2018 Cheektowaga Community Inventory and Profile

3.1 EXISTING LAND USE PATTERNS

Since the preparation of the 2010 Draft Comprehensive Plan, the land use and development pattern of the Town of Cheektowaga has undergone limited changes. This is due to the relatively complete development of the Town, owing to its position as a key first ring suburb of the City of Buffalo and its longstanding history as a major residential community and key economic hub centered in Erie County. With that, the description of the existing land use patterns in Section 3.1 of Comprehensive Plan remains accurate.

The following table provides updated land use calculations with additional information on the number of parcels in each classification as well as the percent of the Town's total each represents.

Table 1 – Existing Land Use

Land Use*	Acres	Percent	# Parcels	% Parcels
Residential	4,908	35.9%	25,529	88.9%
Commercial	2,468	18.1%	1,366	4.8%
Industrial	305	2.2%	39	0.1%
Public Utilities	1,235	9.0%	162	0.6%
Institutional/Community Facilities	2,062	15.1%	184	0.6%
Vacant	1,756	12.9%	1,195	4.2%
Uncategorized	926	6.8%	232	0.8%
Total	**13,660**	**100.0%**	**28,707**	**100.0%**

* Land use calculations were computed using the land use classifications codes utilized by assessors in New York State. Uncategorized parcels are those without a classification code.

It is worth making a few key observations about this table and land use in the Town in general. First, residential parcels make up the highest percentage of all acreage in the community at 35.9% but account for 88.9% of all parcels. What is evident is that residential is a key component in land use and zoning considerations in the Town. Second, commercial uses are also a significant component of land use and zoning. The importance of residential as a key component of the community is exemplified by understanding its impact on local government finance. As shown in Table 2, residential is a significant percentage of the Town's assessed value and therefore, its tax revenue. Based on 2017 tax rolls, residential properties in the Town account for $2,708,456,238 in total assessed value. A key takeaway is that Cheektowaga is a community that relies heavily on residential properties for local property tax revenue.

Table 2 – Property Assessment by Type

Property Type	Assessed Value	Percentage
Residential	$2,708,456,238	58.17%
Business	$216,123,194	4.64%
Commercial	$1,710,906,851	36.75%
Unclassified	$20,510,900	0.44%
Total	$4,655,997,183	100.0%

3.2 LAND USE CONTROLS

A. Zoning

In 2005, the Town of Cheektowaga made amendments to the 1992 Zoning Ordinance and some minor changes have been made since. However, the descriptions of zoning districts within the Comprehensive Plan are substantively still accurate.

The following provides and update to the acreage of land in the Town of Cheektowaga currently designated to each of the Town's zoning districts.

Residential Districts

- Residence District (R) – 7,092 acres (43.5%)
- Single Residential District (RS) – 267 acres (1.6%)
- Apartment District (RA) – 539 acres (3.3%)
- Residential Senior Citizen District (RSC) – 69 acres (0.4%)
- Residential Mobile Home District (RMH) –173 acres (1.1%)

Business Districts

- Neighborhood Service District (NS) – 250 acres (1.5%)
- Retail Business District (C) – 826 acres (5.1%)
- General Commercial District (CM) – 658 acres (4.0%)
- Motor Service District (MS) – 132 acres (0.8%)
- Community Facilities District (CF) – 2,929 acres (18.0%)

Manufacturing Districts

- Light Manufacturing District (M1) – 2,593 acres (15.9%)
- General Manufacturing District (M2) – 605 acres (3.7%)
- Special Aggregate District (AG) – 160 acres (1.0%)

Total zoned acreage is 16,293, which deviates from the 13,660 acres calculated for existing land use described in the prior section. The reason for the discrepancy is that all land in the Town falls within a Town zoning district and these districts include land that is not assigned a property class code for assessment purposes. For example, public rights of way for all Town roads are not assigned property class codes yet cover a large area of land in the Town and account for nearly all of the difference between land use and zoning calculations.

3.3 DEMOGRAPHIC PROFILE

Since the Draft Comprehensive Plan was prepared, there have been a number of updates reported by the United States Census, most importantly the 2010 Decennial Census and annual American Community Survey (ACS) estimates. Key data variables from both the Decennial and American Community Survey programs are presented in this section.

Since the Comprehensive Plan was initiated in 2007, most of the data within it came from the 2000 Decennial Census, as well as 2006 ACS estimates. Since the 2010 Decennial Census is a full count of the

population, as well as other data as presented in this report, it provides a starting point for understanding and tracking changes since then using the ACS 5-Year Annual Estimates.

Population

From the table below (Table 3), it is clear that population declines continue in the Town, as well as the portion of the Villages of Depew, Sloan, and Williamsville that are within the Town's boundary. The rate of population decline from 2010 to 2012-2016, -0.67%, appears to have slowed somewhat from prior time periods. From 2000 to 2010 the population declined by -6.0%. Also of note, population in the County from 2010 through 2012-2016 is estimated to have increased, reversing a decades-long downward trend. Much of that population increase has been in outer ring suburbs like Clarence, Lancaster, and Orchard Park.

Table 3 – Population

	1990[a]	2000[a]	2010[a]	2012-2016[b]	Percent Change, 2000 – 2010	Percent Change, 2010 – 2012-2016
Cheektowaga	84,387	79,988	75,178	74,673 (+/-69)	-6.0%	-0.67% (+/- 0.09%)
Depew[c]	11,068	10,228	9,369	9,312 (+/-33)	-8.4%	-0.61% (+/- 0.35%)
Sloan[c]	3,830	3,775	3,661	3,606 (+/-22)	-3.1%	-1.50% (+/- 0.60%)
Williamsville[c]	29	28	18	0 (+/-11)	-64.3%	-100.00% (+/- 61.11%)
Erie County	968,532	950,265	919,040	922,129	-3.29%	0.34%

[a] US Decennial Census
[b] American Community Survey, 5-Year Estimates
[c] Villages within the Town boundary
Figures in ( ) in this report represent the margins of error of the 5-year estimate

Age

The age distribution of the population has many impacts on a community, from school enrollment to housing provision to economic development. Here, age data is presented in two ways: the Town's median age and the dependency ratio. Median age provides the midpoint of age distribution in a community, with half the population being older and half younger. From this perspective, we can see if a community is getting older or younger relative to prior time periods. The median age in Cheektowaga has increased from 40.8 year of age in 2000 to an estimated 43.1 years of age during 2012-2016. Over that same time period, Erie County's median age has also increased, from 38.0 years of age in 2000 to 40.4 during 2012-2016. In general terms, Cheektowaga's increasingly older population aligns with the county-wide trend. To provide some perspective, the median age in the United States was 35.3 years old in 2000 and estimated at 37.7 years old during 2012-2016.

Table 4 – Median Age

Year	Cheektowaga	Erie County
2000	40.8	38.0
2010	43.0	40.4
2012-2016	43.1 (+/- 0.9)	40.4 (+/- 0.2)

Although the median age provides important insight into the overall age distribution of the community, it does not provide much detail about important age groups, specifically the working age (18-64); youth (0-17); and elderly population (65+). The dependency ratio is a method to determine the ratio of the working age population to the non-working populations (youth and elderly).

Table 5 – Dependency Ratio

	Cheektowaga			Erie County		
Age Groups	**2000**	**2010**	**2012-2016**	**2000**	**2010**	**2012-2016**
0-17	35.0	30.2	27.5 (+/- 1.7)	40.6	34.6	26.4 (+/- 0.1)
18-64	70.1	62.1	57.4 (+/- 2.6)	67.2	59.6	59.5 (+/- 0.1)
65+	35.0	31.9	29.9 (+/- 1.4)	26.6	25.1	33.1 (+/- 0.1)

In 2012-2016, for every 100 working age residents, there were an estimated 57.4 non-working residents. And for every 100 working age residents, there were 27.5 youths and 31.9 elderly residents. The trend since 2000 can be understood in multiple ways. First, one might interpret it as a positive to have the number of dependents decrease, or be a smaller portion of the overall population, suggesting more people are of working age. On the other hand, declining numbers of school age children represents a challenge to local school districts as enrollments decline (see Section 3.7) and to the community as a whole as fewer younger residents represent less potential future residents who were born in Cheektowaga and may prefer to remain in the community.

Education

The trend in educational attainment in Cheektowaga generally mirrors the trend in Erie County and nationally as more and more people attend post-secondary institutions. The following tables provide the distribution of population in Cheektowaga and Erie County by highest educational attainment for the population ages 25 and over. The general observation here is that since 2000, the number of residents who have not graduated from high school has declined. Similarly, the proportion of the population that has a bachelor's, Master or professional degree, or doctorate has increased from 16% in 2000 to an estimated 22% during 2012-2016.

Table 6a – Cheektowaga Educational Attainment for the Population 25+

	2000	2007-2011	2012-2016
No Diploma	10,923 (18.9%)	6,387 (11.9%) (+/-487)	5,013 (9.2%) (+/-455)
High School Graduate	20,928 (36.2%)	19,809 (36.8%) (+/-736)	20,296 (37.1%) (+/-730)
Some College	10,976 (19.0%)	10,638 (19.8%) (+/-609)	10,780 (19.7%) (+/-611)
Associate	5,757 (10.0%)	6,461 (12.0%) (+/-488)	6,521 (11.9%) (+/-456)
Bachelor	6,252 (10.8%)	7,026 (13.1%) (+/-472)	7,665 (14.0%) (+/-509)
Master/Professional	2,719 (4.7%)	3,290 (6.1%) (+/-391)	4,094 (7.5%) (+/-404)
Doctorate	262 (0.5%)	225 (0.4%) (+/-108)	284 (0.5%) (+/-97)

Table 6b – Erie County Educational Attainment for the Population 25+

	2000	2007-2011	2012-2016
No Diploma	109,120 (17.1%)	69,442 (11.1%) (+/-1,775)	58,410 (9.2%) (+/-1,516)
High School Graduate	190,461 (29.9%)	183,085 (29.4%) (+/-2,249)	180,119 (28.2%) (+/-2,284)
Some College	121,263 (19.0%)	116,094 (18.6%) (+/-2,165)	118,400 (18.6%) (+/-2,185)
Associate	60,320 (9.5%)	68,713 (11.0%) (+/-1,791)	75,504 (11.8%) (+/-1,586)
Bachelor	92,112 (14.4%)	103,362 (16.6%) (+/-1,906)	113,511 (17.8%) (+/-1,996)
Master/Professional	58,263 (9.1%)	74,314 (11.9%) (+/-1,636)	82,543 (12.9%) (+/-1,508)
Doctorate	6,137 (1.0%)	8,210 (1.3%) (+/-557)	9,313 (1.5%) (+/-571)

Income

Income is an important characteristic of a given population and has important impacts on local government planning, economic development, and housing. In order to fully understand the importance and implications of income, it is necessary to examine a few key measures, specifically total income, per capita income, and median household income, as well as the rate of poverty.

Per capita income (Table 7) provides an important measure of income in the community. First, it theoretically tells us how much money each person in the community earns and allows us to track that over time. Secondly, per capita income is simply the total income in a community divided by the population, which means we can also use it to examine the change in total income in the community over time.

Per capita income in 2016 is estimated to have increased since 2010 by approximately $760. This reversed the trend seen during the 2000s when per capita income decreased. Both of those trends were also evident in Erie County, although per capita income in the County remains slightly higher than in Cheektowaga.

Although per capita income provides a simple way to understand income change in a community, it has one major drawback for communities undergoing population decline. Persistent declines in population (and households, see section 3.5) can strip income out of a community. Therefore, it is worthwhile to examine the change in total income in a community. In Cheektowaga, the decline in population and households has resulted in a significant decline in total income in the community, estimated to have decreased by $323,025,655 since it peaked at $2,281,569,555 in 2000.

Table 7 – Per Capita and Total Income

	Per Capita Income		Total Income		
Year	**Cheektowaga**	**Erie County**	**Cheektowaga**	**Erie County**	**Cheektowaga Share of Total County Income**
2016	$26,756 (+/- $1,777)	$31,450 (+/- $792)	$1,958,543,900 (+/- $126,353,454)	$28,967,352,200 (+/- $729,607,746)	6.8%
2010	$25,997 (+/- $1,887)	$27,956 (+/- $467)	$1,950,236,326 (+/- $154,043,964)	$25,681,714,711 (+/- 429,887,519)	7.6%
2000	$28,525	$29,333	$2,281,569,555	$27,874,132,758	8.2%
1990	$24,446	$25,351	$2,062,973,216	$24,554,287,831	8.4%

All income reported in 2016 dollars

As much as can be learned from per capita and total income, these figures do not provide much detail on households, a key component for local governments as it relates to service provision, economic development, and housing. Median household income (Table 8) is estimated to have declined since 2000 by approximately $5,600. In simple terms, the bottom 50% of households are making less today than they were in 2000. This can be a significant concern for communities with high owner-occupancy rates as it limits maintenance and investment in housing stock. Further detailed household data is provided in Section 3.5.

Table 8 – Median Household Income, 1990 - 2016

Year	Cheektowaga	Erie County
2016	$48,994 (+/- $1,593)	$52,744 (+/- $481)
2011	$50,718 (+/- $1,471)	$52,100 (+/- $604)
2000	$54,652	$55,573
1990	$54,345	$52,357

All income reported in 2016 dollars

Poverty in Cheektowaga and Erie County has increased since 1990, when the rate of poverty was 5.1% in the Town and 12.23% in Erie County. In 2016, poverty in Cheektowaga was estimated to be 10.8% (+/- 1.1%) whereas it was 14.7% (+/- 0.4%) in the County. The trend in Cheektowaga mirrors a national trend where the poverty rate was 13.1% in 1990 and has risen to 14.10% (+/- 0.1%) in 2016. The poverty issue, once consider merely an urban or central issue, has begun to slowly spread across suburban communities as well, with first ring suburbs particularly impacted.

Table 9: Persons in Poverty 1990 – 2012-2016

	Cheektowaga		Erie County	
Years	**Population**	**Persons in Poverty**	**Population**	**Persons in Poverty**
2012-2016	73,601 (+/- 194)	7,937 (10.8%)	895,999 (+/- 1,083)	132,072 (14.7%)
2007-2011	74,564 (+/- 144)	6,852 (9.2%)	892,646 (+/-1,465)	126,609 (14.2%)
2000	79,326	5,124 (6.7%)	922,582	112,358 (12.2%)
1990	83,940	4,255 (5.1%)	944,942	115,613 (12.2%)

Households

As mentioned above, decline in total income in Cheektowaga can be attributed to the loss of households and population. Since 2000, the number of total households in the Town has declined by approximately 842. Coupled with this is a decline in average household size. This is likely due to changes in the types of households (Section 3.5).

Table 10 – Households

Years	Cheektowaga	Average HH Size	Erie County	Average HH Size
2012-2016	33,346 (+/- 495)	2.20 (+/- 0.04)	382,822 (+/- 1,372)	2.34 (+/- 0.02)
2007-2011	32,814 (+/- 447)	2.27 (+/- 0.04)	379,478 (+/- 1,643)	2.35 (+/- 0.02)
2000	34,188	2.31	380,873	2.41
1990	33,904	2.47	376,994	2.50

3.4 HOUSING AND NEIGHBORHOODS

According to the 2012-2016 U.S. Census American Community Survey (ACS) 5-year estimates, there are approximately 35,797 total housing units in the Town of Cheektowaga. Over 93% (approximately 33,346) of housing units are occupied, with an estimated Town-wide vacancy rate of approximately 6.9%. As discussed in a later section, the majority of vacant units in the Town are now classified as "Other Vacant", which represents a shift from 2000 and 2010 (the two most recent years in which a decennial census was conducted). In both of these decennial census years, the majority of vacant properties in the Town were classified as "For Rent" or "For Sale". The shift to "Other Vacant" may be an

indication that property abandonment and/or foreclosures have trended upward in the Town (see below).

Among occupied housing units, more than seven out of every ten units are owner-occupied. Homeownership rates in the Town—and, moreover, the fraction of the population living in owner-occupied units—are slightly higher relative to Erie County (75% and 69%, respectively); but are slightly lower relative to comparable suburban communities in the County, as shown in Table 11.

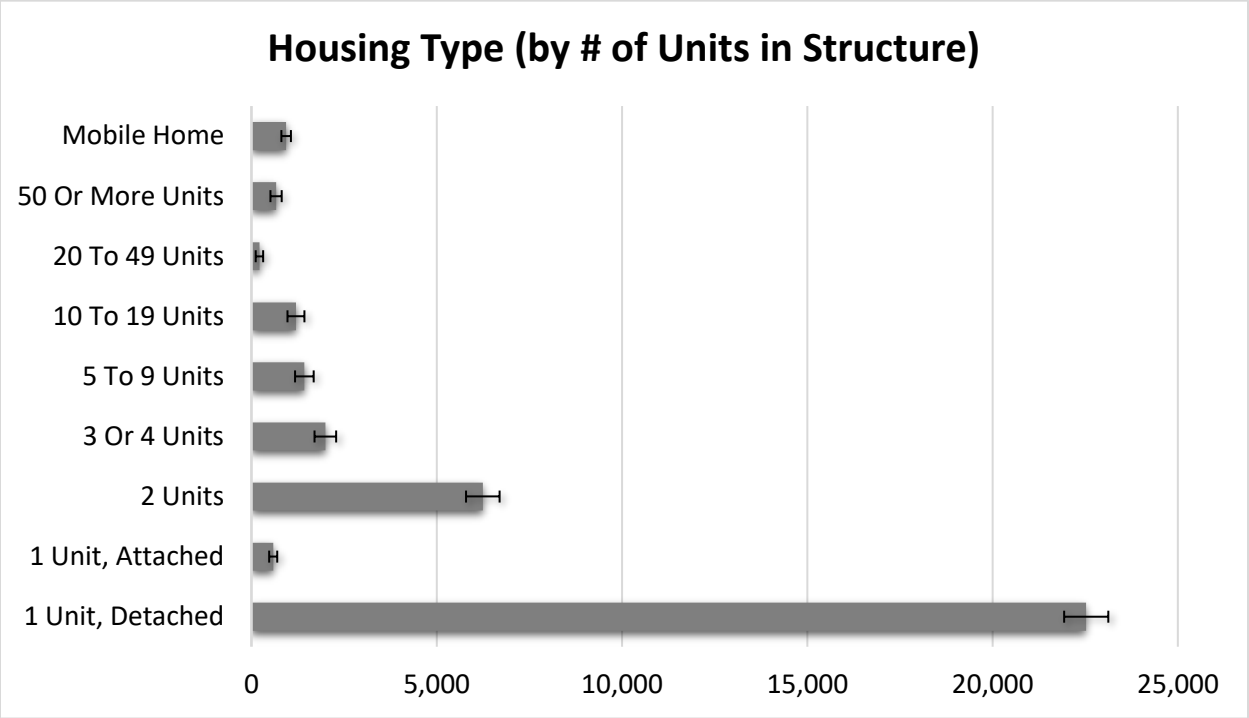
Table 11 – Percentage of Homeownership by Community

Geography*	Population Living in Occupied Housing Units	% of Population Living in Owner Occupied Units	Occupied Housing Units	% of Occupied Units that are Owner Occupied
Cheektowaga	73,488 (+/- 210)	74.0% (+/- 1.4%)	33,346 (+/- 495)	70.5% (+/- 2.4%)
Town of Amherst	116,403 (+/- 472)	75.9% (+/- 1.1%)	49,735 (+/- 696)	71.3% (+/- 0.8%)
Town of Lancaster	42,107 (+/- 176)	83.0% (+/- 1.9%)	17,108 (+/- 326)	77.3% (+/- 1.3%)
Town of Tonawanda	72,611 (+/- 161)	75.9% (+/- 1.6%)	32,801 (+/- 519)	71.5% (+/- 1.4%)
Town of West Seneca	44,705 (+/- 228)	81.9% (+/- 1.6%)	19,741 (+/- 412)	77.0% (+/- 1.0%)
City of Buffalo	249,899 (+/- 533)	43.0% (+/- 1.1%)	109,668 (+/- 1,035)	41.4% (+/- 0.8%)
Erie County	894,228 (+/ 1,023)	69.1% (+/- 0.4%)	382,822 (+/- 1,372)	65.3% (+/- 0.3%)

**All Towns, not including Cheektowaga, are U.S. Census Bureau County Subdivisions and include Villages*

The overwhelming majority (64.5%) of the housing stock in Cheektowaga consists of single-family units, with 62.9% of units being classified as single-family, detached homes, and 1.6% classified as single-family, attached homes (e.g., townhomes or rowhomes). Approximately 17% of units are classified as two-family, while apartments in buildings containing three or more units account for another 15% of the housing stock. Mobile homes make up the remaining 2.6% of the housing stock (Figure 1)

Figure 1 – Housing Type



The Census ACS estimates that roughly half (49.8%) of the Town's housing stock was built between 1950 and 1969. Moreover, nearly nine out of every ten units (89.5%) were built prior to 1980, indicating that the Town is characterized by an older housing stock. The median year built of a housing unit in Cheektowaga is 1960, suggesting a median age in 2018 of around 58 years old. Nevertheless, new housing is still being built in the Town, with more than 900 new units added to the stock since the year 2000 (Figure 2).

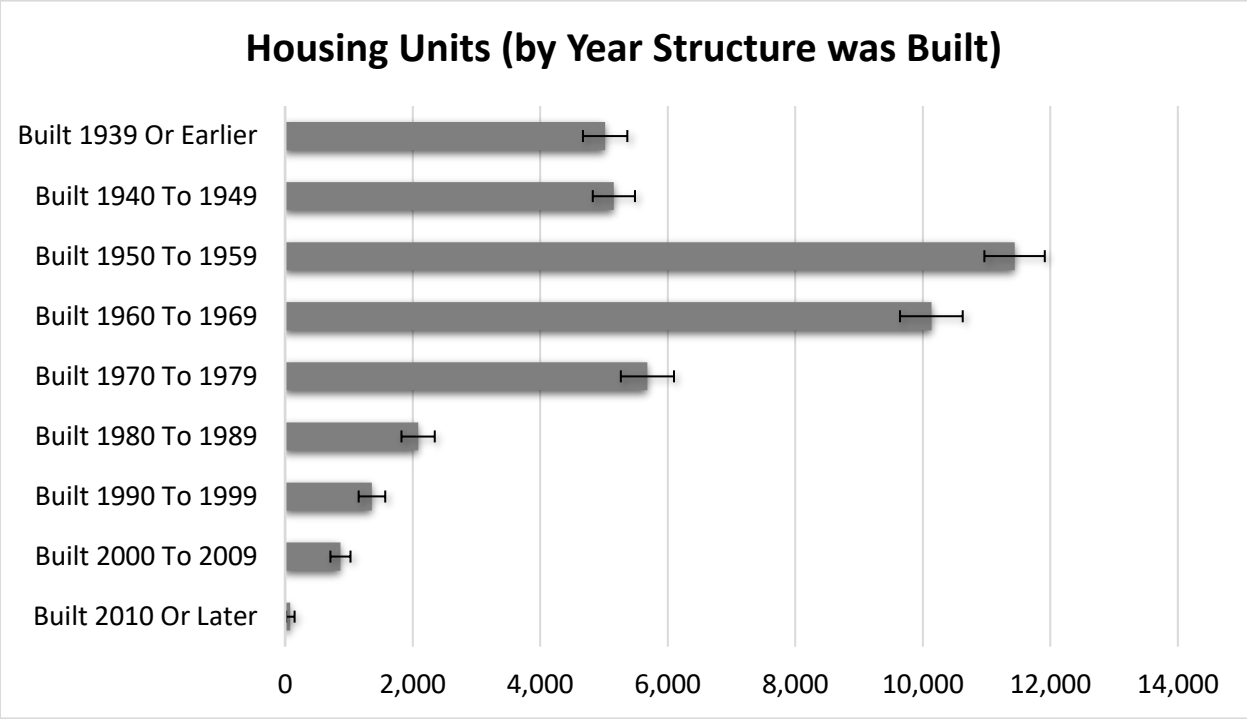
Building Permit Trends

The U.S. Census Building Permit Survey provides annual and monthly data on permits for residential construction that were issued by permitting jurisdictions (e.g., municipalities) during the relevant time period. Jurisdiction-reported data for Cheektowaga for the years 2000-2016[1] are summarized in Figures 4 and 5. Over the 17-year period from 2000 through 2016, more than 900 units were added to the Town's housing stock. Single-family construction has remained relatively stable, with construction in most years coming close to the median of 17 units added. Still, some anomalies exist, with a low of two units built in 2011 and a high of 54 units built in 2002. In addition, per the Building Permit Survey data, the Town saw several investments into multi-family apartments (five or more units per building) since

[1] Data for 2016 are reported as "preliminary". The data refer to permits issued for the Town of Cheektowaga proper, and will not necessarily reflect permitting activities in the parts of Depew, Sloan, and Williamsville that lie within the Cheektowaga County Subdivision. Thus, the total number of units permitted/constructed reported in this section will not perfectly match with the Census ACS totals for units constructed since the year 2000. Nevertheless, it is important to note that the values are highly complementary. Indeed, the Building Permit Survey data show that 906 units were built in Cheektowaga proper between 2000 and 2016, whereas the ACS estimates show that approximately 950 units were added to the housing stock in Cheektowaga *and* the portions of Sloan, Depew, and Williamsville that lie within the Cheektowaga County Subdivision (refer to Figures 3 and 4).

2000. Most recently, 103 units distributed across 13 buildings were reported in 2013, and a high of 197 units were added to 5-plus unit apartment buildings in 2003.

Figure 2 – Housing: Year Built



The construction value of the residential developments described in Figure 4 has been significant (Figure 5), with a median of $3,122,211 (in nominal dollars—meaning that values have not been adjusted for inflation) per year in single-family construction value added between 2000 and 2016. The investments into multi-family housing described above, particularly in 2003 and 2013, are linked to substantial spikes in construction value in Cheektowaga.

Figure 3 – New Housing Construction (# of Units)

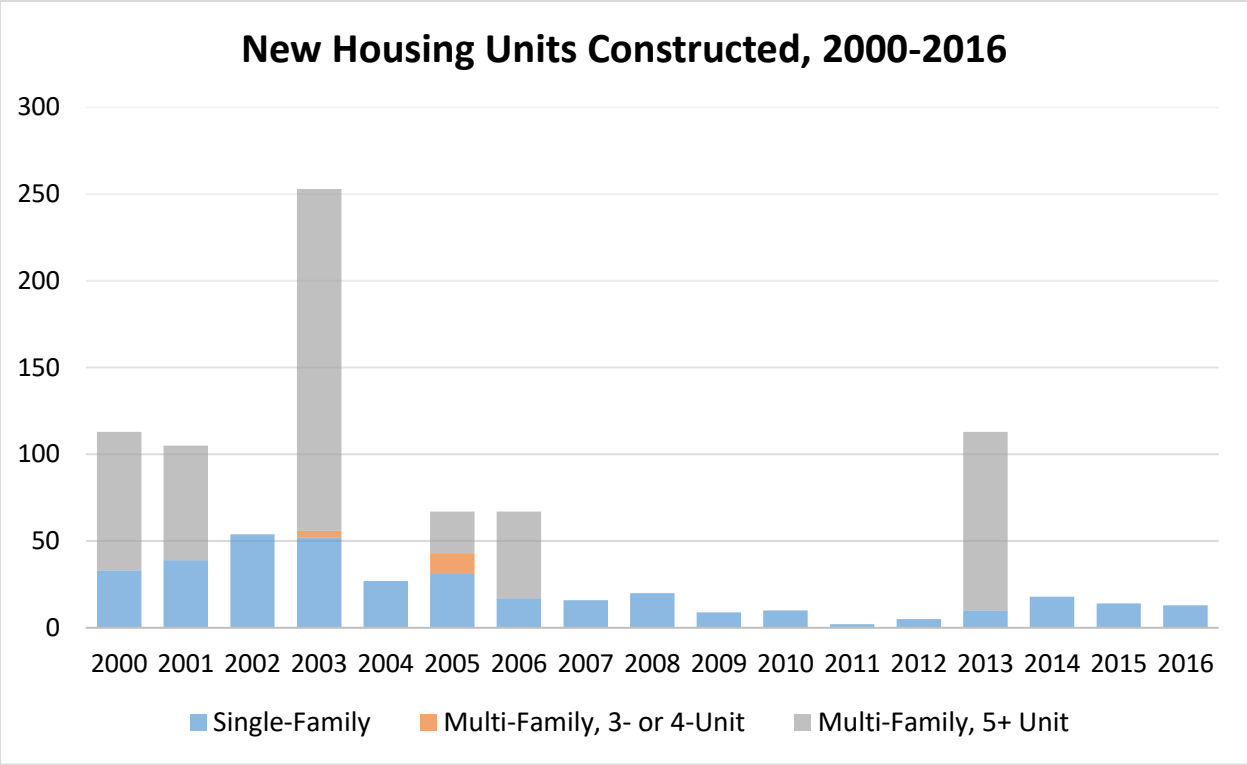
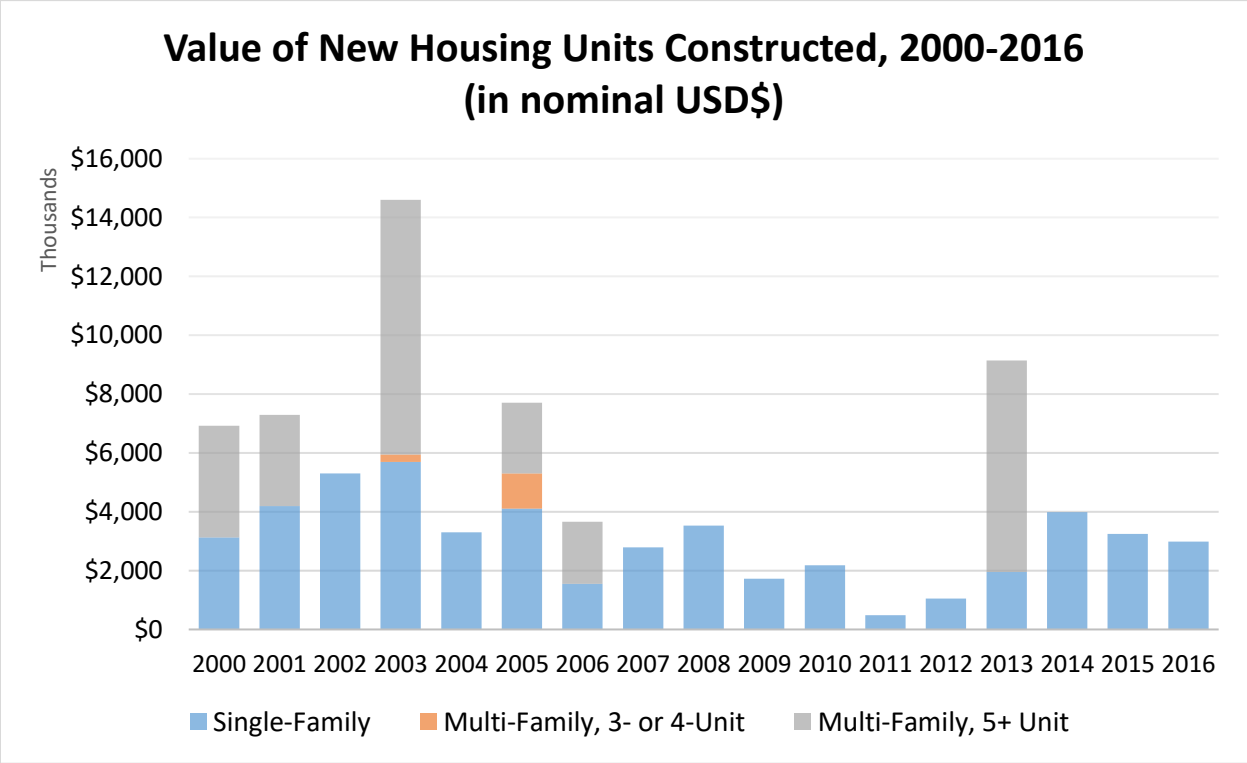


Figure 4 – Value of New Housing Construction



Given that approximately two out of every three housing units in Cheektowaga are single-family (SF) residences (see Fig. 1 above), it is worthwhile to evaluate the strength of the Town's SF residential housing market in the region. To do so, Figure 5 maps a custom housing market position index (HMPI) that the firm Neighborhood Planners created for Erie County. The HMPI is a composite index that compares the (1) price per square foot, (2) ratio of sold to list price, and (3) number of days on market for SF residential sales from the multiple listing service (MLS) in a given municipality to the same variables measured for Erie County as a whole. The SF residential sales transaction data needed to create the index were originally obtained from the Buffalo Niagara Association of Realtors (BNAR) for the period 2005-2016.

The HMPI weights each SF residential transaction according to the time period in which it occurred, with more recent sales receiving the highest weight. The final, overall HMPI is a score that reveals some valuable information about the health of a municipality's SF residential housing market. Based on the way the score is constructed, the typical (overall) value for a housing market in Erie County is equal to 100. Values above 100 indicate markets that are, on average, healthier than the typical Erie County SF residential housing market from 2005-2016; while values below 100 describe markets that are, on average, less competitive than the average Erie County SF residential housing market. As Figure 5 shows, for the full period from 2005-2016, Cheektowaga ranks in the second lowest category of overall HMPI. In other words, the Town is in the bottom 50 percent of the housing market health measure. Table 12 expands on this information, to show the HMPI for Cheektowaga and comparable municipalities over time, along with each municipality's HMPI rank (out of 43, with 1 being the highest) and number of SF residential transactions that factored into the HMPI calculation.

As Table 12 makes clear, the Town of Cheektowaga has had one of the more active SF residential housing markets in Erie County over the past decade-plus. Indeed, the Town is third only to Buffalo and Amherst, respectively, in the number of SF residential properties sold on the MLS between 2005 and 2016. Moreover, in the earliest portion of the time period used by Neighborhood Planners to construct the HMPI (specifically, from 2005 to 2007), Cheektowaga had one of the most competitive SF residential markets in Erie County. However, the Town's strong market performance in the middle of the first decade of the 2000s seems to be somewhat anomalous. Since that time, for instance, Cheektowaga's SF residential housing market has ranked consistently in the lower third of Erie County municipal markets.

Figure 5 – Relative position of residential (SF) housing market in Erie County (2005-2016), by Municipality

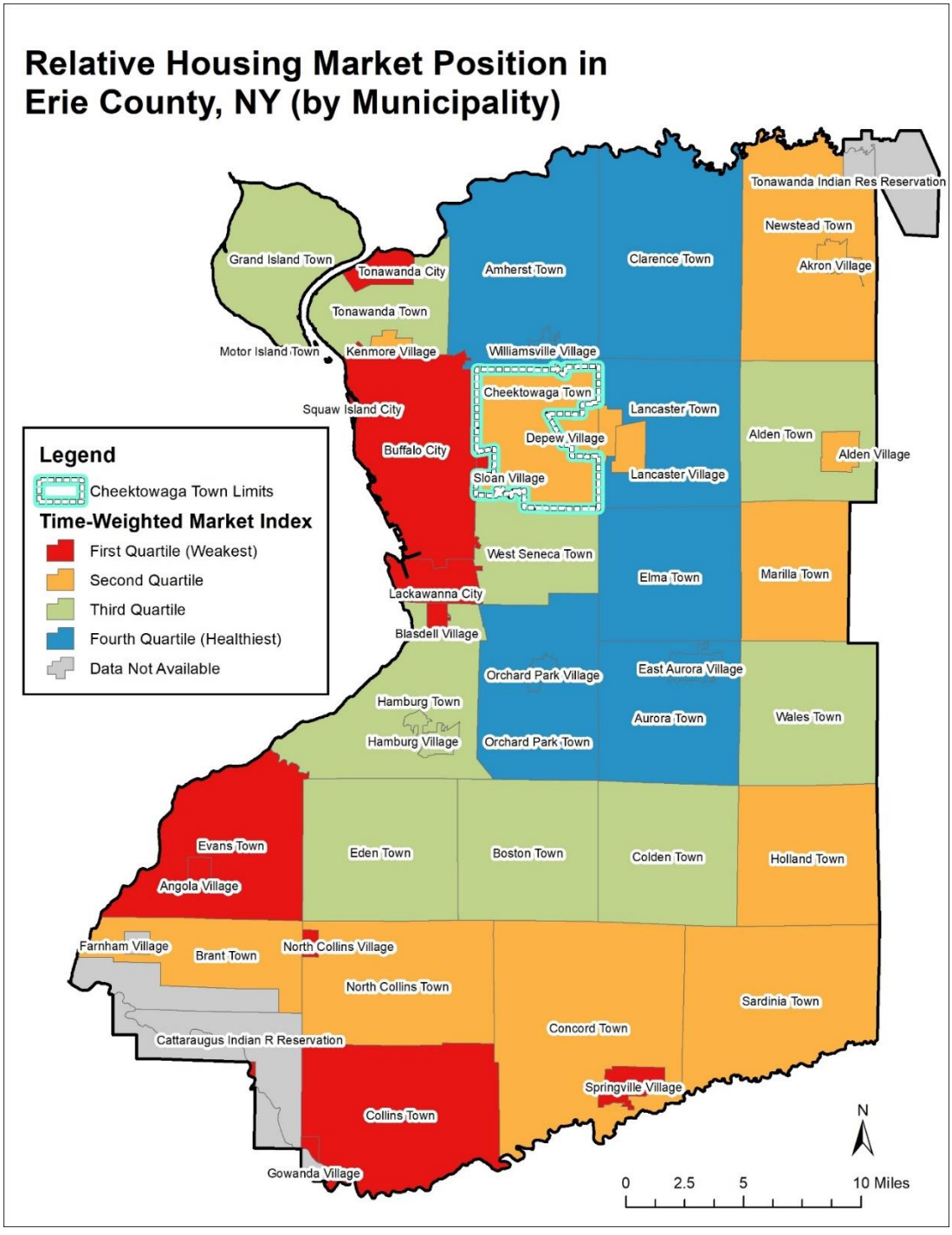


Table 12 – Single Family Residential Housing Market Performance in Erie County
(rank is out of 43: 1 = highest; 43 = lowest)

Municipality	HMPI, 2005-2007 (rank)	# of Transactions, 2005-2007	HMPI, 2008-2010 (rank)	# of Transactions, 2008-2010	HMPI, 2011-2013 (rank)	# of Transactions, 2011-2013	HMPI, 2014-2016 (rank)	# of Transactions, 2014-2016	Overall HMPI (rank)	# of Transactions, 2005-2016
Town of Cheektowaga	107 (9th)	2,169	94 (30th)	1,988	95 (30th)	1,833	95 (29th)	2,528	96 (29th)	8,518
Town of Amherst	106 (12th)	3,235	103 (12th)	3,048	105 (9th)	3,036	106 (9th)	3,379	105 (9th)	12,698
Town of Lancaster	110 (5th)	570	112 (2nd)	599	112 (1st)	615	110 (5th)	672	111 (4th)	2,456
Town of Tonawanda	100 (22nd)	1,740	99 (19th)	1,774	100 (22nd)	1,914	100 (18th)	2,136	100 (18th)	7,564
Town of West Seneca	100 (21st)	983	98 (20th)	1,027	100 (23rd)	985	100 (19th)	1,311	100 (19th)	4,306
City of Buffalo	93 (43rd)	3,865	84 (41st)	2,961	87 (40th)	2,435	90 (37th)	2,942	88 (40th)	12,203
Erie County Average	100 (22nd)	21,169 Total	102 (22nd)	19,016 Total	99 (22nd)	18,687 Total	99 (22nd)	22,003 Total	100 (22nd)	80,875 Total

3.5 ECONOMIC DEVELOPMENT

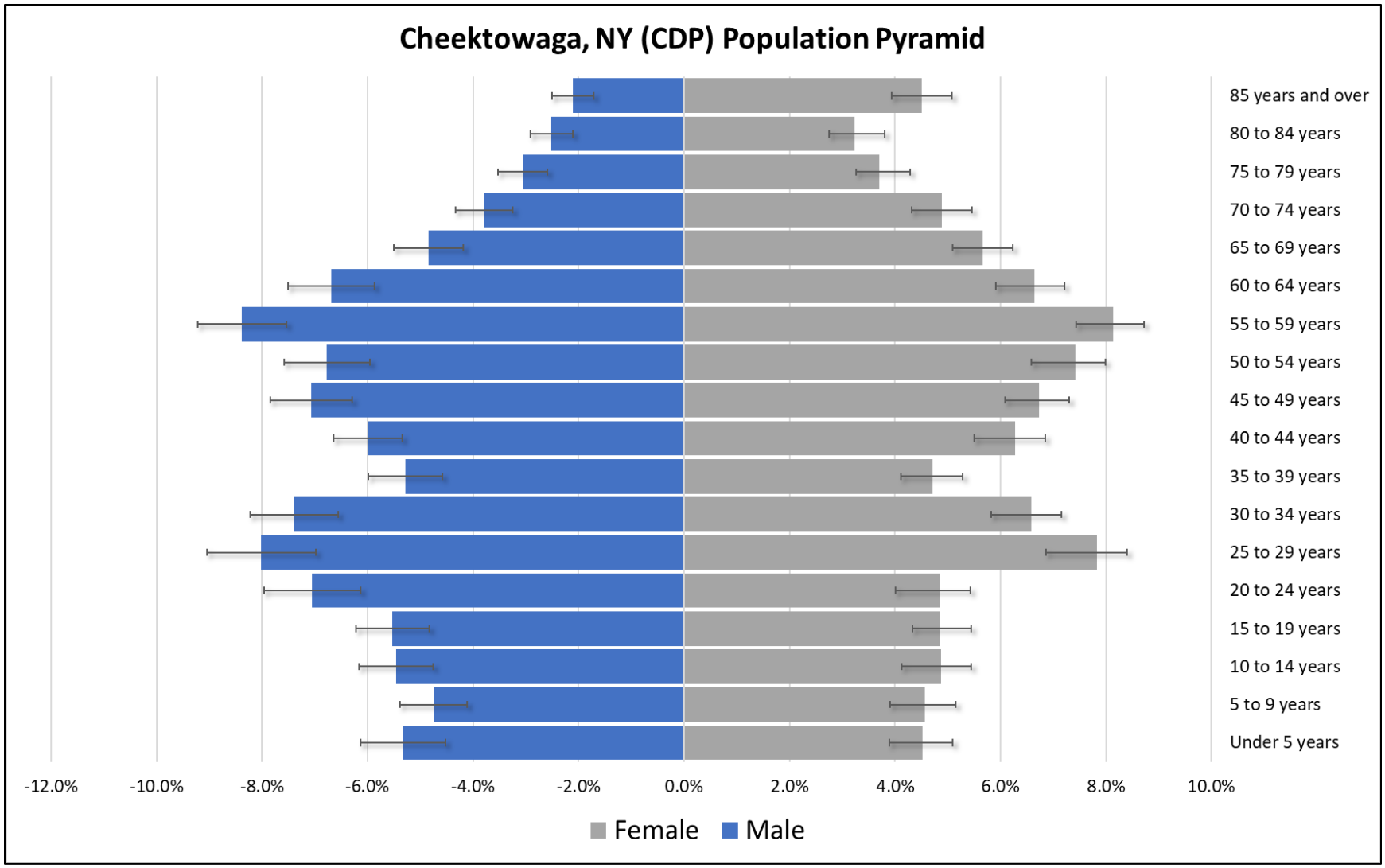
An Aging Population

In the present and near future, the United States will undergo a profound demographic shift as baby-boomers enter retirement. The economic consequences will be enormous. Consumer spending patterns will shift, while companies providing those goods and services will need to re-tool their workforce to deal with the exit of experienced talent and entrance of new talent. An aging population requires a significantly different set of services (both public and private). These include medical, public transportation, personal care, and social services. The comprehensive plan must account for this change.

Figure 6 shows a population pyramid for the Town of Cheektowaga. These data reflect the most recent set of statistics available for Cheektowaga proper (the 5-year ACS estimates for 2012-16). The ACS is sample-based and should not be considered a substitute for the accurate population counts provided by the decennial census. However, because the ACS reports margins of error (MOE) along with their estimates, it is possible to visualize the level of uncertainty in the estimates using error bars. The lines that are found near the end of each bar in the population pyramid in Figure 6 show 90% confidence intervals for the population estimates in each age/sex category.

Grouping people by age and sex can often lead to insights about local spending patterns, for example, explaining significant sales of such goods as diapers or dentures. The population pyramid in Figure 6 illustrates how Cheektowaga's population is slightly top-heavy, with approximately 19% of the population aged 65 years or over, and 14.5% aged 14 years or younger. Nonetheless, the overall shape of the pyramid is somewhat rectangular, which indicates a stationary or slow growth population. The exceptions to the rectangular shape occur in (1) bulges among the Millennial (25-34 years) and Baby Boomer (55-64 years) generations, and (2) a characteristic tapering off at the top of the pyramid. The upshot is that, given the current age distribution in Cheektowaga, the Town is potentially poised for slow population growth in the near future. The firm SimplyAnalytics (http:// simplyanalytics.com), for example, forecasts that the Town's population will increase by 3.68% over the next five years. Given that the population in Cheektowaga has decreased consistently since 1990 (refer to Table 2), this level of projected growth is plausibly an indicator that the population may be stabilizing around its current level. (Once again, a relatively rectangular population pyramid describes a relatively stationary—neither expanding nor contracting—population).

Figure 6 – Population Pyramid for Cheektowaga



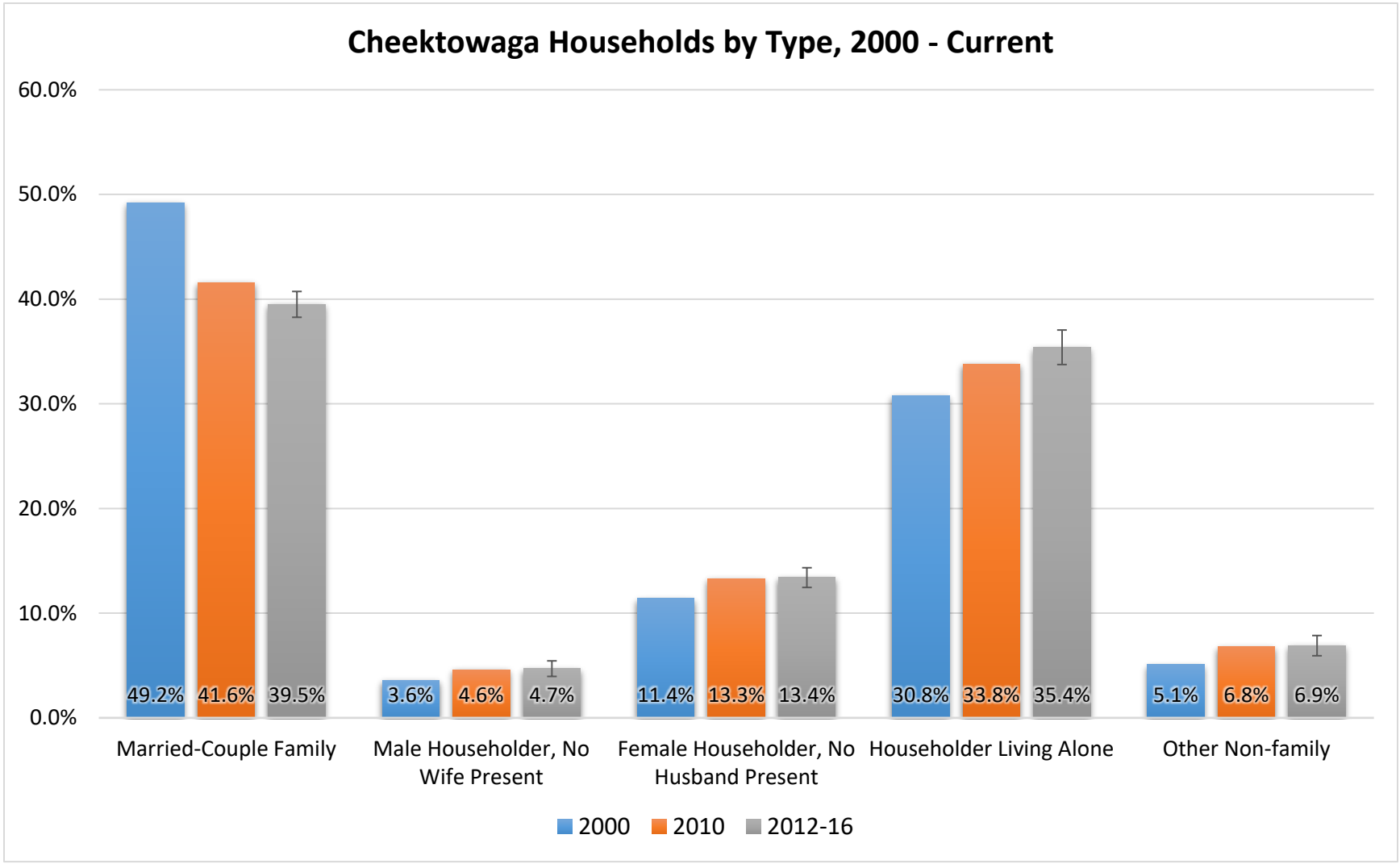
Households by Type

At the start of the new millennium, "traditional" married-couple households accounted for about half of all households in the Town of Cheektowaga. Ten years later, that value had ticked down to around 42% according to the 2010 decennial census. And current (2012-2016) ACS estimates indicate that married-couple families now account for around 40% of all households in Cheektowaga. Over the same time period, the percentage of households characterized by individuals living alone has steadily increased from about 31% in 2000 to over 35% according to current ACS estimates. This growth in householders living alone mirrors a national trend and illustrates the changing nature of housing demand among the Town's residents. By extension, it reveals a need for diverse housing types in the future in response to these changing needs.

Table 13 – Change in Household Types from 2000 – Current (2012-16 ACS)

	Change (by number and percent)	
Total Households	-842 (+/- 495)	-2.5% (+/- 1.4%)
Family households (families)	-2,697 (+/- 432)	-12.3% (+/- 2.0%)
Married-couple families	-3,639 (+/- 456)	-21.7% (+/- 2.7%)
Other family, female householder	+584 (+/- 321)	+15.0% (+/- 8.2%)
Non-family households	+1,855 (+/- 630)	+15.1% (+/- 5.1%)
Householder living alone	+1,264 (+/- 577)	+12.0% (+/- 5.5%)
Other non-family	+591 (+/- 324)	+34.4% (+/- 18.8%)

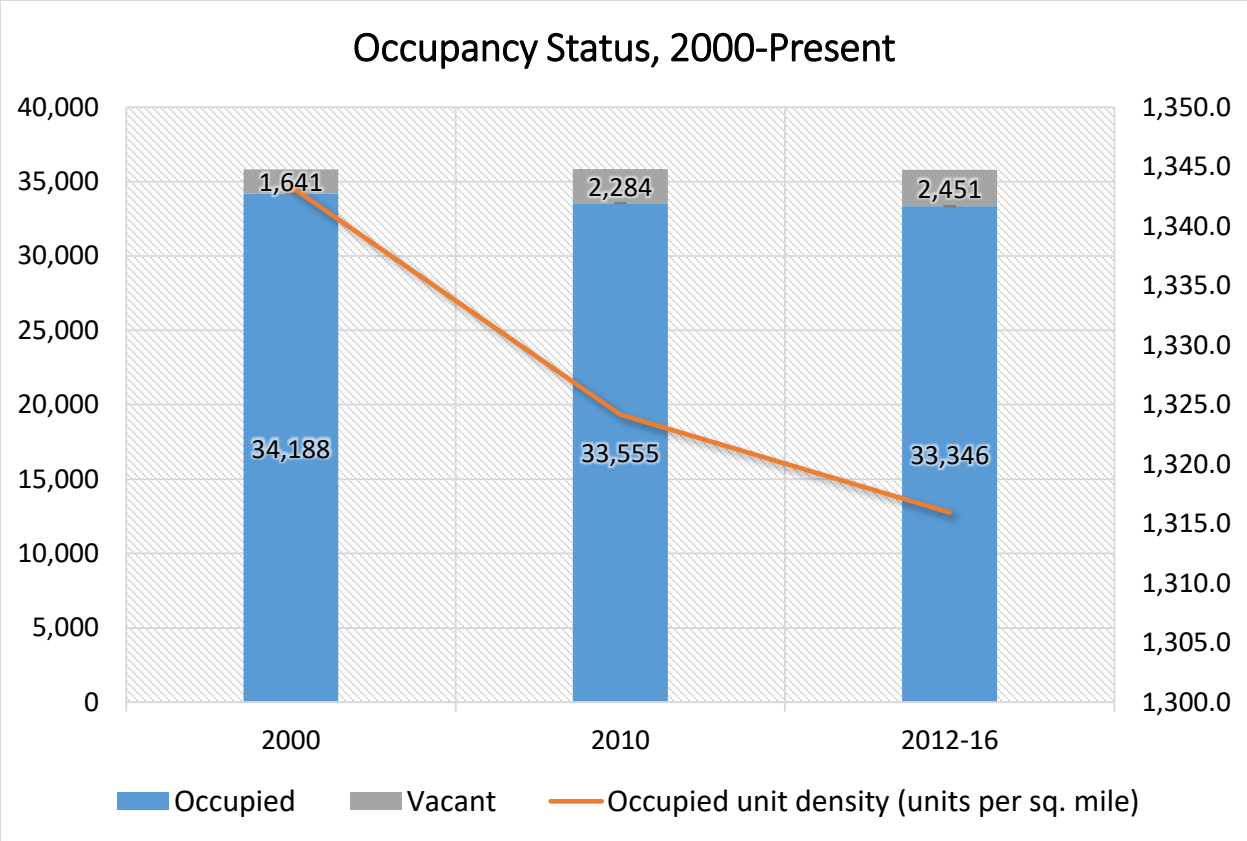
Figure 7 – Households by Type (2000 Decennial, 2010 Decennial, 2012-16 ACS)



Housing Occupancy and Vacancy

In keeping with regional trends, Cheektowaga has experienced a significant increase in housing vacancy. In 2000, 1,641 vacant units (4.6% of the housing stock) were classified as vacant. That fraction rose to 6.4% at the 2010 decennial census, and currently sits at approximately 6.8% (+/- 0.6%). At the same time, the overall housing stock has remained relatively constant. There were 35,829 total housing units in 2000, and ACS estimates indicate that the current housing stock is not much different from that level, consisting of approximately 35,797 units. The implication is that land *actively in use* for residential purposes is on a downswing. More specifically, to the extent that *occupied unit density*, or the number of occupied housing units per square mile, is an indicator of active residential land use,[2] a relatively static housing stock combined with rising vacancy implies less active residential use. In this case, occupied unit density has fallen from 1,343.3 units per square mile in 2000 to approximately 1,315.9 units per square mile based on current ACS estimates. That is, for a given square mile in the Town, there are nearly 30 fewer housing units that are occupied relative to the year 2000 (Figure 8).

Figure 8 – Housing Occupancy

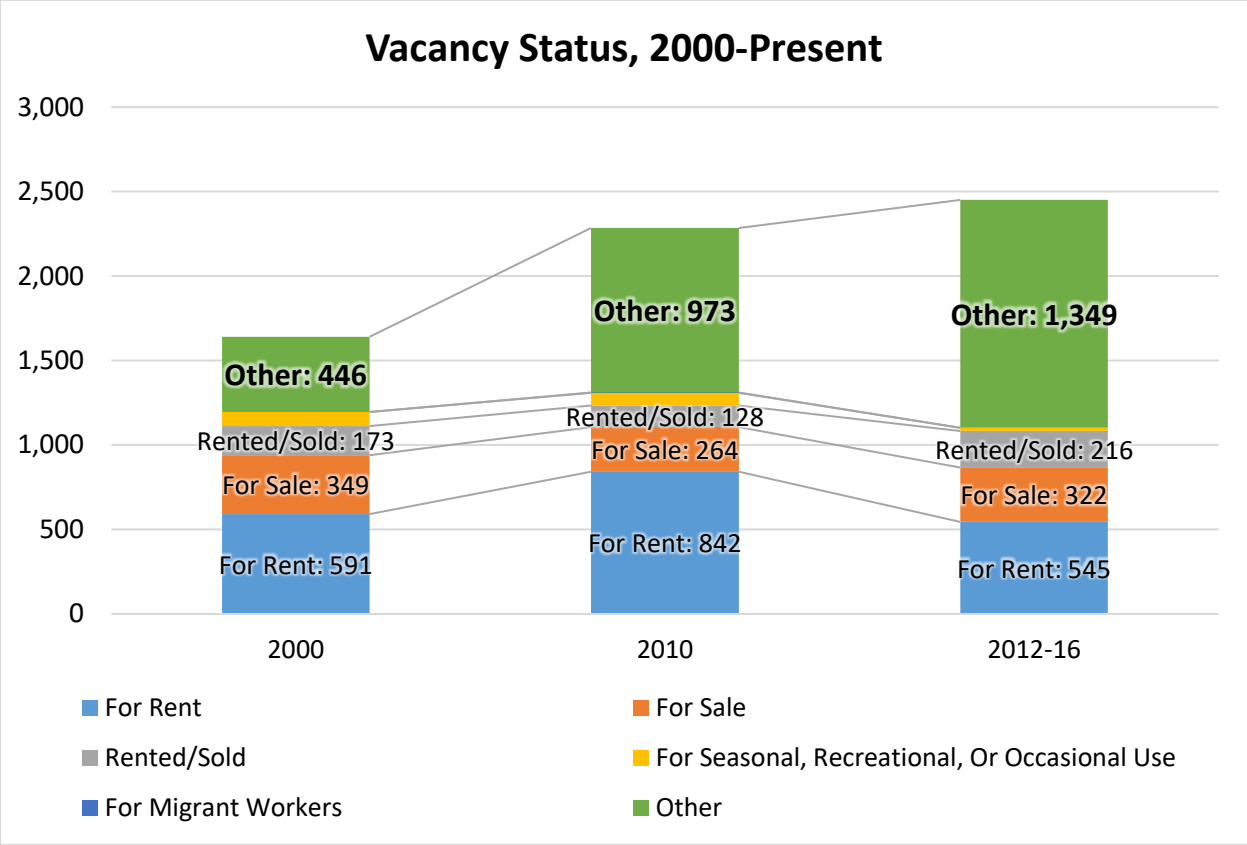


Perhaps more important than the quantitative increase in vacancy is the qualitative change in the Town's vacant units. More specifically, as noted above, the preponderance of vacant units in 2000 and 2010 were classified by the Census Bureau as "For Rent" or "For Sale", meaning that these units were being marketed for the purpose of occupancy (i.e., for active residential land use). In contrast, current ACS data categorize 55% (+/- 5%) of the Town's vacant units as "Other Vacant" (Figure 9). Academic research has argued that the Census Bureau's "Other Vacant" classification is a proxy measure for

[2] See Hollander, Justin B. *Sunburnt cities: The great recession, depopulation and urban planning in the American sunbelt*. Routledge, 2011.

properties that have been foreclosed on and/or abandoned.[3] This proxy definition is widely accepted by planning researchers and spatial analysts and used in empirical research.[4] Issues of property abandonment and foreclosure often require housing strategies and tools that augment more traditional market-based mechanisms.

Figure 9 – Vacancy Status



Regional Employment and Sales Statistics

Data collected from Esri Business Analyst 2016 were used to compute two metrics for industries in Cheektowaga. These metrics, described below, can be used to summarize levels of industry specialization and relative profitability of industries in Cheektowaga compared to the Buffalo-Niagara metropolitan region.

First, a *location quotient* (LQ) is an indicator of how concentrated an industry is or is not in one place relative to its region. Most commonly, the LQ focuses on the number of jobs in a given industry. In this sense, the LQ is computed as:

$$LQ_i = \frac{\#\ of\ jobs\ in\ industry\ i\ in\ Cheektowaga/Total\ \#\ of\ jobs\ in\ Cheektowaga}{\#\ of\ jobs\ in\ industry\ i\ in\ Buffalo\ Niagara/Total\ \#\ of\ jobs\ in\ Buffalo\ Niagara}$$

[3] Schilling, Joseph, and Jonathan Logan. "Greening the rust belt: A green infrastructure model for right sizing America's shrinking cities." Journal of the American Planning Association 74, no. 4 (2008): 451-466.
[4] Weaver, Russell, Sharmistha Bagchi-Sen, Jason Knight, and Amy E. Frazier. *Shrinking cities: understanding urban decline in the United States*. Routledge, 2016.

Put differently, the LQ is a ratio of ratios. The ratio in the numerator describes the share of employment in Cheektowaga accounted for by a particular industry (e.g., warehousing); and the ratio in the denominator describes the share of employment in the overall Buffalo-Niagara region accounted for by that same industry. A LQ value of 1 describes a situation in which the employment in the industry of interest in Cheektowaga mirrors employment levels in that industry in the Buffalo-Niagara region. Values above 1 suggest that Cheektowaga is *specialized* in the given industry relative to the Buffalo-Niagara region; while values below 1 indicate that Cheektowaga is underrepresented in the given industry relative to the Buffalo-Niagara region.

The second metric employed here is referred to below as an *average sales ratio* (ASR). Similar in spirit to the LQ, the ASR draws on Esri Business Analyst 2016 data describing sales volume and number of businesses by industry. More precisely, the total volume of industry sales per business in that industry (i.e., average sales volume) in Cheektowaga is compared to the corresponding measure for the Buffalo-Niagara region. As with the LQ, the comparison is made via a ratio of ratios:

$$ASR_i = \frac{sales\ (\$)\ in\ industry\ i, Cheektowaga / \#\ of\ busineses\ in\ industry\ i, Cheektowaga}{sales\ (\$)\ in\ industry\ i, Buffalo\ Niagara / \#\ of\ busineses\ in\ industry, Buffalo\ Niagara}$$

For ASR, a value of 1 indicates that the average sales of a business in the given industry (e.g., warehousing) in Cheektowaga is exactly equal to the average sales of a related business in the region. Values above 1 indicate that the typical Cheektowaga business in the given industry has stronger sales performance, on average, than a typical business in the region; while values below 1 carry the opposite interpretation.

Figure 10 plots active industries in Cheektowaga based on their respective ASR and LQ values. Industries to the right of the vertical line in the figure are *specialized* in Cheektowaga relative to the Buffalo-Niagara metro (LQ values above 1). Industries above the horizontal line in the figure are characterized by, on average, *strong market performance* in the Buffalo-Niagara region. Those industries that lie in the northeast quadrant of the figure are therefore relatively *established* industries—they are areas in which Cheektowaga specializes, and where Cheektowaga businesses tend to have stronger market performance than related businesses in the region.

Figure 10 – Location Quotients by Industry

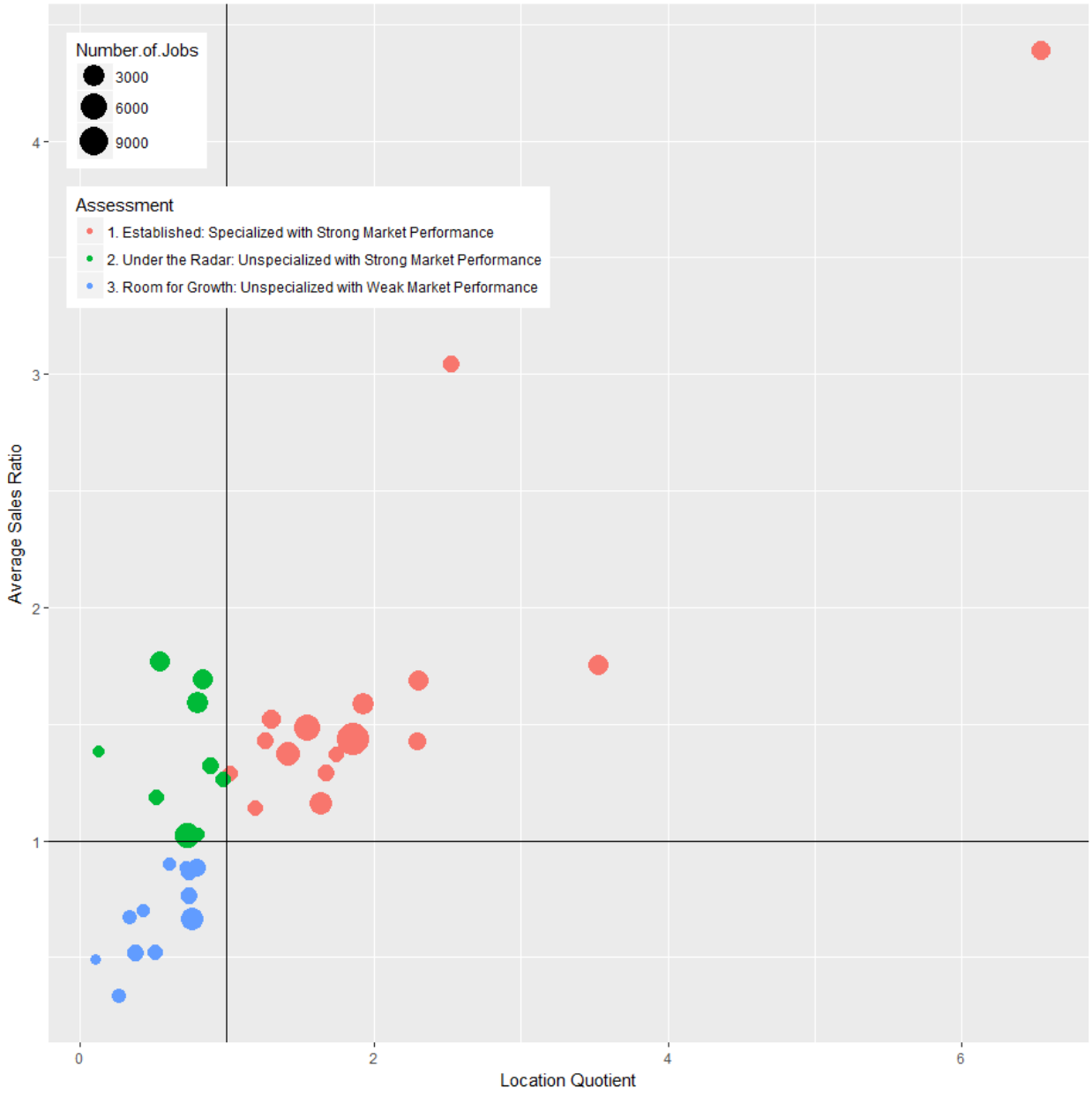


Table 14 unpacks the information from Figure 10 by listing all industries according to their combined *level of specialization* and *average market (sales) performance*. Not surprisingly, given institutions such as Walden Galleria and the Buffalo-Niagara Airport (and nearby hotels), as well as plentiful warehouse square footage, Cheektowaga's established industries include retail, accommodation, and transportation/warehousing.

Table 14 – Location Quotients

1. Established industries. The following industries are *specialized* in Cheektowaga relative to the Buffalo-Niagara Metropolitan region (LQ>1), and are characterized by *strong regional market performance* (Average Sales Ratio>1). These industries are where the Town currently has strengths.	
Accommodation	Furniture/Home Furnishing
Accommodation/Food Service	General Merchandise
Auto Repair/Maintenance	Health and Personal Care
Building Materials/Garden Equipment	Real Estate/Rental/Leasing
Clothing/Accessory	Retail Trade
Electronics/Appliances	Sports/Hobby/Book/Music
Food and Beverage Stores	Transportation/Warehouse
Food Service/Drinking Establishments	Wholesale Trade
2. Under the Radar industries. The following industries are *unspecialized* in Cheektowaga relative to the Buffalo-Niagara Metropolitan region (LQ<1), but are characterized by *strong regional market performance* (Average Sales Ratio>1). The Town's businesses in these industries are profitable in the region, but are somewhat underrepresented in the Town relative to Buffalo-Niagara as a whole.	
Misc. Stores Retailers	Healthcare/Social Assistance
Motor Vehicles/Parts Dealers	Educational Services
Other Service excluding Public Administration	Insurance/Funds/Trusts/Other
Nonstore Retailers	Agriculture/Forestry/Fishing/Hunting
Professional/Scientific/Technical	
3. Room for Growth industries. The following industries are *unspecialized* in Cheektowaga relative to the Buffalo-Niagara Metropolitan region (LQ<1), and are characterized by relatively *weak regional market performance* (Average Sales Ratio<1). These industries are underrepresented in the Town relative to Buffalo-Niagara, and average sales for the Town's businesses in these industries are slightly lower compared to related businesses in the region.	
Construction	Arts/Entertainment/Recreation
Manufacturing	Securities/Commodities Contracts
Admin/Support/Waste Management	Finance/Insurance
Information	Legal Services
Utilities	Central Bank/Credit Intermediary
Gas Stations	Management of Companies/Enterprises

<u>Commercial Retail Specialization</u>

Drawing again on 2016 Esri Business Analyst data, it is possible to describe local and regional spending habits. Retail sales figures (see Tables 15 and 16) are collected and categorized using the North American Industry Classification System (NAICS) which, despite its name, addresses all aspects of the economy including government, retail and service activity, as well as industrial enterprises. NAICS organizes the economy into numerous sectors and sub-sectors corresponding to numeric codes.

NAICS codes are nested and specificity increases with the number of digits. Although this degree of specificity yields some fascinating information—and some NAICS sub-sectors require 8 digits to describe—for smaller geographic areas, the need to suppress data to preserve confidentiality means that even the four-digit level of detail contains significant gaps. That being said, the four-digit level of detail is the focus of this section.

Tables 15 and 16 (below) describe consumer spending for, respectively, Erie County and Cheektowaga:

- **Expected Consumer Expenditures (Market Demand)**

The market demand columns in Tables 15 and 16 provide estimates of what people are expected to spend on goods categorized by industrial sectors and sub-sectors (NAICS) in Erie County and Cheektowaga.[5]

- **Actual Retail Sales (Market Supply)**

The market supply figures in Tables 15 and 16 refer to purchases made at merchants physically located within either the Buffalo-Niagara MSA (Table 15) or Cheektowaga (Table 16). These figures do not reveal anything about where the people making these purchases live.

- **Expected Consumer Expenditures less Actual Retail Sales (Leakage or Surplus)**

This number indicates whether a market opportunity may exist depending on whether the actual retail sales are greater than or less than the expected consumer expenditures.

Consider an example whereby the actual retail sales for cut flowers total $15 million, compared to expected consumer expenditures of $25 million. Given the gap between supply and demand, one can conclude that local households are either spending $10 million on flowers at stores located in other communities (i.e., sales are **leaking** out of the community); or, for whatever reason, they spend below average amounts on flowers. In this case, the calculated figure will be positive: $25 million expected consumer expenditures less $15 million in actual sales yields $10 million, representing potential missed sales.

Missed sales that are actually taking place elsewhere comprise what's known as **leakage**: the sales are "leaking" out of the local economy and into another region. Missed sales that never take place anywhere—perhaps there are no convenient stores selling cut flowers so people purchase wine or chocolate gifts or do without—are potentially available to an enterprise capable of inducing demand. When missed sales are significant enough to support an enterprise offering these goods, an opportunity awaits investors willing to accept the associated risks.

To continue with the cut flowers example, if, conversely, actual cut flower sales total $35 million compared to expected consumer expenditures of $25 million, then one can conclude that either households located elsewhere are coming to the community to buy fresh cut flowers (to the tune of $10 million annually); or, local households are spending an extraordinary amount on flowers! In this case, the calculated figure will be negative: $25 million expected consumer expenditures less $35 million in actual sales yields -$10 million, representing a surfeit of sales. Higher than expected sales represent what is known as **surplus**: the sales are being captured from other areas by stores doing business within the local economy.

Communities like Cheektowaga that include regional malls often demonstrate surplus/excess capture across many retail categories, because people from other nearby towns cross municipal borders to shop. Super-regional and destination retail stores (e.g., a major factor outlet cluster) can capture sales from an extremely large market area; Cabela's, for example, is known for its enormous shed.

The type of product also has an influence. Cut flowers are fragile and difficult to transport, so people buy them close to where they will be used (home, the hospital, the graveyard, the party, etc.). People buying cut flowers on the spur of the moment (as opposed to, say, for a wedding) will make do with whatever selection is available that day. Some more durable goods, however, are subject to a more

[5] For information on how these data are calculated, see: https://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf

thorough review—comparison shopping—and are easy to transport. Stores selling these goods often benefit from proximity to other stores offering the same products because people will go where they can easily find a wide selection to consider: groupings appeal to consumers looking for a perfect fit. These "agglomeration" benefits are why shoe stores and car dealers locate near each other. For these uses, excess capture is a sign than more stores of the same type should locate nearby.

To summarize how to interpret the figures, **negative** numbers in Tables 15 and 16 show that area stores sold more than what people within that geography were expected to buy. Unless there is a compelling reason why local households would be buying unusually large quantities of those goods (perhaps the local gossip columnist always reports on the flower arrangements at area events), negative figures generally suggest that retail stores in that sector are attracting customers from outside the area.

Positive numbers show that local stores are selling less than what people within that geography were expected to buy. Unless there is a compelling reason why local households would be buying unusually small quantities of these goods (perhaps the area's outstanding Allergy Hospital attracts patients who live nearby and cannot tolerate flowers), retail stores in that sector are losing sales to their counterparts elsewhere.

Some of the major takeaways from Tables 15 and 16, which are summarized graphically in Figure 11 by showing Leakage/Surplus indices from Esri Business Analyst, include:

- Cheektowaga is extremely attractive to consumers from outside the area in such sectors as Furniture and Home Furnishings Stores, Sports, Department Stores, and Clothing Stores, among others.
- Consumers in Cheektowaga are spending less than would be expected at Florists, Bookshops, Nursery and Garden Centers, Used Good Stores, Beer/Wine/Liquor Stores, and Gas Stations.

Note that the Leakage/Surplus Factor visualized in Figure 11 is a unitless index that ranges from -100 (market with complete surplus, i.e., there are no local shoppers) to +100 (market with complete leakage, i.e., there are no local retailers).

Table 15 – Buffalo-Niagara MSA Consumer Spending and Retail Sales

NAICS-3	NAICS-4	Market Demand (Expected Consumer Expenditures) in 2015	Market Supply (Retail Sales) in 2015	Difference (Positive = Surplus, Negative = Leakage)
Motor Vehicle Parts and Dealers-441	Automotive dealers-4411	$3,095,237,175	$2,933,422,440	$161,814,735
	Other motor vehicle dealers-4412	$277,856,334	$254,229,473	$23,626,861
	Automotive parts/accessories/tire stores-4413	$215,387,078	$228,969,740	($13,582,662)
	Total	$3,095,237,175	$3,416,621,653	($321,384,478)
Furniture and Home Furnishings Stores-442	Furniture stores-4421	$276,582,095	$392,025,570	($115,443,475)
	Home furnishings stores-4422	$238,429,591	$182,050,303	$56,379,288
	Total	$515,011,686	$574,075,873	($59,064,187)
Electronics and Appliance Stores-443	**Total**	$914,346,839	$748,737,492	$165,609,347
Building Material, Garden Equipment and Supply Stores-444	Building material and supply dealers-4441	$813,891,646	$716,288,848	$97,602,798
	Lawn and garden equipment and supply stores-4442	$84,664,912	$68,370,275	$16,294,637
	Total	$898,556,558	$784,659,123	$113,897,435
Food and Beverage Stores-445	Grocery stores-4451	$2,447,208,219	$3,133,449,903	($686,241,684)
	Specialty food stores-4452	$256,800,291	$359,776,994	($102,976,703)
	Beer, wine, and liquor stores-4453	$199,413,545	$143,877,981	$55,535,564
	Total	$2,903,422,055	$3,637,104,878	($733,682,823)
Health and Personal Care Stores-446	**Total**	$1,261,126,271	$1,096,345,244	$164,781,027
Gasoline Stations-447	**Total**	$1,013,514,976	$801,728,508	$211,786,468
Clothing and Clothing Accessories Stores-448	Clothing stores-4481	$811,042,177	$591,663,838	$219,378,339
	Shoe stores-4482	$123,798,075	$102,249,880	$21,548,195
	Jewelry, luggage, and leather goods stores-4483	$198,878,721	$113,859,337	$85,019,384

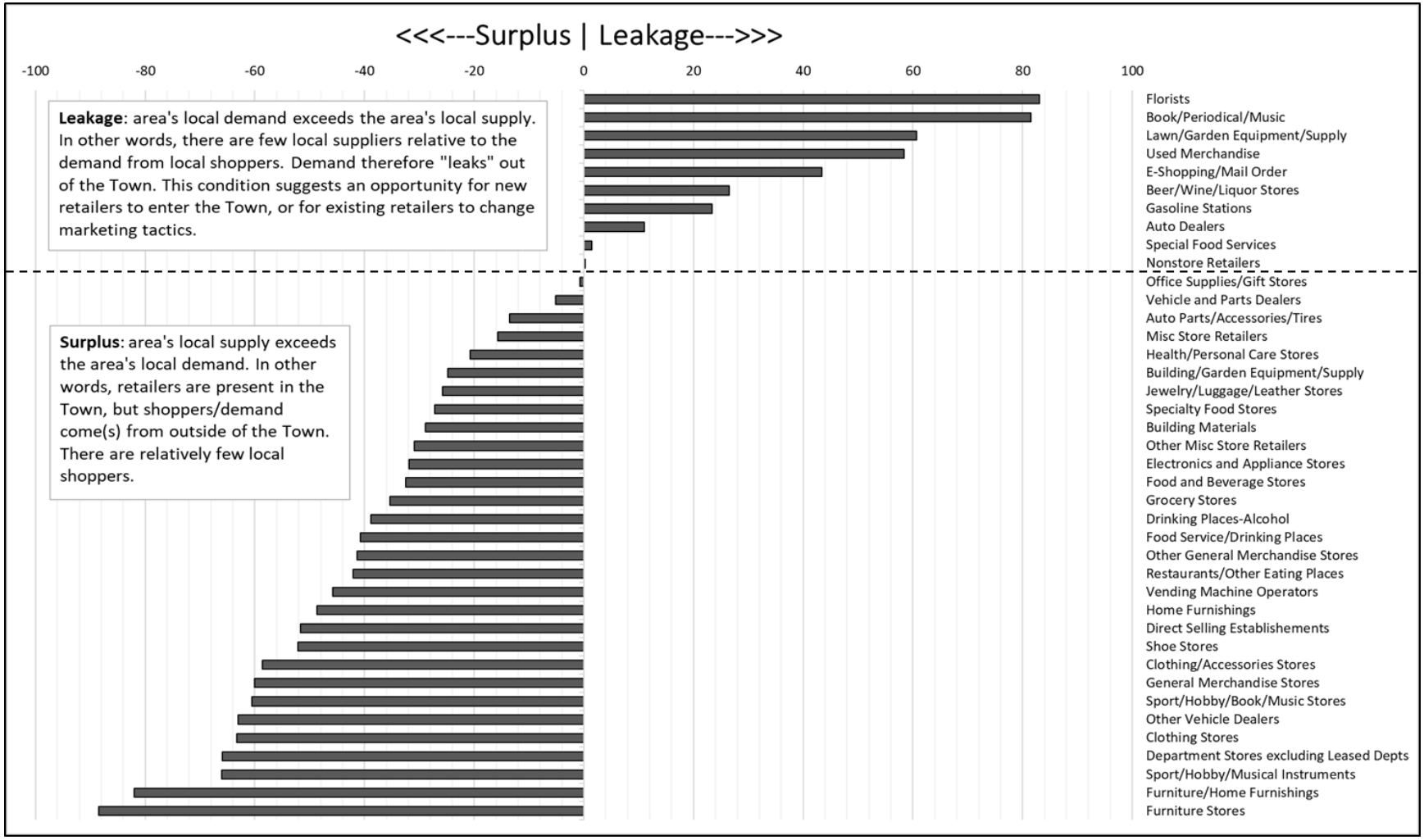
	Total	$1,133,718,973	$807,773,055	$325,945,918
Sporting Goods, Book, Hobby, Music Stores-541	Sporting goods, hobby, musical instruments stores-4511	$347,983,216	$436,935,601	($88,952,385)
	Book, periodical, and music stores-4512	$72,558,799	$48,805,773	$23,753,026
	Total	$420,542,015	$485,741,374	($65,199,359)
General Merchandise Stores-452	Department stores excluding leased departments-4521	$1,298,369,657	$1,929,145,090	($630,775,433)
	Other general merchandise stores-4529	$682,842,778	$689,703,571	($6,860,793)
	Total	$1,981,212,435	$2,618,848,661	($637,636,226)
Miscellaneous Store Retailers-453	Florists-4531	$50,827,812	$32,782,802	$18,045,010
	Office supplies, stationary, gift stores-4532	$170,334,774	$110,974,832	$59,359,942
	Used merchandise stores-4533	$69,327,242	$58,252,217	$11,075,025
	Other miscellaneous retailer stores-4539	$374,702,518	$512,408,714	($137,706,196)
	Total	$665,192,346	$714,418,565	($49,226,219)
Non-Store Retailers-454	E-shopping and mail order houses-4541	$427,812,866	$305,750,144	$122,062,722
	Vending machine operators-4542	$9,909,868	$17,016,444	($7,106,576)
	Direct selling establishments-4543	$108,337,398	$202,570,157	($94,232,759)
	Total	$546,060,132	$525,336,745	$20,723,387
Food Service and Drinking Places-722	Special food services-7223	$74,118,566	$54,687,594	$19,430,972
	Drinking places (alcoholic beverages)-7224	$93,975,132	$90,727,529	$3,247,603
	Restaurants and other eating places-7225	$1,470,363,397	$1,987,380,290	($517,016,893)
	Total	$1,638,457,095	$2,132,795,413	($494,338,318)
Total Retail Sales Including Eating and Drinking Places		$17,479,641,968	$18,344,186,584	($864,544,616)

Table 16 – Cheektowaga Consumer Spending and Retail Sales

NAICS-3	NAICS-4	Market Demand (Expected Consumer Expenditures) in 2015	Market Supply (Retail Sales) in 2015	Difference (Positive = Surplus, Negative = Leakage)
Motor Vehicle Parts and Dealers-441	Automotive dealers-4411	$193,608,201	$155,240,703	$38,367,498
	Other motor vehicle dealers-4412	$17,185,486	$75,741,565	($58,556,079)
	Automotive parts/accessories/tire stores-4413	$13,275,976	$17,458,006	($4,182,030)
	Total	$224,069,663	$248,440,274	($24,370,611)
Furniture and Home Furnishings Stores-442	Furniture stores-4421	$16,622,082	$271,569,478	($254,947,396)
	Home furnishings stores-4422	$14,377,585	$41,629,627	($27,252,042)
	Total	$30,999,667	$313,199,105	($282,199,438)
Electronics and Appliance Stores-443	**Total**	$55,014,940	$106,473,178	($51,458,238)
Building Material, Garden Equipment and Supply Stores-444	Building material and supply dealers-4441	$49,931,575	$90,509,048	($40,577,473)
	Lawn and garden equipment and supply stores-4442	$5,440,188	$1,331,263	$4,108,925
	Total	$55,371,763	$91,840,311	($36,468,548)
Food and Beverage Stores-445	Grocery stores-4451	$152,981,322	$320,435,095	($167,453,773)
	Specialty food stores-4452	$16,047,113	$28,052,911	($12,005,798)
	Beer, wine, and liquor stores-4453	$11,869,950	$6,894,966	$4,974,984
	Total	$180,898,385	$355,382,972	($174,484,587)
Health and Personal Care Stores-446	**Total**	$78,957,676	$120,098,471	($41,140,795)
Gasoline Stations-447	**Total**	$64,297,551	$39,932,733	$24,364,818
Clothing and Clothing Accessories Stores-448	Clothing stores-4481	$48,726,965	$217,045,385	($168,318,420)
	Shoe stores-4482	$7,450,660	$23,697,448	($16,246,788)
	Jewelry, luggage, and leather goods stores-4483	$11,764,311	$19,932,228	($8,167,917)

	Total	$67,941,936	$260,675,061	($192,733,125)
Sporting Goods, Book, Hobby, Music Stores-541	Sporting goods, hobby, musical instruments stores-4511	$21,144,466	$103,511,184	($82,366,718)
	Book, periodical, and music stores-4512	$4,468,270	$455,884	$4,012,386
	Total	$25,612,736	$103,967,068	($78,354,332)
General Merchandise Stores-452	Department stores excluding leased departments-4521	$79,427,810	$386,681,631	($307,253,821)
	Other general merchandise stores-4529	$42,574,937	$102,712,786	($60,137,849)
	Total	$122,002,747	$489,394,417	($367,391,670)
Miscellaneous Store Retailers-453	Florists-4531	$3,115,316	$287,250	$2,828,066
	Office supplies, stationary, gift stores-4532	$10,373,884	$10,521,217	($147,333)
	Used merchandise stores-4533	$4,240,000	$1,114,502	$3,125,498
	Other miscellaneous retailer stores-4539	$23,798,542	$45,114,835	($21,316,293)
	Total	$41,527,742	$57,037,804	($15,510,062)
Non-Store Retailers-454	E-shopping and mail order houses-4541	$26,081,917	$10,289,106	$15,792,811
	Vending machine operators-4542	$615,654	$1,656,405	($1,040,751)
	Direct selling establishments-4543	$6,789,758	$21,315,531	($14,525,773)
	Total	$33,487,329	$33,261,042	$226,287
Food Service and Drinking Places-722	Special food services-7223	$4,413,267	$4,280,820	$132,447
	Drinking places (alcoholic beverages)-7224	$5,377,547	$12,208,733	($6,831,186)
	Restaurants and other eating places-7225	$88,880,583	$218,303,266	($129,422,683)
	Total	$98,671,397	$234,792,819	($136,121,422)
Total Retail Sales Including Eating and Drinking Places		$1,078,853,532	$2,454,495,255	($1,375,641,723)

Figure 11 – Standardized Surplus and Leakage Factor (-100 = Complete Leakage; +100 = Complete Surplus)



Analysis of Local Government Spending

Table 17 provides data on the Town's municipal budget for 2016 as reported at https://www.osc.state.ny.us/localgov/datanstat/findata/index_choice.htm. The table provides a comparison of revenues and expenditures in the Town to other Towns in Western New York. On the revenue side, one important takeaway can be made, which is that the Town relies heavily on real property taxes as a revenue stream (72.9%) compared to other towns (50.0%). On the expenditure side General Government, Public Safety, and Employee Benefits spending outpace other towns in WNY. However, Debt Expenditures in the town were lower that other Towns.

Table 17 – Local Government Spending (2016)

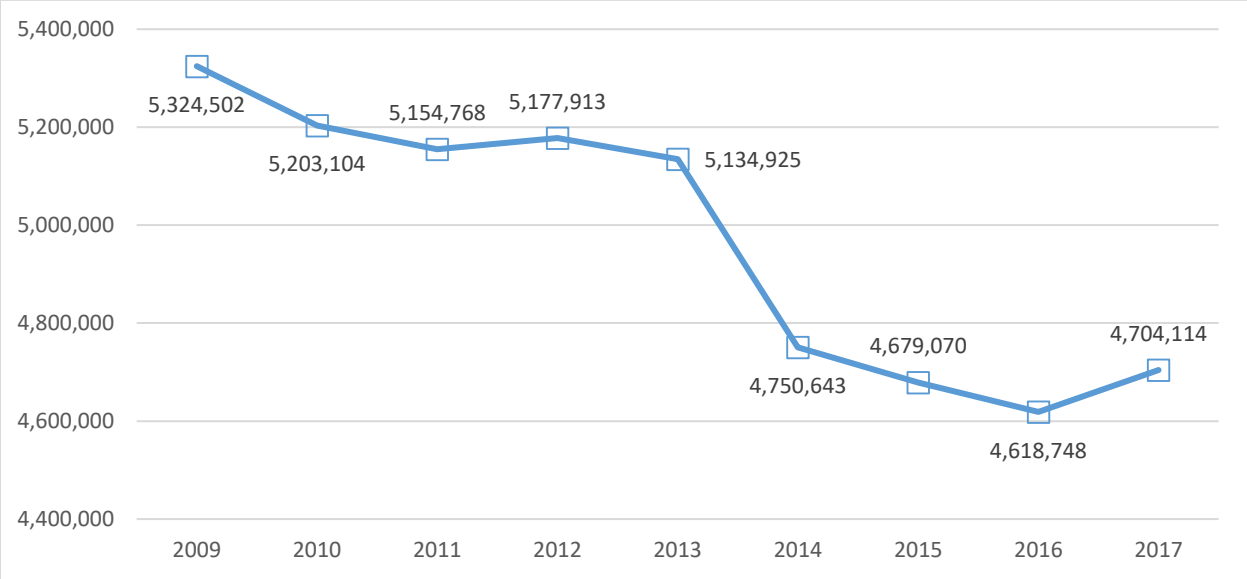
	2016 Raw		2016 Per Capita		2016 (% of Total)	
	Cheektowaga	**Other Towns in WNY**	**Cheektowaga**	**Other Towns in WNY**	**Cheektowaga**	**Other Towns in WNY**
State Comptroller Population	88,226	646,757	88,226	646,757	88,226	646,757
Revenues						
Real Property Tax	$67,134,574	$300,803,728	$760.94	$465.10	72.9%	50.0%
Sales and Use Tax	$9,264,567	$95,796,202	$105.01	$148.12	10.1%	15.9%
Other Non-Property Tax	$1,275,978	$8,583,868	$14.46	$13.27	1.4%	1.4%
Service Charges	$2,407,392	$75,135,816	$27.29	$116.17	2.6%	12.5%
Charges to Other Governments	$316,010	$13,201,588	$3.58	$20.41	0.3%	2.2%
Use and Sale of Property	$4,851,425	$12,124,281	$54.99	$18.75	5.3%	2.0%
Other Local	$1,933,217	$33,570,180	$21.91	$51.91	2.1%	5.6%
State and Federal Aid	$4,953,758	$61,912,191	$56.15	$95.73	5.4%	10.3%
Total Revenues	$92,136,921	$601,127,853	$1,044.33	$929.45	100.0%	100.0%
Expenditures						
General Government	$16,327,164	$77,118,930	$185.06	$119.24	16.7%	11.9%
Public Safety	$18,846,987	$109,551,239	$213.62	$169.39	19.2%	16.9%
Transportation	$12,905,400	$84,928,471	$146.28	$131.31	13.2%	13.1%
Economic Development	$1,431,947	$5,567,454	$16.23	$8.61	1.5%	0.9%
Culture and Recreation	$7,660,239	$46,582,919	$86.83	$72.03	7.8%	7.2%
Community Services	$211,538	$8,138,223	$2.40	$12.58	0.2%	1.3%
Sanitation	$14,298,143	$95,877,883	$162.06	$148.24	14.6%	14.8%
Employee Benefits	$23,216,323	$119,351,388	$263.15	$184.54	23.7%	18.4%
Debt Service	$3,118,450	$48,272,943	$35.35	$74.64	3.2%	7.4%
Total Expenditures	$98,016,191	$648,335,889	$1,110.97	$1,002.44	100.0%	100.0%

Additionally, some discussion of changes in revenues and expenditures since the initiation of the Comprehensive Plan in 2006 are important to explore. Since 2006, total assessed property value, when adjusted for inflation, has risen from $4,251,040,879 in 2006 to $4,599,535,569 in 2016. This represents an actual increase of $348,494,690, or 8.2%. However, the rate of inflation from 2006 to 2019 was 19.6%, indicating that the assessed value of properties in the Town has not maintained pace with inflation. Further, total inflation-adjusted expenditures in the Town increased from $86,252,084 to $98,016,191, or 13.6%, which is less than total inflation. One key point to be made is that although spending has stayed beneath total inflation, it has outpaced the increase in assessed property value, which could be problematic given the Town's heavy reliance (72.9%) on revenue from property taxes to fund the government.

Buffalo Niagara International Airport (BNIA) Passenger Statistics

As indicated in the 2006 Comprehensive Plan, BNIA passenger volume increases annually from 2003 to 2008, when total volume was 5,526,301. However, as indicated below in Figure 12, total passenger volume decline from 2009 to 2016, with a slight increase in volume in 2017. Data provided by BNIA suggests that passenger volume in the first half of 2018, if projected over the entire year, would result in an estimated increase from 4,704,114 in 2017 to 4,849,856 in 2018. All told, since 2009, and total passenger volume is down about 475,000 passengers.

Table 12 – BNIA Passenger Volume, 2009-2017



Buffalo Niagara International Airport

Buffalo Niagara International Airport Cargo Statistics

Air cargo at BNIA generally increased from 2008 to 2015 when it grew from 140.3 tons to 149.8 tons. However, volume dropped to 141.5 tons in 2016 and to 141.1 tons in 2017.

Economic Impacts of the Airport

BNIA reported that in its fiscal year 2018, total revenue per departing passenger was $10.25. This expenditure is broken down as $1.08 on food and retail; $2.33 in auto rental; and $6.84 in parking per

passenger. This does not include any off-site expenditures, such as hotels, restaurants, gas-stations, or other businesses that benefit from airport passenger traffic. In 2008, BNIA passengers averaged $8.84 in expenditures. When adjusted for inflation, that number would be $10.33 in 2018 dollars, resulting in a slight decline in expenditures per passenger since 2008.

The total number of employees at BNIA is 2,611 as of August 2018. Table 18 provides a breakdown of employees by

Table 18 – BNIA On-Site Employment

Job Category	Number of Employees [1]
Airport Management (NFTA) [2]	275
Commercial Air Carriers	493
Federal Aviation Administration	32
Transportation Security Administration	286
US Customs and Border Protection [3]	170
Concession Operations (Delaware North)	329
Fixed Base Operator (Prior Aviation)	205
Air Cargo	178
NFTA (non-airport) [4]	54
Outside Vendors/Contractors [5]	589

Buffalo Niagara International Airport

[1] Source of employee numbers = current list of airport ID badge holders as of August 1, 2018 (all airport employees are required to have an Airport ID Badge)

[2] Includes 44 Aircraft Rescue Firefighters and 85 Transit Police Officers (Transit Police Officers are not all assigned to the airport)

[3] US Customs and Border Protection officers are not all assigned to the airport

[4] NFTA employees assigned part of their time to the airport

[5] Outside Vendor/Contractors are not all employed at the airport full-time or year-round

3.6 TRANSPORTATION

Traffic Counts

The table below provides updated traffic counts based on the original table. However, not all segments in the original table had updated counts so in some instances, nearby segments of the same roadway were provided in replacement.

Table 19 – Traffic Counts

Route Name	Location/Roadway Segment	Vehicle Count (year)
NYS Thruway (I-90)	I-190 to William St.	123,486 (2015)
NYS Thruway (I-90)	Kensington Expwy to Cleveland Dr.	128,321 (2015)
Kensington Expwy (SR 33)	Eggert Road to Pine Ridge Road	90,963 (2015)
Kensington Expwy (SR 33)	I-90 to Union Road	74,175 (2010)
Genesee Street (SR 33)	Airport west entrance to Airport east entrance	40,634 (2015)
Transit Road (SR 78)	Clinton St. to Losson Rd.	33,619 (2013)
Transit Road (SR 78)	Walden Ave. to Genesee St.	27,919 (2014)
Transit Road (SR 78)	Genesee St. to NYS Thruway	32,993 (2015)

Broadway (SR 130)	Harlem Road to Union Road	14,575 (2011)
Broadway (SR 130)	Union Road to Dick Road	17,411 (2014)
Harlem Road (SR 240)	William St. to Broadway	22,833 (2015)
Harlem Road (SR 240)	Broadway to Walden Ave.	23,125 (2010)
Union Road (SR 277)	Losson Road to William St.	41,975 (2014)
Union Road (SR 277)	Walden Ave. to Galleria Dr.	22,270 (2014)
Union Road (SR 277)	Genesee Street to Kensington Expwy	25,757 (2015)
Aero Drive	Wehrle Dr. to Ellicott Creek Rd.	7,185 (2014)
Aero Drive	Ellicott Creek Rd. to Youngs Rd.	6,652 (2014)
Beach Road	Cleveland Dr. to Wehrle Dr.	7,949 (2014)
Bennett Road	Union Road to Como Park Blvd	5,248 (2016)
Borden Road	French Road to Losson Road	11,558 (2013)
Cayuga Creek Road	Harlem Road to William St.	3,329 (2013)
Cayuga Road	Genesee St. to Kensington Expwy	17,743 (2015)
Cleveland Drive	NYS Thruway to Beach Road	11,692 (2010)
Cleveland Drive	Union Road to Cayuga Road	5,496 (2012)
Como Park Boulevard	Union Road to Bennett Road	5,545 (2016)
Como Park Boulevard	Borden Road to Transit Road	9,865 (2016)
Delavan Avenue	Buffalo City Line to Pine Ridge Road	5,100 (2014)
Dick Road	Broadway to Walden Ave.	20,575 (2010)
Dingens Street	Buffalo City Line to Harlem Road	4,868 (2015)
Doat Street	Buffalo City Line to Pine Ridge Road	2,629 (2012)
Eggert Road	Kensington Expwy to Kenville Rd.	16,441 (2013)
French Road	Union Road to Towers Blvd	13,863 (2012)
French Road	Borden Road to Transit Road	14,434 (2015)
Galleria Drive	I-90 WB off ramp to east ring road	13,564 (2015)
Genesee Street	Buffalo City Line to Harlem Road	7,975 (2010)
Genesee Street	Harlem Road to Union Road	12,190 (2010)
Genesee Street	Union Road to Dick Road	11,549 (2014)
George Urban Boulevard	Harlem Road to Union Road	7,035 (2015)
George Urban Boulevard	Union Road to Dick Road	13,388 (2015)
Griswold Street	I-190 SB ramp to Rossler St.	3,343 (2016)
Holtz Drive	Genesee St. to Aero Dr.	15,656 (2015)
Kensington Avenue	Buffalo City Line to Amherst Town Line	8,340 (2015)
Losson Road	Union Road to Towers Blvd	14,256 (2016)
Losson Road	Borden Road to Transit Road	15,113 (2015)
Maryvale Drive	Pine Ridge Road to Harlem Road	6,543 (2014)
Old Union Road	West Seneca Town Line to Union Road	4,313 (2012)
Pine Ridge Road	Genesee St to Delavan Ave.	7,923 (2012)
Rossler Street	Clinton St. to Dingens St.	6,871 (2015)
Towers Boulevard	French Rd. to Le Havre	4,522 (2013)
Towers Boulevard	Le Havre to Losson	5,945 (2015)

Walden Avenue	Buffalo City Line to Harlem Road	13,693 (2015)
Walden Avenue	Harlem Road to NYS Thruway	27,775 (2009)
Walden Avenue	Walden Avenue NYS Thruway to Union Road	38,454 (2014)
Walden Avenue	Union Road to Dick Road	28,851 (2015)
William Street	Buffalo City Line to Harlem Road	10,650 (2013)
William Street	Harlem Road to NYS Thruway	14,931 (2013)
William Street	Cayuga Creek Road to Union Road	30,262 (2009)

Greater Buffalo Niagara Regional Transportation Council

3.7 COMMUNITY FACILITIES (Comp Plan 3.9)

Schools

Data present below represents updated data from the Comprehensive Plan but with one important change. Rather than using the National Center for Educational Statistics, data presented here are from the New York State Department of Education. The change in data source was done in order to utilize a database that is updated annually and is can be easily used by members of the Town and community via the NYSED's data site at www.data.nysed.gov. The only data that is not available here was student/teacher ratios, which are provided annually in a large statewide Excel file at http://www.p12.nysed.gov/irs/pmf/.

In order to offer comparison from Table 17 in the Comprehensive Plan, data is provided from this source for the 2006-2007 school year which is the time period presented in the Comp Plan. Financial data for 2006-2007 is adjusted for inflation to allow for comparison. Additionally, this data provides more depth and breadth than the prior data offered.

As discussed in the section on population, the decline in overall population in the Town is having an impact on school districts with Cheektowaga. Specifically, every single school district has seen a decline in enrollment since 2006-2007.

Table 20 – School District Enrollment, Graduation, and Dropout Data

District	Enrollment 2016-2017	Enrollment 2006-2007	Rate Enrollment Change	Student/ Teacher Ratio (FTE)*	4-Year Graduation Rate	Dropout Rate
Cheektowaga Central	2,074	2,392	-15.3%	10.6	83%	3%
Cheektowaga-Sloan	1,304	1,583	-21.4%	11.1	84%	2%
Cleveland-Hill	1,213	1,502	-23.8%	9.9	90%	2%
Depew	1,781	2,230	-25.2%	11.4	89%	2%
Lancaster	5,654	6,247	-10.5%	13.2	95%	0%
Maryvale	2,094	2,336	-11.6%	13.2	86%	3%
West Seneca	6,482	7,589	-17.1%	14.6	92%	2%
Williamsville	9,961	10,702	-7.4%	12.3	93%	1%

** http://www.p12.nysed.gov/irs/pmf/*

All other data from https://data.nysed.gov/

Table 21 – School District Budget Data (2015-2016)

District	Total Budget	Instructional Budget	Total Expenditure Per Pupil	Percent Total Budget on Instruction
Cheektowaga Central	$38,918,610	$31,681,702	$18,765	81.4%
Cheektowaga-Sloan	$27,250,992	$21,583,029	$20,898	79.2%
Cleveland-Hill	$26,211,717	$19,894,155	$21,609	75.9%
Depew	$36,316,371	$27,221,693	$20,391	75.0%
Lancaster	$87,450,418	$65,808,731	$15,467	75.3%
Maryvale	$38,496,096	$26,655,312	$18,384	69.2%
West Seneca	$108,690,176	$84,253,164	$16,768	77.5%
Williamsville	$171,199,707	$129,214,923	$17,187	75.5%

https://data.nysed.gov/