

# APPENDIX E: DEVELOPMENT TRENDS ANALYSIS

## BUFFALO BUILDING PERMITS

An analysis of the City of Buffalo Building Permit dataset for 2007 to 2018 was performed to identify development trends in Buffalo. It should be noted that out of 86,084 total building permit records, 2,732 records had missing or incorrect coordinates and could not be mapped, and so are excluded from this analysis. The following summarizes the analysis.

### Overview

Overall, the areas comprising downtown Buffalo and its adjacent areas in the West Side and Elmwood Village, which include **Central, Allentown, Lower West Side, West Side, Upper West Side, Elmwood Bryant, and Elmwood Bidwell**, are seeing a consistently high number of building permits, in relation to their square mileage. Other areas which are seeing notable development trends are **North Park** and **Hamlin Park**.

Of these hotspot neighborhoods:

- The areas seeing heavy residential development (per square mile) are: **West Side, Elmwood Bryant, Hamlin Park, and North Park**, followed by **Elmwood Bidwell, South Park, and Kensington-Bailey**. Within these neighborhoods, **CSO priority area 028**, which is partially located in South Park, and **CSO priority area 053**, which is partially located in Hamlin Park, are both undergoing notable residential development per square mile.
- The areas seeing heavy commercial development (per square mile) are: **Allentown and Elmwood Bryant**, followed by **Lower West Side, Central, West Side, Ellicott, Upper West Side, and North Park**. Of particular note, the parts of Lower West Side and Central which comprise **CSO priority area 014** are seeing very high commercial development per square mile.
- The areas seeing heavy industrial development (per square mile) are: **Grant-Amherst and West Side**,

followed by **First Ward, Seneca Babcock, Upper West Side, Ellicott, and Black Rock**. **CSO priority area 027**, which is partially located in Seneca Babcock, is the CSO priority area seeing highest industrial development per square mile. It is worth noting that while some of these areas, such as West Side and Upper West Side, are also hotspots of other types of development (e.g., residential and commercial), most of the areas seeing heavy industrial development are seeing little other development.

Of all the CSO priority areas, **CSO area 014**, which is located downtown and has the smallest area of all the CSO priority areas, is seeing the greatest overall development (all permit types) per square mileage. **CSO priority area 027** is seeing the least amount of overall development per square mileage; however, it has the highest concentration of industrial permits in the last two years of any CSO priority area.

Some of these findings are corroborated by the 1-year forecast of the Zillow Home Value Index, which shows the highest projected increases in home values to be located in **Upper West Side**, parts of **Elmwood Bidwell** and **Elmwood Bryant**, as well as **Kaisertown** in **South Buffalo** and **Central Park** in North Buffalo.

In general, many of the neighborhoods seeing the least overall development are amongst the neighborhoods receiving the highest number of industrial permits. These include **Grant-Amherst, First Ward, Seneca Babcock, Ellicott, Black Rock, Delavan Grider, and Fillmore-Leroy**.

### Downtown Buffalo

Downtown Buffalo is seeing significant commercial development. **Allentown** has seen more commercial permits per square mile in the last two years than any other neighborhood, with **Central** following close behind. The total value of commercial permits in Central since 2016 far exceeds that of any other neighborhood, coming out to a sum of at least \$154M. Indeed, Central has seen

far more permits valued \$100K and higher than any other neighborhood. **CSO priority area 014** falls partially within this area.

Allentown has seen moderate-to-high residential development, while Central has received almost no residential permits per square mile. Neither are hotspots for industrial development.

These trends have been relatively consistent since 2010.

### West Side

Several areas in the West Side are undergoing heavy development. **West Side, Upper West Side, and Lower West Side**—which includes parts of **CSO priority area 014**—have all received a significant number of commercial permits per square mile since 2016. West Side and Upper West Side have also seen heavy residential and industrial development, in addition to a high number of vacant land permits and demolitions. The Zillow 1-year home value forecast projects a substantial increase in the Zillow Home Value Index in Upper West Side over the next year.

Further north, **Riverside** is also seeing a moderate-high number of residential developments per square mile, with little other developments and no expected growth. **Black Rock** is one of Buffalo's neighborhoods seeing the least overall development, though with a moderate-high amount of industrial development. **Grant-Amherst** is also a cold spot for commercial and residential developments; however, it has seen the highest number of industrial permits per square mile of any neighborhood in the last two years, although the cumulative value of these permits is relatively low, at \$4M.

### Elmwood Village

**Elmwood Bidwell** and **Elmwood Bryant** are hotspots for commercial and residential development. Neither have had any industrial development. These trends are expected to continue, with residential developments—in tandem to increased home values—possibly projected to increase in parts

of Elmwood Bidwell. A small section of **CSO priority area 053** overlaps with Elmwood Bryant.

### North Buffalo

In North Buffalo, **North Park** is amongst Buffalo's neighborhoods receiving the highest number of residential permits (and overall permits) per square mile. Neighboring **Central Park** is also seeing a moderate-high amount of residential development. Zillow projects that the Home Value Index in Central Park will see substantive increases over the next year. Commercially, North Park has received a moderate-high number of permits per square mile since 2016, though Central Park has seen less. Both trends have been relatively consistent since 2010.

**Parkside** and **University Heights** have seen a moderate amount of consistent residential development with little commercial and almost no industrial development. However, permit values in Parkside have fluctuated over the last 10 years, especially for other permit types (recreation and entertainment; community services; public services; and/or wild, forested, conservation lands and public parks) and vacant land permits, and University Heights has seen similar such fluctuations since 2014. These may be neighborhoods to watch for future growth. A small section of **CSO priority area 053** overlaps with Parkside.

**West Hertel** is amongst Buffalo's neighborhoods with the least overall development per square mile, despite several spikes in commercial permit values since 2008.

### East Side

Buffalo's East Side is a large area with a lot of variation in development trends between neighborhoods. **Hamlin Park** and **Kensington-Bailey** are two of Buffalo's neighborhoods seeing the highest number of overall permits per square mile since 2016. This is due mostly to heavy residential development per square mile. While Kensington-Bailey is also seeing a moderate amount of

commercial development per square mile, Hamlin Park is seeing very little commercial development. **CSO priority area 053** falls partially within both of these areas.

**Fillmore-Leroy, Delavan Grider, and Genesee-Moselle** are amongst Buffalo's heaviest industrial neighborhoods, based on numbers of industrial permits per square mile since 2016. Delavan Grider, while not historically receiving many industrial permits, saw a spike in 2017, with one particular project worth \$44M. All three are seeing a moderate to moderate-low number of residential permits per square mile and, while Fillmore-Leroy is seeing a moderate amount of commercial development, Delavan Grider and Genesee-Moselle have seen very little commercial development per square mile. Genesee-Moselle has had a history of vacant land/demolition permits which have decreased as residential permits have increased in the last 10 years.

**Masten Park, Fruit Belt, MLK Park, Broadway Fillmore, Kenfield, and Schiller Park** all see a moderate amount of development. Schiller Park and Masten Park have seen a moderate-high amount of residential development per square mile since 2016, while MLK Park, Broadway Fillmore, and Fruit Belt have seen less residential but more commercial development per square mile in the same period. Similar to neighboring Genesee-Moselle, Broadway Fillmore has seen a decrease in vacant land permits possibly correlated with an increase in residential permits in the last 10 years. It has also seen a steady increase in commercial permit values since 2014, which may be worth watching for further growth. Masten Park and MLK Park have seen similar, but milder, negative vacant land-residential permit relationships over the last 10 years. Fruit Belt, neighboring the development-heavy neighborhood of Allentown near downtown, has seen a lot of fluctuation in permit values of all types since 2009 and may merit further analysis for future trends.

**Pratt-Willert** and **Lovejoy** are two of Buffalo's neighborhoods that have seen the least overall development per square mile since 2016. Despite this, Pratt-Willert has seen a steady increase in total commercial permit values since 2015, which may merit further trend analysis.

The East Side contains most of Buffalo's CSO priority areas. **CSO priority area 053**, which has the largest surface area of any CSO priority area, resides mostly in the East Side, overlapping with residential-heavy areas such as Hamlin Park and Kensington-Bailey, in addition to Fillmore-Leroy, Delavan Grider, Masten Park, Fruit Belt, Genesee-Moselle, Schiller Park, and Kenfield. **CSO priority area 033** is mostly located in East Buffalo, overlapping with Lovejoy, Genesee-Moselle, and Schiller Park, and **CSO priority area 026** fall mostly within Broadway Fillmore, with parts also in Genesee-Moselle and MLK Park.

### South Buffalo

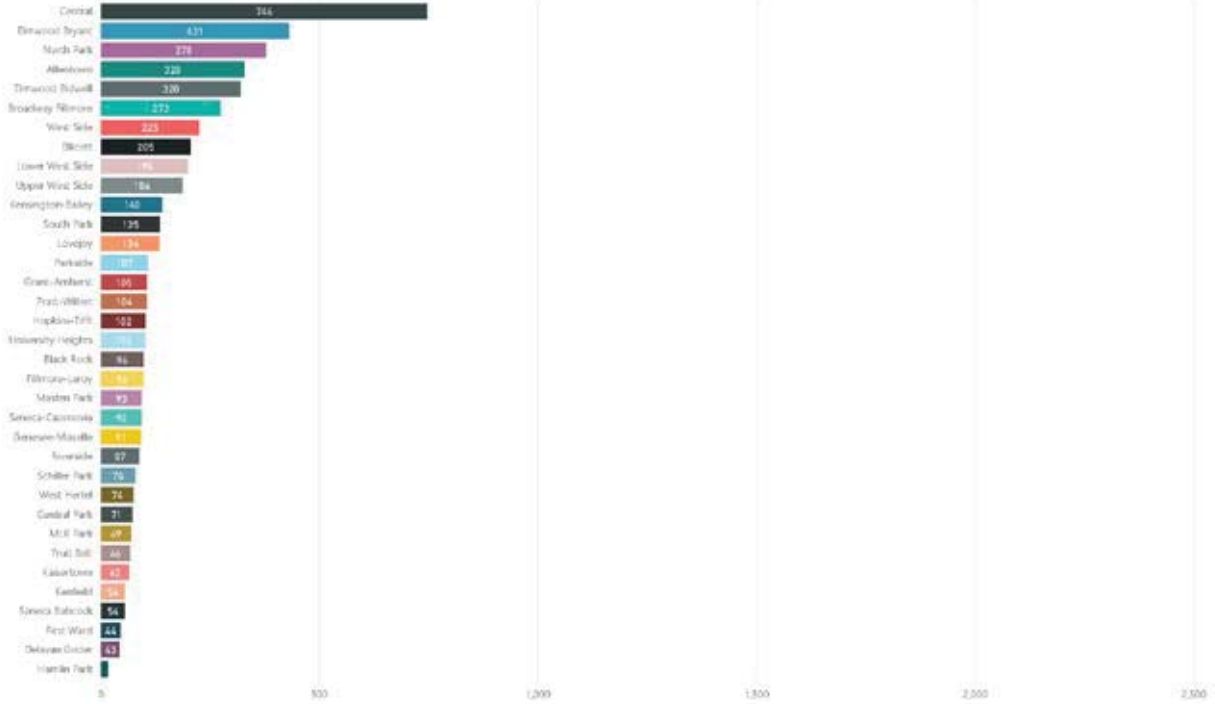
South Buffalo contains some of the neighborhoods in Buffalo with the least overall development. An exception to this is the **South Park** neighborhood, which has seen a consistently high number of residential permits per square mile since 2010 and a steady increase in total permit values for other permit types since 2016. Of interest, while **Kaisertown** has not historically or recently seen a particularly notable number of building permits, Zillow forecasts a substantial increase in the Home Value Index in Kaisertown over the next year. Whether or not this may be an indicator for future growth and increasing development in Kaisertown may be something to consider for further analysis. A substantial portion of Kaisertown's surface area is located in **CSO priority area 033**.

**Seneca-Cazenovia** is moderate to moderate-low for all permit types, while neighboring **Seneca Babcock** and **Hopkins-Tifft** are seeing very little overall development. Hopkins-Tifft, which has the largest surface area of any neighborhood analyzed, has received

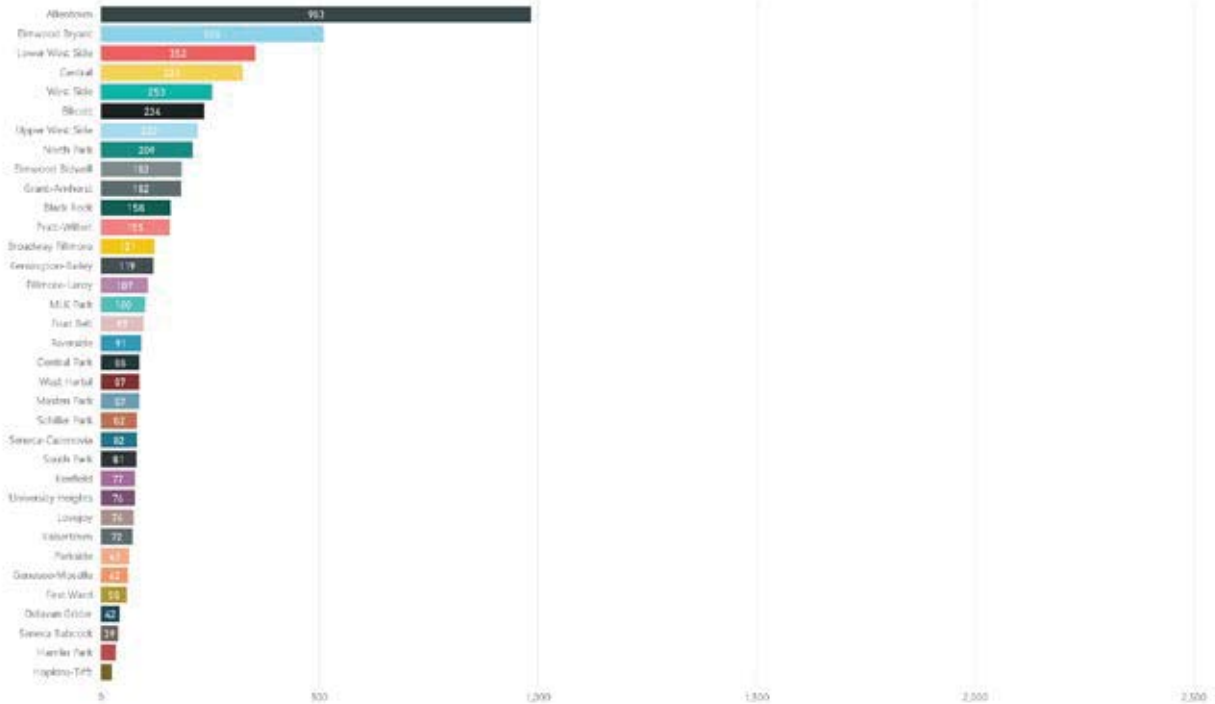
the least permits per square mile since 2016. However, the part of Hopkins-Tifft nearest to South Park overlaps with most of **CSO priority area 028**, which has the highest concentration of residential permits per square mile (since 2016) of any CSO priority area. While Hopkins-Tifft on the whole sees less development per square mile, the section which consists of CSO priority area 028 is a notable hotspot.

**Seneca Babcock, First Ward, and Ellicott** have all seen a significant number of industrial permits per square mile since 2016, with very little residential development. Of these three, only Ellicott is a commercial-heavy area, having also seen some spikes in total commercial permit values since 2014. The vast majority of Seneca Babcock's surface area is located in either **CSO priority area 027** or **CSO priority area 033**. A small part of CSO priority area 033 also overlaps with First Ward.

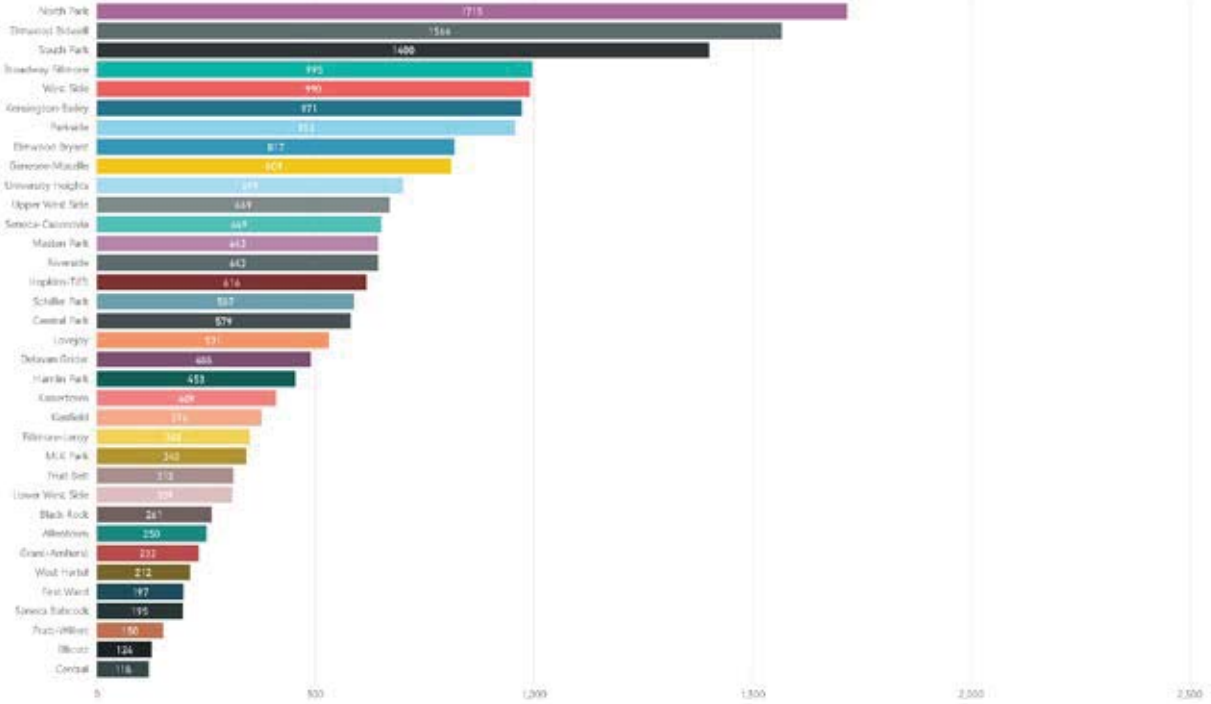
Number of Commercial Permits by Neighborhood, 2016-2018



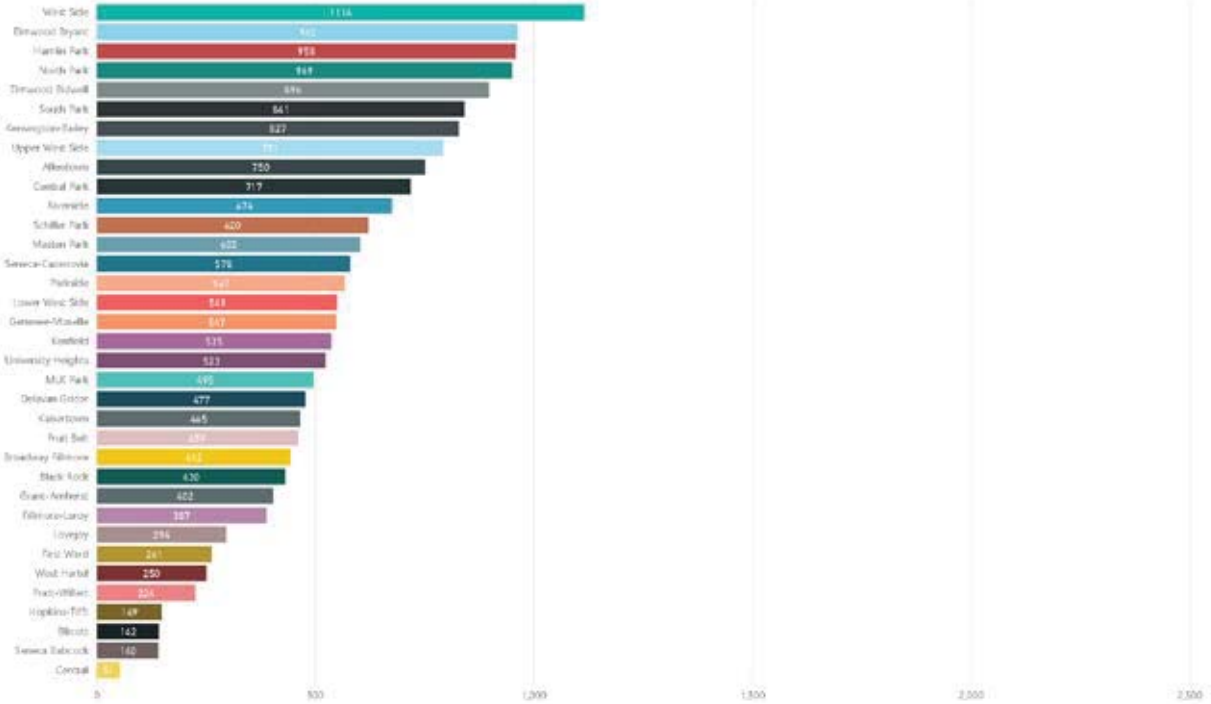
Number of Commercial Permits per Square Mile by Neighborhood, 2016-2018



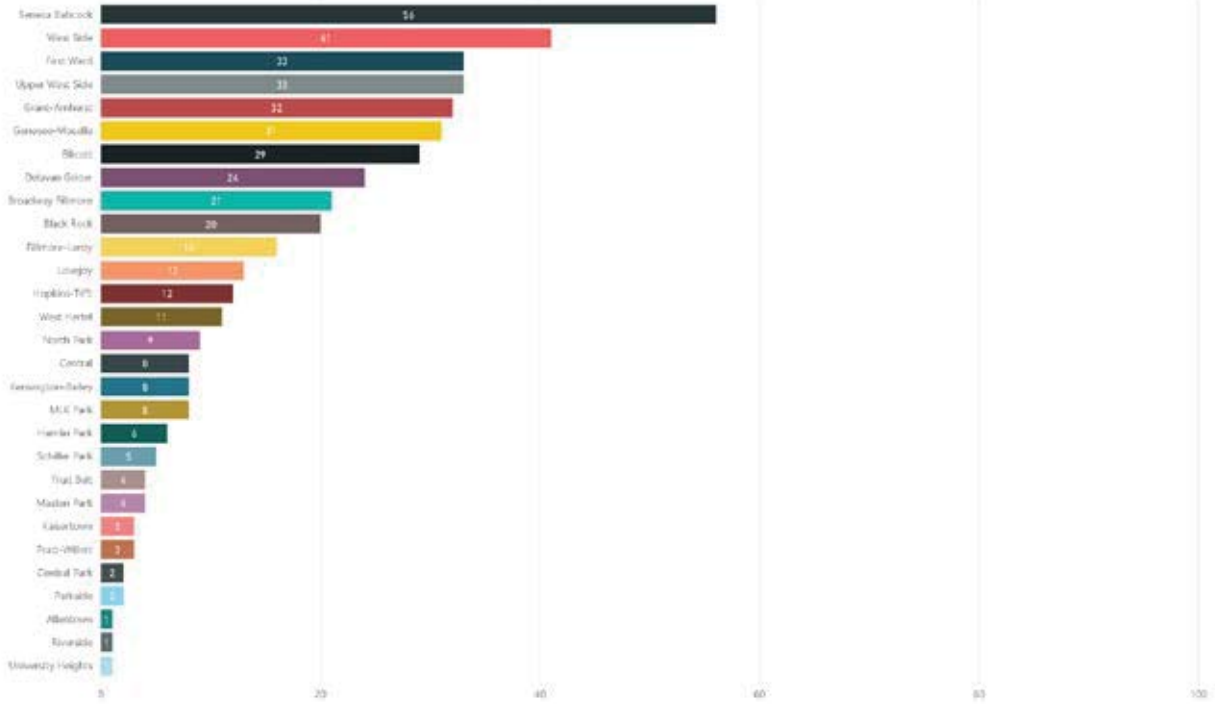
Number of Residential Permits by Neighborhood, 2016-2018



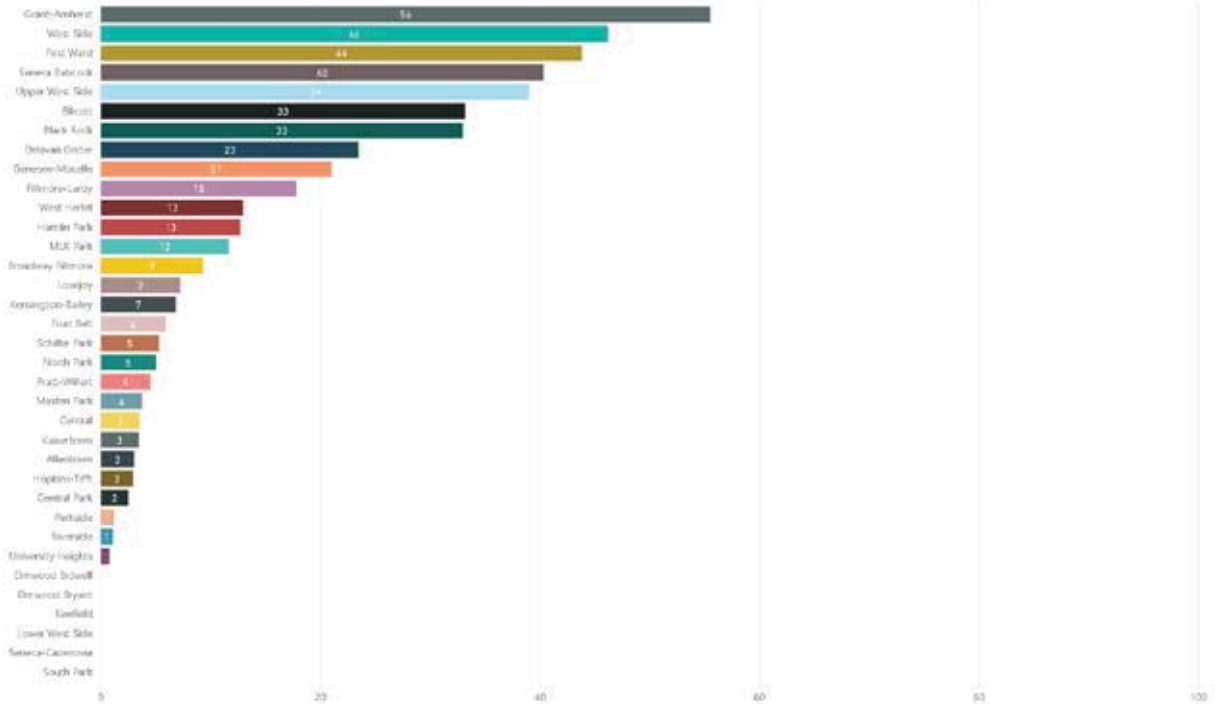
Number of Residential Permits per Square Mile by Neighborhood, 2016-2018



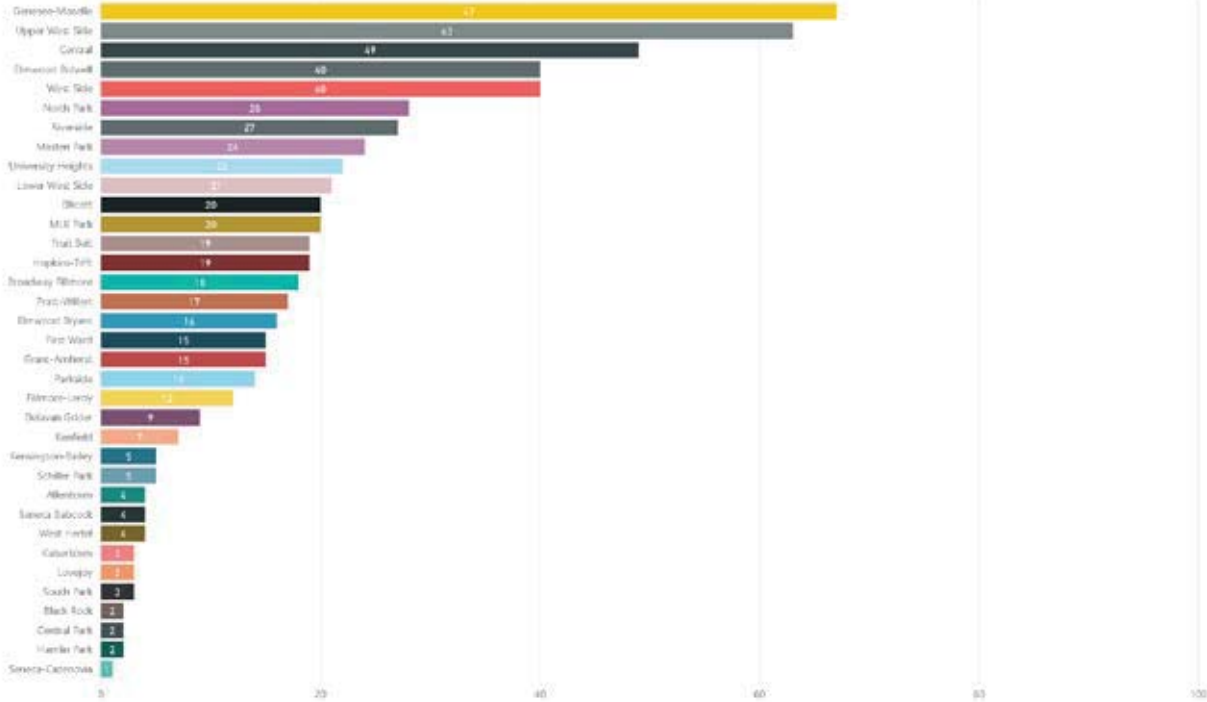
Number of Industrial Permits by Neighborhood, 2016-2018



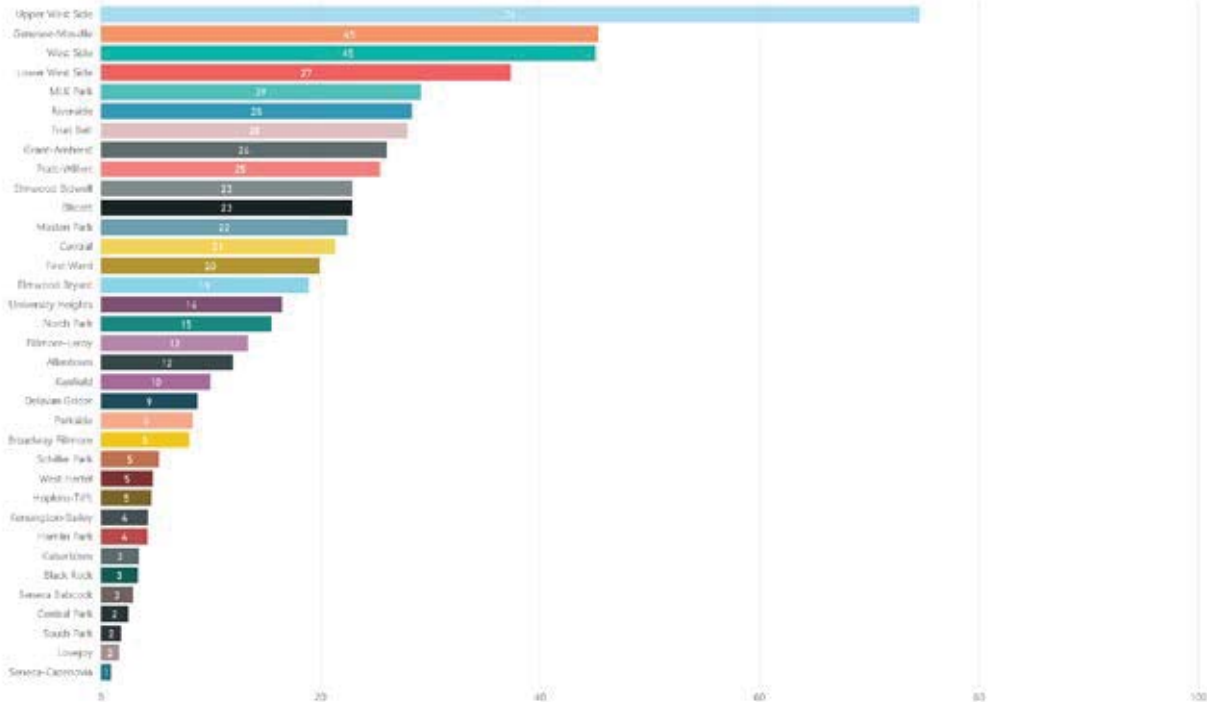
Number of Industrial Permits per Square Mile by Neighborhood, 2016-2018



Number of Vacant Land/Demolition Permits by Neighborhood, 2016-2018

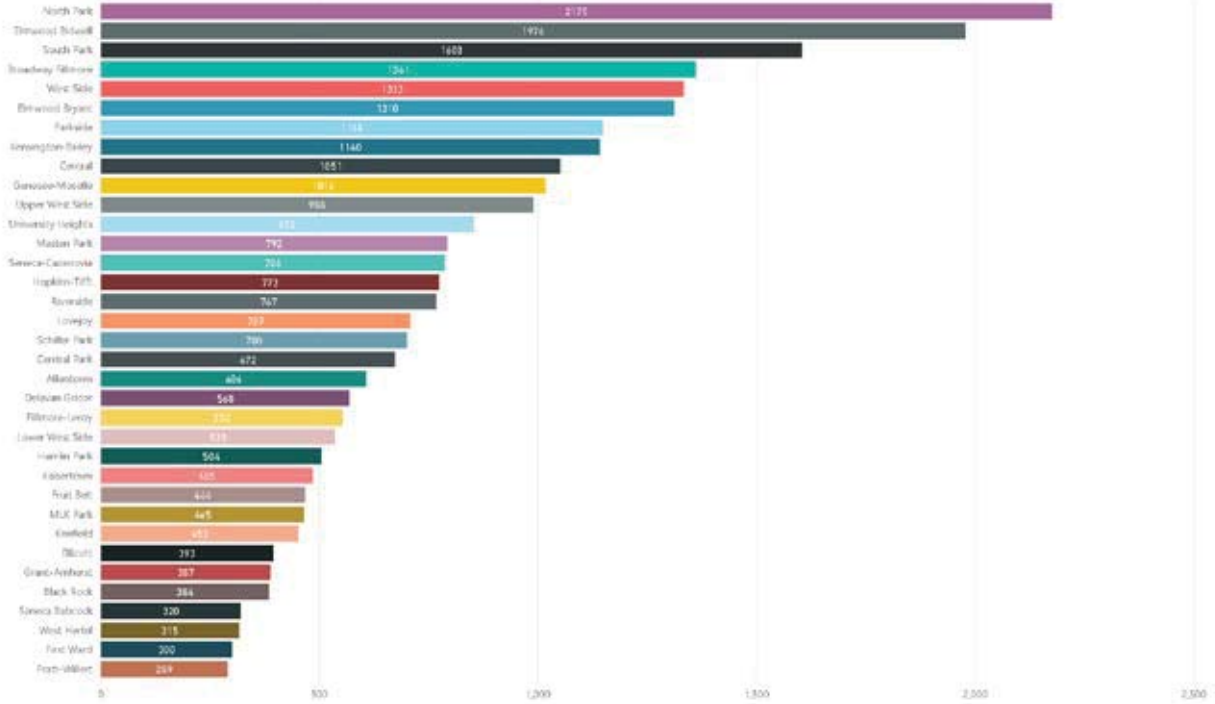


Number of Vacant Land/Demolition Permits per Square Mile by Neighborhood, 2016-2018

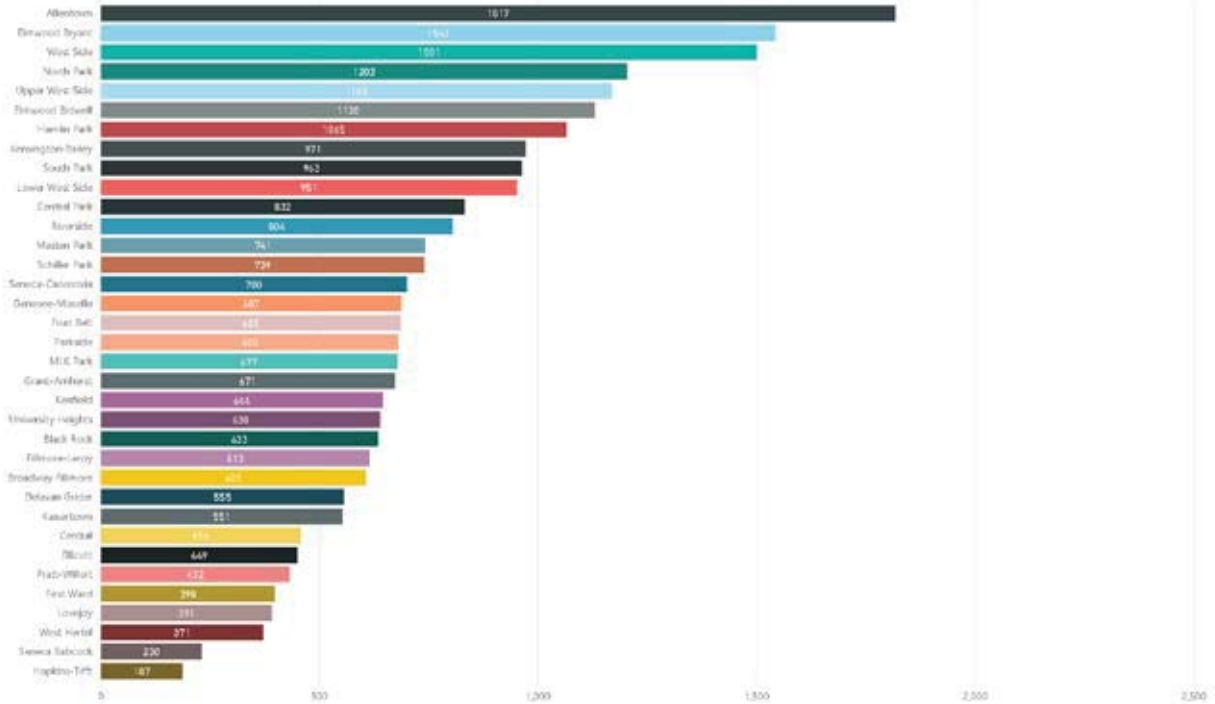




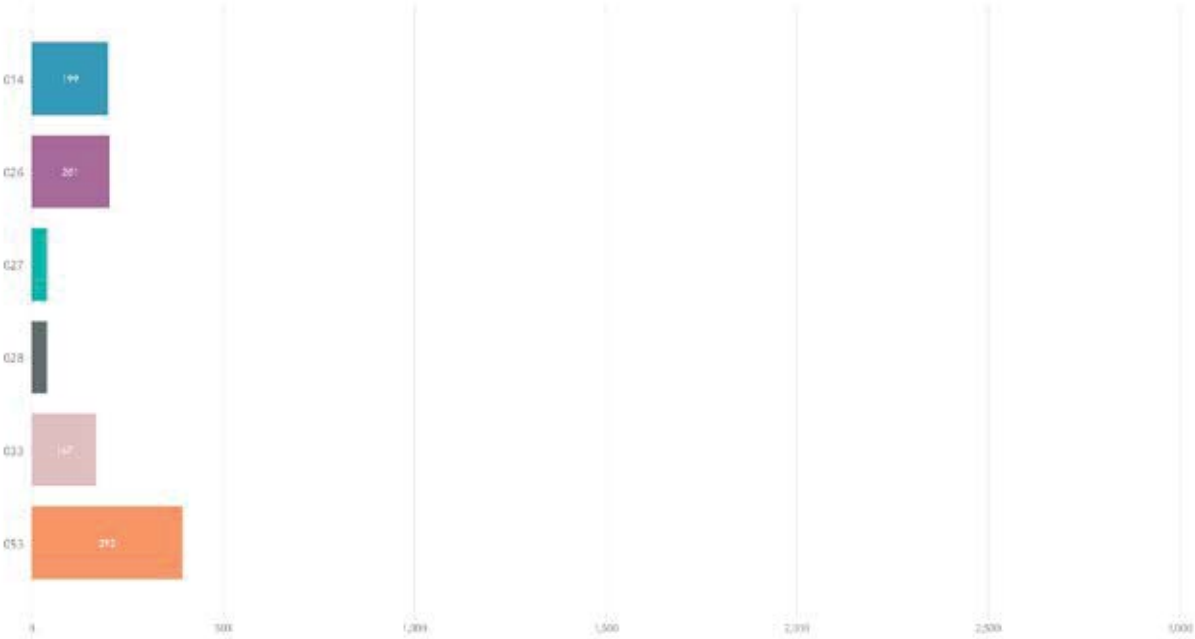
Total Number of Permits by Neighborhood, 2016-2018



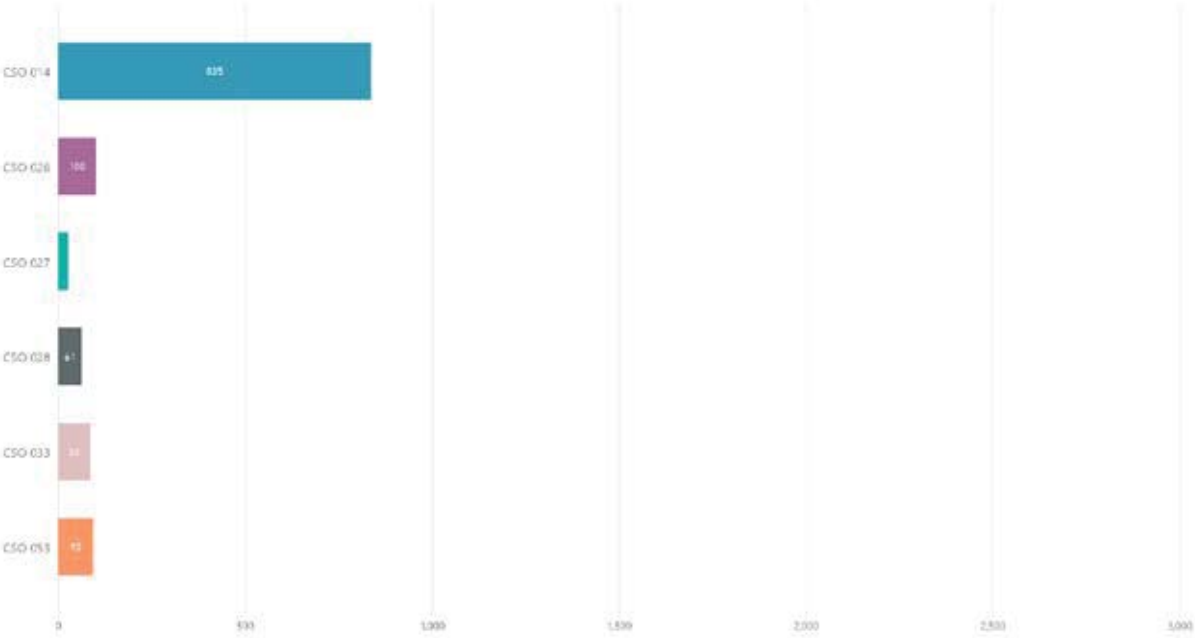
Total Number of Permits per Square Mile by Neighborhood, 2016-2018



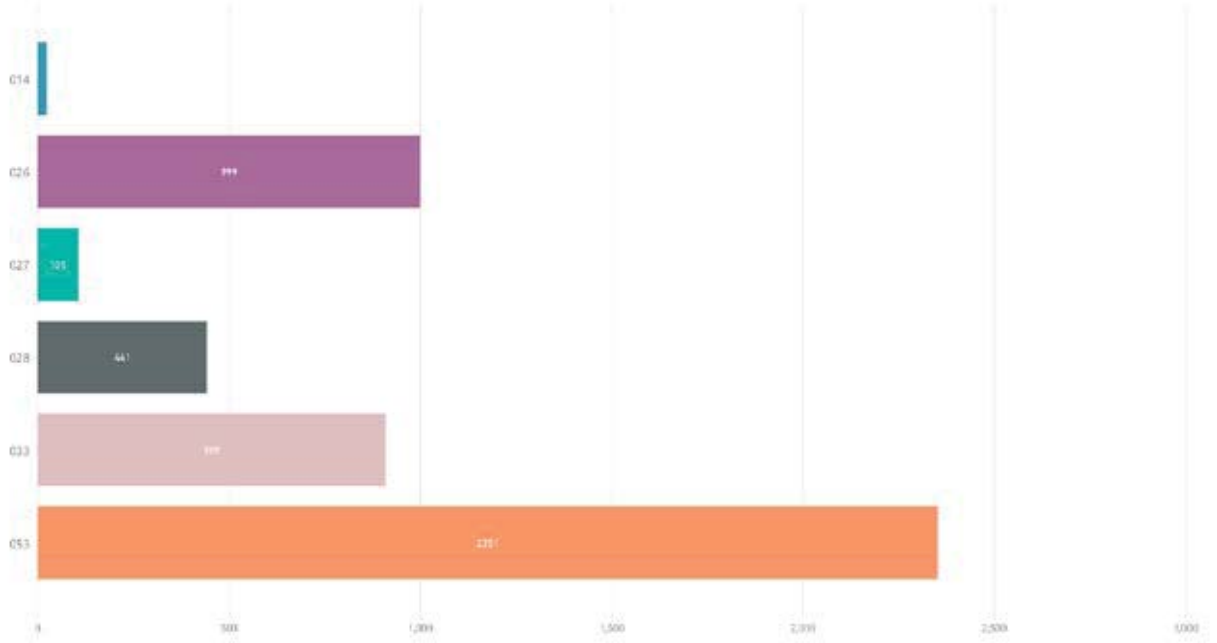
Number of Commercial Permits by CSO Area, 2016-2018



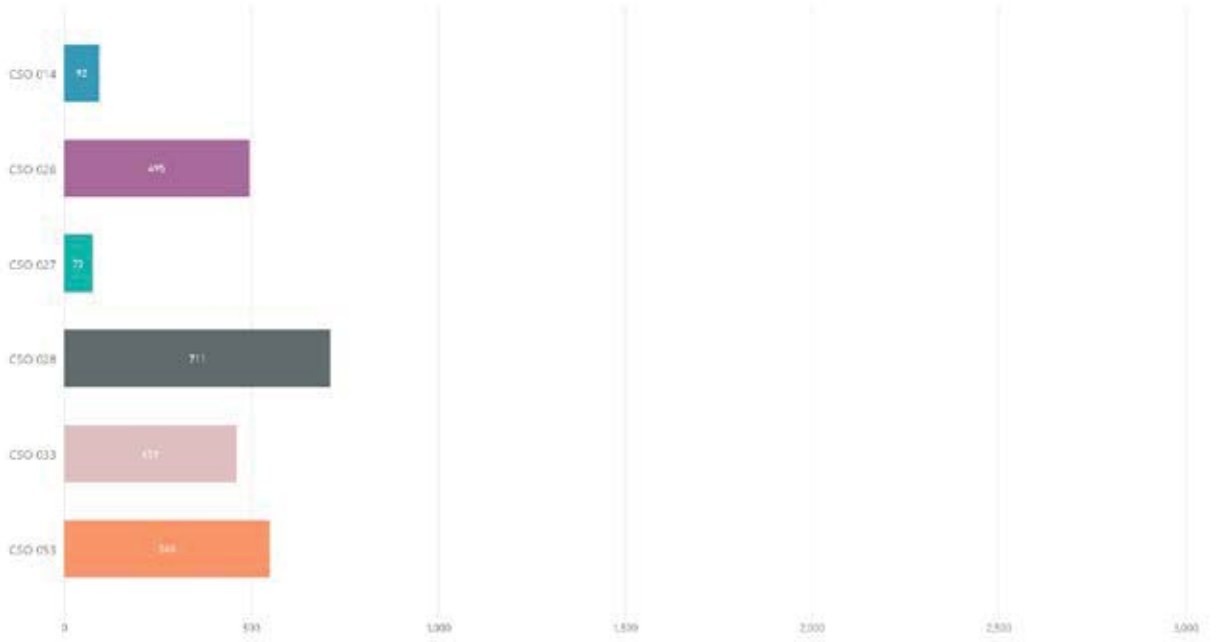
Number of Commercial Permits per Square Mile by CSO Area, 2016-2018



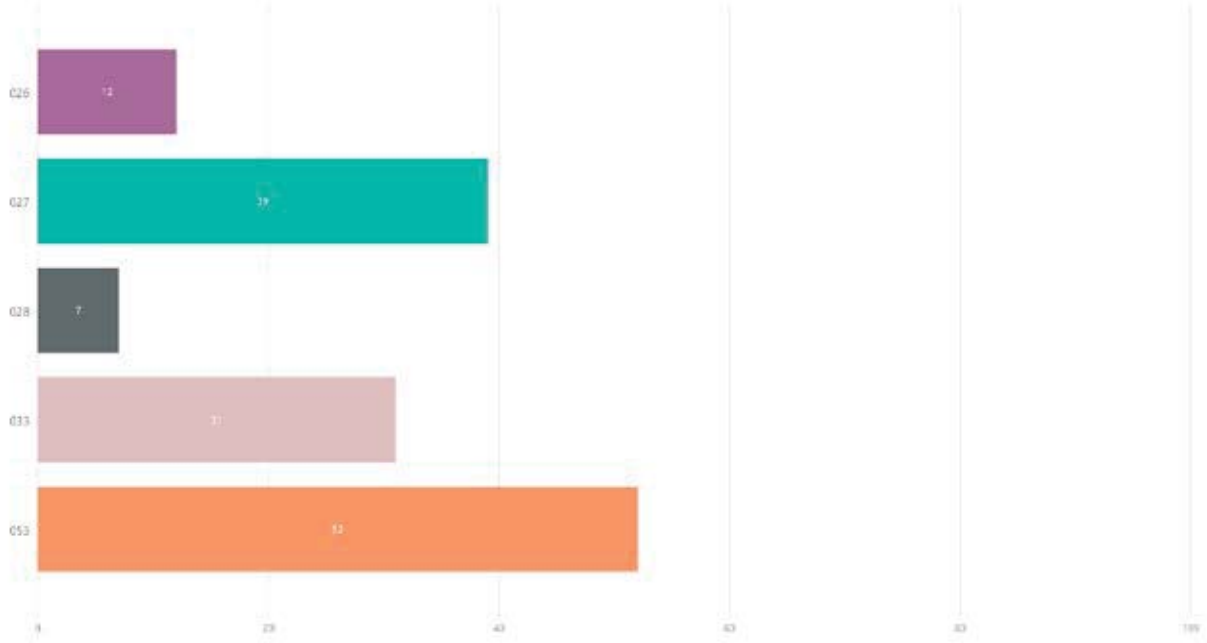
Number of Residential Permits by CSO Area, 2016-2018



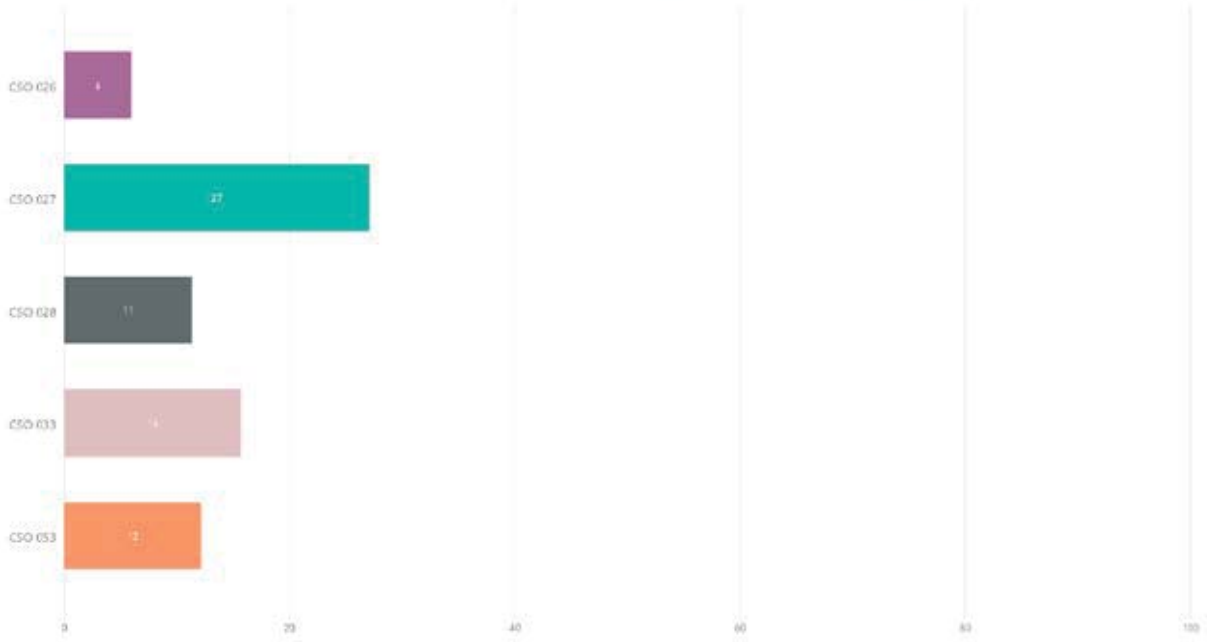
Number of Residential Permits per Square Mile by CSO Area, 2016-2018



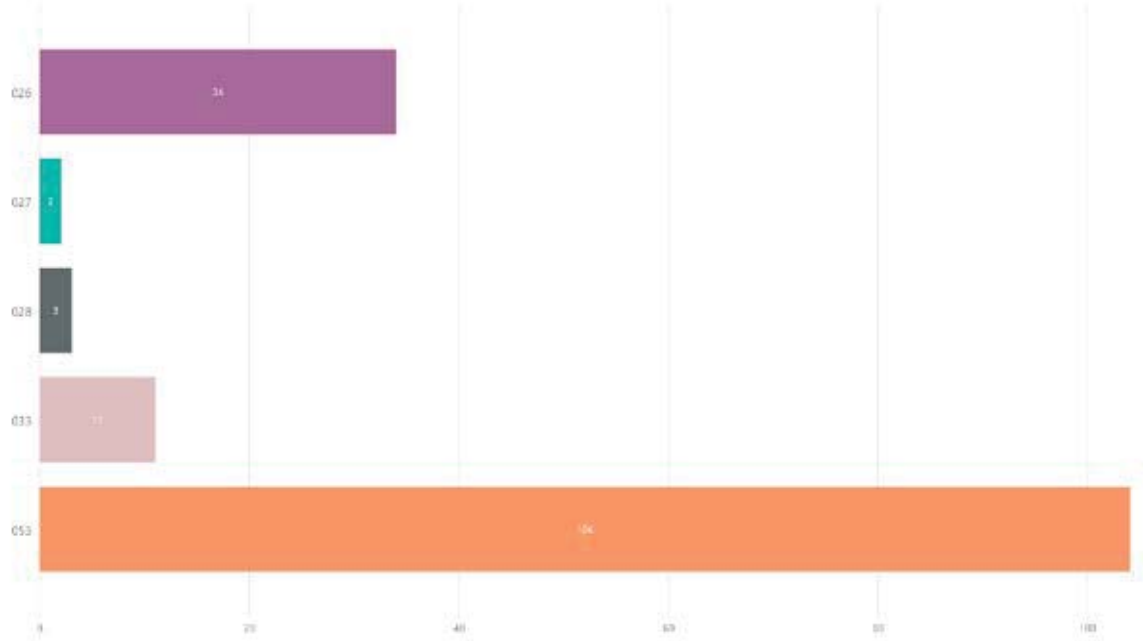
Number of Industrial Permits by CSO Area, 2016-2018



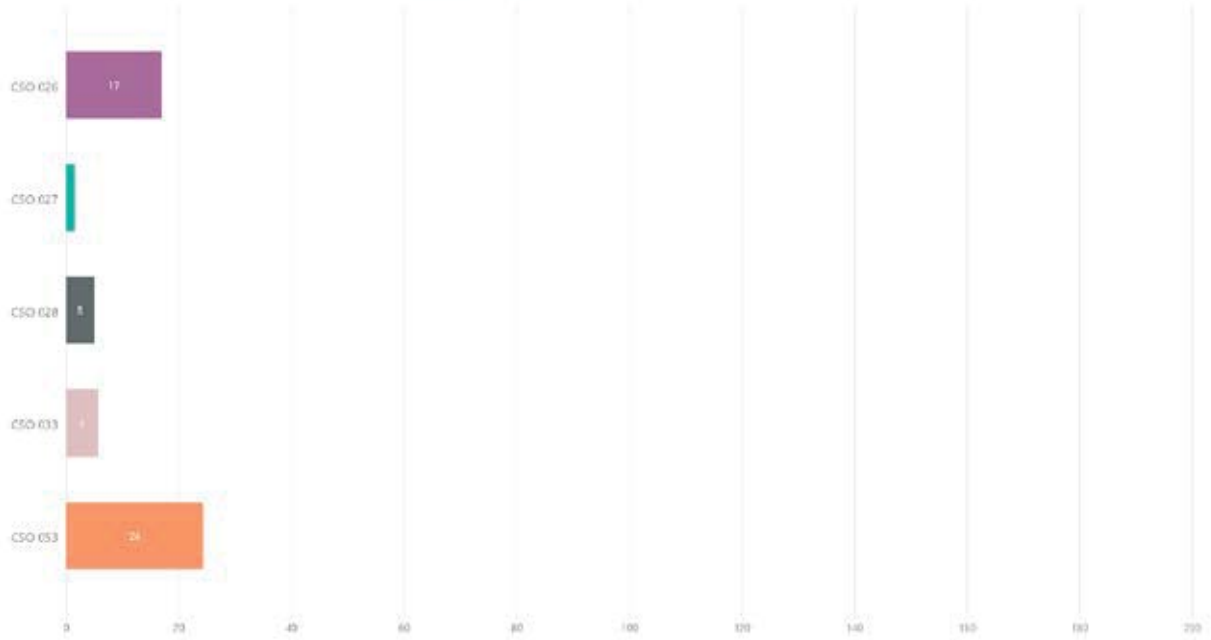
Number of Industrial Permits per Square Mile by CSO Area, 2016-2018



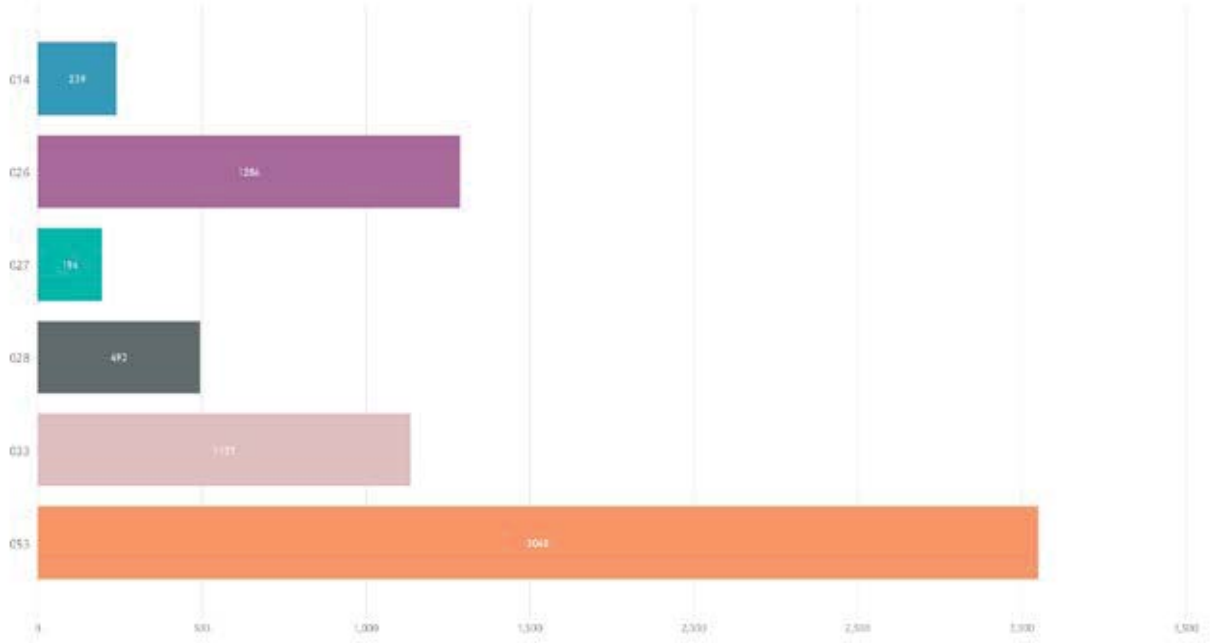
Number of Vacant Land/Demolition Permits by CSO Area, 2016-2018



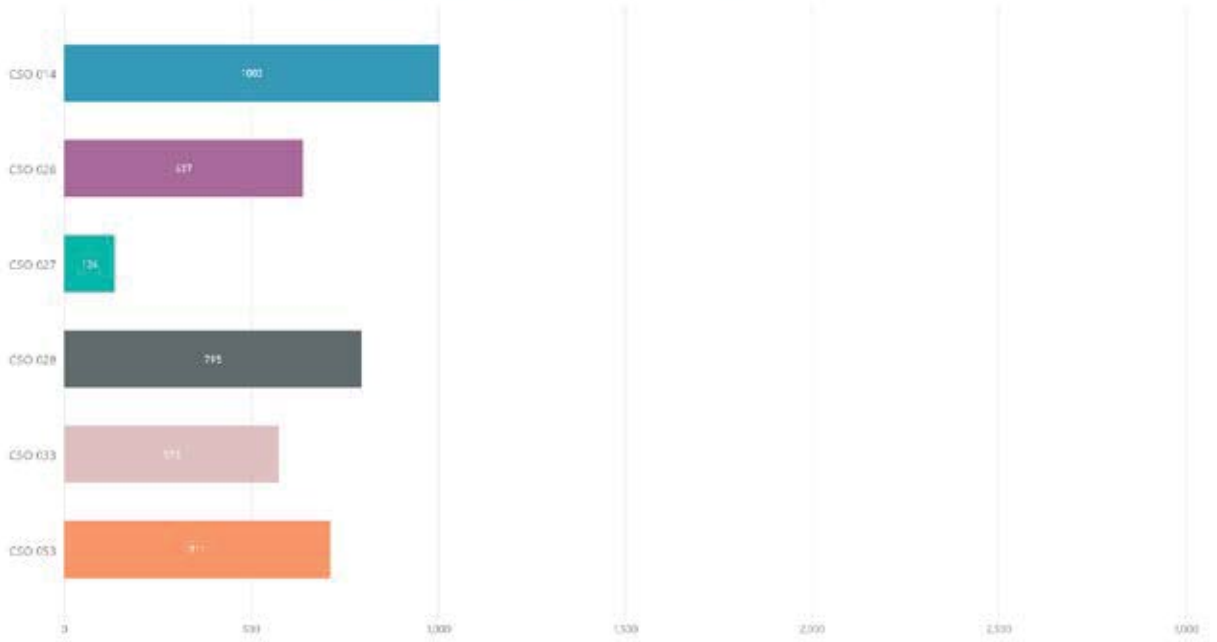
Number of Vacant Land/Demolition Permits per Square Mile by CSO Area, 2016-2018



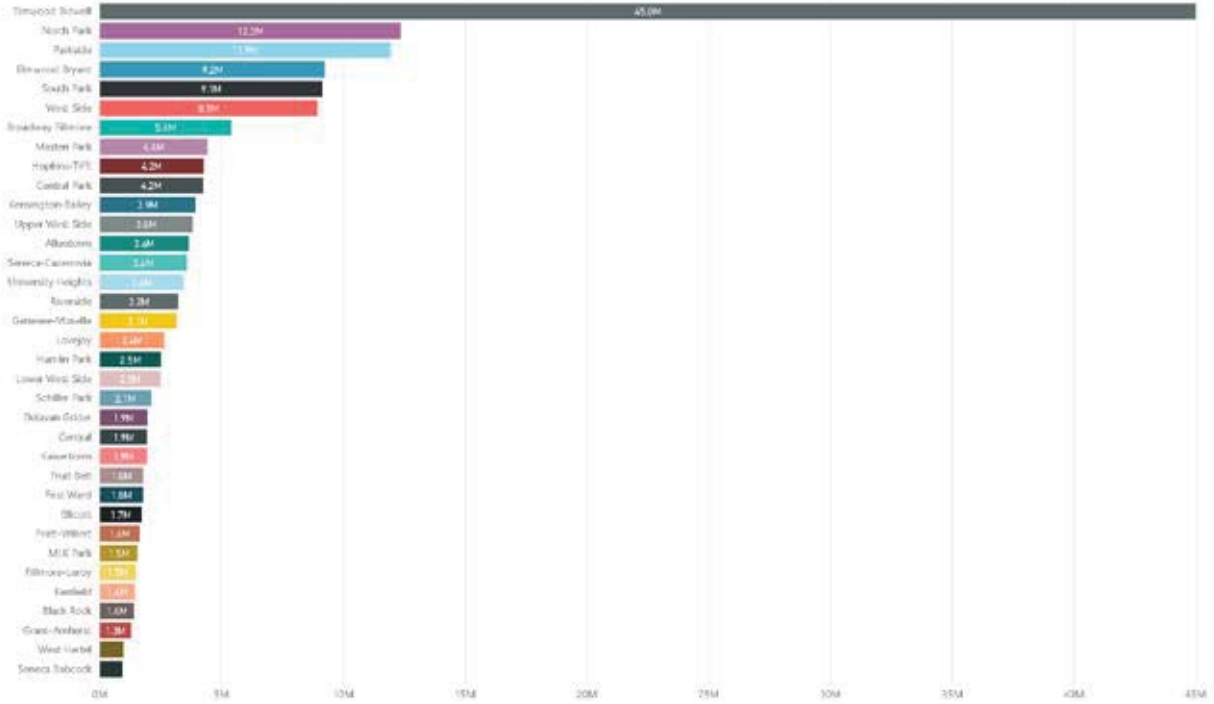
Total Number of Permits by CSO Area, 2016-2018



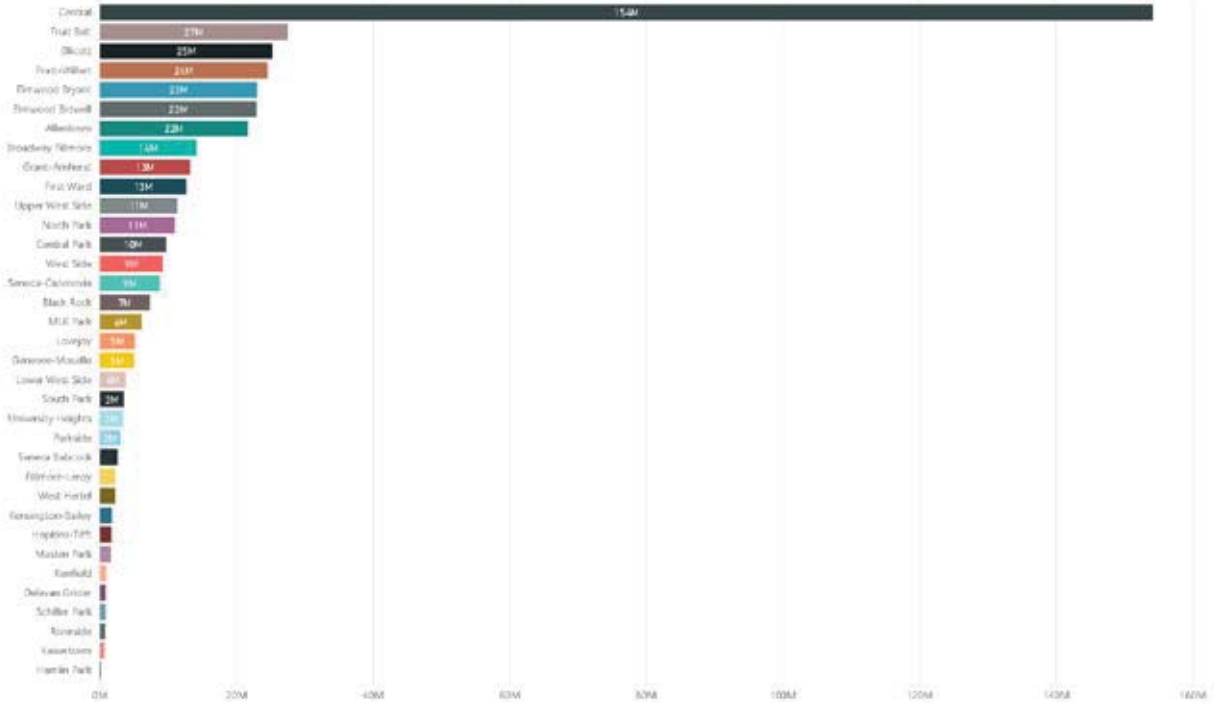
Total Number of Permits per Square Mile by CSO Area, 2016-2018



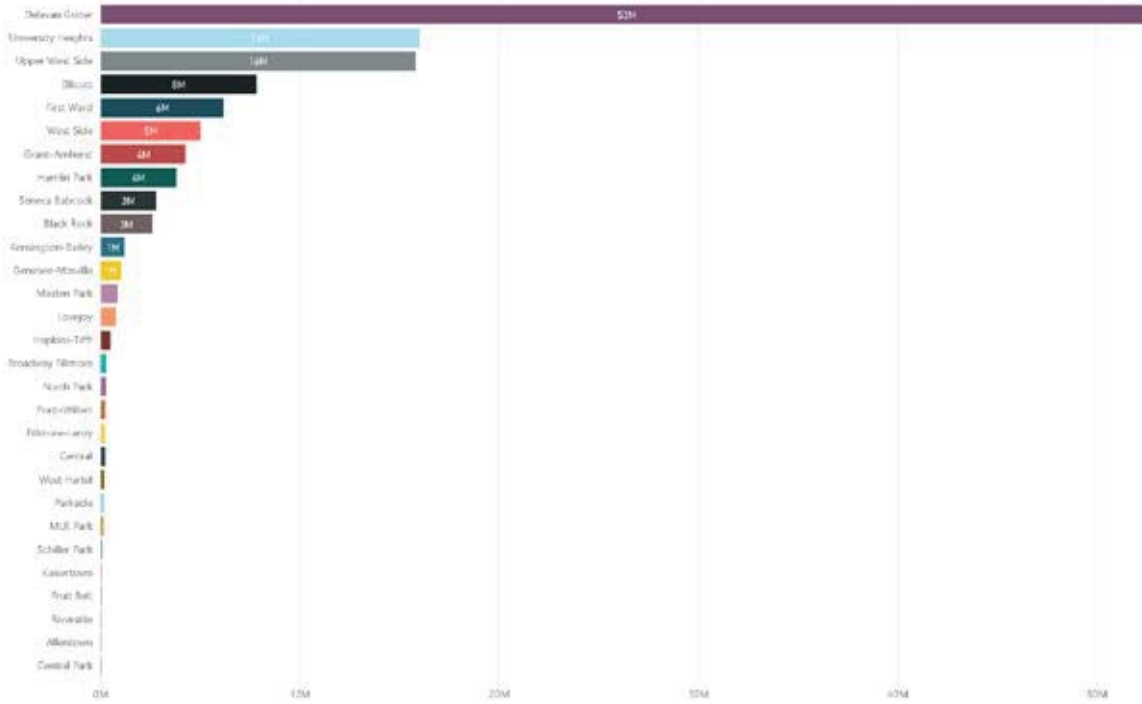
Total Value of Residential Permits by Neighborhood, 2016-2018



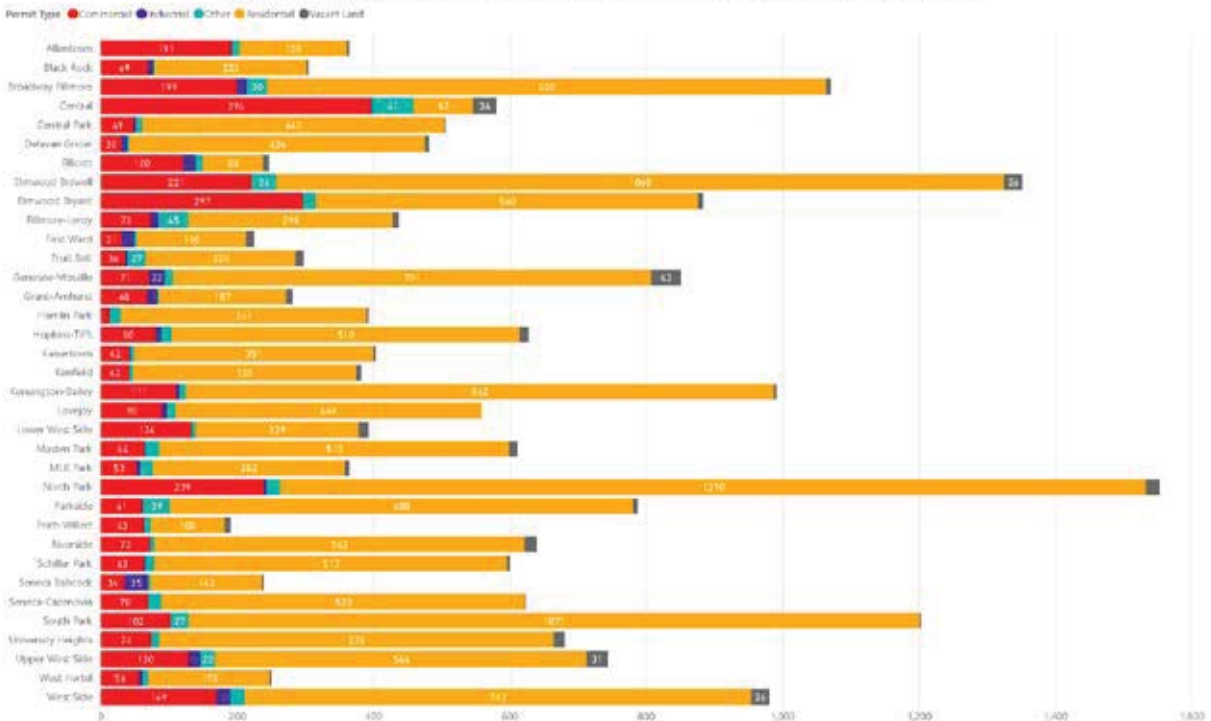
Total Value of Commercial Permits by Neighborhood, 2016-2018



Total Value of Industrial Permits by Neighborhood, 2016-2018

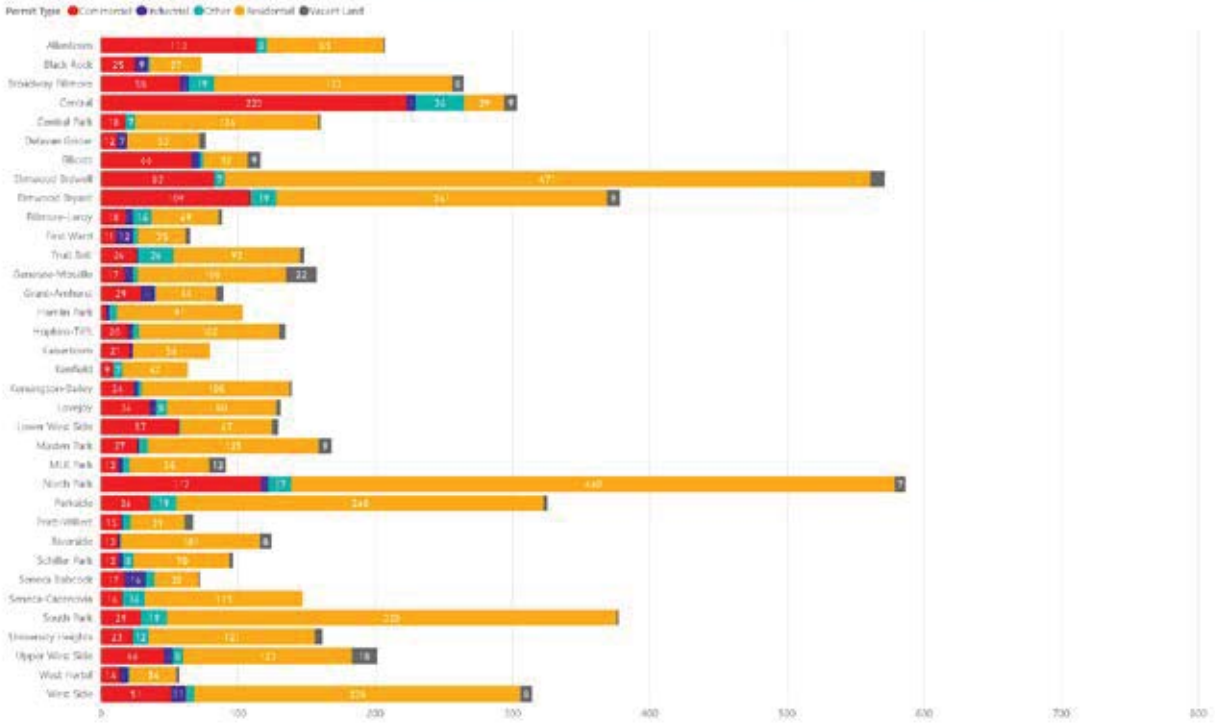


Number of Permits Valued between \$0 and \$9,999 by Neighborhood, 2016-2018

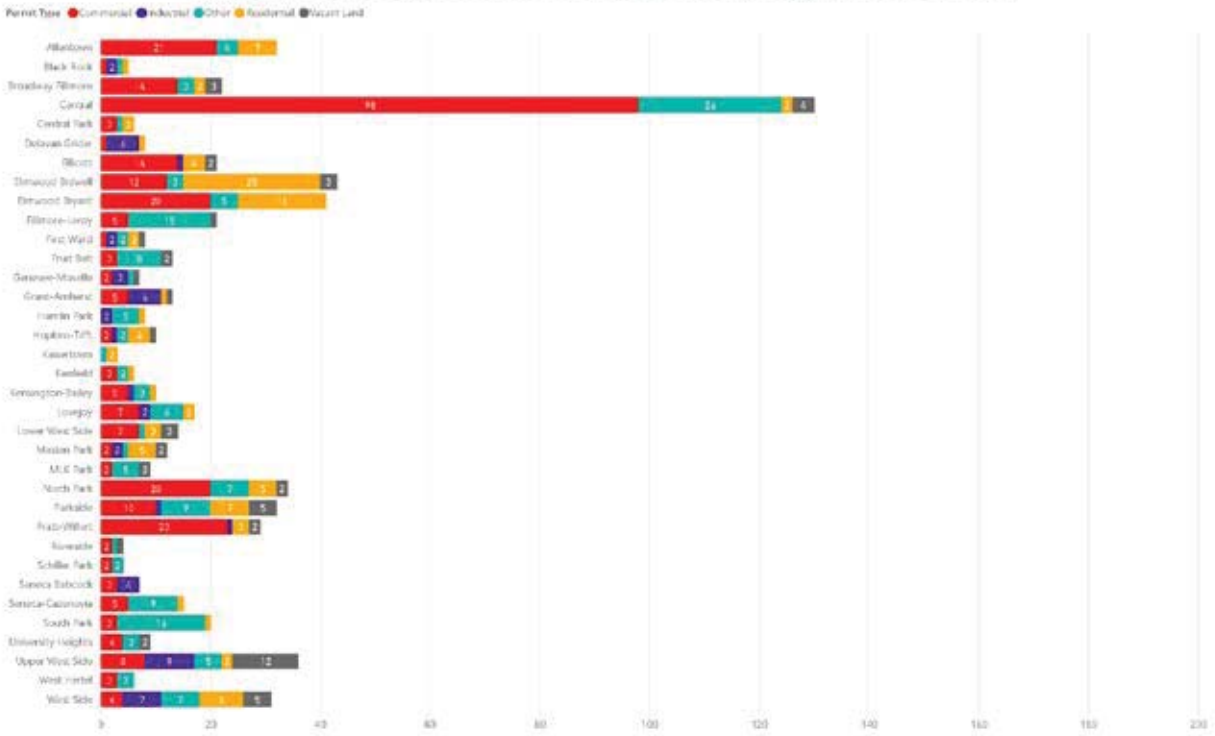




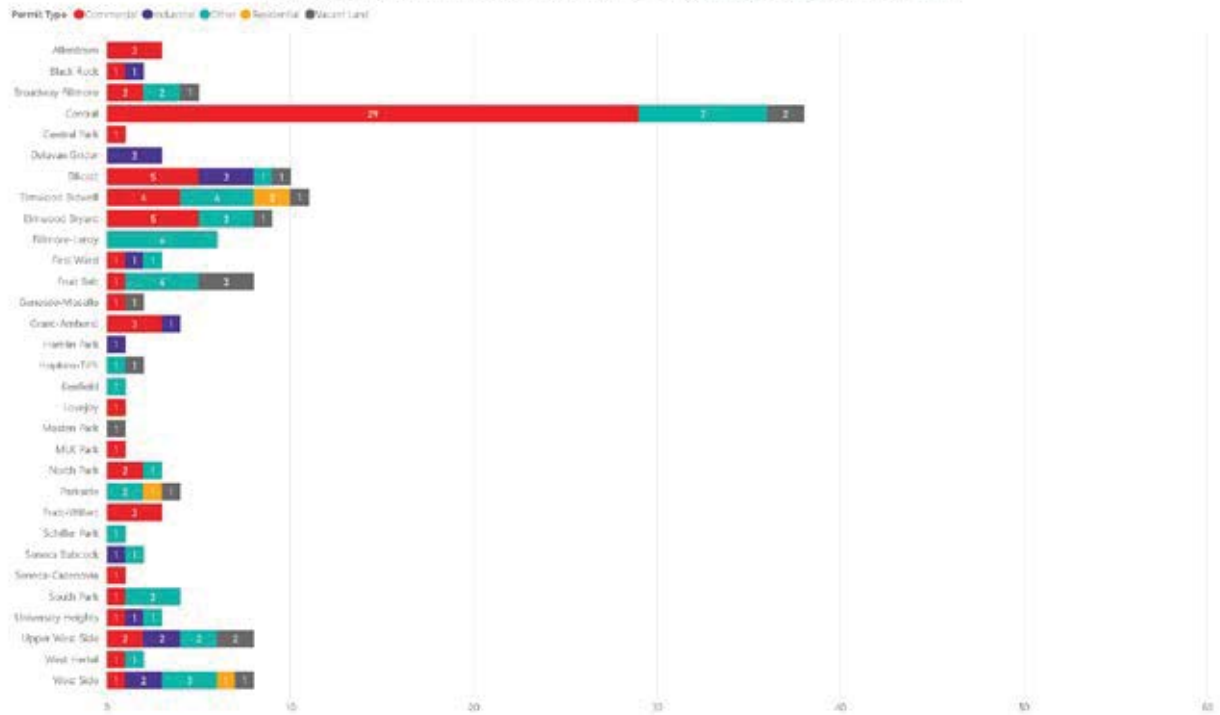
Number of Permits Valued between \$10K and \$99,999 by Neighborhood, 2016-2018



Number of Permits Valued between \$100K and \$999,999 by Neighborhood, 2016-2018



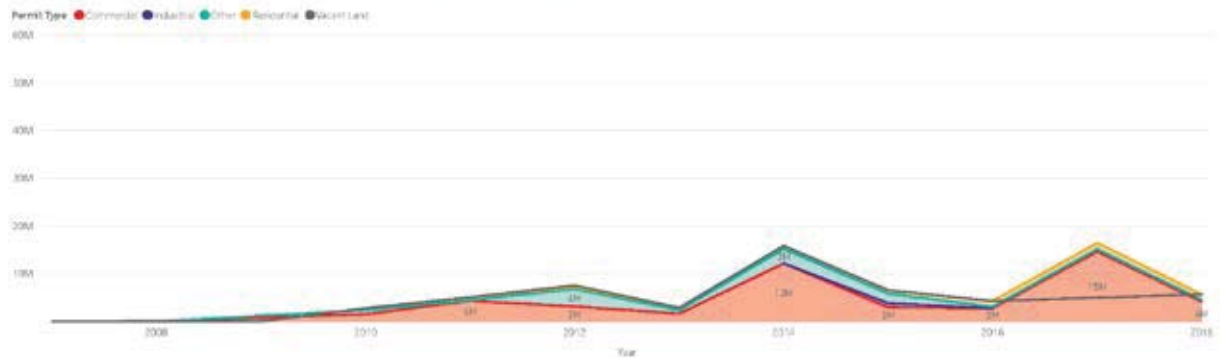
Number of Permits Valued \$1M and Higher by Neighborhood, 2016-2018



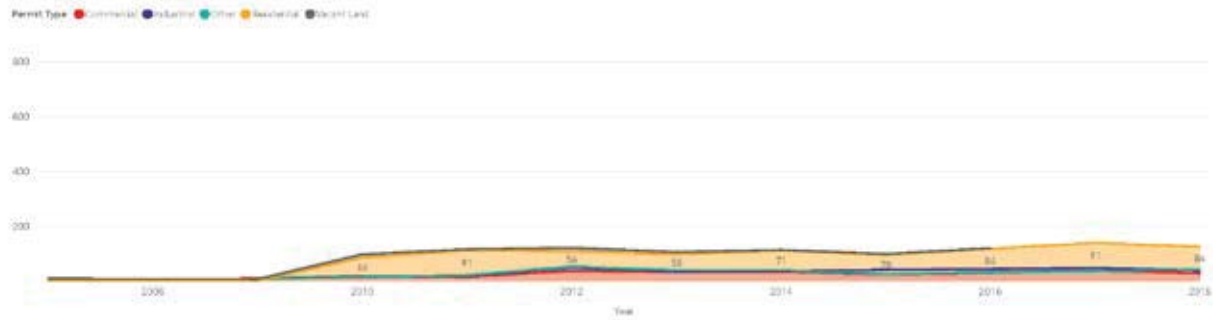
Number of Building Permits in Allentown, 2007-2018



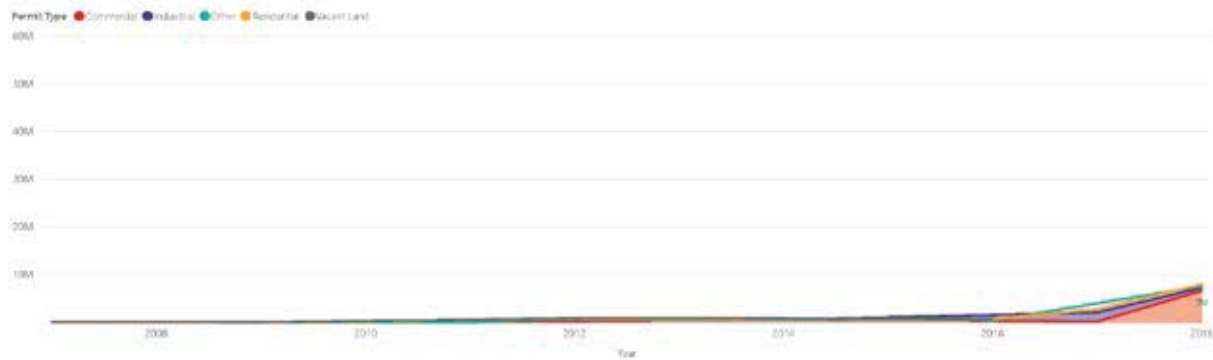
Sum of Values of Building Permits in Allentown, 2007-2018



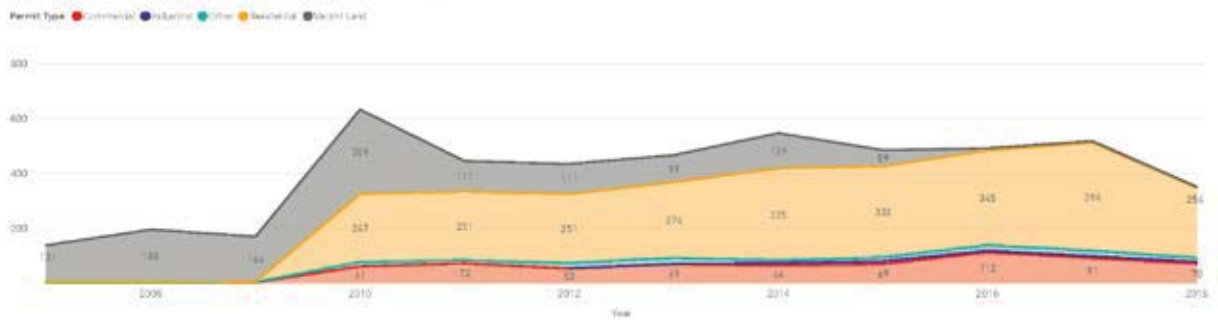
Number of Building Permits in Black Rock, 2007-2018



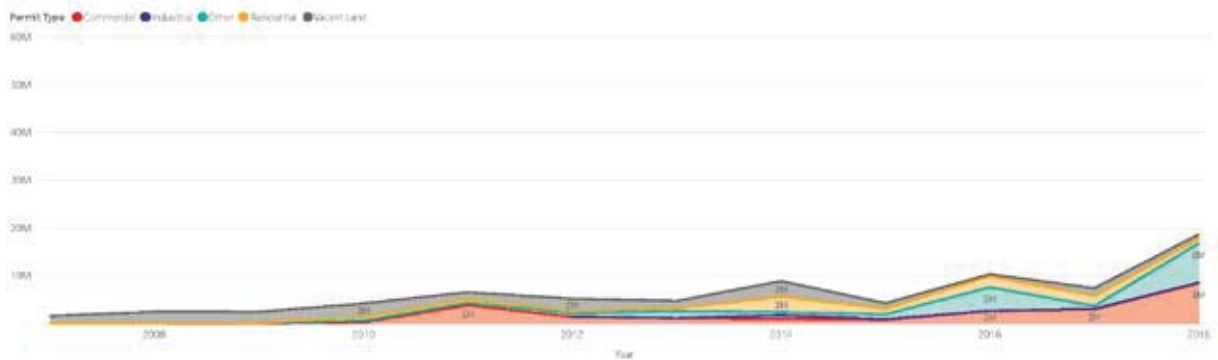
Sum of Values of Building Permits in Black Rock, 2007-2018



Number of Building Permits in Broadway Fillmore, 2007-2018



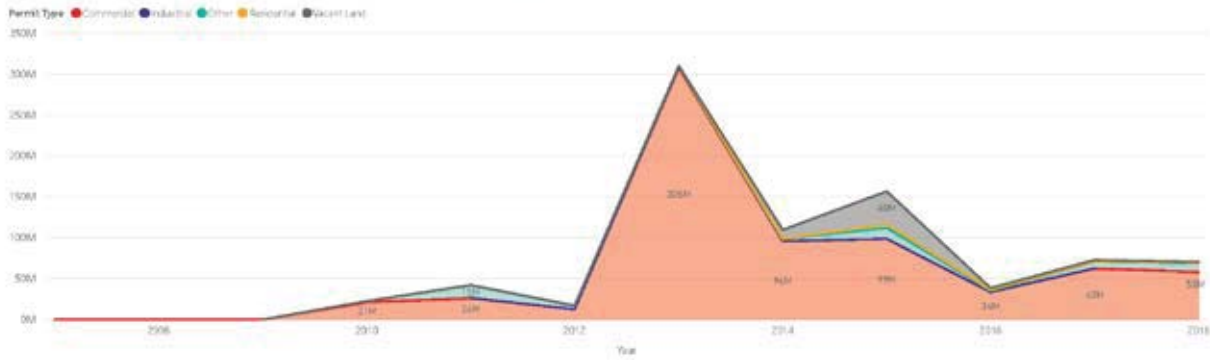
Sum of Values of Building Permits in Broadway Fillmore, 2007-2018



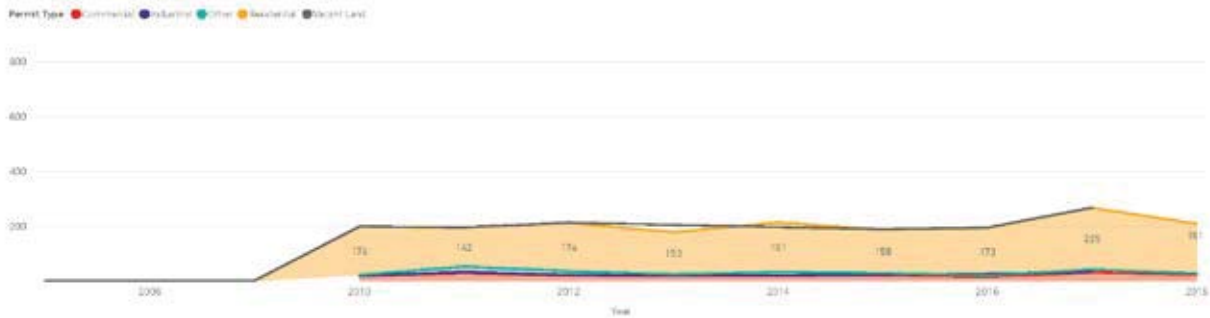
Number of Building Permits in Central, 2007-2018



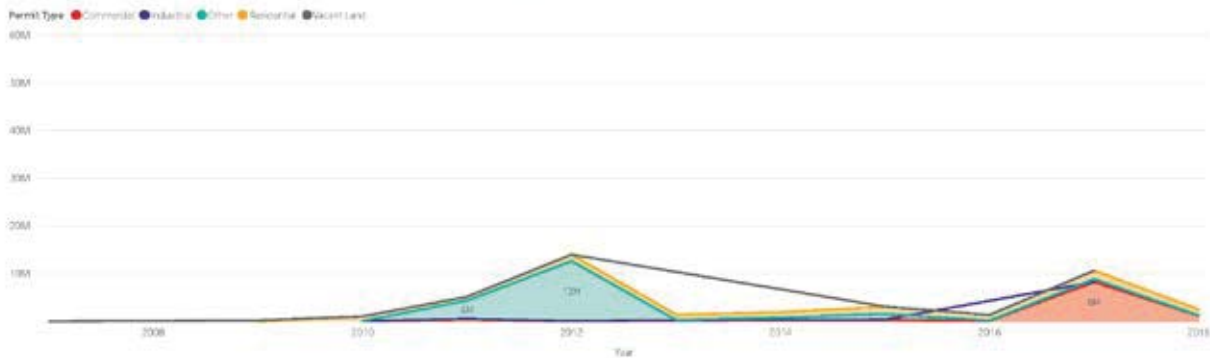
Sum of Values of Building Permits in Central, 2007-2018



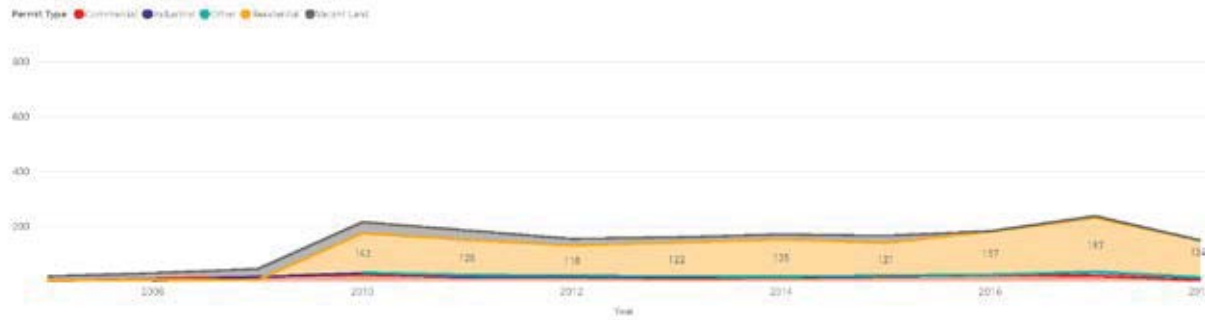
Number of Building Permits in Central Park, 2007-2018



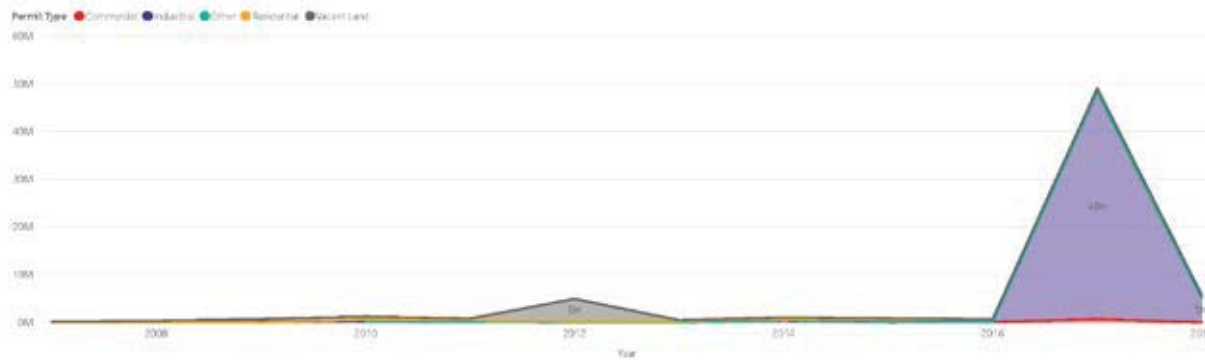
Sum of Values of Building Permits in Central Park, 2007-2018



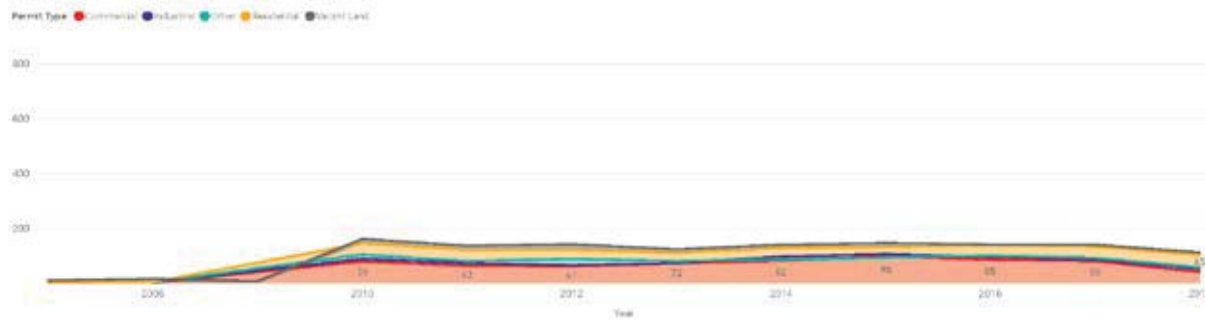
Number of Building Permits in Delavan Grider, 2007-2018



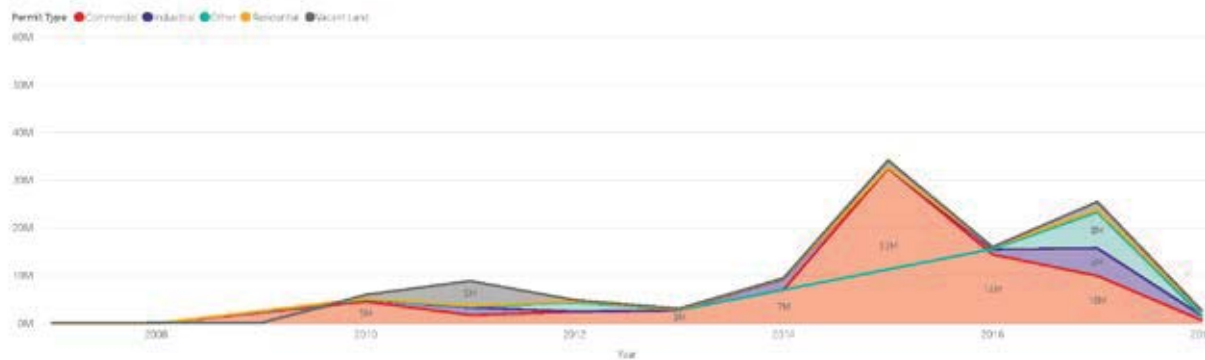
Sum of Values of Building Permits in Delavan Grider, 2007-2018



Number of Building Permits in Ellicott, 2007-2018



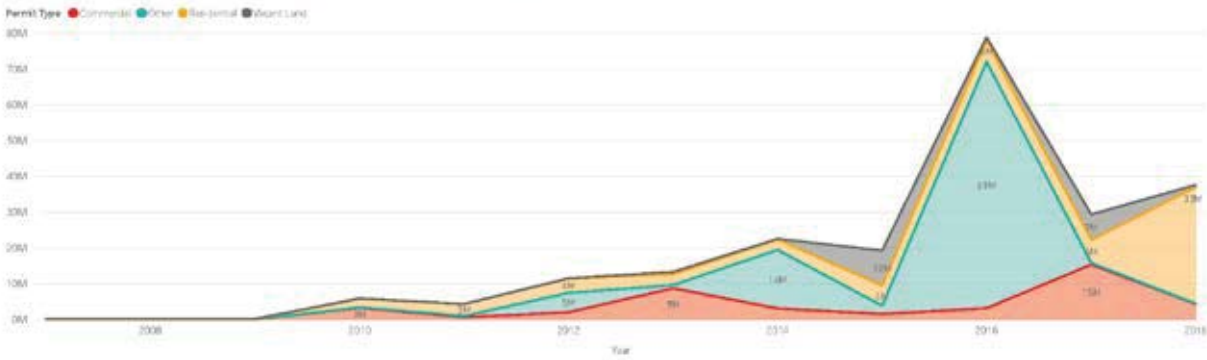
Sum of Values of Building Permits in Ellicott, 2007-2018



Number of Building Permits in Elmwood Bidwell, 2007-2018



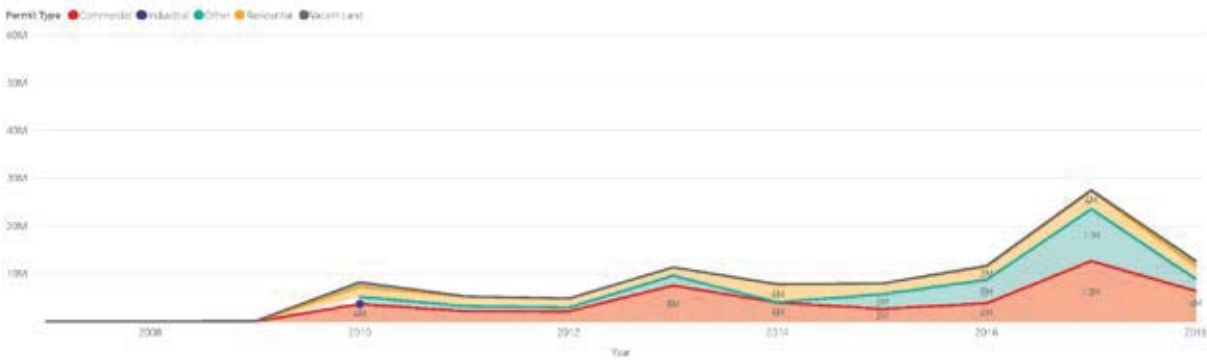
Sum of Values of Building Permits in Elmwood Bidwell, 2007-2018



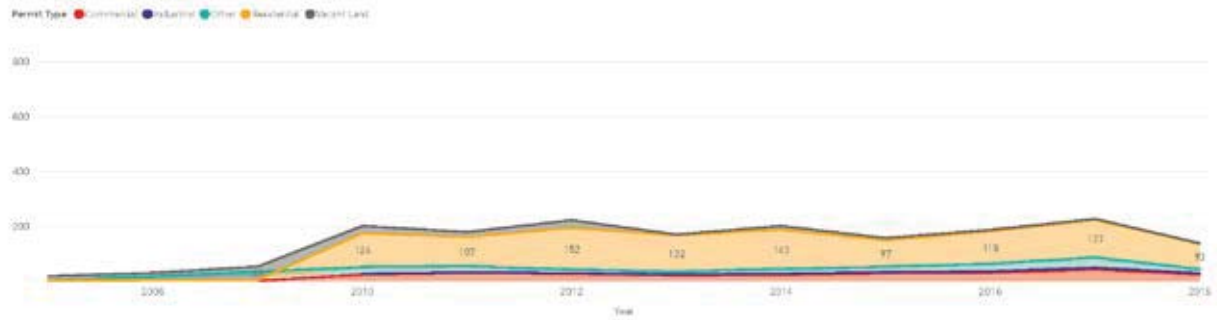
Number of Building Permits in Elmwood Bryant, 2007-2018



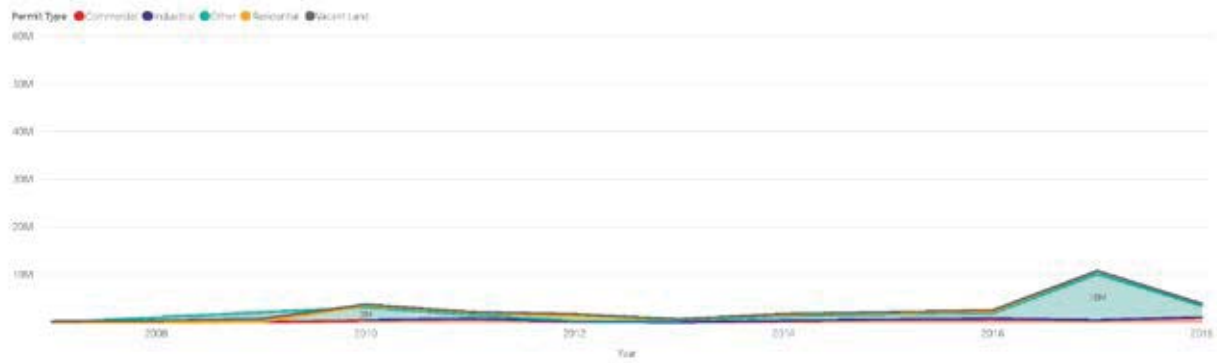
Sum of Values of Building Permits in Elmwood Bryant, 2007-2018



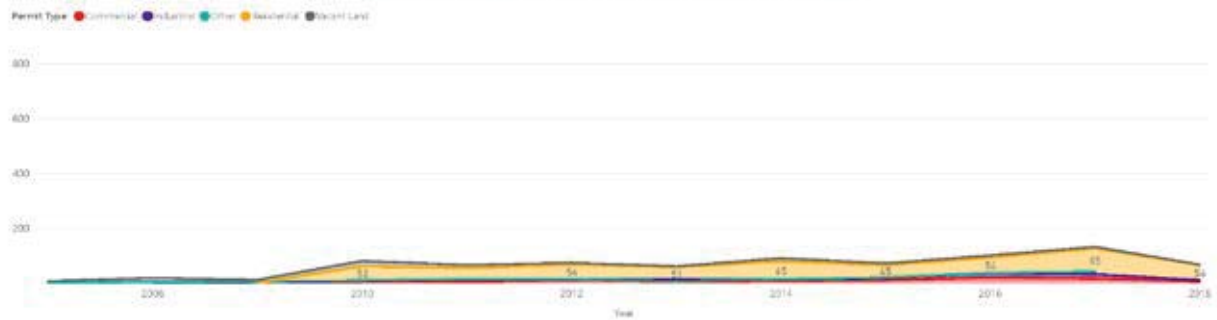
Number of Building Permits in Fillmore-Leroy, 2007-2018



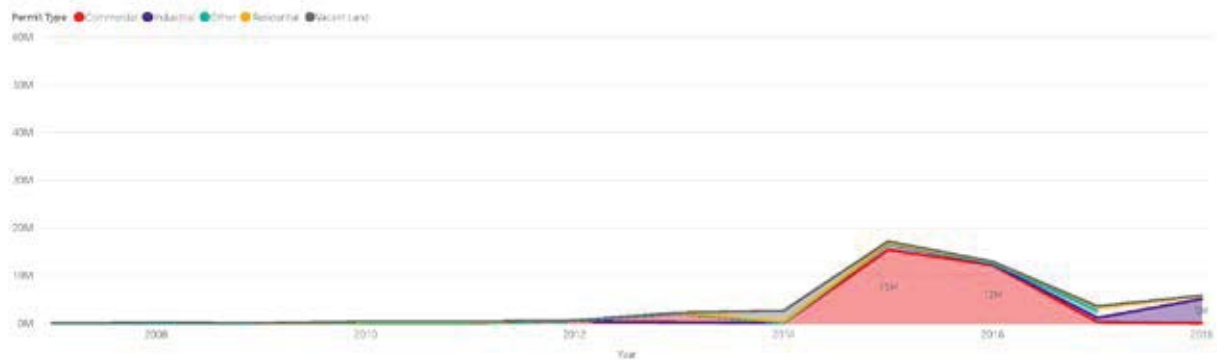
Sum of Values of Building Permits in Fillmore-Leroy, 2007-2018



Number of Building Permits in First Ward, 2007-2018

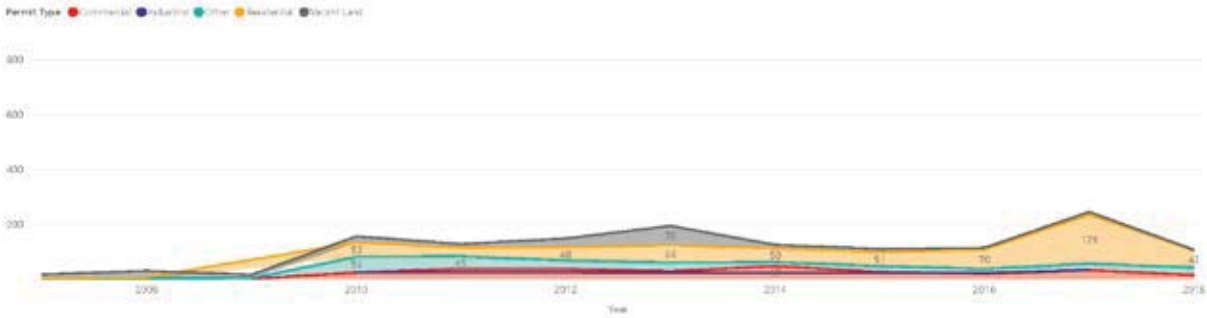


Sum of Values of Building Permits in First Ward, 2007-2018

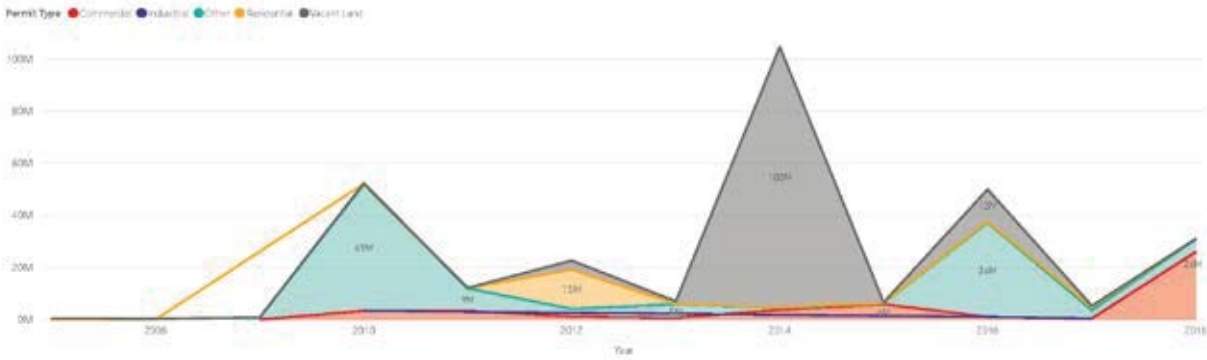




Number of Building Permits in Fruit Belt, 2007-2018



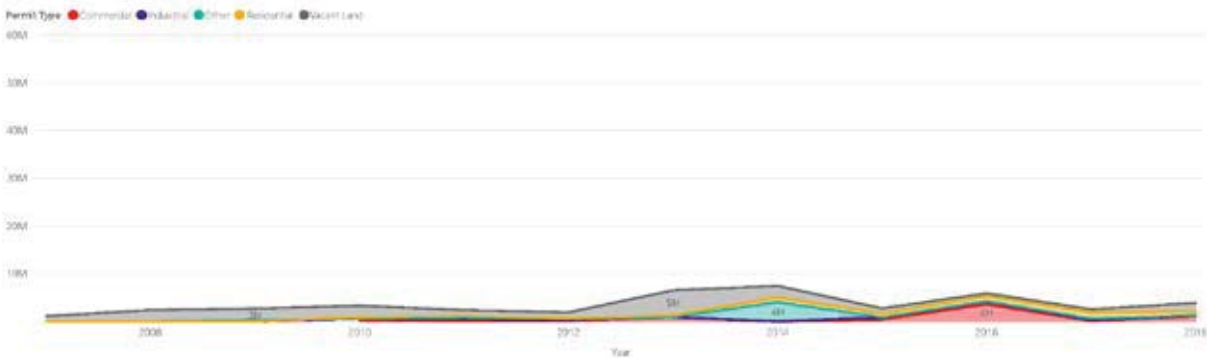
Sum of Values of Building Permits in Fruit Belt, 2007-2018



Number of Building Permits in Genesee-Moselle, 2007-2018

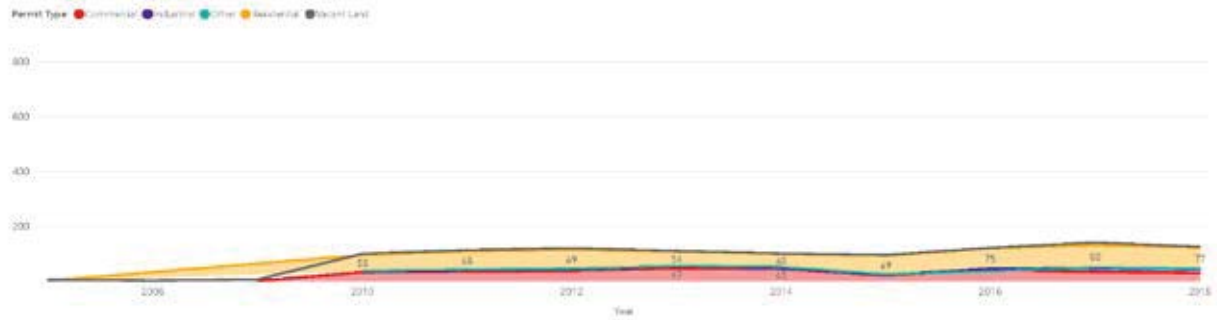


Sum of Values of Building Permits in Genesee-Moselle, 2007-2018

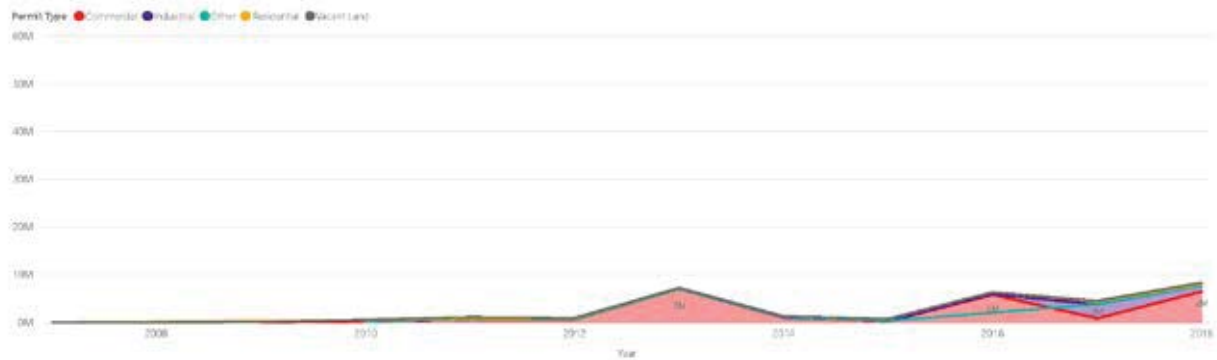




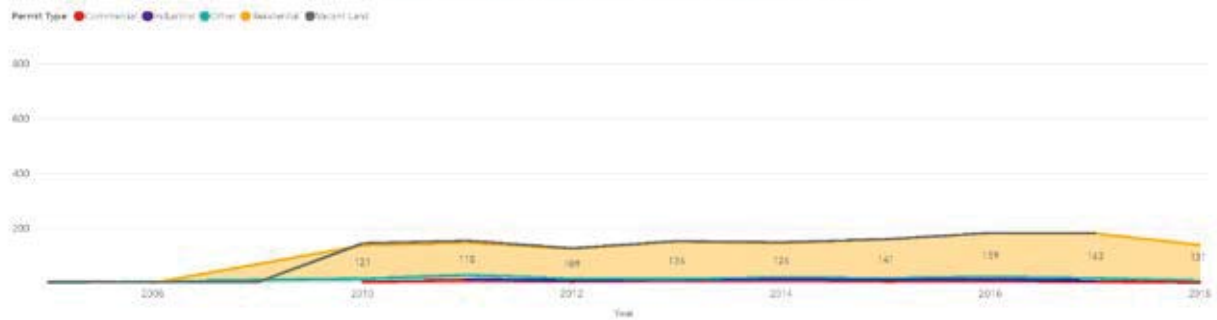
Number of Building Permits in Grant-Amherst, 2007-2018



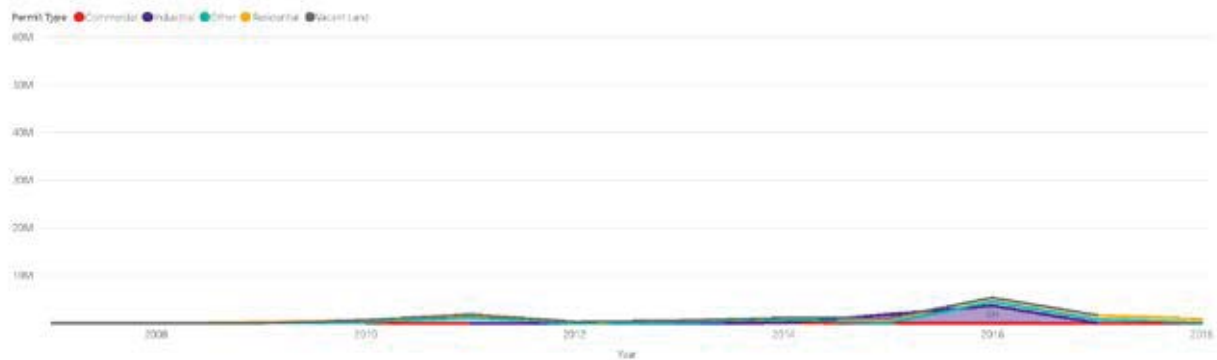
Sum of Values of Building Permits in Grant-Amherst, 2007-2018



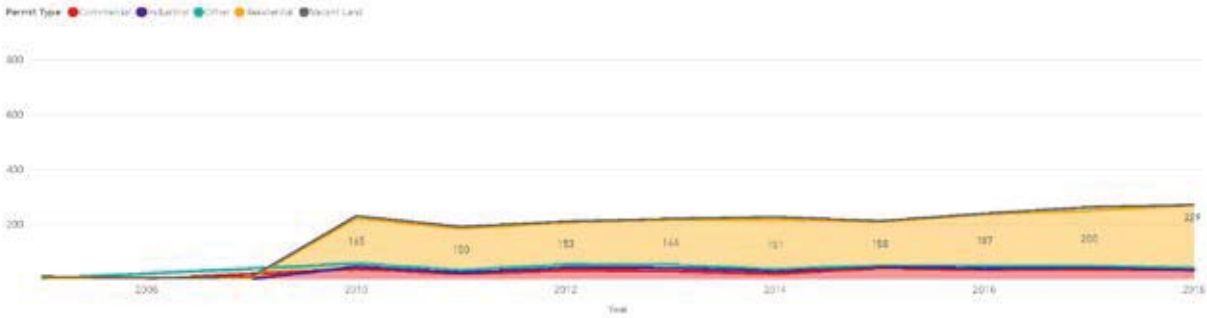
Number of Building Permits in Hamlin Park, 2007-2018



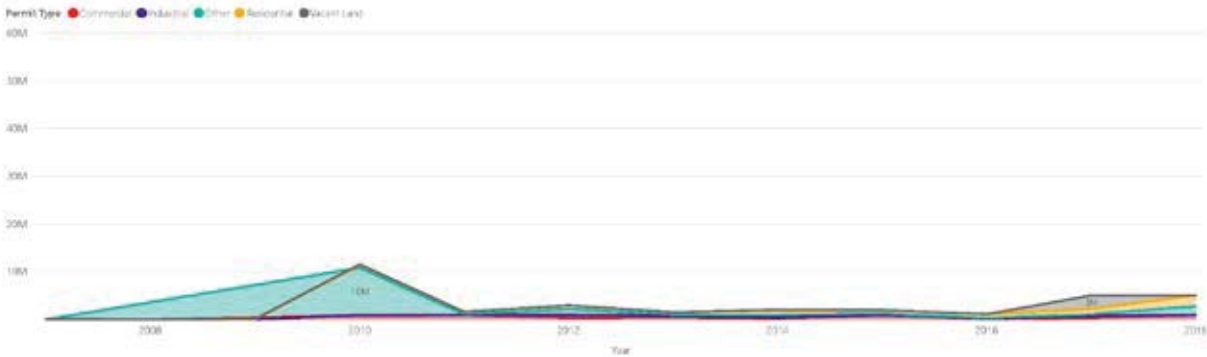
Sum of Values of Building Permits in Hamlin Park, 2007-2018



Number of Building Permits in Hopkins-Tiftt, 2007-2018



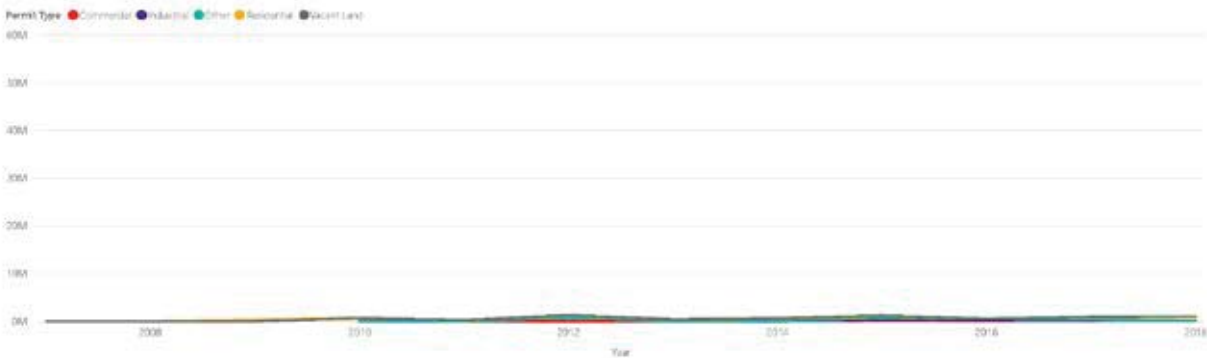
Sum of Values of Building Permits in Hopkins-Tiftt, 2007-2018



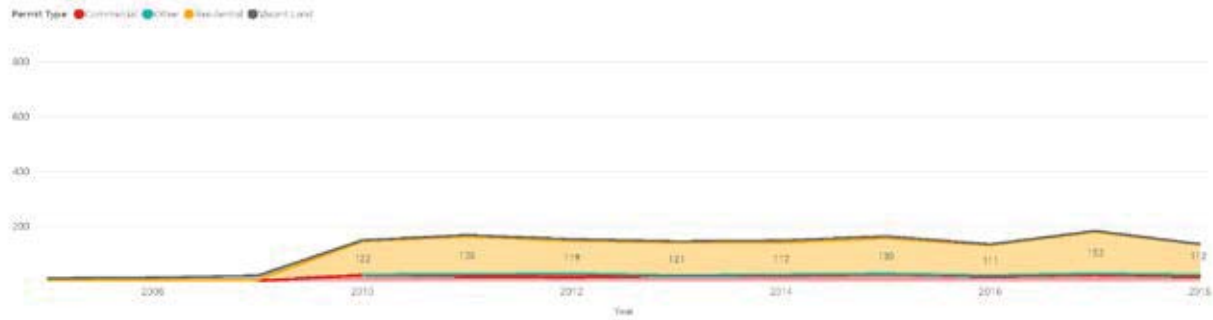
Number of Building Permits in Kaisertown, 2007-2018



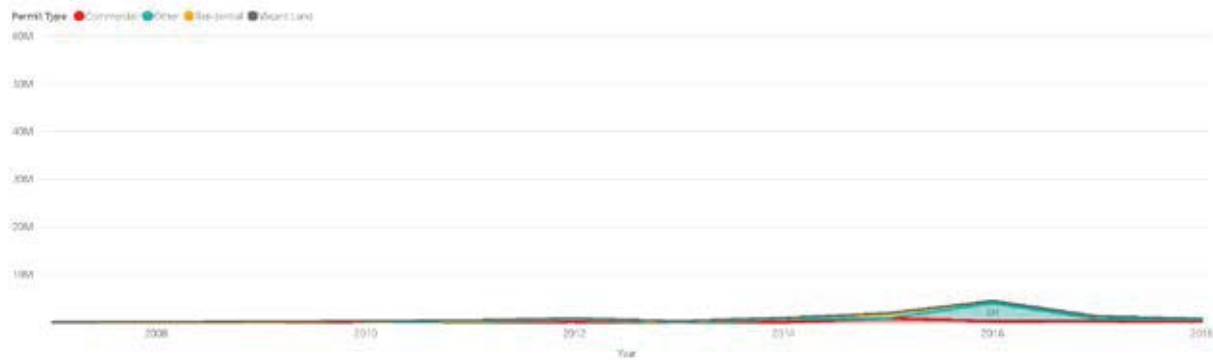
Sum of Values of Building Permits in Kaisertown, 2007-2018



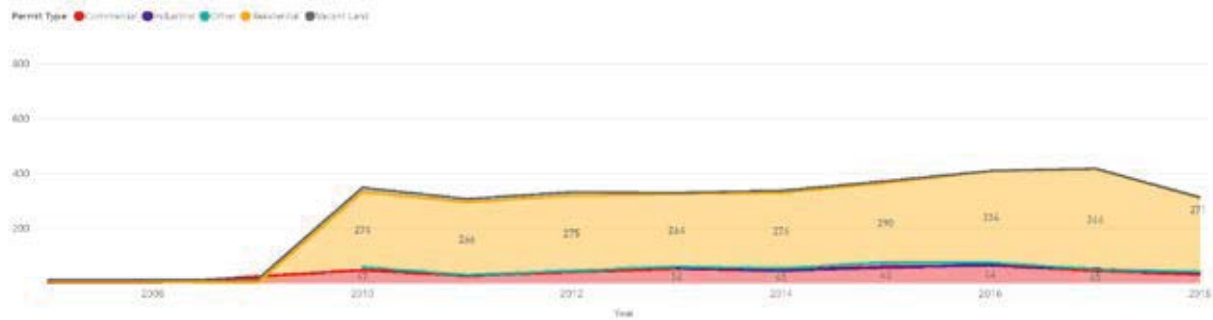
Number of Building Permits in Kenfield, 2007-2018



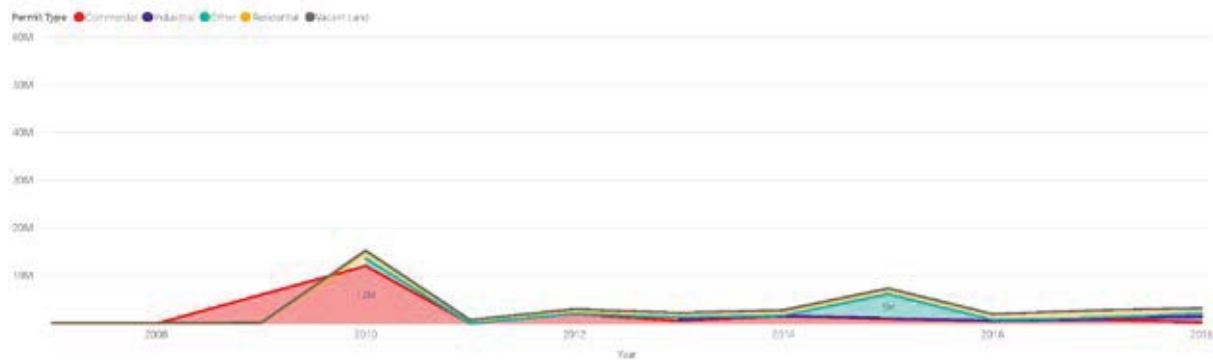
Sum of Values of Building Permits in Kenfield, 2007-2018



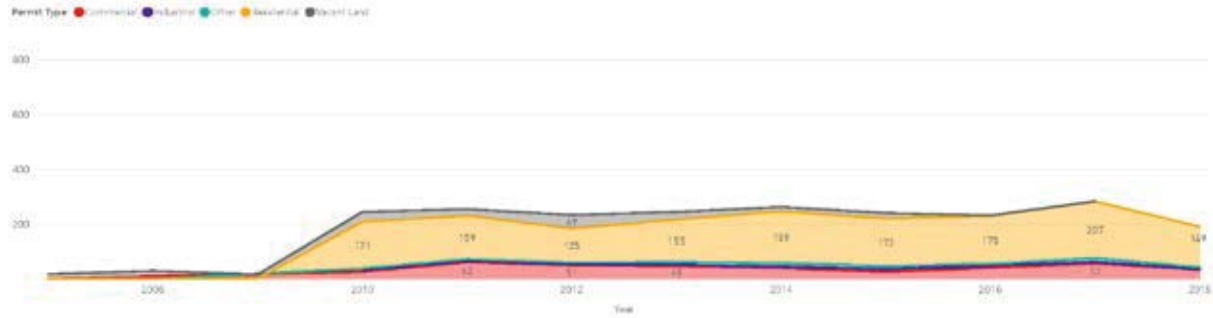
Number of Building Permits in Kensington-Bailey, 2007-2018



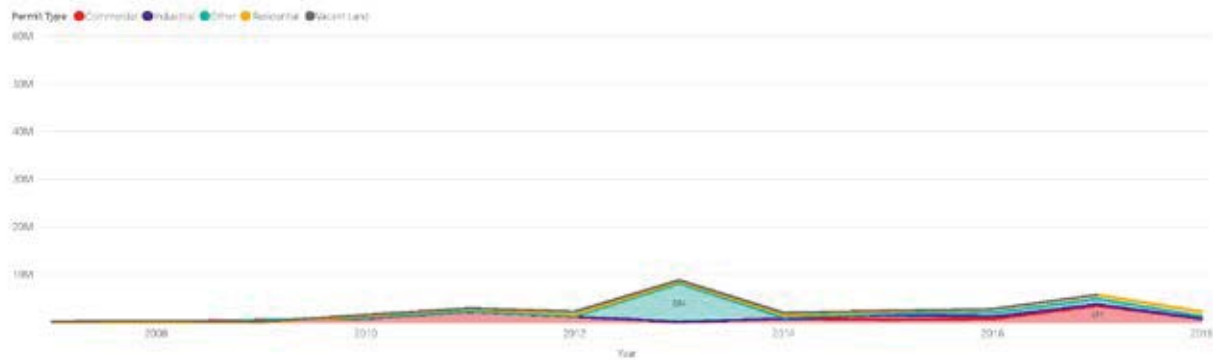
Sum of Values of Building Permits in Kensington-Bailey, 2007-2018



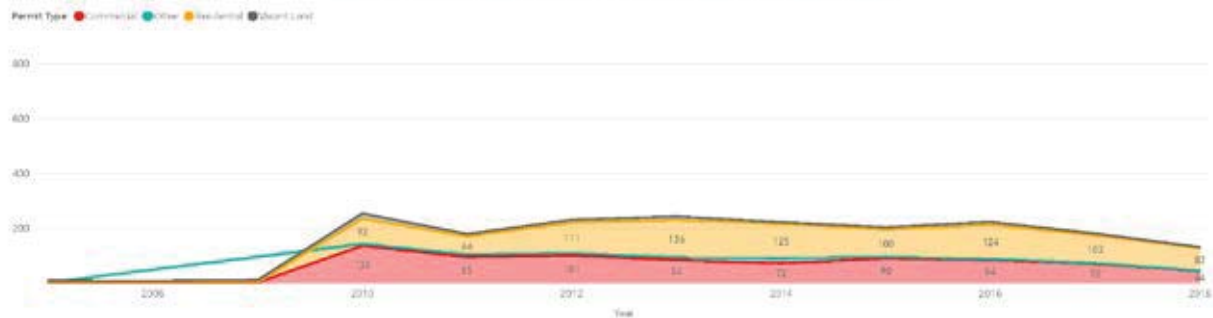
Number of Building Permits in Lovejoy, 2007-2018



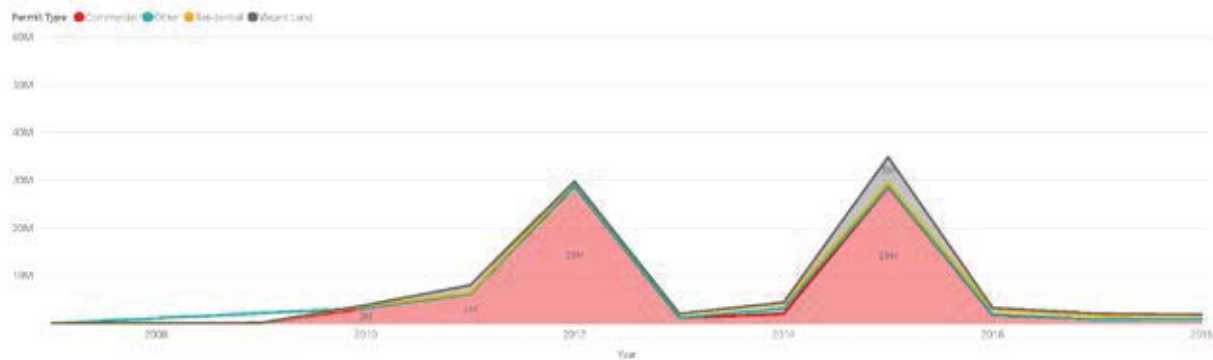
Sum of Values of Building Permits in Lovejoy, 2007-2018



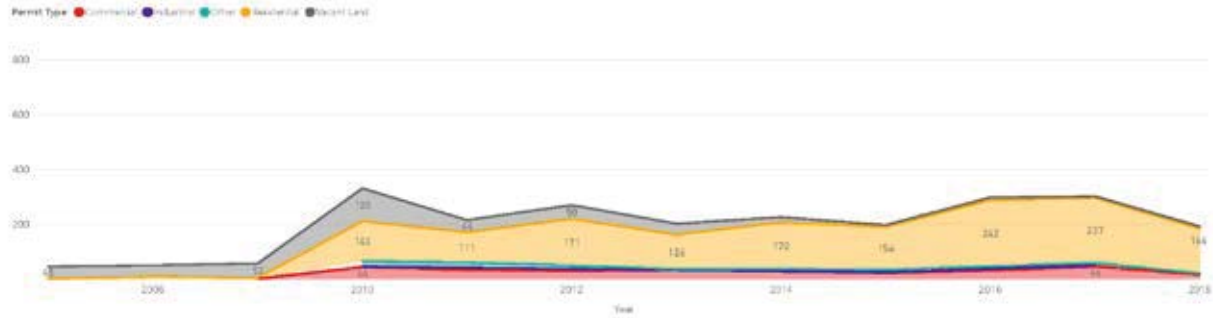
Number of Building Permits in Lower West Side, 2007-2018



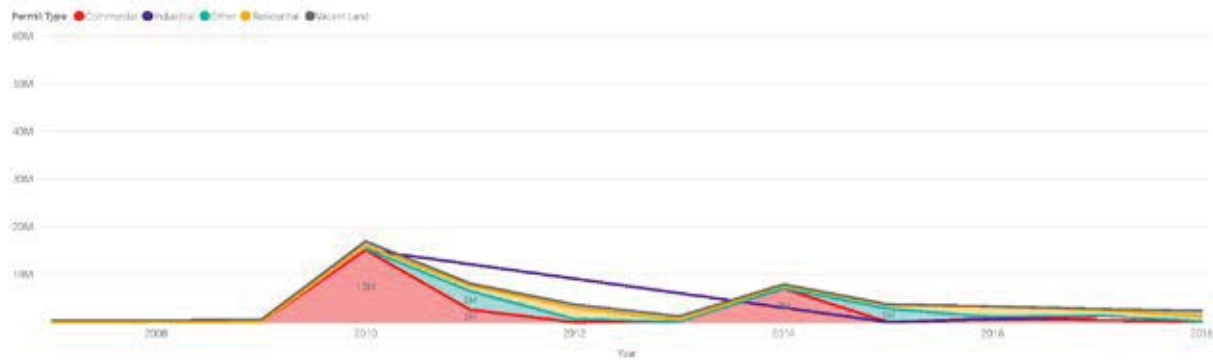
Sum of Values of Building Permits in Lower West Side, 2007-2018



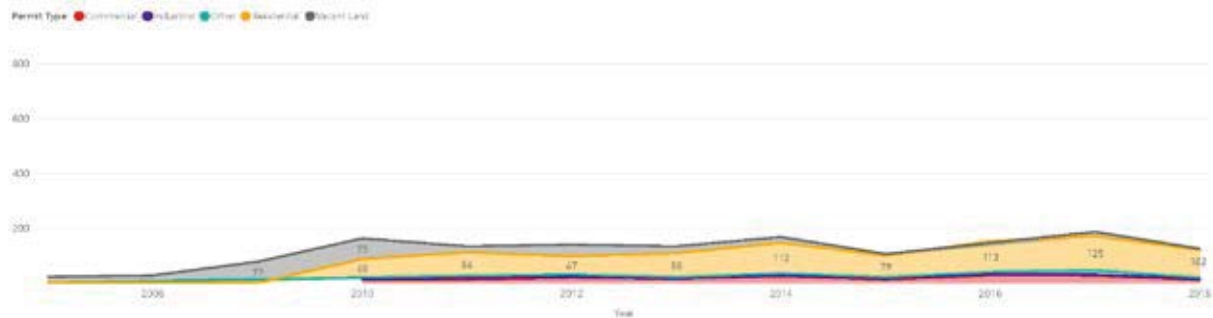
Number of Building Permits in Masten Park, 2007-2018



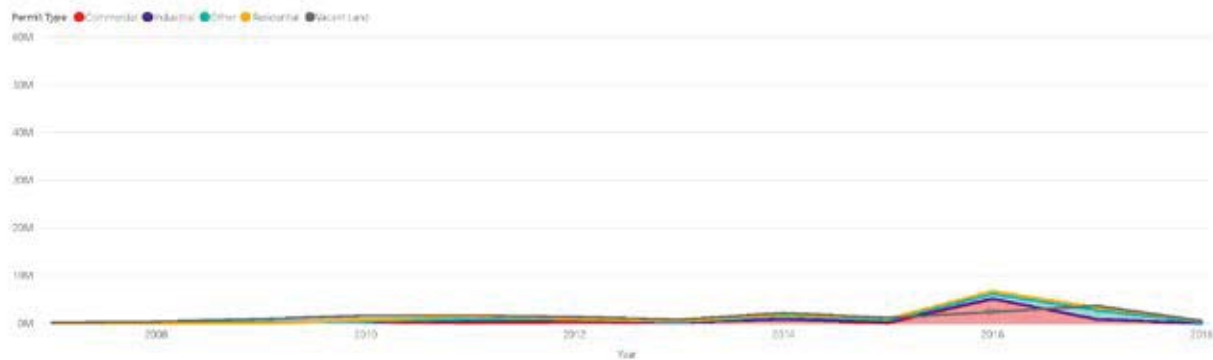
Sum of Values of Building Permits in Masten Park, 2007-2018



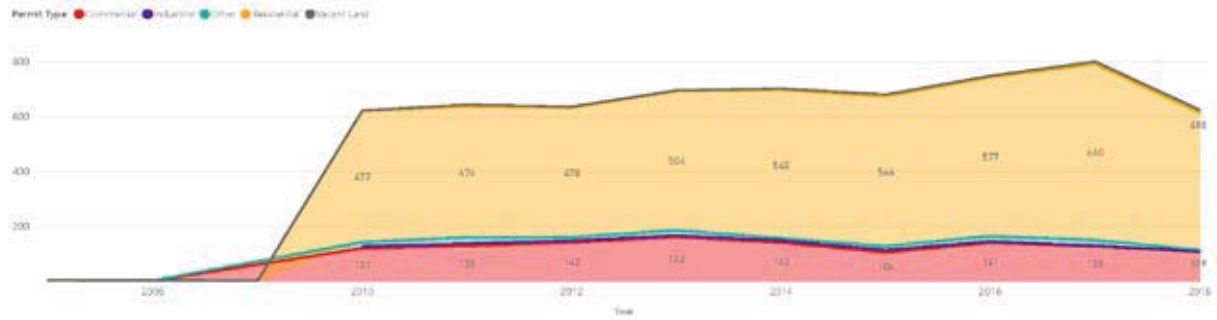
Number of Building Permits in MLK Park, 2007-2018



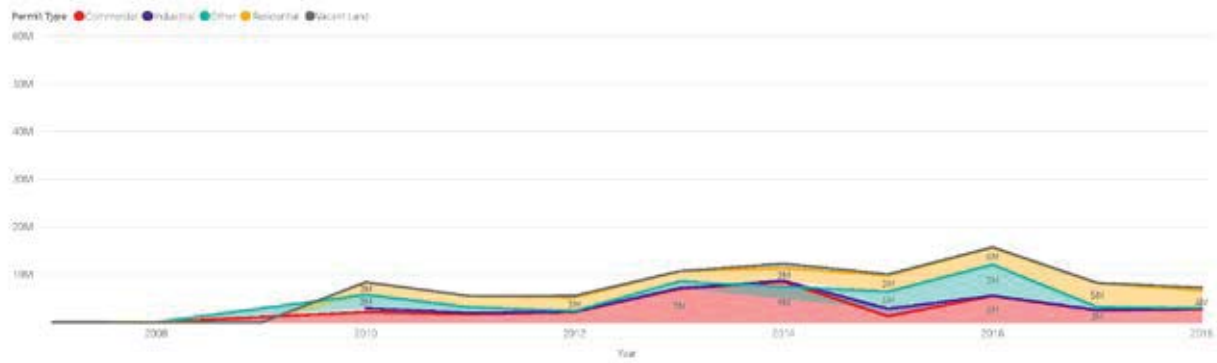
Sum of Values of Building Permits in MLK Park, 2007-2018



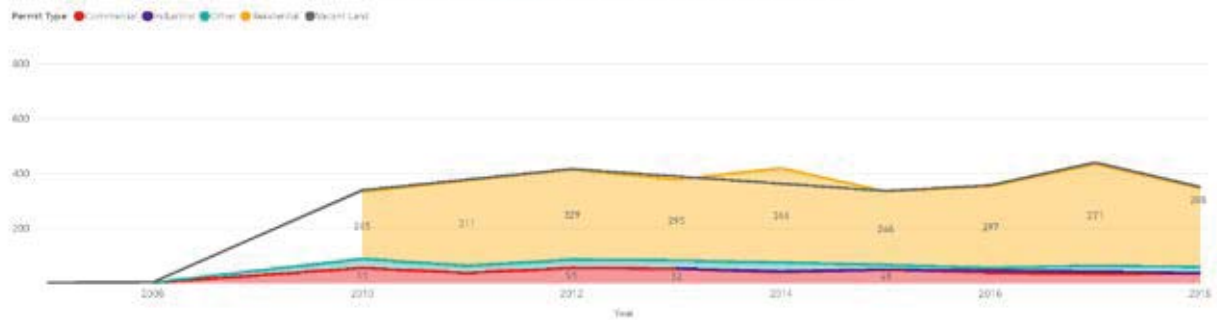
Number of Building Permits in North Park, 2007-2018



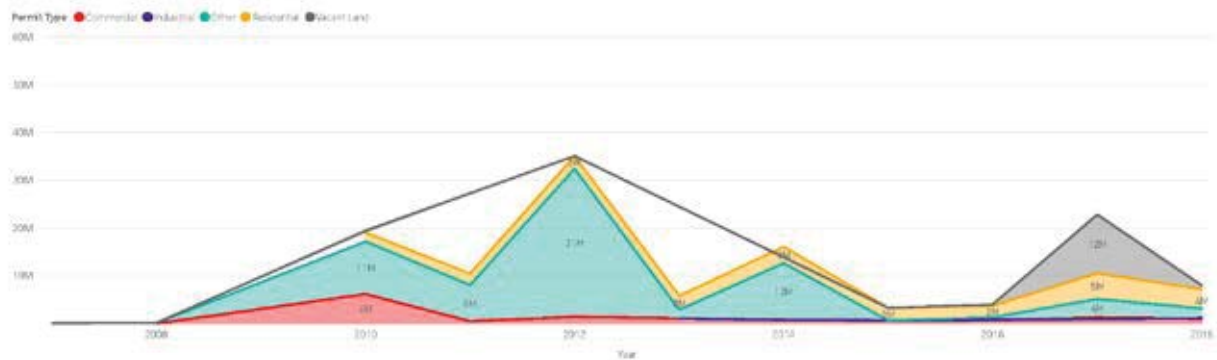
Sum of Values of Building Permits in North Park, 2007-2018



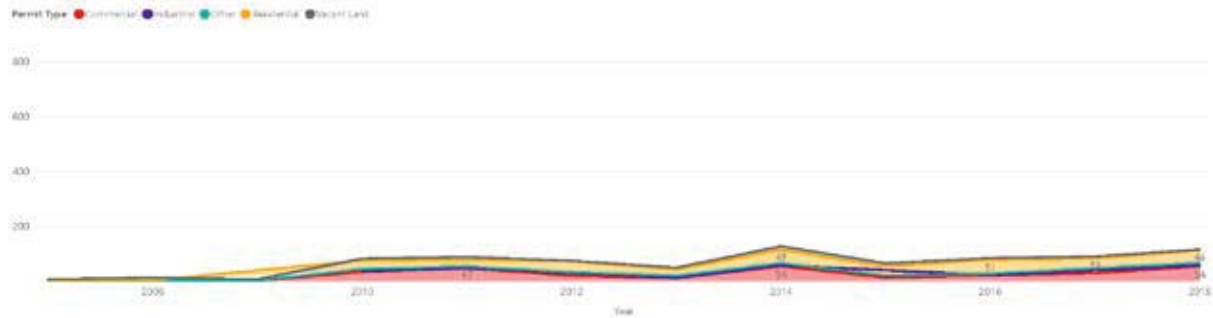
Number of Building Permits in Parkside, 2007-2018



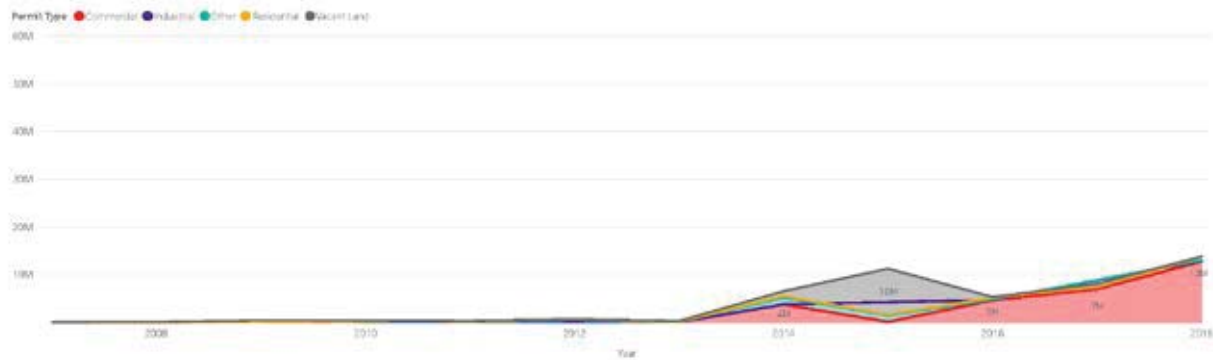
Sum of Values of Building Permits in Parkside, 2007-2018



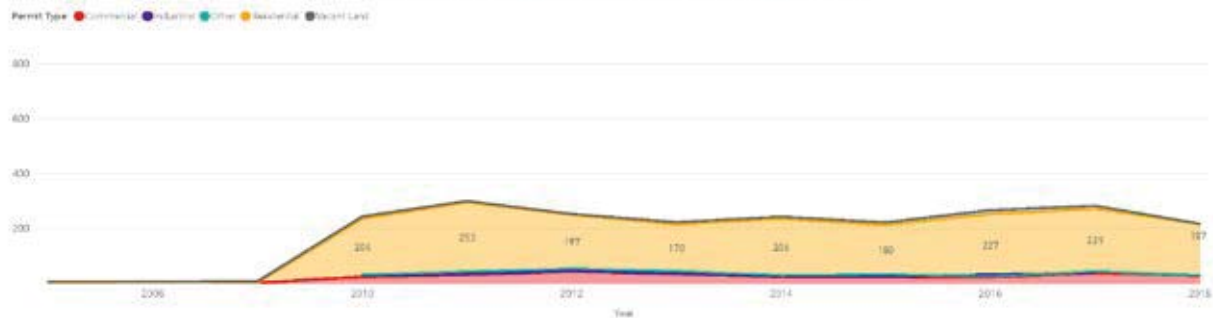
Number of Building Permits in Pratt-Willert, 2007-2018



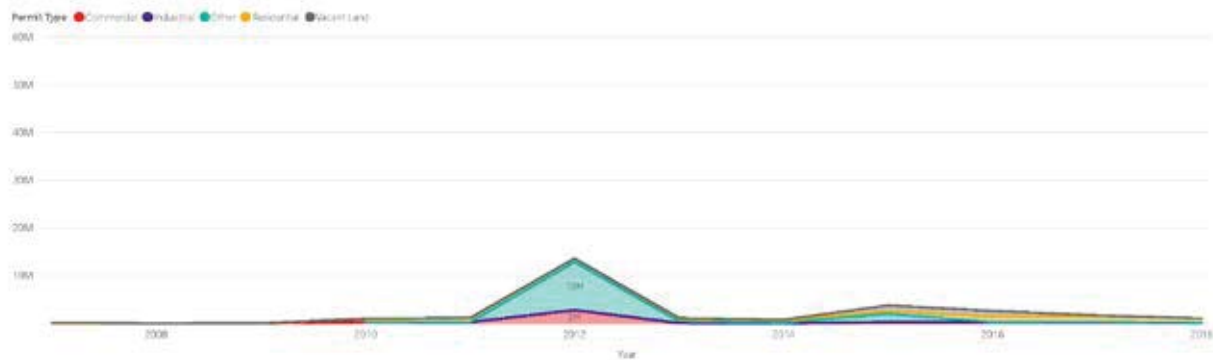
Sum of Values of Building Permits in Pratt-Willert, 2007-2018



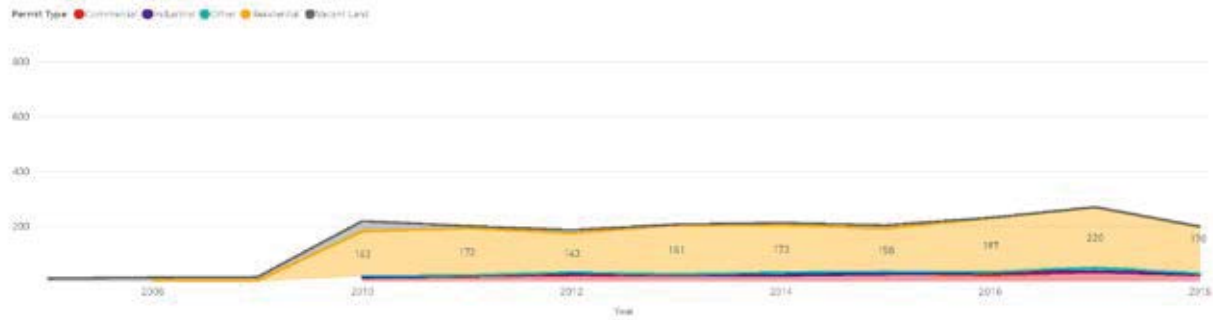
Number of Building Permits in Riverside, 2007-2018



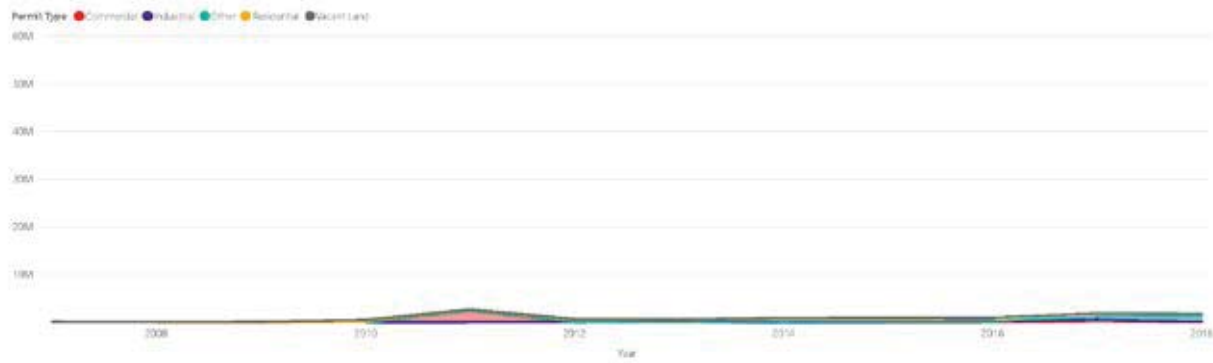
Sum of Values of Building Permits in Riverside, 2007-2018



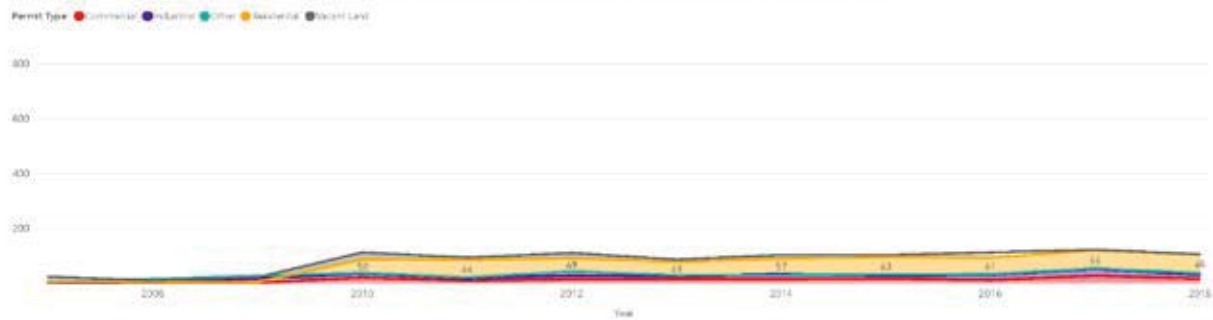
Number of Building Permits in Schiller Park, 2007-2018



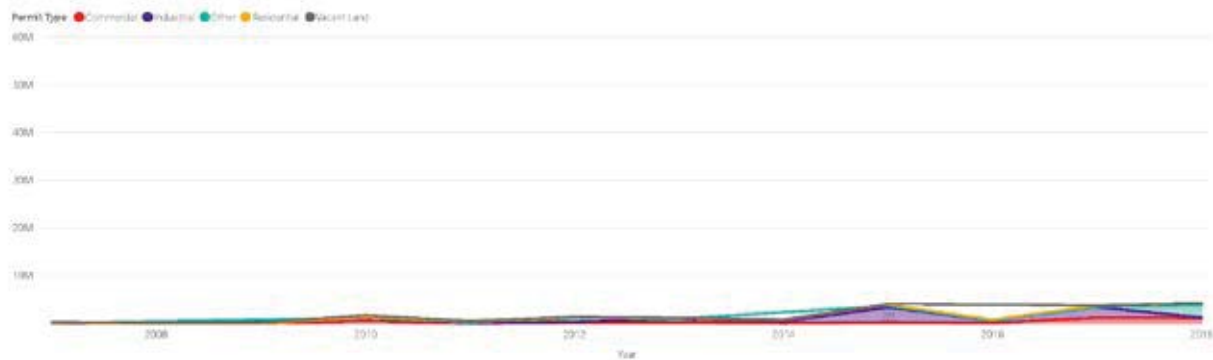
Sum of Values of Building Permits in Schiller Park, 2007-2018



Number of Building Permits in Seneca Babcock, 2007-2018

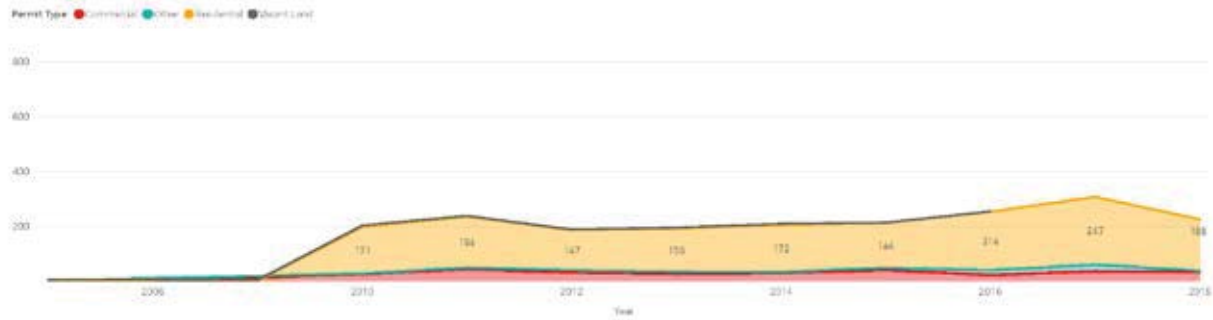


Sum of Values of Building Permits in Seneca Babcock, 2007-2018

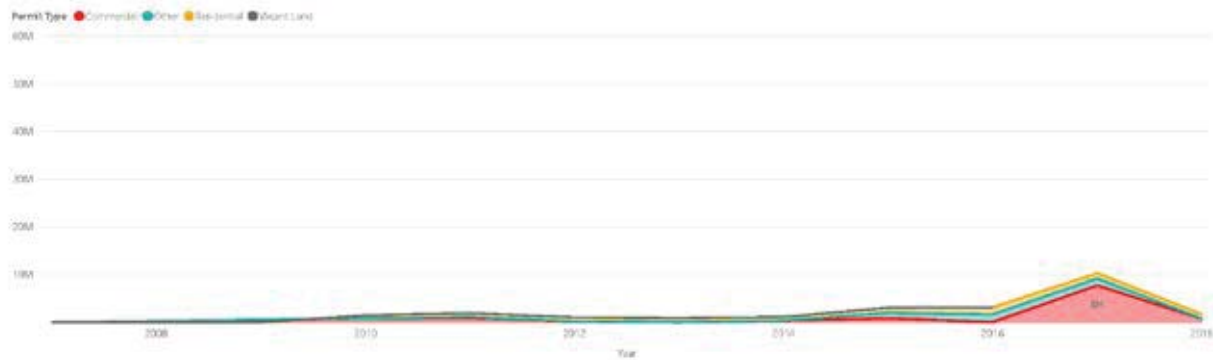




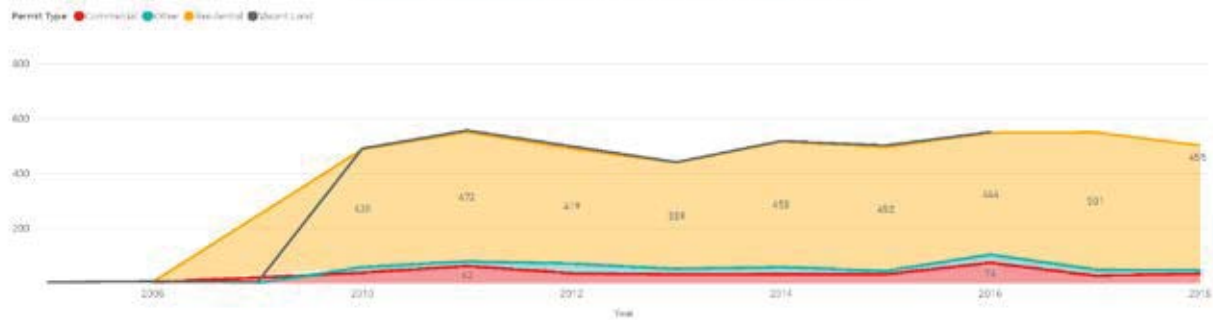
Number of Building Permits in Seneca-Cazenovia, 2007-2018



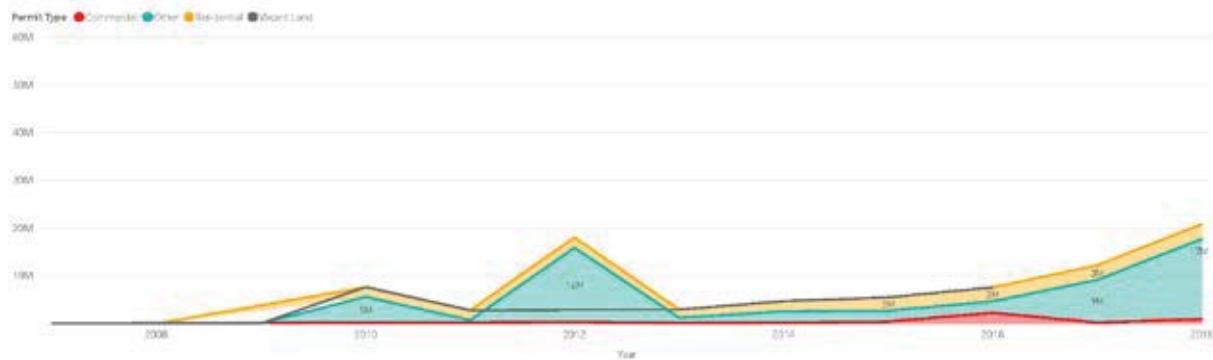
Sum of Values of Building Permits in Seneca-Cazenovia, 2007-2018



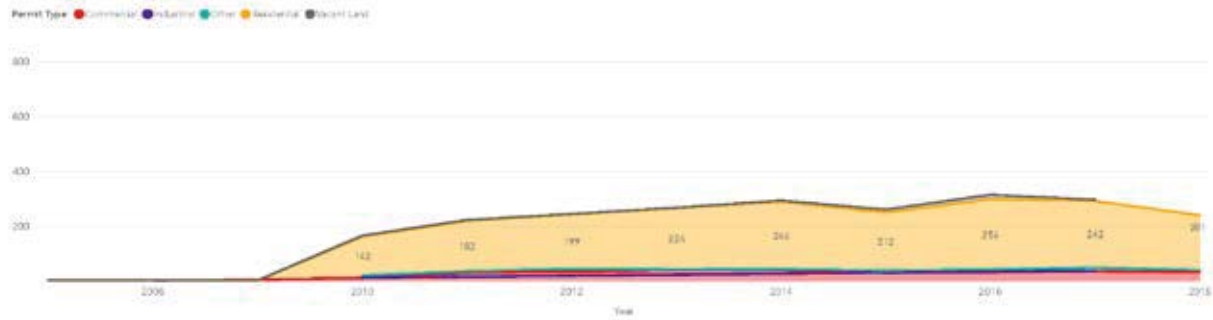
Number of Building Permits in South Park, 2007-2018



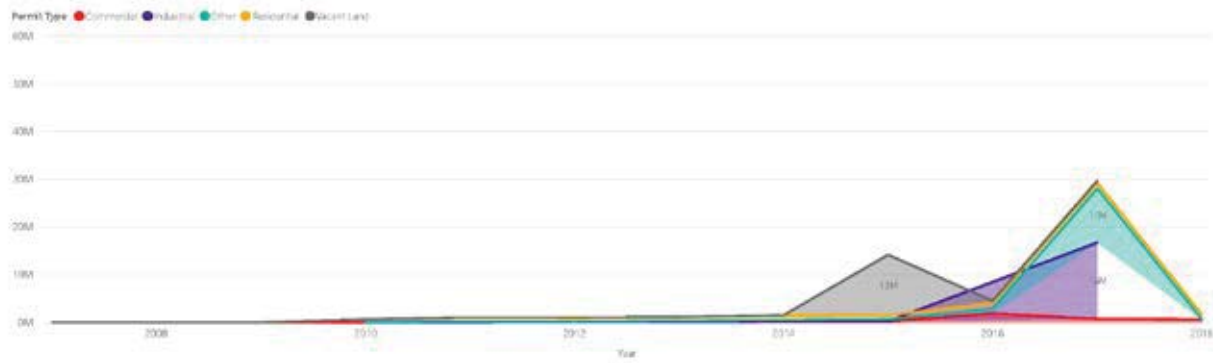
Sum of Values of Building Permits in South Park, 2007-2018



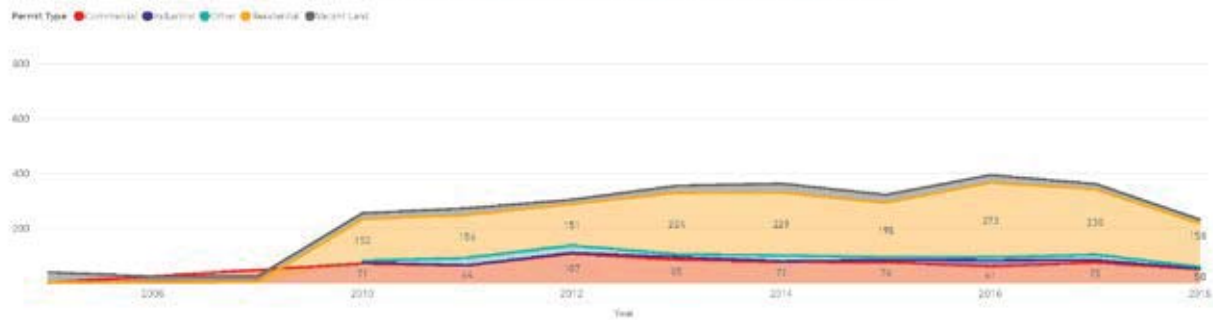
Number of Building Permits in University Heights, 2007-2018



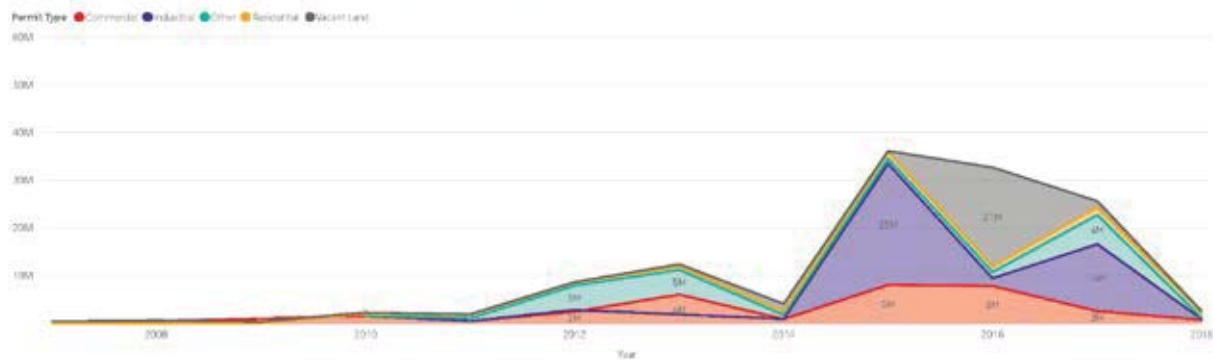
Sum of Values of Building Permits in University Heights, 2007-2018



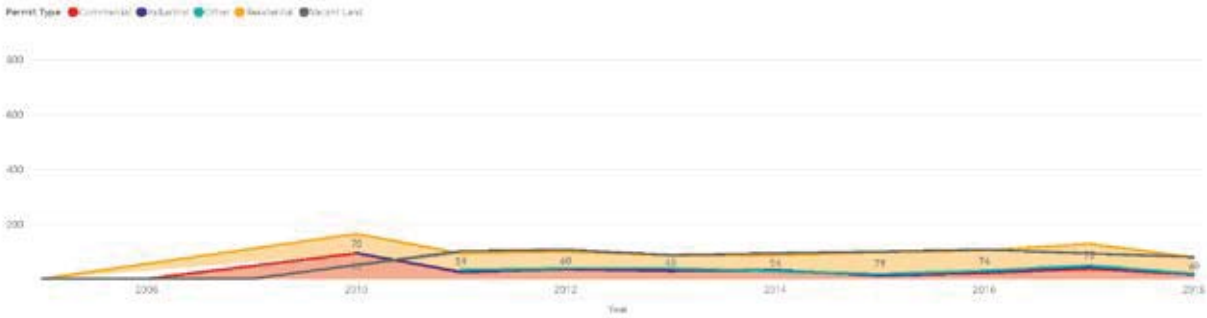
Number of Building Permits in Upper West Side, 2007-2018



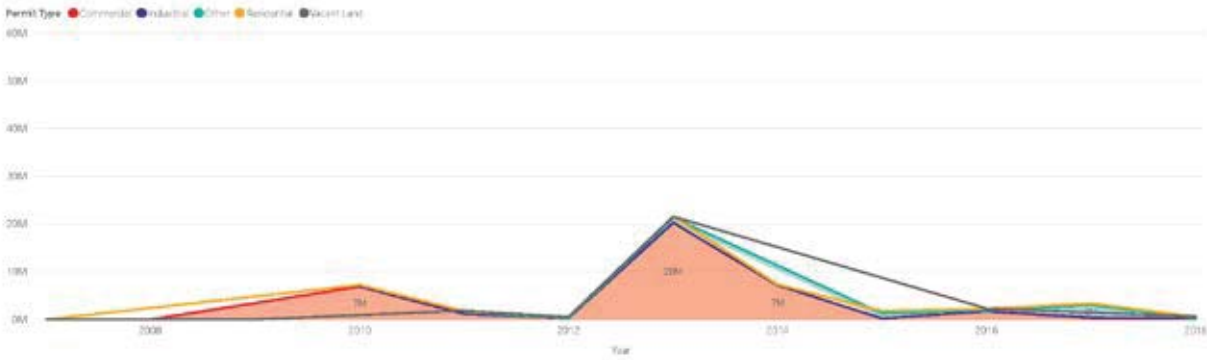
Sum of Values of Building Permits in Upper West Side, 2007-2018



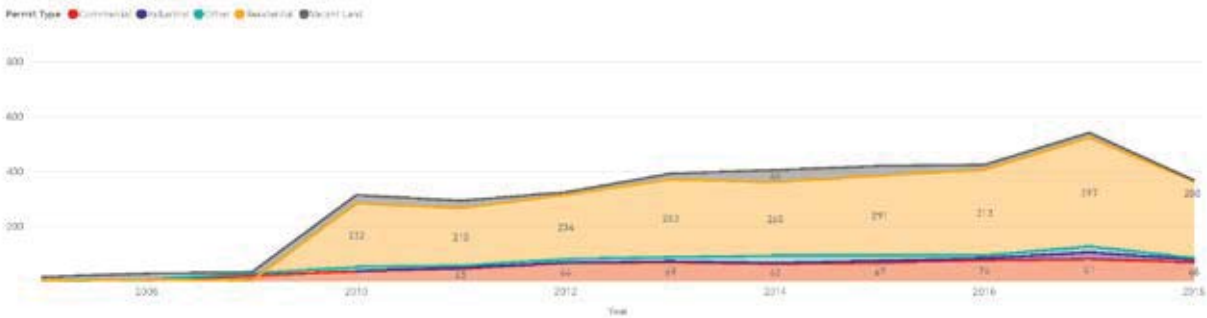
Number of Building Permits in West Hertel, 2007-2018



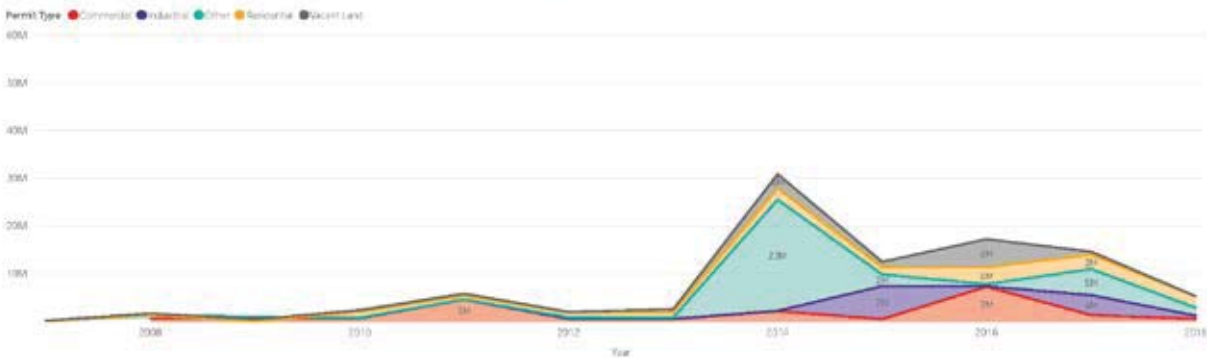
Sum of Values of Building Permits in West Hertel, 2007-2018



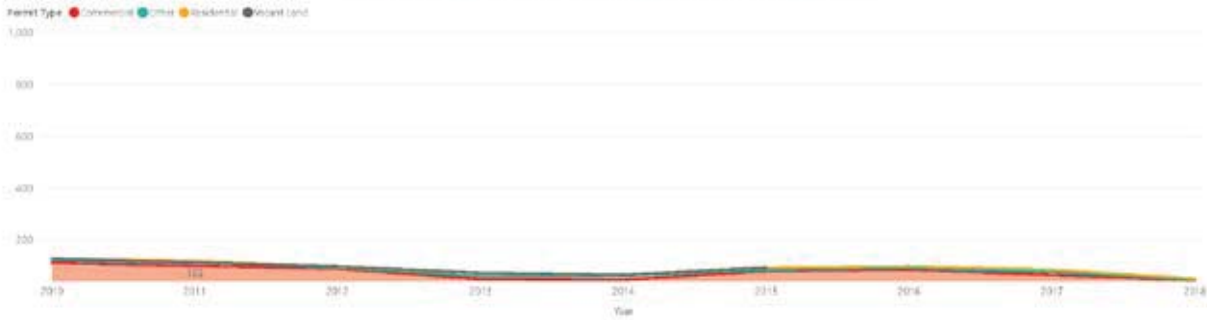
Number of Building Permits in West Side, 2007-2018



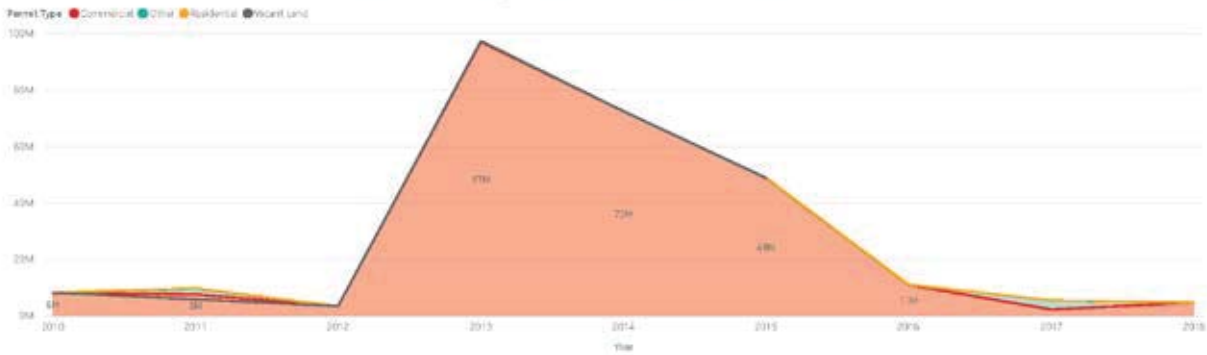
Sum of Values of Building Permits in West Side, 2007-2018



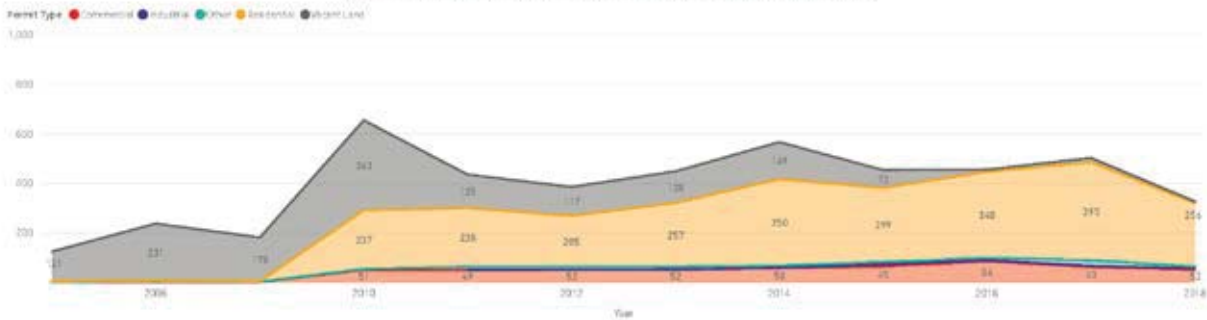
Number of Building Permits in CSO Area 014, 2007-2018



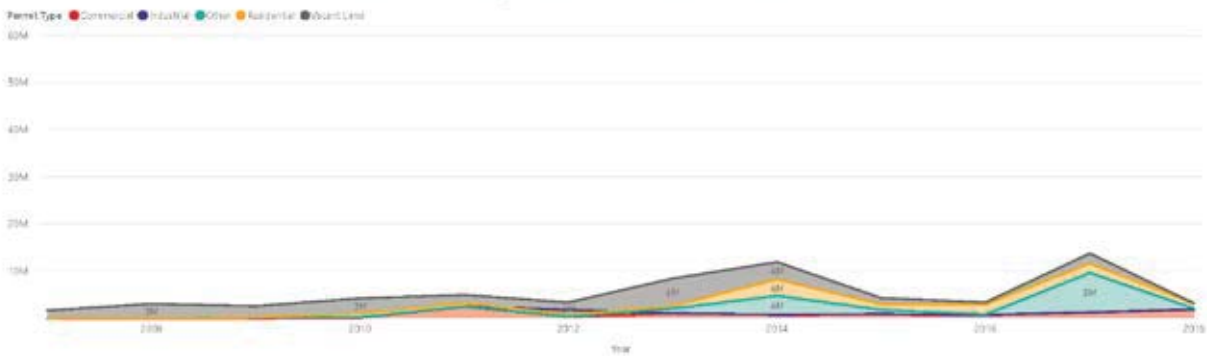
Sum of Values of Building Permits in CSO Area 014 Per Year, 2007-2018



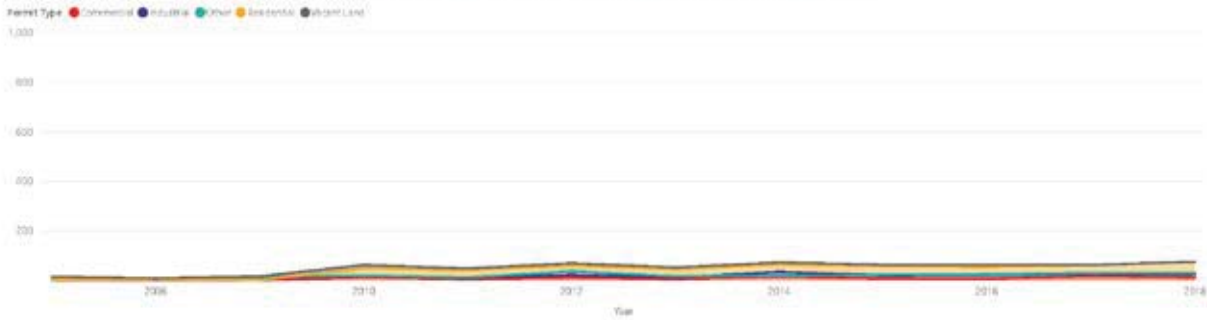
Number of Building Permits in CSO Area 026, 2007-2018



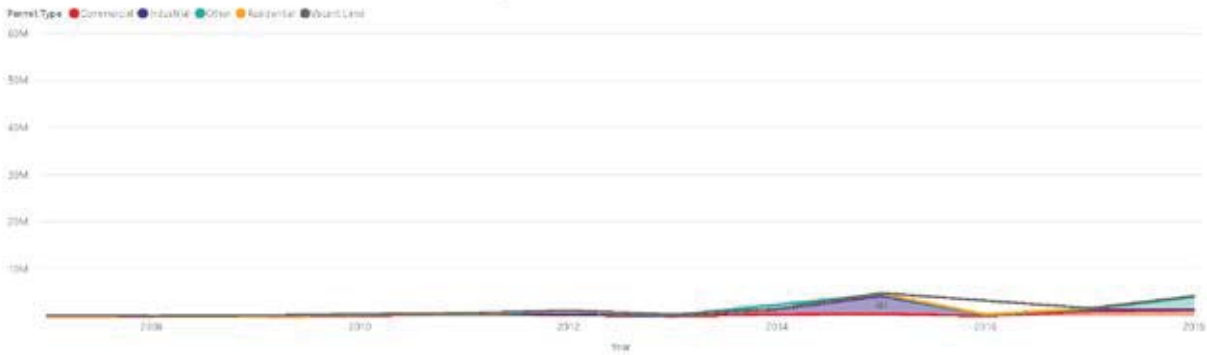
Sum of Values of Building Permits in CSO Area 026 Per Year, 2007-2018



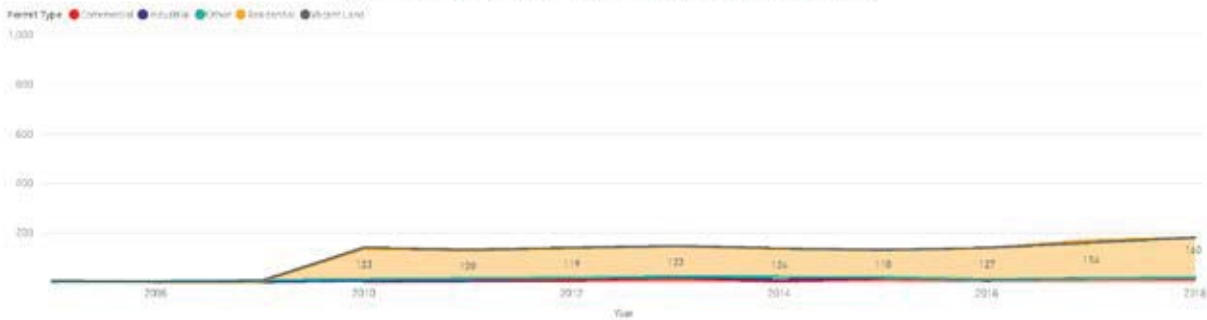
Number of Building Permits in CSO Area 027, 2007-2018



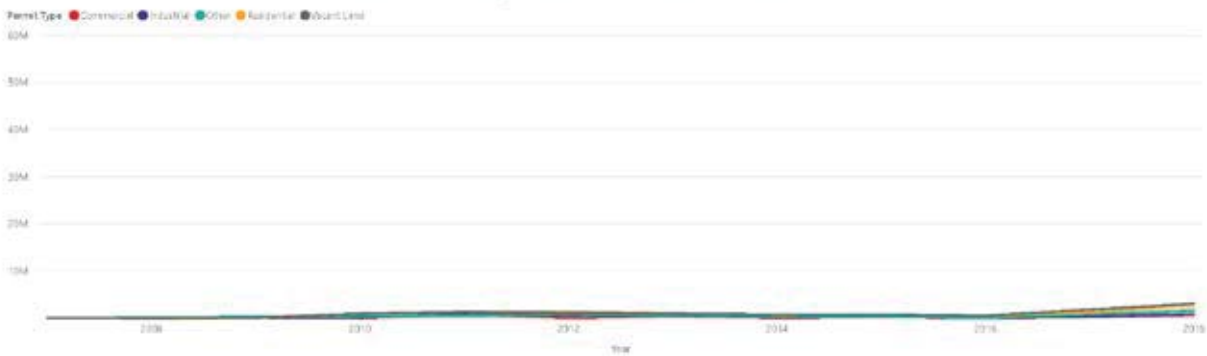
Sum of Values of Building Permits in CSO Area 027 Per Year, 2007-2018



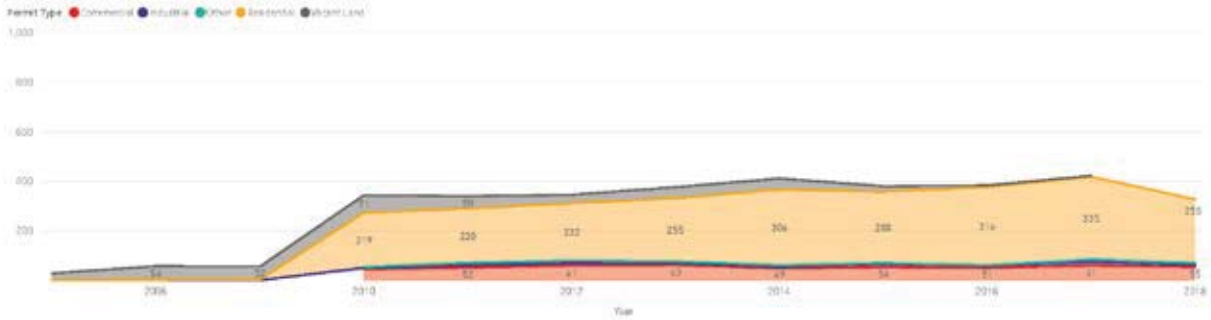
Number of Building Permits in CSO Area 028, 2007-2018



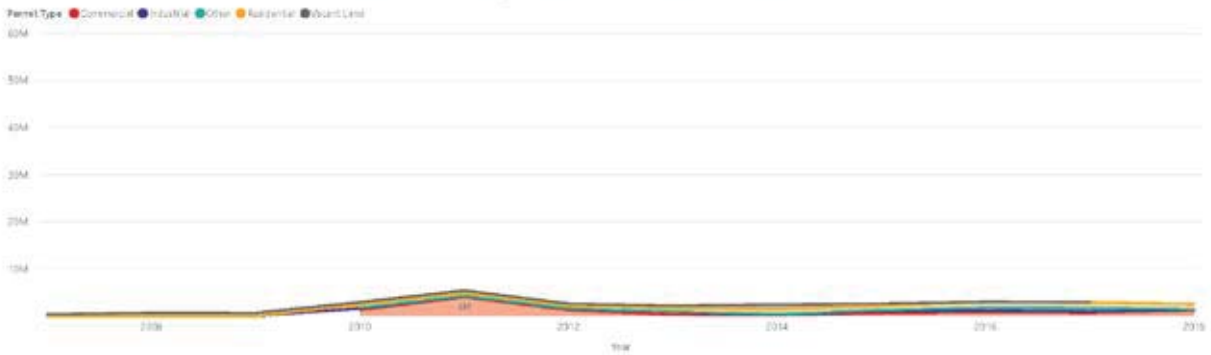
Sum of Values of Building Permits in CSO Area 028 Per Year, 2007-2018



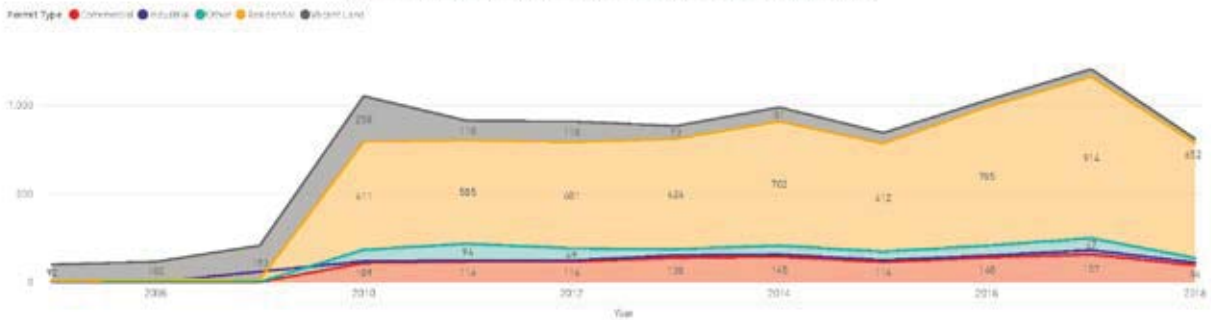
Number of Building Permits in CSO Area 033, 2007-2018



Sum of Values of Building Permits in CSO Area 033 Per Year, 2007-2018



Number of Building Permits in CSO Area 053, 2007-2018



Sum of Values of Building Permits in CSO Area 053 Per Year, 2007-2018

