to Work? Commuting by Automobile in the United States: 2013", the author found that 25- to 29-year-old urban workers saw a 4% decline in car commuting since 2006, while showing an increase in public transportation use from 5.5% to 7.1%

The numbers are more pronounced when looking at neighborhood-level data in the City of Cleveland. Specifically, 80% of Cleveland city residents drove to work in 2012, whereas 4.8% walked to work[3]. The picture is vastly different in Downtown Cleveland and University Circle—two neighborhoods with a high concentration of young adults. Forty-one percent (41%) of University Circle residents walk to work, whereas 39% of Downtown residents get to work on foot.

These facts signify an emerging live-work geography. Specifically, high-tech jobs are growing faster in America's urban cores compared to green field peripheries, according to the study "Foot Traffic Ahead: Ranking Walkable Urbanism in America's Largest Metros" by George Washington University. This is especially so for the "eds and meds," finance, and technology sectors. Amidst this developing landscape comes an infill of knowledge workers to meet this demand. Increasingly, younger knowledge workers prefer proximity to employment and lifestyle amenities over larger lot sizes and longer commutes. Expect this trend of densification to continue as Cleveland repositions itself in the innovation economy.

[1] See: http://www.citylab.com/commute/2015/07/the-clearest-explanation-yet-for-why-millennials-are-driving-less/398366/
[2] Source: US Census Bureau, Social Explorer "Young Adults Then and Now"
[3] Source: US Census Bureau, American Fact Finder, ACS 2012 5-year data via NEOCANDO, http://neocando.case.edu/.

When looking at Downtown Cleveland, the changes are even more pronounced. The growth in the number of 25- to 34-year-olds in Downtown Cleveland increased by 76% from 2000 to 2012[21]. Over 36% of Downtown's population is comprised of those aged 25 to 34, up from 28% in 2000. For the broader 18- to 34-year old cohort, 63% of Downtown residents are millennials[22], compared with 23% nationally, and 20% at the metro level[23]. Also, Cleveland's Downtown residents aged 25 to 34 are highly-educated: 63.7% have at least a 4-year degree, nearly double the 37.6% rate for the Cleveland metro[24].

This infill into the core has recently been termed the "fifth migration" by urban scholars. To put this in context, the "first migration" was the pioneers that settled North America; the "second migration" from farms to the factory towns; the "third migration" to the great metropolitan centers like Cleveland; and the "fourth migration" to the suburbs of these centers. The "fifth migration"—which will significantly affect the City of Cleveland's landscape going forward—is a 'reurbanizing' countermovement to decentralization, particularly for younger, college-educated adults.

Cleveland's fifth migration has altered the Downtown real estate market in short order. Data from Downtown Cleveland Alliance shows that the occupancy rate stands at 97.5% as of 2nd Quarter 2015[25]. The absorption has actually increased from 87.7% since 4th Quarter 2010, even with the addition of 1,362 market rate units. Price per square foot has also risen dramatically, going from $1.01 per sq. ft. for a two-bedroom in 2010 to $1.34 sq. ft. for a two-bedroom in 2015.

Millennial Advisory Team member Anand Brahmbhatt, an intern from Jersey City, NJ, is one Downtown resident seeing the changes first hand:

"Downtown's honestly changed a lot. My rent went up from 700—which is reasonable, because in Boston it's 1500 at least, or even 2000—but the rent went up to a grand. That's a big deal for Cleveland. It must be so in demand."

IMPACT OF MILLENNIALS ON DOWNTOWN CLEVELAND

2012
DOWNTOWN CLEVELAND
63%
18–34 year olds
Source: ACS 5-Year 2012

2013
CLEVELAND METRO
20%
18–34 year olds
Source: ACS 5-Year 2013
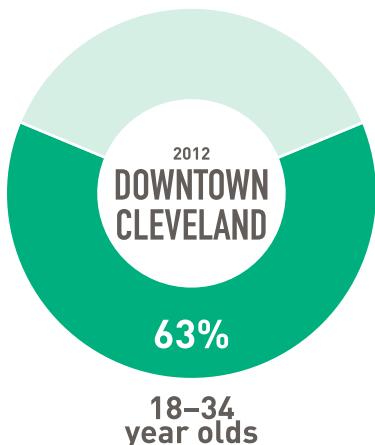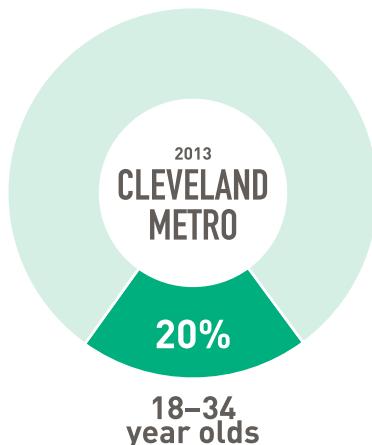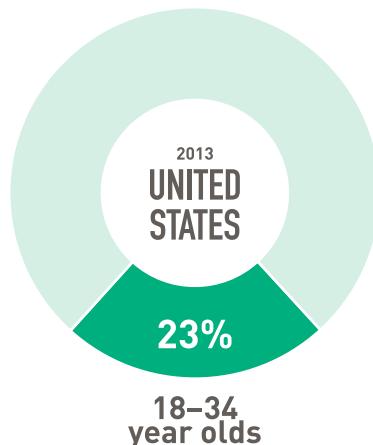
2013
UNITED STATES
23%
18–34 year olds
Source: ACS 5-Year 2013

This demand is reflected in the pipeline of downtown residential units under development. An additional 3,146 residential units are planned for 2015 to 2017—a 50% increase over the current inventory—while another 2,522 units are tentatively slated for 2018 to 2020. The estimated population of Downtown is expected to grow from approximately 13,000 today to 23,000 by 2020, according to Downtown Cleveland Alliance forecasts.

Indeed, a movement of people back into the heart of Rust Belt Cleveland is welcome. For too long, Cleveland has been associated with loss. In investment terms, the city has been a "bear market," destined to the perception of high risk and low reward. It has been a place absent to the assignment of aspiration.

"What concerns me most, and I admit it is only an impression that I have gained from a rather extensive series of intensive interviews over the last five years, is that Cleveland is not fully aware that it has a choice, that it can determine its own future," writes Cleveland State's Richard Knight in a 1980 paper called "The Region's Economy: Transition to What?" "There seems to be a general resignation and acceptance of the inevitable demise of a once proud city."

That is starting to change. The Cuyahoga River burned in 1968—well before millennials were born. Yes, Cleveland still has problems. Transitioning from an industrial to a knowledge economy is an uneven process. The failures along the way exist in the everyday realities on many streets in the form poverty, crime, and abandonment. But a metro without a demographically dynamic urban core is a weak, parochial metro. Part of the requisite change is driven by young folks who see Cleveland for what it could

be, not what it has been. Cleveland is not a "thing" outside of its people fated to decline. Cleveland is a community bent to the direction of the will and work of its residents.

This, then, is the true hope associated with Cleveland's millennials: a generation instilling pride and possibility back into the city after decades of collective managed decline. It is a hope that goes beyond lifestyles and consumption patterns. It is a hope about the chance to produce. Echoes Millennial Advisory Board member Sylvia Pérez:

"I think Cleveland is a place of opportunity and Cleveland neighborhoods offer an opportunity for redevelopment. If you are somebody who wants to build—not just consume—and you have a vision of your own, then Cleveland is a city where your imagination can come to life with minimal barriers. And yes: it's not all equal. Not everybody's vision has equal opportunity. But it's not like New York. It's not like D. C. I can't remake a block in D. C. into a new neighborhood and then have it on a map in a year's time. But you can do that here, and that's really powerful."

Nonetheless, questions remain as to what will be made of the power that young Clevelanders will inevitably inherent, specifically in the creation of societies that are either equitable or unequal, integrated or divided, engaged or isolated.

"All the forces in the world are not so powerful as an idea whose time has come," wrote Victor Hugo.

Whether the ideas of tomorrow end up reshaping Cleveland in a way that's unrecognizable today remains to be seen.

ENDNOTES

1 Note: The Census defined millennials as born between 1982 and 2000, though the definition is flexible and often includes those born from 1980 to 2000. For the current report, analyses will vary on millennial age groups, ranging from 15 to 34, 18 to 34, and 25 to 34, depending on data availability and age group relevance to the topic (e.g., housing, migration, etc.).

2 Source: US Census Bureau, American Fact Finder, Annual Estimates of the Resident Population by Single Year of for the United States: July 1, 2014.

3 Source: US Census Bureau, American Fact Finder, ACS 2013 5-year data

4 Source: https://www.whitehouse.gov/sites/default/files/docs/millennials_report.pdf

5 Source: US Census Bureau, American Fact Finder, ACS 2013 5-year data

6 Source: US Census Bureau, Social Explorer "Young Adults Then and Now"

7 Source: US Census Bureau, American Fact Finder, ACS 2013 5-year data

8 Source: US Census Bureau, Social Explorer "Young Adults Then and Now"

9 Source: US Census Bureau, American Fact Finder, ACS 2013 5-year data

10 Source. Current Population Survey (CPS), 2007, 2010, and 2013.

11 Source: US Census Bureau, American Fact Finder, ACS 2013 5-year data

12 Ibid

13 Source: US Census Bureau, American Fact Finder, ACS 2012 5-year data

14 Source: Zillow Rent Index

15 Source: US Census Bureau, American Fact Finder, ACS 2013 5-year data (adjusted for 2015 dollars)

16 Source: Zillow Real Estate Index

17 Source: US Census Bureau, American Fact Finder, ACS 2013 5-year data for income (adjusted for 2015 dollars); Bureau of Economic Analysis for Regional Price Parity

18 Source: US Census Bureau, 2000 Decennial Census; American Fact Finder, ACS 2005 to 2013 1-year data

19 Ibid

20 Source: US Census Bureau, 2000 Decennial Census; American Fact Finder, ACS 2013 3-year data

21 Source: US Census Bureau, 2000 Decennial Census; American Fact Finder, ACS 2012 5-year data via NEOCANDO, http://neocando.case.edu/. Note: "Downtown" defined by Statistical Planning Area (SPA).

22 Ibid

23 Source: US Census Bureau, American Fact Finder, ACS 2013
5-year data

24 Source: US Census Bureau, American Fact Finder, ACS 2013
5-year data. Note "Downtown" defined as incorporating Cen-
sus Tracts 1033, 1071, 1077, 1078.

25 Source: Downtown Cleveland Alliance. Note: "Downtown" de-
fined as incorporating Census Tracts 1033, 1071, 1077, 1078.

APPENDIX A

Change in 25- to 34-Year-Olds of Top 40 Metros
with Bachelor's or Higher
Across Three Economic Eras.

Source: 2000 Census, ACS 3-Year, 2007, 2008, 2010, 2011, 2013

FIRST ECONOMIC ERA 2000—2007

Metro	Brain Gain/Loss	Percent Change
Riverside-San Bernardino, CA	47,457	80.8%
Sacramento, CA	27,170	41.9%
Las Vegas, NV	15,435	40.7%
Tampa, FL	16,098	21.7%
Jacksonville, FL	7,319	20.5%
Orlando, FL	13,749	20.4%
Phoenix, AZ	25,629	20.4%
San Diego, CA	22,074	17.6%
Austin, TX	12,896	14.5%
San Antonio, TX	7,603	14.3%
Providence, RI	6,706	11.4%
Portland, OR	9,623	10.4%
Indianapolis, IN	6,985	9.1%
Virginia Beachs, VA	4,823	9.0%
Houston, TX	14,508	7.8%
Columbus, OH	6,385	7.1%
Baltimore, MD	8,347	6.9%
Los Angeles, CA	33,109	6.5%
Charlotte, NC	5,428	6.4%
St. Louis, MO	6,072	5.6%
Nashville, TN	3,373	5.1%
Dallas, TX	11,338	4.5%
Miami, FL	5,516	3.1%
New York, NY	27,534	2.7%
Seattle, WA	3,908	2.3%
Philadelphia, PA	5,085	1.9%
Atlanta, GA	1,991	0.8%
Kansas City, MO	534	0.6%
Washington, DC	343	0.1%
Cincinnati, OH	79	0.1%
Minneapolis, MN	-1,580	-0.9%
Denver, CO	-2,591	-2.0%
Pittsburgh, PA	-2,567	-2.6%
Chicago, IL	-12,687	-2.6%
Milwaukee, WI	-2,588	-3.8%
Boston, MA	-20,505	-6.5%
Detroit, MI	-19,791	-11.0%
Cleveland, OH	**-9,842**	**-11.4%**
San Francisco, CA	-44,811	-14.7%
San Jose, CA	-20,674	-15.4%

SECOND ECONOMIC ERA
2008—2010

Metro	Brain Gain/Loss	Percent Change
San Francisco, CA	56,039	21.9%
Washington, DC	69,270	20.0%
San Jose, CA	21,363	19.5%
Milwaukee, WI	10,323	16.4%
Denver, CO	20,785	16.4%
Houston, TX	33,894	16.3%
Los Angeles, CA	82,805	15.6%
New York, NY	157,575	15.1%
Kansas City, MO	13,347	14.9%
Chicago, IL	70,193	14.9%
Seattle, WA	25,774	14.6%
Nashville, TN	10,328	14.5%
San Antonio, TX	8,706	13.4%
Minneapolis, MN	23,947	13.3%
St. Louis, MO	15,227	13.3%
Philadelphia, PA	35,165	13.1%
Austin, TX	12,526	12.4%
Pittsburgh, PA	11,879	12.2%
Miami, FL	21,814	12.0%
Boston, MA	32,398	10.9%
Portland, OR	10,941	10.5%
Jacksonville, FL	4,418	10.3%
Cleveland, OH	**7,231**	**9.9%**
Charlotte, NC	8,992	9.5%
Baltimore, MD	12,004	9.0%
Columbus, OH	8,599	8.8%
Las Vegas, NV	4,931	8.5%
San Diego, CA	12,311	8.2%
Dallas, TX	19,620	7.4%
Cincinnati, OH	4,984	5.8%
Indianapolis, IN	4,480	5.3%
Atlanta, GA	13,399	5.2%
Orlando, FL	3,237	3.9%
Virginia Beach, VA	2,283	3.9%
Tampa, FL	3,159	3.5%
Detroit, MI	2,212	1.4%
Phoenix, AZ	-416	-0.3%
Providence, RI	-2,457	-3.7%
Sacramento, CA	-8,543	-9.1%
Riverside-San Bernardino, CA	-12,930	-11.4%

THIRD ECONOMIC ERA
2011—2013

Metro	Brain Gain/Loss	Percent Change
Nashville, TN	11,316	13.7%
Pittsburgh, PA	14,027	12.5%
Denver, CO	17,684	11.4%
Orlando, FL	9,550	11.3%
San Antonio, TX	8,369	10.8%
Houston, TX	25,661	10.1%
Austin, TX	11,639	9.9%
Seattle, WA	17,148	8.3%
Cleveland, OH	**6,675**	**8.3%**
Miami, FL	17,129	8.3%
Virginia Beachs, VA	5,047	8.0%
Baltimore, MD	11,096	7.5%
Riverside-San Bernardino, CA	7,500	7.5%
Washington, DC	32,725	7.5%
San Jose, CA	9,693	7.3%
San Diego, CA	11,933	7.3%
Tampa, FL	6,957	7.2%
Phoenix, AZ	11,099	7.0%
Philadelphia, PA	21,207	7.0%
San Francisco, CA	21,873	6.9%
Milwaukee, WI	5,088	6.7%
Columbus, OH	6,953	6.5%
Charlotte, NC	6,682	6.4%
Boston, MA	21,417	6.3%
Los Angeles, CA	39,329	6.3%
Minneapolis, MN	12,321	5.9%
Indianapolis, IN	5,261	5.8%
Dallas, TX	16,449	5.6%
New York, NY	66,101	5.4%
Portland, OR	6,116	5.3%
Jacksonville, FL	2,558	5.2%
St. Louis, MO	6,810	5.1%
Detroit, MI	7,760	5.0%
Cincinnati, OH	3,258	3.5%
Las Vegas, NV	2,025	3.3%
Chicago, IL	14,677	2.7%
Kansas City, MO	2,372	2.3%
Atlanta, GA	4,509	1.7%
Providence, RI	829	1.3%
Sacramento, CA	1,064	1.3%

APPENDIX B

Percent of Millennials in the Workforce with an Advanced Degree Source: Current Population Survey (CPS)

2000 Metro	Percent Workers 25 to 34 w/ Advanced Degree	2007 Metro	Percent Workers 25 to 34 w/ Advanced Degree
San Jose, CA	19.2	Pittsburgh, PA	20.3
Washington, DC	16.5	Boston, MA	19.4
Austin, TX	14.5	Washington, DC	17.1
Boston, MA	14.3	San Francisco, CA	16.1
Baltimore, MD	12.4	New York, NY	15.5
San Francisco, CA	12.3	Baltimore, MD	14.6
New York, NY	12	Kansas City, MO	14
Nashville, TN	11.8	Seattle, WA	13.7
Detroit, MI	10.7	San Jose, CA	12.8
Chicago, IL	10.5	Chicago, IL	12.4
Seattle, WA	10.4	Minneapolis, MN	11.9
Atlanta, GA	10.2	Columbus, OH	11.7
Philadelphia, PA	9.5	Orlando, FL	11.7
Portland, OR	9.2	Philadelphia, PA	11.6
Cincinnati, OH	8.7	Cincinnati, OH	11.2
Providence, RI	8.7	Atlanta, GA	10.5
Pittsburgh, PA	8.3	Denver, CO	10.5
Cleveland, OH	**7.9**	Portland, OR	10.4
Dallas, TX	7.8	St. Louis, MO	10.3
Indianapolis, IN	7.8	Detroit, MI	10.2
St. Louis, MO	7.8	Indianapolis, IN	9.8
Miami, FL	7.5	San Diego, CA	9.7
Milwaukee, WI	7.2	Providence, RI	9.5
Los Angeles, CA	7.1	Los Angeles, CA	9.4
Minneapolis, MN	7.1	Austin, TX	9.2
Houston, TX	6.9	Milwaukee, WI	8.8
Sacramento, CA	6.9	Charlotte, NC	8.4
Kansas City, MO	6.8	Miami, FL	8
Columbus, OH	6.5	**Cleveland, OH**	**7.9**
Denver, CO	6.2	Virginia Beachs, VA	7.7
Phoenix, AZ	5.9	Dallas, TX	7.6
Tampa, FL	5.9	Houston, TX	7.5
San Antonio, TX	5.7	Nashville, TN	7.4
Orlando, FL	5.6	Jacksonville, FL	7.3
San Diego, CA	5.5	Sacramento, CA	6.8
Jacksonville, FL	4.6	Tampa, FL	6.5
Charlotte, NC	4.4	Phoenix, AZ	6.1
Virginia Beachs, VA	4.4	San Antonio, TX	5.8
Las Vegas, NV	4.1	Las Vegas, NV	5
Riverside-San Bernardino, CA	3	Riverside-San Bernardino, CA	3.5

2010 Metro	Percent Workers 25 to 34 w/ Advanced Degree
Washington, DC	21.6
Boston, MA	19.4
San Jose, CA	16.8
Baltimore, MD	16.4
Portland, OR	15.2
San Francisco, CA	15.1
Cleveland, OH	14.9
Pittsburgh, PA	14.8
New York, NY	14.8
Austin, TX	14.5
Detroit, MI	14.4
Chicago, IL	13.5
Philadelphia, PA	13.4
Columbus, OH	12.9
Jacksonville, FL	12.9
Virginia Beachs, VA	12.6
Seattle, WA	12.2
Nashville, TN	12.2
San Diego, CA	12.0
Atlanta, GA	11.8
Kansas City, MO	11.6
Minneapolis, MN	11.6
Miami, FL	11.4
Denver, CO	11.1
Milwaukee, WI	10.8
Houston, TX	10.4
St. Louis, MO	9.8
Providence, RI	9.6
Orlando, FL	9.4
Dallas, TX	9.3
Tampa, FL	8.8
Charlotte, NC	8.7
Los Angeles, CA	7.9
Cincinnati, OH	7.8
Phoenix, AZ	7.4
San Antonio, TX	6.1
Indianapolis, IN	6.0
Sacramento, CA	5.6
Riverside-San Bernardino, CA	5.6
Las Vegas, NV	5.3

2013 Metro	Percent Workers 25 to 34 w/ Advanced Degree
Washington, DC	21.2
Boston, MA	19.8
Pittsburgh, PA	19.3
San Jose, CA	19.2
New York, NY	16.9
San Francisco, CA	16.8
Baltimore, MD	16.6
Cleveland, OH	15.9
Chicago, IL	15.2
Seattle, WA	14.4
Philadelphia, PA	14.3
San Diego, CA	13.9
Austin, TX	12.3
Sacramento, CA	12.2
Indianapolis, IN	12.1
Kansas City, MO	11.6
Detroit, MI	11.4
St. Louis, MO	11.3
Denver, CO	11.2
Columbus, OH	11.1
Jacksonville, FL	11.1
Atlanta, GA	10.7
Portland, OR	10.5
Milwaukee, WI	10.5
Nashville, TN	10.3
Minneapolis, MN	10.3
Providence, RI	10
Los Angeles, CA	9.7
Dallas, TX	9.5
Phoenix, AZ	9.5
Orlando, FL	9.4
Houston, TX	9.3
Virginia Beachs, VA	9
Miami, FL	8.3
Charlotte, NC	7.2
San Antonio, TX	7.2
Tampa, FL	6.9
Cincinnati, OH	6.9
Las Vegas, NV	6.6
Riverside-San Bernardino, CA	4.8

APPENDIX C: MILLENNIAL STUDY ADVISORY COMMITTEE

The Cleveland Foundation would like to thank the Millennial Study Advisory Committee (below) who provided input and guidance throughout the process of creating this report. This diverse group of young leaders assisted in selecting the focus topics. Also, the group was instrumental in directing the study team to integrate a diversity and inclusion lens throughout the study. Select quotes from the advisory member interviews have been utilized in the report.

KRISTI ANDRASIK
Hometown: Bedford, OH
Moved to Cleveland: 2008
Path: Bedford → Strongsville → Kent → Cleveland Heights → University Heights → Cleveland

HANNAH BELSITO
Hometown: Salem, OH
Moved to Cleveland: 1999
Path: Salem, OH → University Heights, OH → Cleveland → Lakewood, OH

ANAND BRAHMBHATT
Hometown: Jersey City, NJ
Moved to Cleveland: 2013
Path: Jersey City → Boston → Cleveland
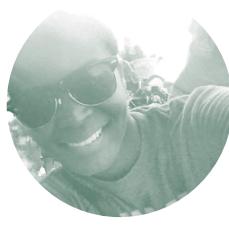
EVELYN BURNETT
Hometown: Youngstown, OH
Moved to Cleveland: 2013
Path: Youngstown → Akron → Cleveland → New York City → Cleveland

JUSTIN CARSON

Hometown: Berea, OH
Moved to Cleveland: 2013
Path: Berea → Medina → Cleveland

CHRIS FORD

Hometown: Maple Heights, OH
Currently: University of Michigan
Path: Cleveland → Kent → Florence → Ann Arbor, MI

JUSTIN GLANVILLE

Hometown: Brecksville, OH
Moved to Cleveland: 2005
Path: Brecksville → Grinnell, Iowa → Edinburgh, Scotland→ New York City → Cleveland

ERIN GUIDO

Hometown: Rocky River, OH
Moved to Cleveland: 2012
Path: Rocky River → Indiana University → Cleveland → University of Michigan →
Detroit → Cleveland

STEPHEN LOVE

Hometown: South Euclid
Moved to Cleveland: 2012
Path: South Euclid → Berea → Cleveland

MATT OLIVER
Hometown: Kingston, NY / Solon, OH
Moved to Cleveland: 2003
Path: Kingston, NY → Solon → East Lansing → Solon

SYLVIA PÉREZ
Hometown: Washington D.C.
Moved to Cleveland: 2010
Path: Washington D. C. → New York City → Buenos Aires → New York City → Bogota → New York City → Cleveland

KEVYN R. SHAW
Hometown: Cleveland
Moved to Cleveland: 2004
Path: Cleveland → Dayton → Cleveland

MARIKA SHIOIRI–CLARK
Hometown: Berkeley, CA
Moved to Cleveland: 2012
Path: Berkeley → Providence, RI → Los Angeles → Boston → Mumbai → Kigali, Rwanda → San Francisco → Cleveland

LUCIA SIDLER
Hometown: North Ridgeville, OH
Moved to Cleveland: 2015
Path: North Ridgeville → Dayton → North Ridgeville