

2022 Western New York Scan

An update of community needs

Prepared for the Community Foundation for Greater Buffalo



Community Foundation
for Greater Buffalo

MAKE THE MOST OF YOUR GENEROSITY.
Updated July 2022

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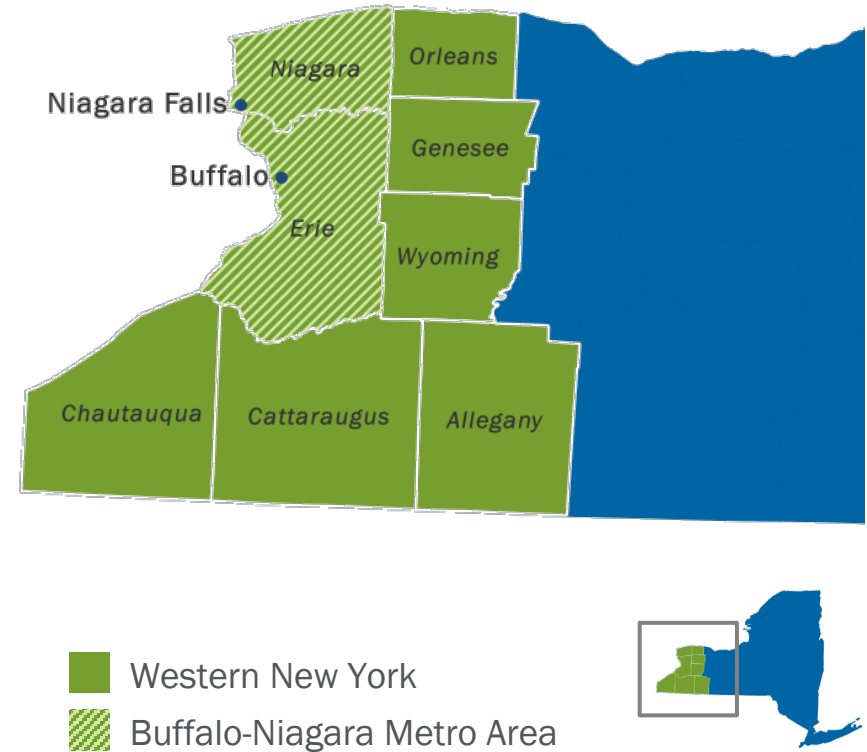
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INTRODUCTION

Since 1919, the Community Foundation for Greater Buffalo has been committed to improving lives in Western New York (WNY) (Map 1).¹ In order to do this effectively, we must understand the needs of the community and develop plans to strategically address those needs. As this report makes clear, the region continues to face challenges, yet there are numerous bright spots that point to positive transformation. The Community Foundation has cultivated deep, local knowledge of these challenges and opportunities. By staying connected to the pulse of the community, the Foundation can better serve the region and make the most of our clients' generosity to improve lives in WNY.

It is in this spirit that we present our 2022 WNY Scan, an update of community needs based on publicly available data and reports. We will begin with a broad overview of the national and local economy, the philanthropic sector and the nonprofit sector. We will then take an in-depth look at key local indicators and their consequences in WNY today. Finally, we will highlight some of the many assets of the region, pointing the way toward solutions.

MAP 1
Eight Counties of Western New York



¹ Allegany, Cattaraugus, Chautauqua, Erie, Genesee, Niagara, Orleans and Wyoming Counties
Western New York Scan

METHODOLOGY

The Community Foundation reviewed key indicators between the years 2005 and 2020 in order to understand the changes in WNY since the inception of the Community Foundation's first strategic plan in 2006. This scan includes an analysis of secondary data to inform decision-making for the Community Foundation and our partners. This document is updated regularly to ensure continuity between the Community Foundation's strategic objectives and community needs.

This report contains publicly available data from state and federal agencies. In most cases, the latest data year available is 2019 or 2020. Although that allows an accurate picture of the recent state of our region, it does not capture the full impact of the COVID-19 pandemic, which began in early 2020. The crisis is ongoing, but early data point to wide-ranging implications for Western New York, including substantial employment losses, more than the Great Recession, that have disproportionately affected low-wage workers and from which the area has yet to recover. The full extent of these consequences, and others, will become clearer as more robust data become available.

For the 2022 update, data were primarily collected from the U.S. Census Bureau American Community Survey (ACS) 2019 1-year and 2020 5-year estimates, as well as the U.S. Bureau of Labor Statistics slate of data tables. In 2020, the U.S. Census Bureau experienced unprecedented challenges to a complete and accurate count. The Bureau was already implementing changes to its operations, including new data privacy protections and the option to respond online, when the COVID-Western New York Scan

19 pandemic began. The pandemic caused process disruptions and changes in the composition of households due to repeated stay-at-home orders and the displacement of college students. In order to address issues with nonresponse bias, the Bureau introduced new weighting and delayed the release of the American Community Survey (ACS), which measures social and economic characteristics of the population. Ultimately, they could only make an experimental release of the 2020 ACS 1-year estimates, citing concerns over data quality. The Bureau advised users to rely instead on 2019 ACS 1-year estimates or 2020 ACS 5-year estimates, which is what we have done in this report.

Additional supportive data were obtained from various government agencies, research institutes, colleges and universities, and news organizations. **Data represent the most up-to-date information as of July 2022 for the City of Buffalo and the Buffalo-Niagara Metropolitan Statistical Area, referred to as the Buffalo-Niagara Metro Area (Erie and Niagara Counties).** Where possible and appropriate, data for the United States, New York State and all eight counties of WNY are included.

Several in-depth studies and reports are cited within as well. Data in these reports represent various vintages based upon the source documentation. Links to data sources can be found in footnotes, and more information about sources can generally be found by following the links provided. A data book containing more detailed tables is also available.

CONTEXT

Historically, WNY has experienced a slower recovery from economic recessions than the country as a whole. That trend continued through the COVID-19 pandemic, which disrupted the region’s tourism industry and caused a prolonged closure of the US-Canadian border.

A look at the job market reveals shifts in the WNY economy, some of which are continuations of long-standing trends, and some of which may be signs of things to come. Manufacturing in the Buffalo-Niagara Metro Area, for instance, suffered a net loss of over 13,200 manufacturing jobs between 2005 and 2021. However, these losses—and more—occurred between 2005 and 2010. Between 2010 and 2019, manufacturing in the region regained nearly 3,000 jobs. Although the region lost those gains during 2020, manufacturing jobs were increasing again as of 2021, although not yet at 2019 levels. Pre-pandemic job gains in other sectors, such as an increase of 16,000 jobs in education and health services and 12,600 jobs in leisure and hospitality between 2005 and 2019, show an adapting and shifting local economy.² However, these sectors were much harder hit during the pandemic, with an 8% decline in jobs between 2019 and 2021 in education and health services and 20% decline in leisure and hospitality, compared to a 4% decline in manufacturing.

The larger shift away from a manufacturing economy can also be seen in the list of the 10 largest non-government employers in WNY, which only includes one manufacturing firm (Moog Inc.)

² <https://dol.ny.gov/current-employment-statistics-0>

TABLE 1
Significant Industries in WNY, 2021

Industry	<ul style="list-style-type: none"> Construction of buildings Specialty trade contractors Plastics and rubber products manufacturing Electrical equipment and appliance mfg. Transportation equipment manufacturing Warehousing and storage Credit intermediation and related activities Professional, scientific, and technical services Educational services Ambulatory health care services Hospitals Nursing and residential care facilities Social assistance
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SOURCE: NYS Department of Labor, 2021. Based on job count, job growth, projected job growth, and average wages.

among a list of financial, service, retail, and health care companies.³ Manufacturing is still a specialization in WNY (an industry in which the region has a higher percentage share of jobs than the national average). In fact, the New York State Department of Labor listed multiple manufacturing industries in its list of significant industries for the WNY regional economy, based on current job counts, wages, previous job growth and projected job growth (Table 1).

Over the last decade, the region has benefited from significant state and local investment. Many of the largest investments came in the form of the Buffalo Billion Investment Development Plan, colloquially referred to as the Buffalo Billion. The plan, developed by the WNY Regional Economic Development Council and released in 2013, serves as a roadmap for implementation and identifies six high-level strategies and the unique assets to move the five-county region (Allegany, Cattaraugus, Chautauqua, Erie, and Niagara) forward on the path to sustainable growth.

According to the plan, key sectors for ongoing investment include advanced manufacturing, health and life sciences, and tourism (closely correlated with the significant industries named by the New York State Department of Labor in Table 1). To complement these key sectors, the Buffalo Billion plan names three key enablers for successful economic development: entrepreneurship, workforce development and smart growth. The Buffalo Billion strategy provides a framework that encompasses, contextualizes and aligns existing efforts, and guides future economic growth initiatives.⁴

³ <https://www.bizjournals.com/buffalo/subscriber-only/2022/01/28/largest-employers-in-buffalo-and.html>

⁴ <http://buffalobillion.ny.gov/about-buffalo-billion>

TABLE 2
Buffalo Billion II
Funding
Commitments
(in Millions),
2017

Revitalization & Smart Growth	
East Side Revitalization	\$60
Scajaquada Boulevard	\$30
The Buffalo Blueway	\$10
Outer Harbor Phase II	\$15
The Erie Street Waterfront Connection	\$10
DL&W Canalside-Cobblestone	\$20
Light Rail Extension	\$5
Buffalo Train Station	\$25
Better Buffalo Fund Phase II	\$10
Bethlehem Steel Site Redevelopment	\$10
Downtown Revitalization Initiative	\$20
Innovation & Entrepreneurship	
43North Phase II	\$25
The Innovation Hub	\$40
Workforce	
Workforce Development Fund	\$10
Say Yes Buffalo	\$10
Advanced Manufacturing	
Strategic Investments & Incentives	\$15
Buffalo Manufacturing Works Phase II	\$35
Tourism	
Strategic Investments & Incentives	\$10
Niagara Falls Redevelopment	\$25
Frank Lloyd Wright's Legacy	\$10
National Comedy Center	\$5
Visitor Welcome Center	\$20
Marketing Buffalo Niagara	\$5
Health Life Sciences	
Strategic Investments & Incentives	\$10
University at Buffalo Jacobs School of Medicine and Biomedical Sciences	\$20
Regional Economic Development Council Award	\$70

Buffalo Billion II, a second phase of state investment, was announced in 2017. It promises to increase strategies for broad participation in and benefit from revitalization (Table 2).

In April 2022, Governor Kathy Hochul announced the Regional Revitalization Partnership, a collaborative regional development strategy that includes a \$180 million private and public co-investment in East Buffalo. The investment will create new commercial corridors; fund improvements to existing destinations, such as the Broadway Market, Central Terminal, Michigan Street African American Heritage Corridor, and Martin Luther King, Jr. Park; and provide job training and placement for under- and unemployed residents.

In addition to these investments, the region has seen an accelerating real estate investment market, with \$20.15 billion in investments across 1,209 projects in the eight counties of WNY in 2019.⁵ This includes the construction of the University at Buffalo Jacobs School of Medicine and Biomedical Sciences (\$376 million), the new Delaware North global headquarters (\$110 million), Canterbury Woods on Gates Circle (\$150 million), and renovation of the Seneca One Tower (\$120 million).

These new investments in physical growth are tangible signs of a WNY resurgence that redirects the longstanding view of Buffalo as a depressed and declining city. In 2007, renowned Harvard economist Edward Glaeser penned a watershed article entitled “Can Buffalo Ever Come Back?” in which he advocated for federal and state disinvestment in the City of Buffalo. A decade later,

⁵ <https://www.bizjournals.com/buffalo/news/2020/12/01/covid-disrupts-the-momentum-of-regional-developmen.html>

TABLE 3 Buffalo’s New Story

As told through local, national and global newspaper headlines

2007

Can Buffalo ever come back? *City Journal*

2015

Buffalo ranks as hottest construction market in Northeast, *Buffalo Business First*
In Buffalo, NY, a new vitality is giving the once-gritty city wings, *The Washington Post*
Millennials are moving back to Buffalo & living like kings, *The Gothamist*
The wind and sun are bringing the shine back to Buffalo, *The New York Times*
Buffalo’s tech scene reboots the city, *USA Today*
Buffalo stance: NY state’s forgotten city is coming in from the cold, *The Guardian*

2016

The happiest cities to work right now, *Forbes*
After decades of ‘woe is us,’ there’s a new spirit of optimism in Buffalo, *Globe & Mail*
The next big thing: 10 awesome comeback cities to visit, *Smarter Travel*
America’s favorite city, *Travel + Leisure*
Why you need to take a look at Buffalo, New York, *Wine Enthusiast*

2017

Buffalo rising: A Rust Belt resurgence, *Lonely Planet*
Buffalo’s past glory lives on in its architecture, *Globe & Mail*
Buffalo builds on architecture tourism, *USA Today*
These are America’s friendliest cities, *Travel + Leisure*

2018

The 52 Places Traveler: From refugees to a reunion, Buffalo lives up to its welcoming reputation, *The New York Times*
Hike, paddle, pedal & zip: 4 outdoor adventures in Buffalo, *Lonely Planet*
Here’s why Buffalo is America’s next great comeback city, *Travelocity*
Buffalo, New York: America’s coolest summer city, *The Sunday Times of London*

2019

Oscar-winning director Guillermo del Toro expected to film in Buffalo, *The Buffalo News*
What design lovers will be surprised to find in Buffalo, *Architectural Digest*
Why you should visit New York’s other city, *The Telegraph*
Best in Travel 2020: Welcome to Buffalo, *Lonely Planet*

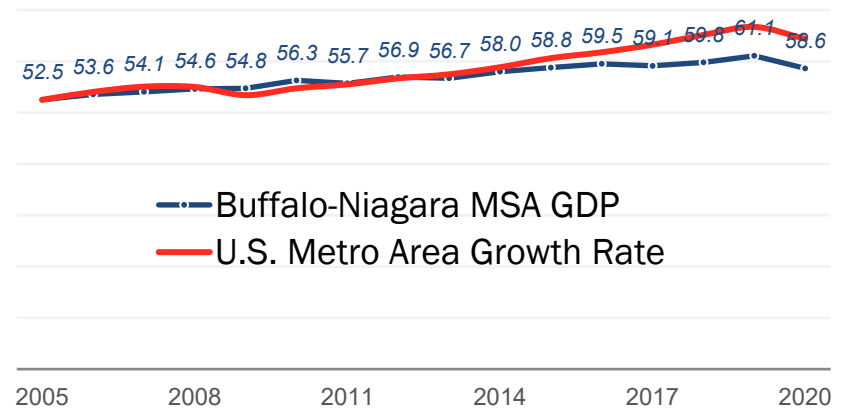
recent headlines have given credence to a new story for the greater region (Table 3).

Pre-pandemic economic indicators also pointed to a rebound. Regional gross domestic product (GDP) growth and declining unemployment in the region have been two key factors in growing optimism. As the region closely mirrors trends in the broader national economy, WNY expected continued growth, albeit at a slower pace. In Buffalo, the pre-pandemic regional economy had continued to improve. **Real GDP in the Buffalo-Niagara Metro Area grew by 22% between 2005 and 2019** with slight declines after the Great Recession (Figure 1).⁶ Local growth, though not as quick as national growth, was still trending upward.

However, real GDP declined sharply (3.5% nationally and 4% in the Buffalo-Niagara Metro Area) between 2019 and 2020 as a result of the COVID-19 pandemic. Real GDP for the U.S. had returned to pre-pandemic levels by the second quarter of 2021.⁷ The Federal Reserve projects a 2.8% increase in national Real GDP between Q4 2021 and Q4 2022 and slowing growth over the next few years.⁸

Supply-demand imbalances caused by the COVID-19 pandemic and the war in Ukraine have led to inflation in consumer prices across a broad range of goods and services in the United States, which reached a 30-year high in 2021 at 4.7%. Rising inflation can

FIGURE 1
Buffalo-Niagara Metro Area Real GDP Growth (in \$Billions) versus U.S. Metro Area Growth Rate Trend, 2005-2020



SOURCE: Bureau of Economic Analysis 2012 chained dollars.

⁶ <http://www.bea.gov/iTable/iTableHtml.cfm?reqid=70&step=10&isuri=1&7003=900&7035=-1&7004=naics&7005=-1&7006=15380&7036=-1&7001=2900&7002=2&7090=70&7007=-1&7093=levels>

⁷ <https://fred.stlouisfed.org/series/GDPC1>

⁸ <https://www.federalreserve.gov/monetarypolicy/files/fomcprojtabl20220316.pdf>

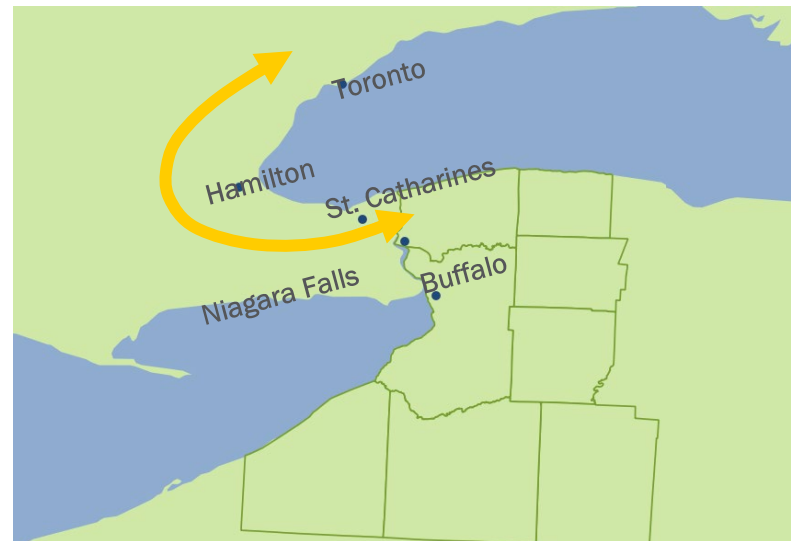
quickly erode the purchasing power of American families' incomes.⁹

As of May 2022, consumer prices were still rising rapidly, and PCE price inflation was 6.6% between March 2021 and March 2022. The Federal Reserve expects a considerable decline in inflation in the next few years.¹⁰ Year-over-year PCE price inflation was expected to be 4.3% by the end of 2022 and decline to 2.1% by 2024, nearing the Fed's 2% target.¹¹ However, understanding the full impact of the COVID-19 pandemic in the immediate term is challenging due to the unpredictable nature of the pandemic and changes to and expiration of federal assistance programs.¹²

The region is also part of a bi-national economy, with Toronto a two-hour drive away. Canada, and Southern Ontario specifically, continue to play a major role in the WNY economy. Canadian citizens visiting the region boost sales for local businesses, and Canadian companies increasingly look to the region as a potential base for U.S. operations. The strengthening of the Canadian dollar, in addition to sustained population growth within Canada, may further the economic impact from Canadian consumers in the coming years. Projections estimate that the population of the "Golden Horseshoe" area of Southern Ontario (Toronto-Niagara Falls-Hamilton) will increase approximately 45% between 2021 and 2051 (Map 2).¹³

MAP 2

Golden Horseshoe from Toronto to the Buffalo-Niagara Metro Area



⁹ <https://www.federalreserve.gov/monetarypolicy/fomcminutes20220504.htm>

¹⁰ <https://www.federalreserve.gov/monetarypolicy/files/fomcprojtabl20220316.pdf>

¹¹ <https://fred.stlouisfed.org/series/FPCPITOTLZGUSA>; <https://www.federalreserve.gov/monetarypolicy/fomcminutes20220504.htm>

¹² <https://www.bea.gov/news/2022/gross-domestic-product-second-estimate-and-corporate-profits-preliminary-first-quarter>

¹³ Hemson, Greater Golden Horseshoe: Growth Forecasts to 2051, <https://www.hemson.com/wp-content/uploads/2020/08/HEMSON-GGH-Growth-Outlook-Report-26Aug20.pdf>

DEMOGRAPHICS

The Community Foundation for Greater Buffalo serves the needs of the communities across WNY. The eight counties in the region cover a land area of approximately 6,000 square miles. It is bordered by Pennsylvania to the south, the Canadian province of Ontario to the northwest, and two Great Lakes: Erie to the west and Ontario to the north.

Population

The City of Buffalo and wider region have faced population decline since the middle of the 20th century (Figure 2). **Nearly 1.6 million people live in the eight counties of WNY, with three-quarters (1.2 million residents) living in the Buffalo-Niagara Metro Area (Erie and Niagara Counties).** Of the other six counties, Chautauqua County is the largest, with 130,000 residents, and Orleans is the smallest with 40,000.¹⁴

Despite a slight population increase since the 2010 Census, a forecast provided by PolicyLink’s National Equity Atlas still predicts a 7% population decline in the Buffalo-Niagara Metro Area by 2050.¹⁵

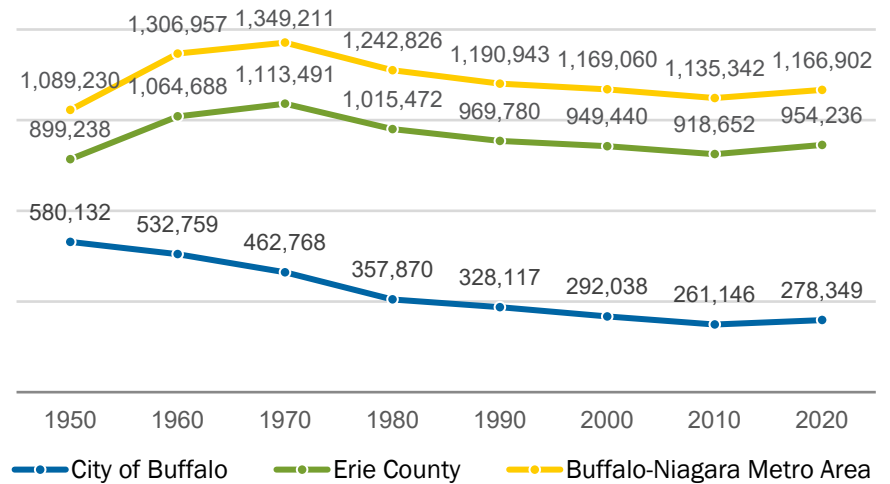
The City of Buffalo represents the largest single municipality within the Metro Area and the wider region, with just over 278,000 residents (Figure 3). The City of Buffalo comprised 53% of the population of the Metro Area in 1950, but only 24% in 2020. Outside of the City of Buffalo, the remainder of Erie County accounts for 58% of the population of the Metro Area. Niagara County makes up 18%.¹⁶

¹⁴ U.S. Census Bureau 1950-2020 Decennial Census, Table P1

¹⁵ https://nationalequityatlas.org/indicators/population_growth

¹⁶ U.S. Census Bureau 2020 Decennial Census, Table P1

FIGURE 2
Regional Population Change, 1950-2020



SOURCE: U.S. Census Bureau Decennial Census

FIGURE 3
Western New York Population, 2020

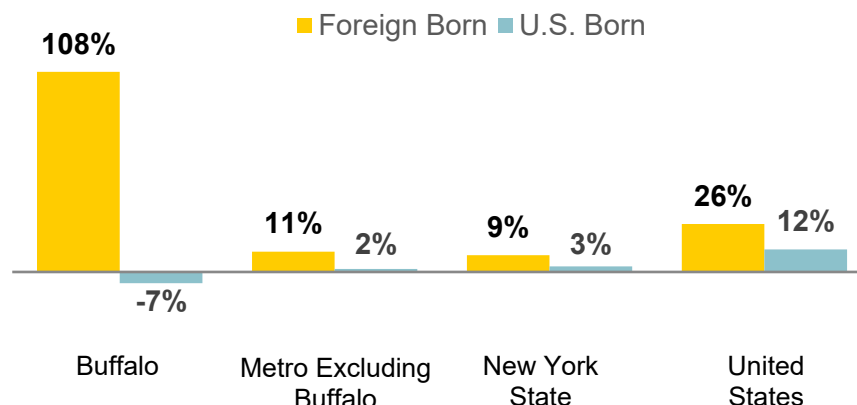
Erie County (including Buffalo)	954,236
Niagara County	212,666
Chautauqua County	127,657
Cattaraugus County	77,042
Genesee County	58,388
Allegany County	46,456
Orleans County	40,343
Wyoming County	40,531
<i>City of Buffalo</i>	<i>278,349</i>

SOURCE: U.S. Census Bureau Decennial Census

International immigration has added to the diversity of the region and slowed population loss. Buffalo is an epicenter of the region’s recent influx of immigrants and refugees. As of 2005, the city was home to only 13,990 foreign-born residents, but by 2010 there were 21,926—and by 2019 29,084—foreign-born residents in the city. This 108% increase in the foreign-born population in 14 years far outstripped the rates of growth in the region, state, or nation (Figure 4), and saw the percentage of the city’s population that was foreign-born rise from only 6% in 2005 to about 11% in 2019. However, even this rapid increase has not yet caught up to the overall U.S. rate of 14% foreign-born residents or New York State’s rate of 22% (Figure 5).¹⁷

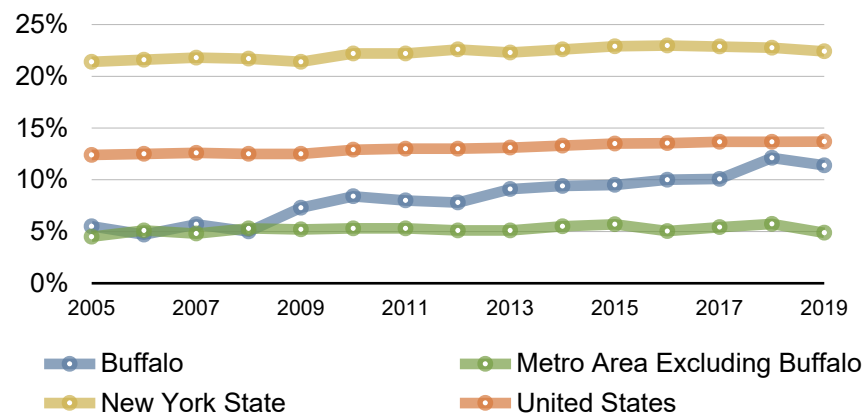
Buffalo’s increasing diversity is also reflected in data provided by the Buffalo Public Schools, which counted over 5,300 English Language Learners in the 2019-2020 school year, a 158% increase from the 2003-2004 school year.¹⁸ Buffalo Public Schools students speak a total of 82 languages, making it the most linguistically diverse school district in the State.¹⁹ The most recent Census data suggests that 8% of foreign-born residents in Buffalo are from Europe, 52% are from Asia, 21% are from Africa, 17% from Latin America, and 3% from Canada. These figures vary significantly from U.S. immigration numbers as a whole, where 50% of all international immigrants are from Latin America.²⁰

FIGURE 4
Foreign-Born vs. U.S.-Born Population Growth, 2005-2019



SOURCE: U.S. Census Bureau ACS 1-year estimates

FIGURE 5
Percentage of Population that was Foreign-Born 2005-2019



SOURCE: U.S. Census Bureau ACS 1-year estimates

¹⁷ U.S. Census Bureau 2005-2019 ACS 1-year estimates, Table B05002

¹⁸ <https://data.nysed.gov/lists.php?start=66&type=district>

¹⁹ <https://www.buffaloschools.org/Page/85595>

²⁰ U.S. Census Bureau 2020 ACS 5-year estimates, Table B05006

Age

Between 2006 and 2019, the median age in the City of Buffalo decreased from 36 to 33 years.²¹ The median age in the Buffalo-Niagara Metro Area, however, has increased from 40 to 41 over the same 12-year period. As of 2020, the City of Buffalo was by far the youngest municipality in the metro region. Only Lockport (37.0), Lackawanna (37.2), North Collins (38.9), and Royalton (39.7) had median ages under 40, with 21 cities and towns having median ages greater than 45. With the exception of Allegany, the remaining counties of WNY are all older than Erie County (Table 4). In the Buffalo Metro area, the 55-64-year-old cohort (Baby Boomers born 1955-1964) showed a slightly higher growth rate than the state and nation; however, the City's growth rate in this cohort was significantly smaller. 20-34-year-olds (Millennials and older Generation Zs born 1985-1999) in the City, however, showed significantly higher growth rates between 2006 and 2019 than the region, the state or the nation, suggesting that the Millennial wave is and may continue to have a larger impact on the City than other areas.

The growing Baby Boomer population will pose new questions for WNY. According to a 2019 survey conducted by Del Webb, 57% of older Generation Xs and Baby Boomers in the United States plan to move in the future, which could lead to further population decline in the region.²²

TABLE 4
Median Age, Various Geographies, 2020

	Median Age
United States	38.2
New York	39.0
City of Buffalo	33.4
WNY Counties	
Allegany	39.3
Erie	40.2
Wyoming	42.9
Cattaraugus	42.5
Chautauqua	42.8
Niagara	43.4
Orleans	43.4
Genesee	43.0

U.S. Census Bureau 2020 ACS 5-year estimates

²¹ U.S. Census Bureau 2006-2019 ACS 1-year estimates, Table S0101

²² <https://www.pultegroupinc.com/investor-relations/press-releases/press-release-details/2019/Baby-Boomers-and-Generation-X-Agree-Bigger-is-Better-and-City-Life-is-OVERRATED/default.aspx>

In addition, the aging of the Millennial generation into adulthood will have implications for new household formation and potentially the pace and nature of real estate development. Statistics show that nationally the largest cohort of Millennials was born between 1990 and 1994, and the subsequent influx of age cohorts on the housing market will be lower in number. Experts are divided on whether Millennials will remain in cities at higher rates than prior generations,²³ but this retention may be the key to reversing population decline within the city.

²³ *Peak Millennial? Cities Can't Assume a Continued Boost From the Young*, Conor Dougherty . *NYTimes*, JAN. 23, 2017.

<https://www.nytimes.com/2017/01/23/upshot/peak-millennial-cities-cant-assume-a-continued-boost-from-the-young.html? r=0> Retrieved 20 April 2017.

Race & Ethnicity

The Buffalo-Niagara Metro Area is not as diverse as its metro area peers, ranking in the bottom quarter (#115) for overall diversity among the top 150 metro areas in the country (Figure 6). Like the nation, though, WNY is growing more diverse each year. Though people of color make up only 23% of the metro area’s population as a whole, 34% of the region’s youth are people of color.²⁴ The National Equity Atlas (produced by PolicyLink and the USC Equity Research Institute) predicts an increasingly diverse Buffalo-Niagara Metro Area by 2050.²⁵ The City of Buffalo is much more diverse than the Metro Area. In 2020, 61% of residents identified as a person of color (Figure 7).²⁶

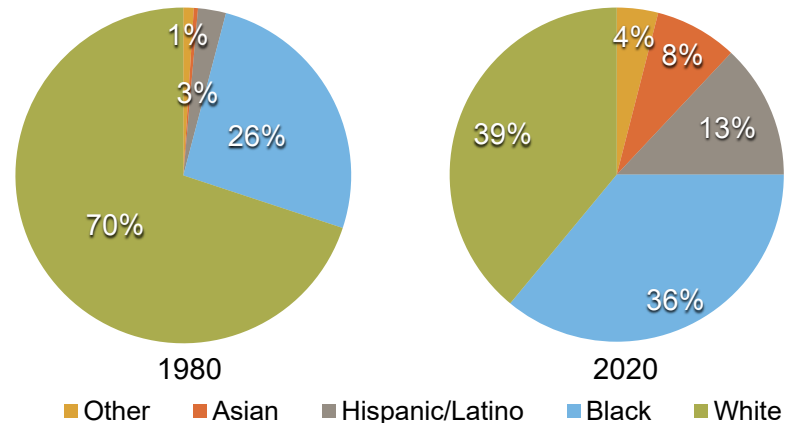
Asian and Hispanic/Latino populations were two of the fastest growing populations in the City and Metro Area, further pointing to the impact of immigration and refugee settlement into WNY. From 2000-2019 the Asian demographic was the fastest growing racial category in the Metro Area, with a 132% increase. Second fastest growing, however, was mixed race or individuals that identified outside of the standard racial categories that the Census uses (+71%), followed by growth among Hispanic/Latino populations (+68%). During this time, the White non-Hispanic population in the region actually declined 9%, and it was a 25% increase in people of color that helped to stem population loss from the Metro Area.²⁷

FIGURE 6
Diversity Score Ranked:
Buffalo-Niagara Metro Area vs. U.S., 2019



SOURCE: National Equity Atlas. The maximum diversity score (1.79) would occur if the six major racial groups were evenly represented in the region. Data represent a 2015-2019 average.

FIGURE 7
City of Buffalo Racial Composition, 1980 & 2020



SOURCE: National Equity Atlas, U.S. Census Bureau

²⁴ U.S. Census Bureau 2019 ACS 1-year estimates, Table S0201

²⁵ National Equity Atlas, <https://nationalequityatlas.org/indicators/Race-ethnicity#/>

²⁶ The Office of Management and Budget (OMB) defines Hispanic/Latino origin as a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race. Hispanic/Latino is therefore considered to be an ethnicity and not a race. For example, a person could identify as racially White and ethnically Hispanic/Latino.

²⁷ National Equity Atlas, <https://nationalequityatlas.org/indicators/Race-ethnicity#/>

Spatial Segregation

Over 67% of African American or Black residents in the Buffalo-Niagara Metro Area live in the City of Buffalo. Moreover, within the City a majority (58%) of Black residents live in three ZIP codes, all east of Main Street (14208, 14211 and 14215).²⁸ Those same three ZIP codes make up roughly 7% of the population of the metro region, but account for 39% of the Black population.

The high concentration of people of color in the City of Buffalo and the high concentration of the Black population east of Main Street amounts to spatial segregation along racial and ethnic lines. Tangible spatial segregation creates intangible social boundaries by limiting the potential for contact with individuals from different racial groups, and by creating differential access to amenities, services and opportunity.

Based on the distribution of Black and White residents, Brookings Institution ranks the Buffalo-Niagara Metro Area as the seventh most segregated of the largest metro areas in the nation (Table 5).²⁹ This spatial segregation was created through policies and differential service delivery implemented at the federal, state and local level and was reinforced by private sector practices. The disparate outcomes that the region witnesses among racial grouping is deeply connected to racialized segregation and geographic inequality.³⁰

²⁸ U.S. Census Bureau 2020 ACS 5-year estimates, Table S0601

²⁹ https://www.brookings.edu/wp-content/uploads/2022/05/A-2020-Census-Portrait-of-America_s-Largest-Metro-Areas_-Populati.pdf. This analysis uses the Black-White dissimilarity index with 2020 Census data. The analysis included 53 metropolitan areas with populations exceeding one million and with Black populations exceeding 3 percent of the metro population.

³⁰ Fair Housing Equity Assessment, UB Regional Institute.

1	Milwaukee
2	New York City
3	Chicago
4	Cleveland
5	Detroit
6	St. Louis
7	Buffalo
8	Philadelphia
9	Cincinnati
10	Pittsburgh
11	Miami
12	Los Angeles
13	Hartford
14	Rochester

SOURCE: Brookings Institution, based on 2020 Census data for dissimilarity index values (see text below)

Demographers commonly use two measurements to understand spatial segregation: the dissimilarity index and the isolation/exposure index.

Dissimilarity Index

The dissimilarity index measures the extent to which populations are evenly distributed across a given area and was the measure used by the Brookings Institution to rank Metro Areas (see Table 5, previous page). In the Buffalo-Niagara Metro Area in 2020, the spatial dissimilarity between White and Black residents was 65. In other words, 65% of the Metro Area’s Black population would have to move to a different neighborhood in order to bring about complete spatial integration between Black residents and White residents. The White-Hispanic/Latino dissimilarity index was 46, and the White-Asian dissimilarity index was 54 (Table 6).

Isolation & Exposure

The isolation and exposure indices measure the likelihood of contact with various racial groups (including one’s own) within one’s neighborhood. These measures illustrate the racial/ethnic makeup of the average neighborhood where residents live. In a region without any spatial segregation, the average neighborhood would have the exact same racial/ethnic composition as the wider region.

The average neighborhood that Hispanic/Latino and Asian residents live in has a slight majority of White neighbors. On average, White residents live in markedly distinct neighborhoods, where the majority of their neighbors, over 80%, identify as White. The typical Black resident lives in a neighborhood that is less

TABLE 6
City and Metro Area Dissimilarity

		1980		2000		2020
Metro Area	White-Black	80	▼	77	▼	65
	White-Hispanic/Latino	48	▲	56	▼	46
	White-Asian	51	▼	47	▲	54
City	White-Black	77	▼	70	▼	61
	White-Hispanic/Latino	54	▼	50	▼	42
	White-Asian	47	▼	45	▲	58

SOURCE: Spatial Structures in the Social Sciences, Brown University

isolated and about 37% White. The isolation and exposure indices indicate clear spatial segregation along racial and ethnic lines.

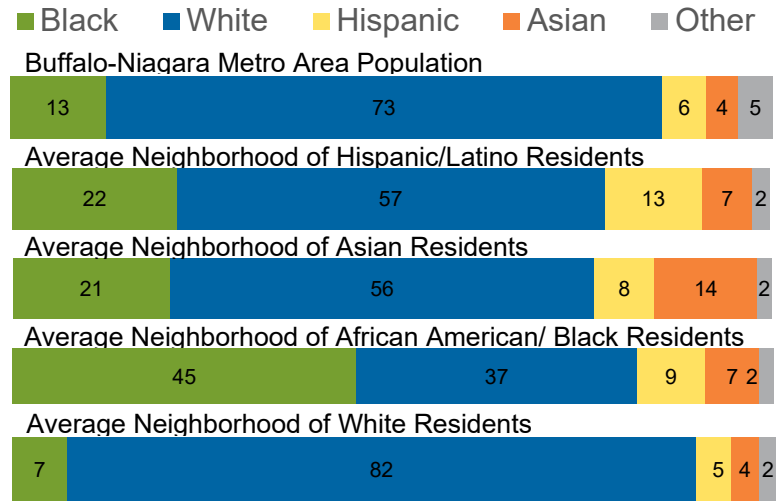
Isolation and exposure measurements for the City of Buffalo reveal a similar pattern to that of the wider Metro Area (Figures 8 & 9). The typical Hispanic/Latino and Asian residents live in neighborhoods that are highly diverse, much like the larger city. While White residents in the City of Buffalo are much more likely than their Metro Area counterparts to have neighbors of color, the average Black resident in the City lives in a neighborhood that is 58% Black and the average White resident lives in a neighborhood that is 59% White.

The impacts of racial segregation are even more pronounced for children. An analysis of decennial shifts in the segregation rates for children revealed that, despite a small decline, Black children within the Buffalo Metro faced a dissimilarity index of 78.2 (where 60 and above is considered highly segregated). This means that 78.2% of Black children would need to move in order to create an even distribution of racial groups across the region. Hispanic/Latino child dissimilarity was 53.7, (also down somewhat from the previous Census count). Out of the top 100 metro areas, Buffalo ranked fifth highest for Black child segregation and twenty-ninth highest for Latino child segregation.³¹

³¹ McArdle, Nancy; Osypuk, Theresa; Hardy, Erin; & Acevedo-García, Dolores. *Segregation Falls for Black Children in Most Metro Areas but Remains High; Fewer Metros Experience Declines for Latinos*. Diversity Data Issue Brief. July 2011.

FIGURE 8

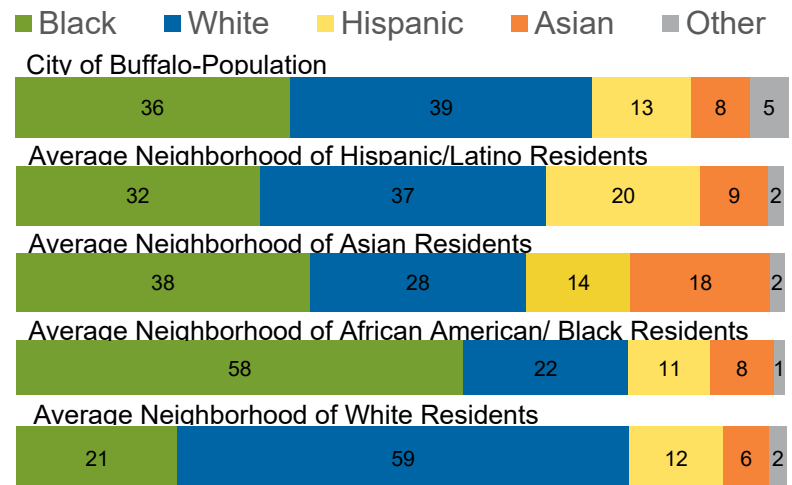
Buffalo-Niagara Metro Area Isolation & Exposure, 2020



SOURCE: U.S. Census Bureau, 2020 Decennial Census; Spatial Structures in the Social Sciences, Brown University

FIGURE 9

City of Buffalo Isolation & Exposure, 2020



SOURCE: U.S. Census Bureau, 2020 Decennial Census; Spatial Structures in the Social Sciences, Brown University

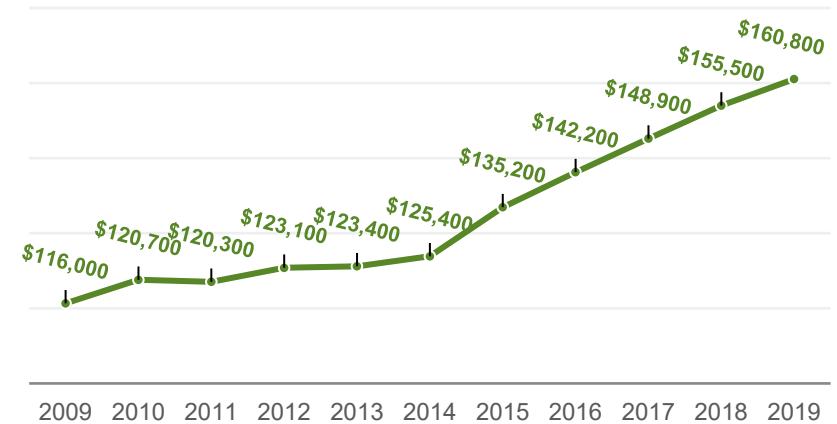
HOUSING

In 2000, the U.S. Department of Housing and Urban Development released a report that identified the benefits of homeownership. In general, homeowners:

- accumulate wealth as the investment value grows
- enjoy better living conditions
- are more involved in their communities
- have children that, on average, do better in school and are less likely to become involved in crime

Despite the advantages attributed to homeownership, purchasing a home is out of reach for many Americans and there are detriments to elevating a homeownership-for-all policy. This aspiration can obscure the challenges and risks of homeownership. The relaxed regulations on the financial industry that were a part of the push for increased housing development and ownership created the conditions that allowed the subprime foreclosure crisis to develop. The ensuing fallout from the Great Recession drained wealth for middle- and low-income families and significantly tightened access to mortgage lending. Across the country, this means a new paradigm of increased renting, in spite of years of low credit rates. Though the Buffalo-Niagara Metro Area was spared the worst of the housing bubble and has seen steady increases since the recession (Figure 10), these new standards have shifted the housing market locally as well.

FIGURE 10
Median Home Value, Buffalo-Niagara Metro Area, 2009-2019
(in thousands)



SOURCE: U.S. Census Bureau 2009-2019 ACS 1-year estimates

Homeownership & Renting

The U.S. homeownership rate had been on a downward trend since its pre-recession peak in 2004. The homeownership rate was at 63.7% in 2016, its lowest level since 1965 (Figure 11). Between 2016 and 2020, however, homeownership increased, with the highest levels of homeownership since the Great Recession in the second and third quarters of 2020.³² Median home prices remained below their pre-recession peak until 2018 and continued to rise through 2021. Meanwhile, median asking price for rental units since the recession have continued to rise to an all-time high.³³

The Buffalo-Niagara Metro area has experienced more fluctuation in homeownership rates than the U.S. as a whole. Homeownership rates are now higher in the Buffalo-Niagara Metro Area than before the Great Recession. Although Metro Area homeownership was on a steady decline between 2013 and 2017, it increased significantly through 2020.³⁴ Owner-occupancy rates are much lower in the City of Buffalo than in the Metro Area as a whole (Figure 12). A high prevalence of multi-unit homes in the Buffalo housing market is likely a factor, as are higher instances of poverty and access to the conventional lending market, which has historically been constricted in urban areas. Owner-occupied housing accounted for 66% of housing units in the Metro Area in 2020, but only 42% in Buffalo.³⁵

³² <http://www.census.gov/housing/hvs/files/currenthvspress.pdf>

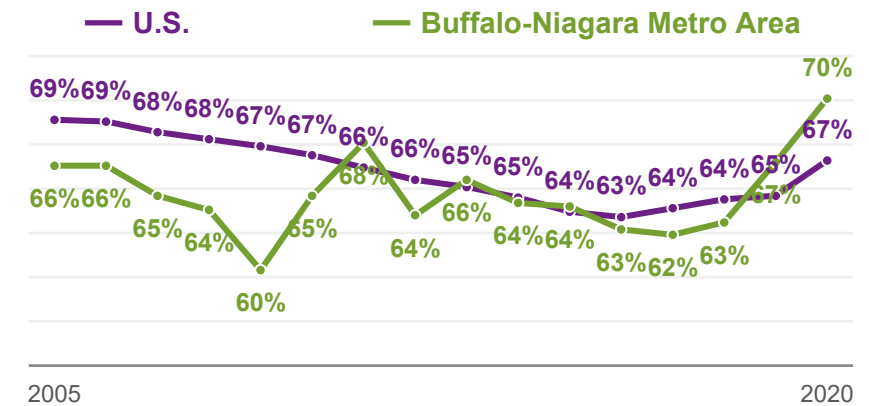
³³ Ibid.

³⁴ <http://www.census.gov/housing/hvs/data/rates.html>

³⁵ U.S. Census Bureau 2020 ACS 5-year estimates, Table B25003

FIGURE 11

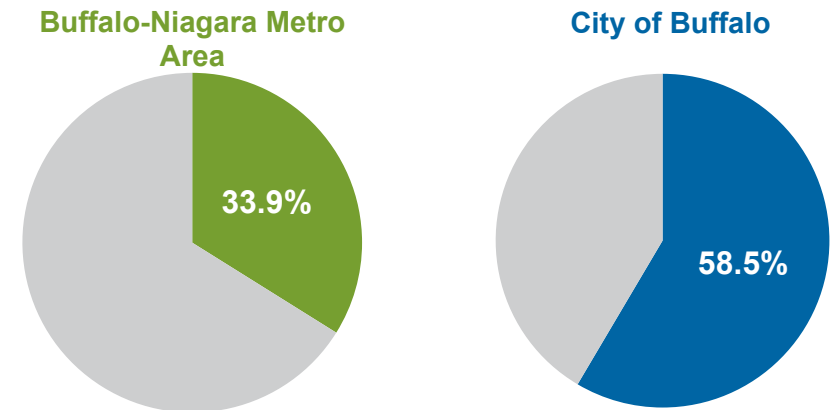
Average Quarterly Homeownership Rate, U.S. & Buffalo-Niagara Metro Area, 2005-2020



SOURCE: U.S. Census Bureau Current Population Survey

FIGURE 12

Renter-Occupied Housing Units, City & Metro Area, 2020



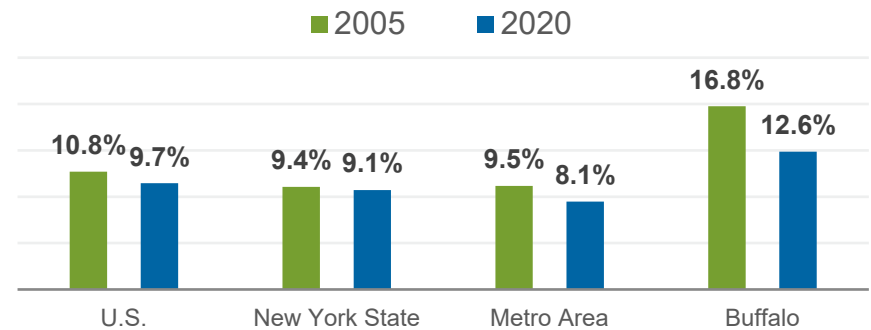
SOURCE: U.S. Census Bureau 2020 ACS 5-year estimates

Vacancy Rates

Housing units are considered vacant when they are unoccupied, whether they are for sale, for rent, seasonal or abandoned. High vacancy rates are generally indicative of a market imbalance and lack of demand for housing in an area. Housing unit vacancy is both a consequence and a cause of declining home prices and is one factor in a vicious cycle of housing market decline.

The vacancy rate for the Buffalo-Niagara Metro Area is lower than the U.S. and New York State (Figure 13). The region saw increases in vacancy from 2005 through roughly 2010, but since that time, vacancy rates have come down. Vacancy rates in 2020 were lower than 2005 for the Metro Area (8.1% compared to 9.5%) and the City of Buffalo (12.6% compared to 16.8%).³⁶ Buffalo's decline in vacancy can be explained in part by a focus on vacant housing demolition by the City.

FIGURE 13
Vacancy Rates, 2005 & 2020



SOURCE: U.S. Census Bureau 2005 ACS 1-year estimates and 2020 DEC Redistricting Data

³⁶ U.S. Census Bureau 2005 ACS 1-year estimates, Table B25002; 2020 DEC Redistricting Data, Table H1

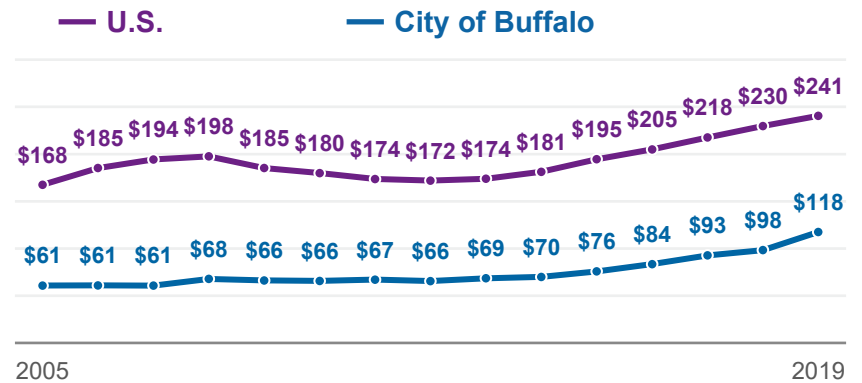
Housing Cost & Affordability

Median housing values within the Buffalo-Niagara Metro Area are among the lowest of metropolitan areas with 1 million or more residents in the country.³⁷ The median housing value in the Buffalo-Niagara Metro Area was \$160,800 in 2019, almost \$80,000 less than the median value in the U.S. \$240,500) (Figure 14).³⁸ The median housing value in the City of Buffalo is \$117,500, up by \$56,700 from 2005.

The City’s median housing value remained relatively flat throughout the recession while the nation’s declined. Though the nation’s values have appreciated roughly 40% since 2012, the city’s values have increased approximately 79% in that time frame. The City’s median housing value is now 49% of the nation’s, up from 38% in 2012.

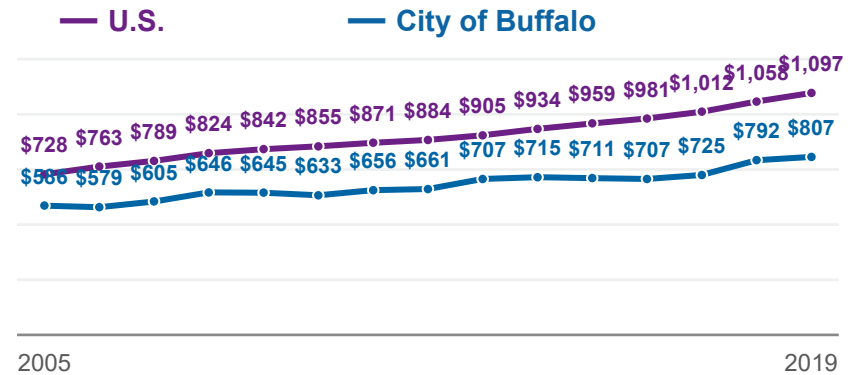
As noted earlier, the majority of households in the City of Buffalo rent their homes. Since 2005 the national rental rate has risen 3%, while Buffalo’s rental occupancy has risen just 1%.³⁹ In spite of this relative stability in rental rates, Buffalo’s monthly median rent has risen by \$221 from \$586 per month in 2005 to \$807 per month in 2019 (+37.7%) (Figure 15).⁴⁰

FIGURE 14
Median Home Value, City of Buffalo & U.S, 2005-2019
(in thousands)



SOURCE: U.S. Census Bureau 2005-2019 ACS 1-year estimates

FIGURE 15
Median Rent, City of Buffalo & U.S, 2005-2019



SOURCE: U.S. Census Bureau 2005-2019 ACS 1-year estimates

³⁷ <http://www.kiplinger.com/tool/real-estate/T010-S003-home-prices-in-100-top-u-s-metro-areas/index.php>

³⁸ U.S. Census Bureau 2019 ACS 1-year estimates, Table B25077

³⁹ U.S. Census Bureau 2005-2019 ACS 1-year estimates, Table B25003

⁴⁰ U.S. Census Bureau 2005-2019 ACS 1-year estimates, Table B25064

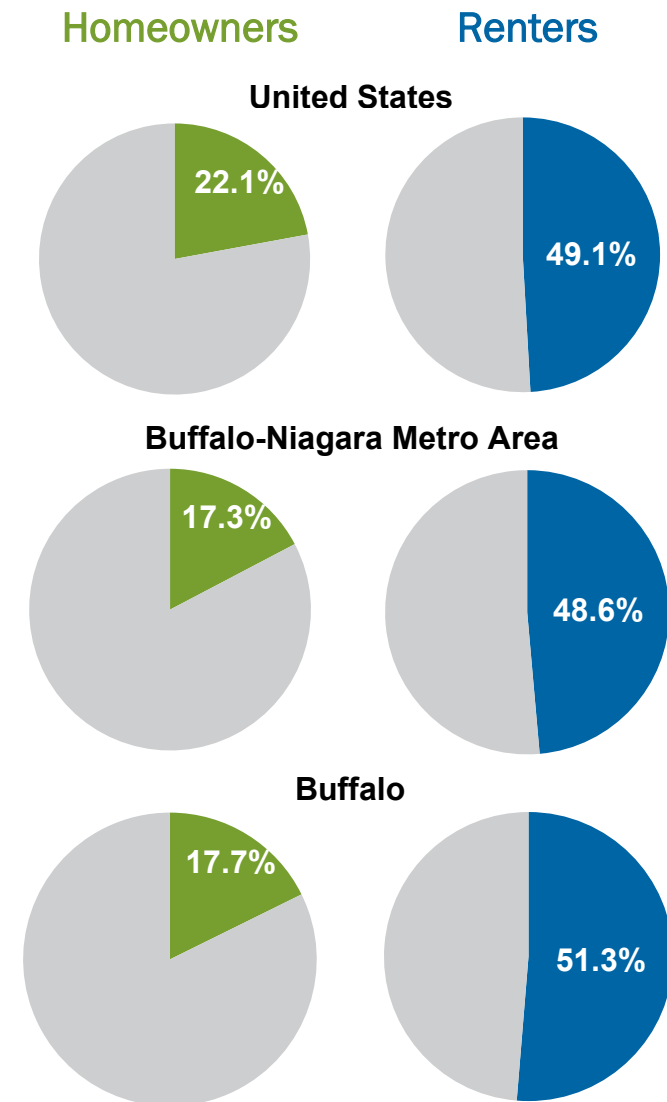
Housing costs, both for homeowners and renters, remain unaffordable for many households in WNY, despite housing costs that are lower than the national average. To be considered “affordable,” housing costs (mortgage/rent, utilities, taxes) should be 30% or less of household income. Over 17% of homeowners in the Buffalo-Niagara Metro Area face unaffordable housing costs.⁴¹ This is low compared to renters. In the Metro Area 49% of all renters spend over 30% of their household income on housing costs, approximately the same as the national rate. However, in the city of Buffalo, this portion is greater than 51% (Figure 16).

Those who cannot afford permanent housing face eviction and the threat of homelessness. According to the most recent report from the Homeless Alliance of WNY, over 6,000 people in the Buffalo-Niagara Metro Area experienced homelessness at some point during 2020, a decline from almost 7,000 in 2019 due to the eviction moratorium during the COVID-19 pandemic.⁴² Of those who were surveyed, more than 19% were children. Homelessness, particularly for children, poses lingering consequences. People who experience homelessness as children are more likely to be homeless as adults, and homelessness has been associated with poor academic outcomes.

⁴¹ U.S. Census Bureau 2020 ACS 5-year estimates, Table DP04

⁴² <https://wnyhomeless.org/local-report-on-homelessness/>

FIGURE 16
Percent of Households Living in Unaffordable Housing, 2020



SOURCE: U.S. Census Bureau 2020 ACS 5-year estimates

Healthy Housing

For many low-income residents, affordable options are accompanied by increased health risks, exacerbated by substandard facilities (e.g., lack of plumbing). A number of these health risks are the result of an old housing stock. The Buffalo-Niagara Metro Area has the oldest housing stock in the nation for Metro Areas with more than one million residents (Table 7).⁴³ The overwhelming majority of homes in the Buffalo-Metro Area were built in 1979 or earlier (79%).⁴⁴ The median age of each of the region’s eight counties’ housing stock is pre-1965, ranging from Allegany (1964) to Orleans (1952).⁴⁵ Housing in the City of Buffalo is even older, with a median age of pre-1939, and 91% of the housing units built before 1979 (Figure 17).

Older housing stock presents a particular challenge related to lead paint, which was not outlawed until 1978. Eleven ZIP codes in Erie County have been designated by the NYS Department of Health as “Communities of Concern”, where children are at high risk for lead poisoning.⁴⁶ All eleven ZIP codes are located in the City of Buffalo: 14201, 14206, 14207, 14208, 14209, 14210, 14211, 14212, 14213, 14214 and 14215. According to the New York State Community Health Assessment, Erie County’s incidence of blood lead levels over 5 µg/dL of 35.0 for 2016-2019 is almost three times the statewide rate of 12.1 per 1,000 children tested. Erie County was among the quarter of all counties in New York State

⁴³ U.S. Census Bureau 2020 ACS 5-year estimates, Tables B25035 and B01003

⁴⁴ U.S. Census Bureau 2020 ACS 5-year estimates, Table DP04

⁴⁵ U.S. Census Bureau 2020 ACS 5-year estimates, Table B25035

⁴⁶ <https://www.getaheadoflead.org/>

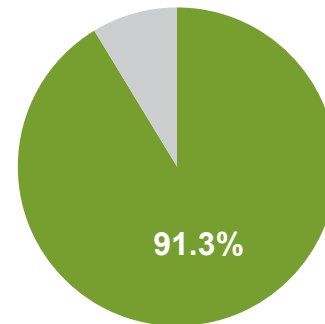
Oldest Median Housing Stock U.S. Metro Areas > 1 million population		
1	Buffalo	1956
2	New York City	1958
3	Pittsburgh	1959
4	Cleveland	1961
5	Providence	1961
6	Boston	1962
7	Milwaukee	1964
8	Philadelphia	1964
9	Rochester	1965
10	Hartford	1966

SOURCE: U.S. Census Bureau 2020 ACS 5-year estimates

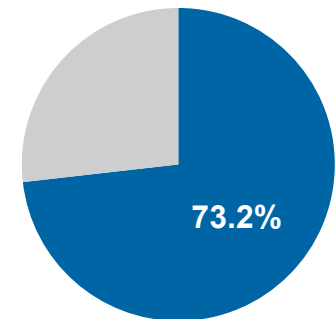
FIGURE 17

City of Buffalo Housing & Lead, 2020

Homes Built Pre-1979



Children Living in High-Risk Lead ZIP Codes



SOURCE: U.S. Census Bureau 2020 ACS 5-year estimates

with the highest incidence rates.⁴⁷ CDC data also indicates lead exposure in Erie County is 33% higher than the national average.⁴⁸

In addition to risks of lead poisoning, a child's house and neighborhood can also trigger asthma symptoms through mold, airborne toxins, dust particles, pet dander and other environmental factors. The Centers for Disease Control and Prevention have cited asthma as a leading chronic illness among children in the nation, with high rates in the Northeast.⁴⁹ See the Health section of this report for additional detail on asthma and related illnesses.

⁴⁷ New York State Community Health Indicator Reports, Revised September 2021. Retrieved from <https://www.health.ny.gov/statistics/chac/indicators/index.htm>

⁴⁸ Centers for Disease Control and Prevention. *Childhood Lead Poisoning Prevention: Blood Lead Surveillance Data, 2018*. Retrieved from <https://www.cdc.gov/nceh/lead/data/surveillance-data.htm>

⁴⁹ <https://www.cdc.gov/healthyschools/asthma/index.htm>; <https://www.cdc.gov/asthma/data-visualizations/prevalence.htm>

ECONOMIC HEALTH

Multiple indicators of economic health offer insights into the day-to-day well-being of regional residents and their pocketbooks. Though median and average figures present a snapshot of regional economic health, opportunity and outcomes for communities and individuals is intimately linked with systemic influences of geography and demographics, influences that have been shaped by issues of race, segregation, housing, education and health that are discussed in greater depth elsewhere in this report.

Income & Earnings

According to the most recent estimates, The Buffalo-Niagara Metro Area has a median household income of \$60,105. While this is lower than New York State (\$72,108) and the nation (\$65,712), it is significantly higher than the City of Buffalo’s median household income of \$40,843.⁵⁰ The median household income has increased across geographies in the last decade. Growth in median household income in the City of Buffalo has outpaced the U.S., New York State, and the Metro Area as a whole. However, gaps between the City and broader regions remain. The median household income in the City of Buffalo is only 68% of that for the Metro Area, representing a gap of more than \$19,000 per household (Table 8).

Similar differences are evident in earnings. Median earnings for workers in the Metro Area (\$37,254) are slightly higher than the nation (\$36,280), while median earnings for workers in the City of

TABLE 8
Median Household Income, 2005 & 2019

Median Household Income	2005	% Change	2019
United States	\$46,242	42% ▲	\$65,712
New York State	\$49,480	46% ▲	\$72,108
Buffalo-Niagara Metro Area	\$42,315	42% ▲	\$60,105
City of Buffalo	\$27,311	50% ▲	\$40,843

SOURCE: U.S. Census Bureau 2005 & 2019 ACS 1-year estimates

TABLE 9
Median Individual Earnings by Race/Ethnicity, 2020

	American Indian/ Alaska Native	Asian	Black	Hispanic/ Latino	White (non-Hispanic)
Buffalo-Niagara Metro Area	\$22,743	\$24,669	\$26,835	\$26,747	\$40,584
City of Buffalo	\$21,360	\$18,727	\$25,539	\$24,163	\$35,241

SOURCE: U.S. Census Bureau 2020 ACS 5-year estimates

⁵⁰ U.S. Census Bureau 2019 ACS 1-year estimates, Table B19013

Buffalo are significantly lower (\$29,248).⁵¹ Over the course of a 40-year career, this amounts to a \$320,240 difference in earnings. In addition to geography, median earnings also differ by race, with White workers of the Metro Area and City earning more than workers of color (Table 9). At current disparity levels, median-earning White workers throughout the Metro Area will earn \$550,000 to \$714,000 more than median-earning workers of other races and ethnicities throughout their careers.

⁵¹ U.S. Census Bureau 2020 ACS 5-year estimates, Table B20017

Poverty

The poverty threshold, defined and updated annually by the U.S. Census Bureau, assesses poverty and determines eligibility for governmental programs. In 2019, a family of two adults and two children earning \$25,926 or less was considered to be living in poverty.⁵²

According to the most recent U.S. Census numbers, 29% of all the people residing in the City of Buffalo live in poverty. This represents a 2-percentage-point increase over 2005 but a 4-percentage-point decrease since 2015 (Figure 18). It remains over twice the poverty rate of the Metro Area (13.1%) and New York State (13.0%) as a whole.

Poverty hits children and families particularly hard. In Buffalo, approximately 43% of all children under the age of 18 live below the poverty line. Although this is a substantial decrease from 54% that lived in poverty in 2015, it remains higher than the 38% that lived in poverty in 2005 (Figure 19). This figure now represents more than 39% of all families with children in the City. Households headed by a single female with children under the age of 18 have a poverty rate of 50%, and those with children under age five have a poverty rate of 52%.⁵³

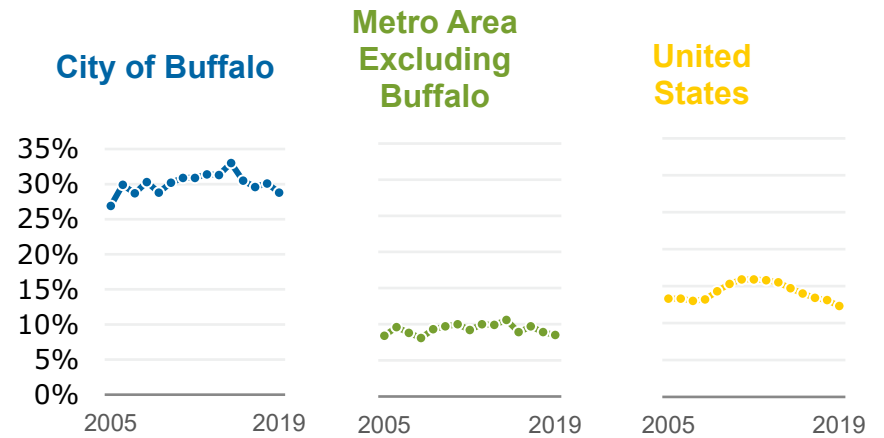
Approximately 14% of households in the Metro Area, including 31% of households in the City received SNAP benefits (food stamps) in the last 12 months, up from 2005 when the utilization rates were 10% and 23% respectively. Despite making up less than one-quarter of the Metro Area population, the City of Buffalo accounts for slightly less than half of all households receiving SNAP benefits. In the outlying WNY counties, the aggregate utilization rate is also 15%, ranging from a high of 19% in Chautauqua County to a low of 9% in Wyoming County.⁵⁴

⁵² <http://www.census.gov/data/tables/time-series/demo/income-poverty/historical-poverty-thresholds.html>

⁵³ U.S. Census Bureau, 2019 ACS 1-year estimates, Table DP03

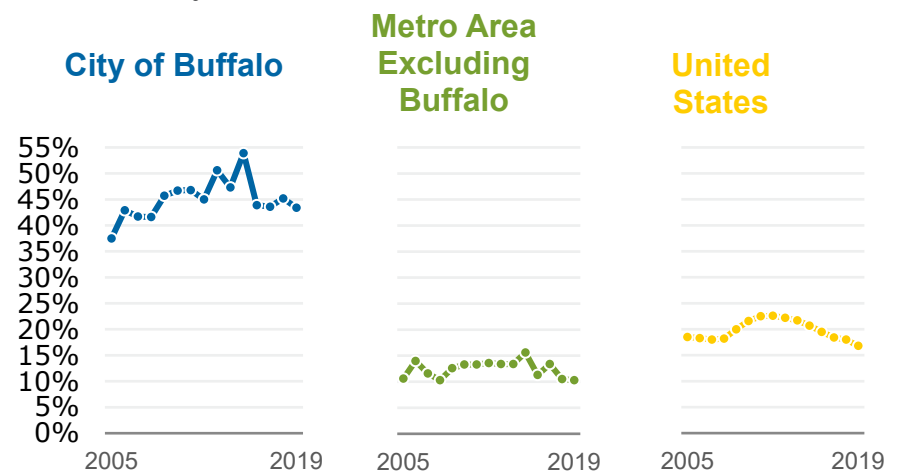
⁵⁴ U.S. Census Bureau, 2005 and 2020 ACS 5-year estimates, Table DP03

FIGURE 18
Poverty Rates, 2005-2019



SOURCE: U.S. Census Bureau 2005-2019 ACS 1-year estimates

FIGURE 19
Child Poverty Rates, 2005-2019



SOURCE: U.S. Census Bureau 2005-2019 ACS 1-year estimates

Labor Force & Employment

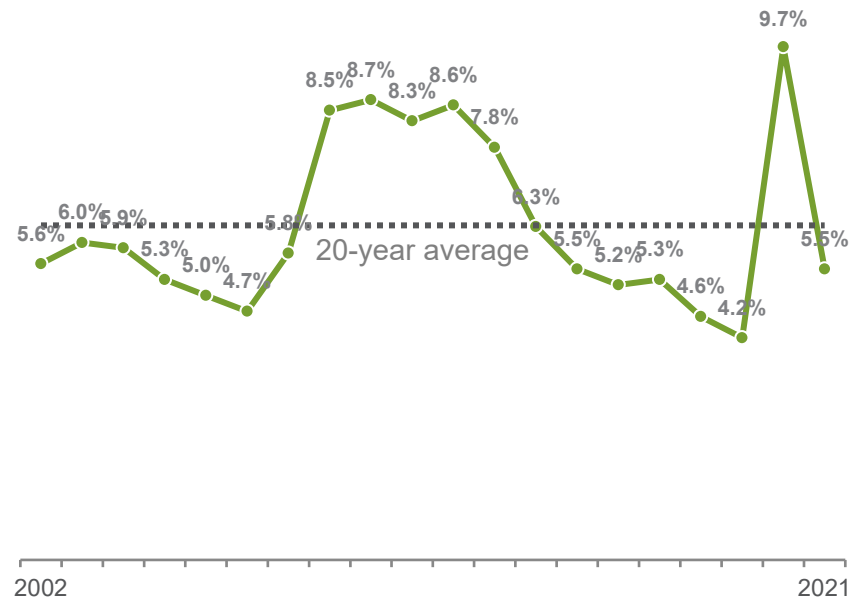
The portion of the population 16 and older that is in the labor force (employed or seeking work) has been shrinking since 2012, a trend that has continued through the pandemic. The labor force was 6% smaller in 2021 (531,799) than in 2012 (566,723), in keeping with statewide and national trends toward a lower workforce participation rate. Still, across the eight counties of WNY, there are nearly 38,000 individuals seeking employment.⁵⁵

According to the New York State Department of Labor, the Buffalo-Niagara Metro Area lost 43,800 jobs between 2019 and 2021 and is now home to 520,800 jobs.⁵⁶ However, job openings in the Metro Area have increased over 50% since February 2020.⁵⁷

Prior to 2020, the combination of a shrinking labor force and increased jobs helped to lower the unemployment rate in the Metro Area, which hit 4.2% in 2019. Although not back to pre-pandemic levels, unemployment has declined significantly between 2020 and 2021, from 9.7% to 5.5% (Figure 20).

These numbers, however, do not account for a large portion of workers who are underemployed. In 2016, 132,000 people employed in the Metro Area were not utilizing their skillsets and were prepared for higher responsibility positions. This represented 17.9% of the workforce, a dramatic increase from the 4.9% of the workforce that was underemployed in 2006.⁵⁸

FIGURE 20
Buffalo-Niagara Metro Area Annual Unemployment, 2000-2021



SOURCE: Bureau of Labor Statistics

⁵⁵ Local Area Unemployment Statistics Program, Seasonally Adjusted Metropolitan Area Estimates and Labor Force Data by County, New York State Department of Labor, Retrieved July 2022.

⁵⁶ Current Employment Statistics, New York State Department of Labor, <http://dol.ny.gov/current-employment-statistics-0>, Retrieved June 2022.

⁵⁷ Economic & Market Update, Wilmington Trust (Member of the M&T Family), July 20, 2022

⁵⁸ University at Buffalo Regional Institute, based on local research and survey methodology performed by The Pathfinders in 2006 and 2016.

In addition, wages in the region have lost ground to inflation since 2009, and the average annual wage in WNY (\$43,580) is now 6% lower than the national average.⁵⁹

The Bureau of Labor Statistics (BLS) also predicts slower growth in national labor force participation between 2020 and 2030, as many employed Baby Boomers plan for retirement and both male and female labor participation declines.⁶⁰ By 2030, all baby boomers will be 65 and over.

EDUCATION

The long-term economic health of WNY is highly dependent upon the educational attainment of its workforce. Educational attainment affects income, employment stability, and a range of other factors.

According to the most recent Census data, about 92% of the population 25 years and older in the Buffalo-Niagara Metro Area has graduated from high school, and 33% hold a bachelor’s degree or higher (Figure 22). Educational attainment is tied closely to income and poverty status. In the City of Buffalo, 43% of individuals 25 years old and over without a high school diploma had income below the poverty level. For Buffalonians 25 and over with a Bachelor’s degree or higher, only 10% are in poverty (Figure 23).

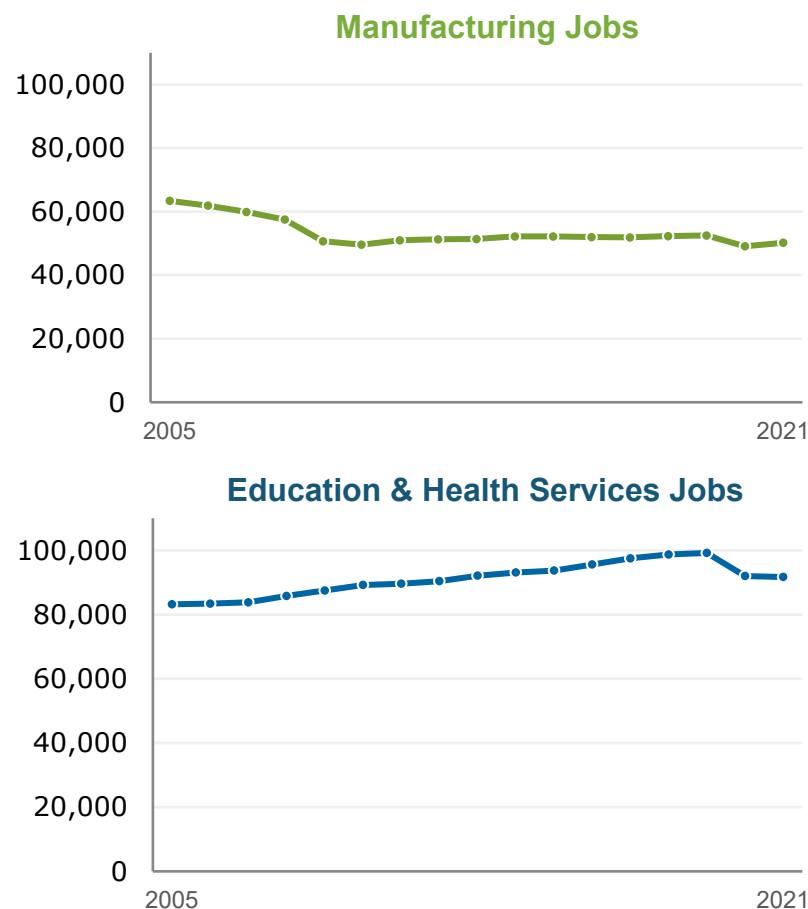
Educational attainment correlates with higher median earnings and lower jobless rates as well (Figure 24). At 2020 levels, workers with graduate degrees in the Metro Area would earn approximately

⁵⁹ Ibid.

⁶⁰ <http://www.bls.gov/news.release/ecopro.nr0.htm>

FIGURE 21

Metro Area Job Growth by Selected Sectors, 2005-2021

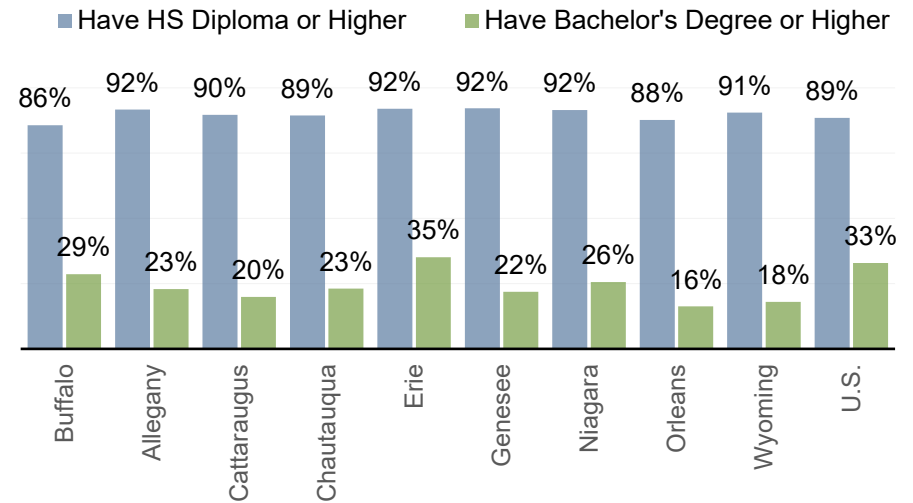


SOURCE: New York State Department of Labor, Current Employment Statistics

\$1,670,000 throughout the course of their careers more than workers without a high school diploma (based on 40 years of working).

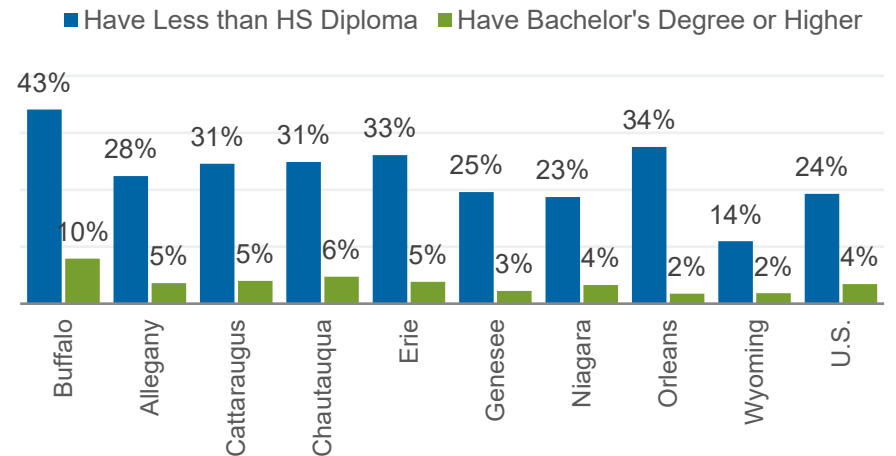
Increasing postsecondary completion rates within our region begins with raising the high school graduation rate. The Buffalo City School District's four-year high school graduation rate for the 2020-2021 class is reported to be 79%, a 30-percentage point increase from the 2011-2012 class (Figure 25). Despite this increase, postsecondary enrollment has been declining since 2017, with the most significant year-to-year decline between 2019 and 2020 (Figure 26).

FIGURE 22
Educational Attainment, 2020



SOURCE: U.S. Census Bureau 2020 ACS 5-year estimates

FIGURE 23
Poverty Rate by Educational Attainment, 2020

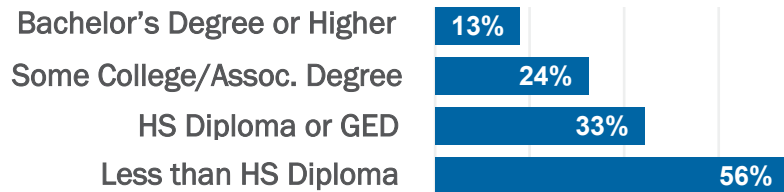


SOURCE: U.S. Census Bureau 2020 ACS 5-year estimates

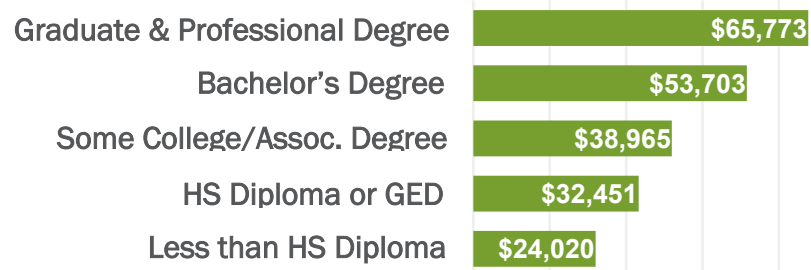
FIGURE 24

Metro Area Earnings and Unemployment by Educational Attainment, 2020

**Jobless rate
(individuals 25-64, unemployed and not in labor force)**



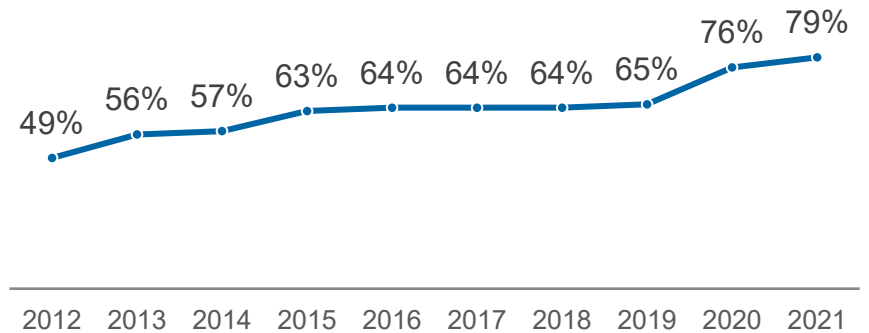
Median Annual Earnings



SOURCE: U.S. Census Bureau 2020 ACS 5-year estimates

FIGURE 25

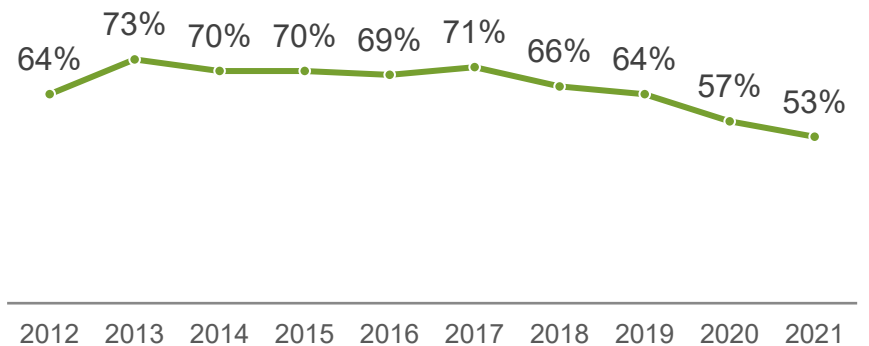
Buffalo Public Schools 4-year High School Graduation Rate, 2012-2021



SOURCE: Say Yes to Education Buffalo, February 2022 updates

FIGURE 26

Buffalo Public Schools Postsecondary Enrollment, 2012-2021



SOURCE: Say Yes to Education Buffalo, February 2022 updates

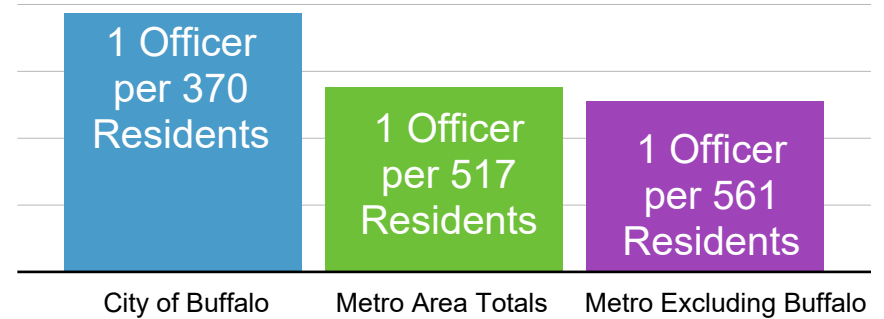
CRIMINAL JUSTICE

High profile cases of police-involved violence, a wave of legislative actions involving police reform, and major initiatives from philanthropic, social justice, and political spheres has brought national media attention to local, state and federal criminal justice systems. In particular, concerns regarding over-policing, racial profiling and discrimination have led to protests and calls for solutions throughout the criminal justice system. Proposed solutions include modified disciplinary procedures in schools, implicit bias training and community-based policing strategies, representative police forces, sentencing and bail reform, police misconduct and use of force accountability measures, and more.

The Buffalo-Niagara Metro Area is home to 31 police agencies employing 2,257 full- and part-time sworn officers (including those affiliated with the University at Buffalo and Buffalo State College but excluding NFTA and State Police).⁶¹ This amounts to one officer for every 517 residents (Figure 27). In the City of Buffalo, there is one Buffalo Police Department officer for every 370 residents (this does not include presence of County Sheriff or State or Agency Police personnel – i.e., State Troopers, Buffalo State or University at Buffalo, or NFTA Police). Excluding Buffalo from the Metro Area totals, there would be one officer for every 561 residents outside of the city.

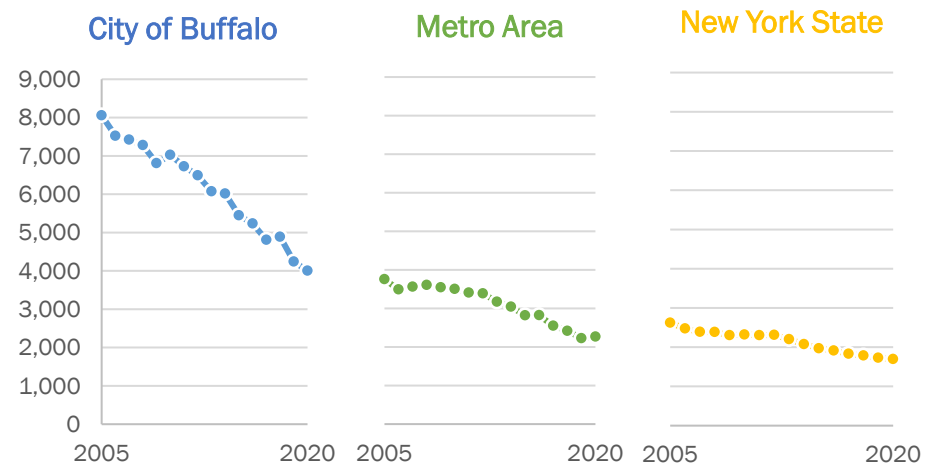
In addition, the Buffalo-Niagara Metro Area criminal justice system includes five holding centers and correctional facilities, which

FIGURE 27
Police Officers Per Capita, 2020



SOURCE: NYS Department of Criminal Justice Services

FIGURE 28
Crime Rate Per 100,000 residents, 2005-2020



SOURCE: NYS Department of Criminal Justice Services

⁶¹ New York State Division of Criminal Justice Services, as of May 2021, <http://www.criminaljustice.ny.gov/crimnet/ojsa/2020-le-personnel.pdf>

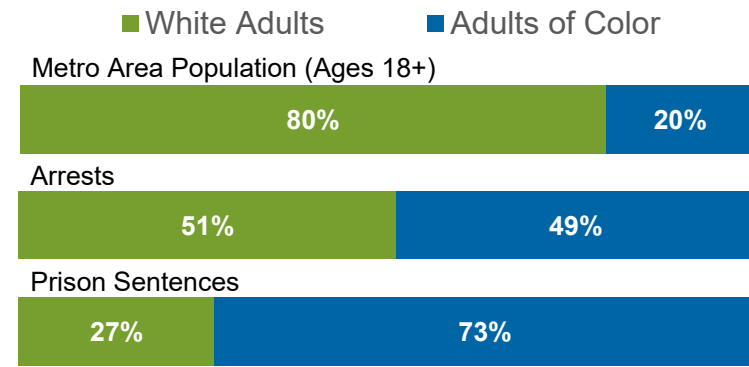
housed an average daily population of 1,035 inmates in 2021.⁶² Since 2005, overall crime rates have fallen in the City of Buffalo, the Metro Area and New York State (Figure 28). While Metro Area and State crime rates remain lower than the City, the City rates dropped much faster (by 50% between 2005 and 2020). Like the crime rate, overall arrest rates have also dropped to decade lows in the Metro Area for both adults and juveniles.⁶³

Despite declining rates, due to systemic disparities throughout the criminal justice system, arrests and detentions disproportionately impact communities of color.

Despite making up 20% of the Metro Area population in 2020, 49% of all adult arrests were people of color (see Figure 29). There were roughly 11 arrests for every 1,000 White adults and 40 for every 1,000 adults of color (55 per 1,000 Black adults). The disparity in prison sentences is even more pronounced. Only 27% of adults who received a prison sentence in the Metro Area in 2018 were White, while 73% were people of color.

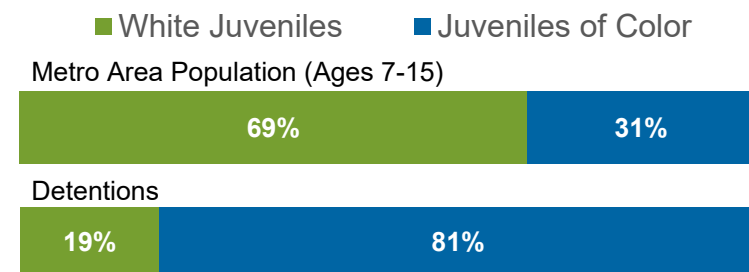
The phenomenon is similar for juvenile detentions. In 2018, juveniles (ages 7-15) of color comprised 31% of the juvenile population in the Metro Area but accounted for 81% of detentions (see Figure 30). In other words, that year, there was 1 White juvenile detention for each 1,000 White juveniles in the region, while there were 7 juvenile of color detentions for every 1,000 juveniles of color (11 for every 1,000 Black juveniles).

FIGURE 29
Buffalo-Niagara Metro Area Adult Arrests, Age 18+, 2020



SOURCE: NYS Department of Criminal Justice Services

FIGURE 30
Buffalo-Niagara Metro Area Juvenile Detentions, Ages 7-15, 2018



SOURCE: NYS Department of Criminal Justice Services

⁶² New York State Division of Criminal Justice Services, 2021 Jail Population, http://www.criminaljustice.ny.gov/crimnet/ojsa/jail_pop_y.pdf

⁶³ New York State Division of Criminal Justice Services, Adult Arrests and Prison Sentences 2005-2020 and Juvenile Justice Profiles 2005-2018

ENVIRONMENT

Water

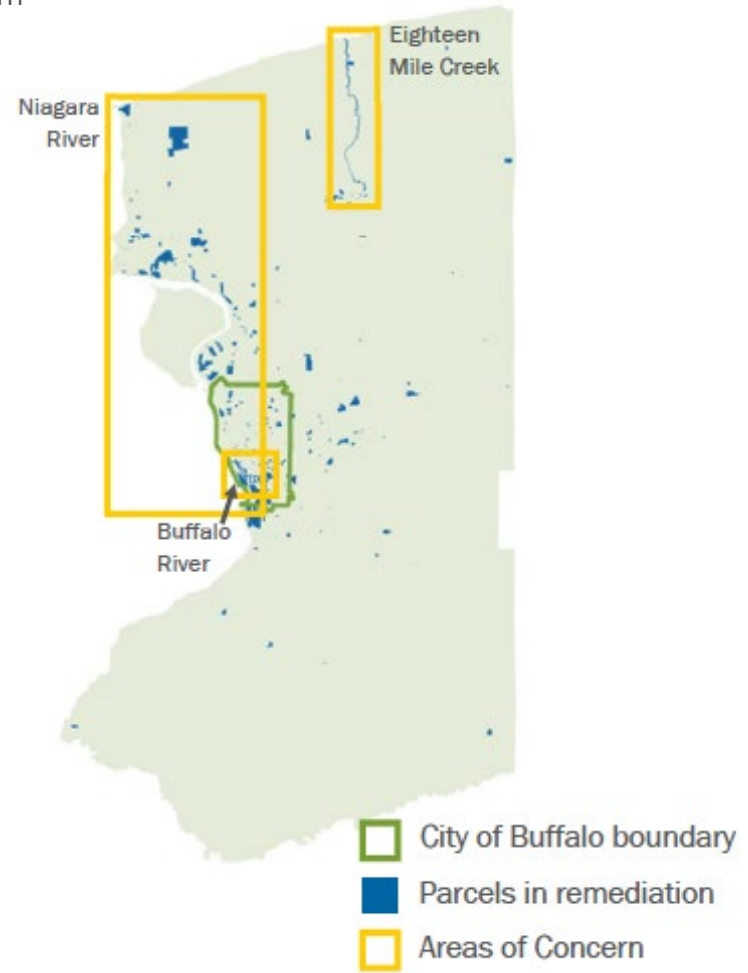
Water defines the climate, topography, culture and economy of WNY. As a Great Lake community nestled between Lake Erie and Lake Ontario, 20% of all freshwater in the world passes through the region. In 1987, the Great Lakes Water Quality Agreement between the United States and Canada named 43 Areas of Concern (AOC) in the Great Lakes that had been environmentally damaged.⁶⁴ Three of those areas—the Buffalo River, the Niagara River and Eighteen Mile Creek—are in the Buffalo-Niagara Metro Area (see Map 3). Although local governments and organizations work to remediate the harm to these water bodies, all three maintain the AOC designation.

Land

Like the region's water, certain tracts of local land were degraded due to industrial overuse in the late 19th and early 20th centuries. Due, in part, to an uptick in real estate values and interest from New York State, nearly 400 land parcels are now under remediation through a variety of state efforts, including the Brownfield Cleanup Program, the Environmental Restoration Program, the State Superfund Program, the Resource Conservation & Recovery Program and the Voluntary Cleanup Program (see Map 3). Nearly 60% of parcels in remediation are located in an area of high poverty and/or unemployment (New York State designated

MAP 3

Buffalo-Niagara Metro Area Land Remediation and Areas of Concern



SOURCE: NYS Department of Environmental Conservation

⁶⁴ New York State Department of Environmental Conservation: <http://www.dec.ny.gov/lands/91213.html>

Environmental Zones) and are eligible for additional support from the State.⁶⁵

Environmental Hazards

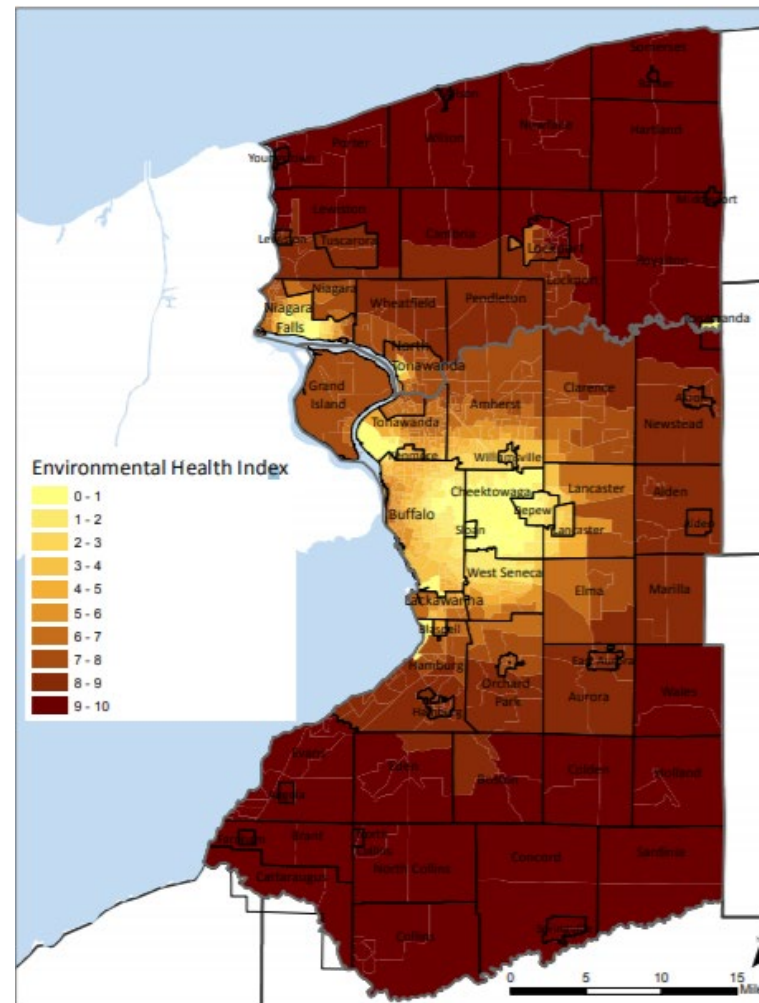
Environmental hazards are not distributed evenly throughout the region (Map 4). An environmental health index, containing blended indicators of industrial releases in the EPA Toxic Release Inventory, the rate of youth asthma emergency department and the presence of New York State superfund or inactive waste sites, reveals that communities of color are saddled with a much heavier environmental health burden than White communities. Residents in environmental justice communities are more likely to suffer health issues leading to missed education and employment opportunities. Black or African American residents face the largest challenges of any racial group, followed by Hispanic/Latino communities (Table 10).

Table 10
Buffalo-Niagara Metro Area Environmental Health Index by Neighborhood of Residence

All Persons	White	Black/African American	Hispanic/Latino	Asian/Pacific Islander	Native American
7.3	7.7	5.7	6.8	7.3	7.9

SOURCE: Based on analysis within Fair Housing Equity Assessment, 2016. University at Buffalo Regional Institute. Based on a relative 10-point scale where 10 represents the highest environmental quality in the region.

MAP 4
Buffalo-Niagara Metro Area Environmental Health Index



SOURCE: Fair Housing Equity Assessment, 2016. University at Buffalo Regional Institute. 1 represents the lowest quality of environmental health and 10 represents the highest.

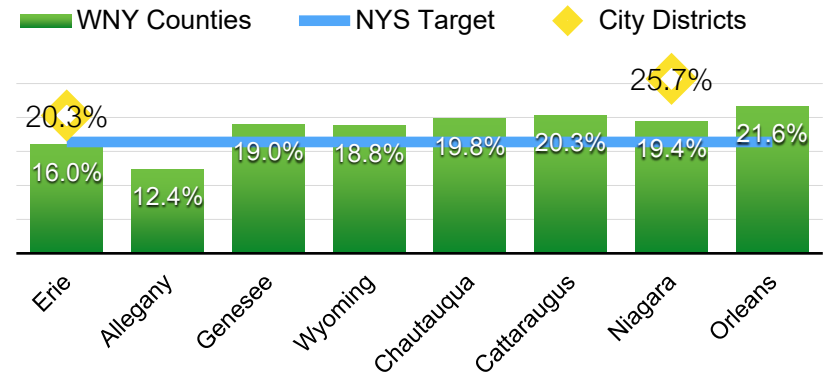
⁶⁵ These are “either census tracts with a poverty rate of at least 20 percent and an unemployment rate of at least 125 percent of the New York State unemployment rate, or a poverty rate of at least double the rate for the county in which the tract is located.” <http://www.dec.ny.gov/chemical/102075.html>

HEALTH

WNY’s health indicators generally point to a healthier core region with rural areas facing increased health challenges. For example, obesity rates in public school children have only achieved the state reduction target (16.4%) in Allegany and Erie County, while the remaining WNY counties struggle with rates as high as 21.6% (See Figure 31).⁶⁶ All WNY counties have adult obesity rates well above the New York State target of 24.2% and above the State average of 27.9% (Figure 32).⁶⁷

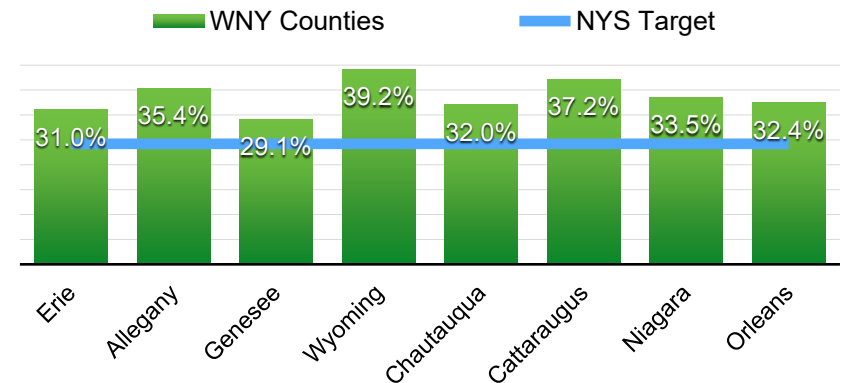
Overall health indicators, however, tend to mask vast disparities in health outcomes by race. Among other factors, differing neighborhood conditions, including access and availability of healthy food and health care, proximity to parks, and—some studies suggest—differential treatment by health care systems create differential outcomes within communities of color. In Erie County, for example, 39% of residents suffer early deaths (< age 75), which includes 35% of White residents but 61% of Black or African American residents, 55% of Asian and Pacific Islanders, and 65% of Hispanic or Latino residents. These disparate trends repeat across the life spectrum from prenatal care, low birthrates and infant mortality to asthma, heart disease hospitalizations and diabetes (Table 11).⁶⁸

FIGURE 31
WNY Public School Obesity Rates by County, 2017-2019



SOURCE: NYS Department of Health, Health Improvement Plan

FIGURE 32
WNY Adult Obesity Rates by County, 2018



SOURCE: NYS Expanded Behavioral Risk Factor Surveillance System Plan

⁶⁶ NYS’s Prevention Agenda strives to decrease the percentage of public school children who are obese from 17.3 to 16.4 by 2024 (in NYS excluding NYC). https://www.health.ny.gov/prevention/obesity/statistics_and_impact/student_weight_status_data.htm

⁶⁷ NYS Department of Health, NYS Community Health Indicator Reports (CHRIS), 2017-2019 data

⁶⁸ NYS Department of Health, Revised February 2019, <https://www.health.ny.gov/statistics/community/minority/county/erie.htm>

TABLE 11

Disparities in Situatedness Health Indicators by Race/Ethnicity, 2017-2019

Erie County	Total	White	Black/ African American	Asian/Pacific Islander	Hispanic
Population (2018)	919,941	699,654	125,737	35,673	53,013
Percentage of population (2018)	100%	76.1%	13.7%	3.9%	5.8%
Median annual household income in U.S. dollars (2015-2019)	\$58,121	\$65,710	\$31,402	\$50,725	\$31,298
Percentage of families below poverty (2015-2019)	9.8%	5.4%	25.9%	25.8%	32.8%
Percentage of premature deaths (< 75 years)	39.8%	35.8%	60.8%	50.8%	67.9%
Percentage of low birthweight births (< 5.5 lbs)	8.8%	6.9%	14.0%	8.2%	12.7%
Asthma hospitalizations per 10,000 population, age-adjusted	7.5	3.9	19.6	6.1	17.6

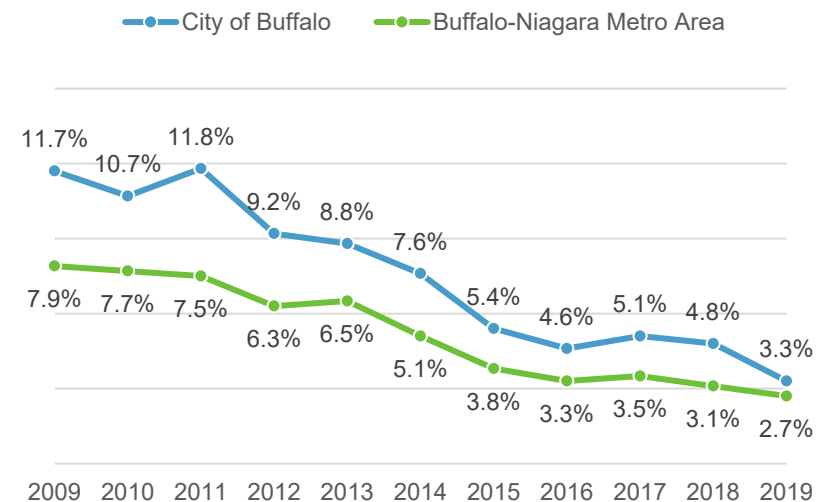
NYS Department of Health, Revised March 2022, <https://www.health.ny.gov/statistics/community/minority/county/erie.htm>

Environmental risk factors are a significant factor in disparate health outcomes. Nationally, about one in ten children suffer from asthma, with higher rates for low-income children, and children living in urban areas. It is also a leading cause of emergency room (ER) visits and missed school days for children, which has a detrimental impact on high school completion and achievement test scores for students and schools alike.⁶⁹

According to the latest data from the New York State Department of Health, Erie County’s asthma-related hospitalization rate (17.5 per 10,000) and asthma-related emergency room visits (84.8 per 10,000) for children 17 years and younger are the third and fourth highest rates in Upstate New York, respectively.⁷⁰ The top five ZIP codes with the highest asthma-related emergency room visits in 2017-2019 were in either East or West Buffalo (14215, 14211, 14213, 14207, 14201). These five ZIP codes represent 30% of Erie County’s child population but 40% of asthma-related emergency room visits.⁷¹

However, across the city and the region, the number of uninsured residents has fallen significantly since 2009, which follows national trends since the implementation of the Affordable Care Act (Figure 33).⁷²

FIGURE 33
Health Insurance Coverage Status, Uninsured as Percentage of Civilian Non-Institutionalized Population, 2009-2019



SOURCE: U.S. Census Bureau, 2019 ACS 1-year estimates

⁶⁹ https://attendanceworks.org/wp-content/uploads/2017/06/Present_and_Accounted_For_Improving_Student_Attendance_Through_Family_and_Community_Involvement.pdf

⁷⁰ New York State Department of Health Asthma Data Dashboard, https://www.health.ny.gov/statistics/ny_asthma/

⁷¹ U.S. Census Bureau 2020 ACS 5-year estimates, Table S0101

⁷² U.S. Census Bureau 2009-2019 ACS 1-year estimates, S2701

Mental and Behavioral Health

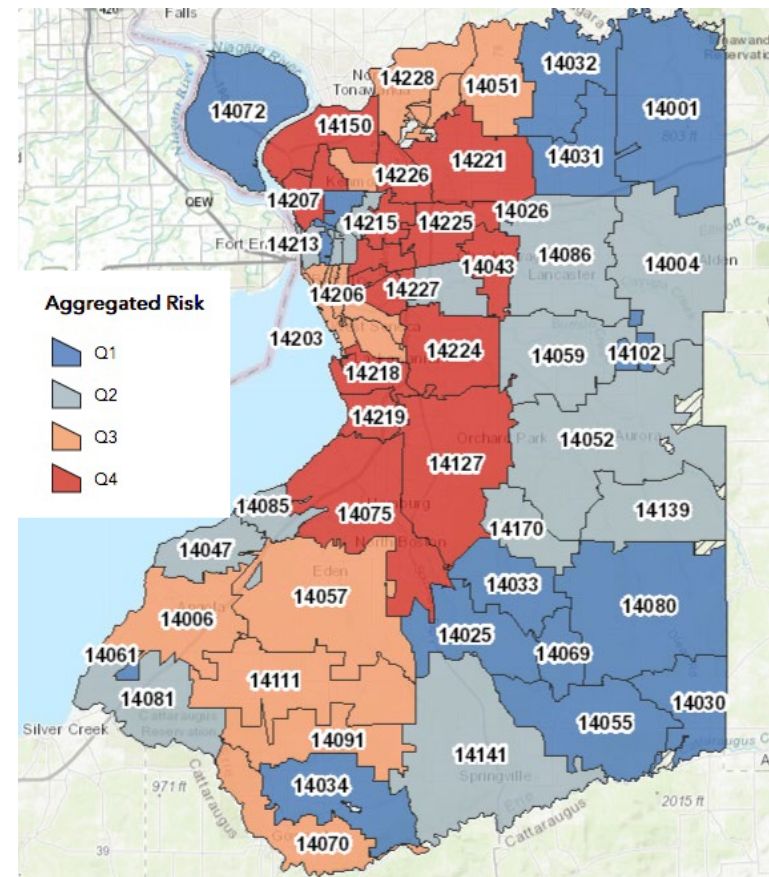
Mental health is the second most common health concern among Erie County residents.⁷³ According to the CDC's Behavioral Risk Factor Surveillance System, the percentage of Buffalo-Niagara Metro Area residents reporting one or more poor physical health days in the previous month declined from 36.6% to 31.7% between 2019 and 2020. However, the percentage of residents reporting poor mental health days in the previous month increased from 40.7% to 45.5%. This is almost 10 percentage points higher than New York State as a whole (36.6%).⁷⁴

The Erie County Department of mental health has long worked to integrate mental, behavioral, and physical health services. Based on responses to the New York State Office of Mental Health Patient Characteristic Survey, half of Erie County mental health patients have one or more chronic health conditions.⁷⁵

A series of factors informs the likelihood of risk for residents in need of mental health services, including low socioeconomic status, poor nutrition, social inequalities, and trauma, among others. Neighborhoods most at risk include those in the City of Buffalo, Tonawanda, Amherst, Cheektowaga, Lackawanna, Orchard Park, and Hamburg (Map 5). This corresponds to observed higher

MAP 5

Erie County: Aggregated Mental Health Risk by ZIP Code by Quartile



SOURCE: Institute for Community Health Promotion

⁷³ Erie County Community Health Assessment 2019-2022, <http://www2.erie.gov/health/sites/www2.erie.gov.health/files/uploads/pdfs/cha.pdf>

⁷⁴ <https://www.cdc.gov/brfss/brfssprevalence/>

⁷⁵ Catholic Health 2019-2021 Erie County Community Health Improvement Plan, <https://www.chsbuffalo.org/sites/default/files/files/mission/2019-2021%20Erie%20County%20Community%20Health%20Improvement%20Plan%20Summary.pdf>

mental health related hospital admissions and emergency room visits in the urban core.⁷⁶

In behavioral health trends, WNY has not been immune from the national opioid crisis, as more Erie County residents sought treatment for opioid addiction than alcohol addiction in 2014 through 2016.⁷⁷ Opioid deaths rose rapidly between 2014 and 2016, followed by declines between 2016 and 2019. However, opioid deaths rose 31% between 2019 and 2020, likely due to increased stress and isolation and reduced access to services during the COVID-19 pandemic.⁷⁸

⁷⁶ Institute for Community Health Promotion (2020). Erie County Risk Indicator Database, Version 13. Retrieved Wednesday, December 09, 2020, <http://www.erieidb.org>⁷⁷ NYS Office of Addiction Services and Supports (OASAS), Chemical Dependence Treatment Program Admissions: Beginning 2007 (Erie County), <https://data.ny.gov/Human-Services/Chemical-Dependence-Treatment-Program-Admissions-B/ngbt-9rwf/data>

⁷⁷ NYS Office of Addiction Services and Supports (OASAS), Chemical Dependence Treatment Program Admissions: Beginning 2007 (Erie County), <https://data.ny.gov/Human-Services/Chemical-Dependence-Treatment-Program-Admissions-B/ngbt-9rwf/data>

⁷⁸ LSP COVID-19 Survey, Erie County Department of Mental Health, https://www3.erie.gov/mentalhealth/sites/erie%20.erie.gov.mentalhealth/files/2021-07/2022-lsp-covid-survey-_final.pdf

ARTS & CULTURE

Buffalo and WNY have tremendous natural features and attractions, but for a mid-size U.S. city and region, it has outsized artistic, cultural, and architectural attractions as well. These assets have a legacy in Buffalo’s status at the turn of the 20th century as the eighth largest U.S. city, and as a hub of technological and social innovation, from the birthplace of the Niagara Movement to the early implementation of electric power and lights.

Architecture, arts and culture are a focus area for the Community Foundation and a critical piece of the WNY economic development strategy focused on realizing WNY’s tourism potential. The nonprofit arts and culture sector is a significant industry in WNY, generating \$352.1 million in total economic activity. The sector supports 10,160 FTEs and generates over \$208.2 million in household income to local residents.

The sector also benefits the public sector as it delivers \$40.3 million in local and state government revenue across Allegany, Cattaraugus, Chautauqua, Erie and Niagara counties. The economic impact extends beyond dollars, in part because of the volunteer resources mobilized. During 2015, over 12,000 volunteers donated over 587,000 hours to nonprofit arts and cultural organizations, with in kind contributions amounting to over \$4.1 million.⁷⁹

Though positions in the arts are difficult to track on a regular basis on their own, Leisure and Hospitality employment in the Buffalo

TABLE 12
Buffalo Area Employment, 2021

(employment numbers in thousands)	2021	Change from 2019	
		Number	Percent
Total nonfarm	520.8	-43.9	-7.8%
Mining, logging, and construction	20.7	-0.5	-2.4%
Manufacturing	50.2	-2.3	-4.4%
Trade, transportation, and utilities	96.6	-2.9	-2.9%
Information	5.8	-1.1	-15.9%
Financial activities	33.9	-2.7	-7.4%
Professional and business services	67.5	-5.2	-7.2%
Education and health services	91.7	-7.5	-7.6%
Leisure and hospitality	48.3	-12.0	-19.9%
Other services	22.8	-3.0	-11.6%
Government	83.3	-6.7	-7.4%

SOURCE: U.S. BLS, Current Employment Statistics

⁷⁹ Arts & Economic Prosperity 5: The Economic Impact of Nonprofit Arts & Cultural Organizations and their Audiences in Western New York (2017).

metro area declined by 12,000 from 2019 to 2021 (-19.9%) to a total of 48,300 (Table 12).⁸⁰ During that time, Leisure and Hospitality experienced the largest percent decline in employment among all the major industries.

Despite significant declines in employment across the country, more Americans report feeling that arts and culture organizations are important than before the pandemic, from 37% pre-pandemic to 40% in Spring 2020 and 56% in Spring 2021. A national survey by Culture Track revealed the respondents believe that arts and culture organizations should become more inclusive and relevant to a wider audience. The need to implement digital offerings during the pandemic may have opened one avenue to achieve that. Although two-thirds of Americans expect to choose in-person over online events in the future, the majority of those who prefer online events were Black/African American or Hispanic/Latino.⁸¹

The region's arts resource hub, Arts Services Inc., strives to ensure that rich artistic experiences in the region are open to all Buffalonians through its Arts Access program. The program provides tickets and transportation to arts events, sites and programs for families living in low-income households. An average 1,440 individuals and families received passes per season in the three seasons before the COVID-19 pandemic.

⁸⁰ U.S. Bureau of Labor Statistics, Current Employment Statistics, Employees on nonfarm payrolls in States and selected areas by major industry (annual averages)

⁸¹ Findings from the Second Wave of a National Survey about Culture, Creativity, Community, and the Arts, Culture Track, January 2022

ASSETS TO BUILD ON

Many data points in this report describe challenges for WNY, but the region is turning the corner and engaging in a number of revitalization efforts to improve the vitality of the region. WNY contains a wealth of assets that can be leveraged to propel the region forward. Collaboration among stakeholders; a focus on smart growth, infrastructure, and workforce development; and new public and private partnerships and investments like the Buffalo Billion and Regional Revitalization Partnership are serving as catalysts for positive change.

Abundance of colleges and universities

WNY is home to 21 colleges and universities, including four community colleges, multiple private institutions, and one of New York State's only Research Universities.⁸² Collectively, these postsecondary institutions have approximately 100,000 enrolled students, many of whom are from WNY.⁸³ An educated workforce is essential to a robust economy. Stronger alignment between grade school, postsecondary institutions and the job market will ensure a more fluid workforce pipeline.

Commitment to education

Before WNY's youngest scholars enroll in one of the region's 21 colleges and universities, they must graduate high school. Since 2012, Buffalo Public School students have benefited from Say Yes Buffalo. Say Yes provides comprehensive support services

for students and families so that they can be successful in the classroom. In addition, Say Yes guarantees a full tuition scholarship for Buffalo Public School graduates who want to pursue a postsecondary degree. As indicated in Figures 25 and 26, high school graduation and postsecondary enrollment have risen significantly since 2012.

Racial Equity Roundtable

The Greater Buffalo Racial Equity Roundtable is helping build a new shared future, one with prosperity on every side of Main Street. A group of roughly 30 C-Suite executives with more than 300 partners, the Roundtable is committed to impacting systems to enhance racial equity in the region and improve outcomes for all of our residents. By taking on strategic initiatives in a variety of sectors and engaging influential institutions and companies to examine how their policies and practices can reduce disparities in the region, the Roundtable is undertaking one of the most intensive community-wide racial equity efforts in the country.

A rich artistic, cultural and architectural history

The wealth generated through Buffalo's position as an industrial powerhouse also created legacies of architectural marvels, from grand residences to early skyscrapers, and cultural institutions such as the Buffalo Philharmonic Orchestra and the Albright-Knox Art Gallery. Not just Buffalo's elite, but also Buffalo's working-class history is enshrined in grand

⁸² <http://www.wnycollegeconnection.com/>

⁸³ <https://nces.ed.gov/collegenavigator/>

architectural gestures and art from City Hall's intricate murals and tile work to the groundbreaking photography of Milton Rogovin.

Buffalo's renaissance has much to owe to appreciation and rediscovery of its heritage. From the revitalization of historic downtown properties to the preservation of neighborhood fabric, investment and energy are flowing into places once neglected. Among many such milestones is the recent \$180 million investment in East Buffalo, including the Michigan Street African American Heritage Corridor (see page 5).

Access to freshwater and a booming waterfront

Around 20% of the world's freshwater flows through the region on its way to the Atlantic Ocean. As public and private development continues at places like Canalside, the Outer Harbor and the Niagara River Greenway, WNY's waterfront will increasingly serve as a gateway for the rest of the region. Capitalizing on our proximity to water will drive growth in multiple sectors, including recreation, tourism, trade, and electric power generation.⁸⁴ Protecting this natural asset is good for both the economy and the environment.

⁸⁴ <http://bnriverkeeper.org/blue-economy-initiative/>
Western New York Scan

NONPROFIT SECTOR

According to a 2019 study by the National Center for Charitable Statistics, there are more than 1.5 million registered nonprofits in the U.S. almost 1.1 million of which are 501(c)(3) public charities. Combined, these public charities reported \$2.04 trillion in annual revenue (Figure 34).⁸⁵

The eight counties of WNY are home to approximately 8,600 registered nonprofits. These local organizations register \$13.3 billion in annual revenue and more than \$17.2 billion in assets.⁸⁶ Roughly 60% of these organizations and 80% of the financial capacity are located in Erie County.

In 2022, the Nonprofit Finance Fund conducted a national survey of over 1,100 nonprofit leaders about their organization's performance the prior year and found the following:

- 39% had <4 months of cash available (Figure 35) (compared to 50% in 2017).
- 71% experienced an increased demand between 2019 and 2021 (Figure 36). A greater proportion of BIPOC-led organizations (81%) experiences increased demand than White-led organizations (67%). To meet this demand in the midst of unprecedented circumstances, 88% of all respondents reported developing new or different ways of working that led to positive outcomes.

⁸⁵ <https://nccs.urban.org/publication/nonprofit-sector-brief-2019#the-nonprofit-sector-in-brief-2019-public-charities-giving-and-volunteering>, Retrieved September 2020

⁸⁶ Internal Revenue Service Exempt Organizations Business Master File () 2020, National Center for Charitable Statistics, The Urban Institute, <http://nccsweb.urban.org/>

FIGURE 34
U.S. Nonprofit Revenues & Expenses (in billions)
1997-2016



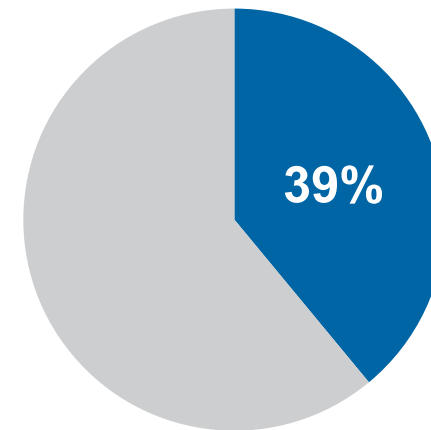
SOURCE: National Center for Charitable Statistics, Urban Institute

- 49% were unable to meet demand (compared to 55% in 2017).
- 66% collaborated on programs with another nonprofit (compared to 68% in 2017).
- 71% reported higher funding levels in 2021 compared to 2019. Over half (57%) of respondents said that foundations had been more flexible with funding since the start of the pandemic. However, that flexibility was not awarded to all organizations equally. 41% of White-led organizations received half or more of their funding as unrestricted funds in 2021, compared to only 26% of BIPOC-led organizations.
- The top-two challenges reported by nonprofits were achieving long-term fiscal stability (73%) and raising funds that cover full costs (66%).⁸⁷

As the 2022 Nonprofit Finance Fund survey indicated, demand has continued to increase for the vast majority of nonprofits, and while many organizations report being in a stronger financial and operational position than before the pandemic, it is unclear how the outlook will change as pandemic-related public funding sources expire. In order to thrive, nonprofits must continue to think creatively about growing organizational capacity. This includes working with peers to find creative ways to fund programs that remain critically important to the community.

FIGURE 35

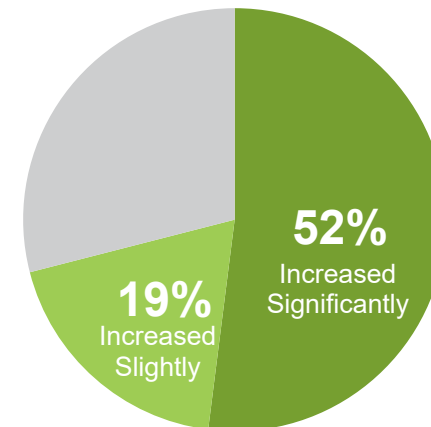
U.S. Nonprofits with <4 Months Cash Available, 2021



SOURCE: Nonprofit Finance Fund

FIGURE 36

U.S. Nonprofits Experiencing an Increase in Demand for Their Services, 2021



SOURCE: Nonprofit Finance Fund

⁸⁷ *State of the Nonprofit Sector Survey 2022*, Nonprofit Finance Fund, <http://survey.nff.org/>. Retrieved July 2022.

APPENDIX

Philanthropy

Total foundation giving in the U.S. grew annually between 2003 and 2008, then plateaued after the Great Recession. By 2011 giving rates surpassed 2008 contributions, reaching \$50 billion for the first time in 2012. The latest estimates from Candid show that in 2020, for the first time, total gifts by all foundations (private, community, corporate, family) reached \$90 billion. Data from Candid suggest that foundation assets also dipped around the Great Recession but are now nearly \$1.2 trillion (Figure 37). **Between 2002 and 2020, foundation assets and gifts both grew by an average of 6% annually.**⁸⁸

Community foundations in the U.S. grew even faster, with an average annual increase in assets and gifts of 7% and 8%, respectively (2002-2020). By 2020, community foundation assets reached \$99 billion. More than 11% of all foundation gifts now come from community foundations (Figure 38).⁸⁹

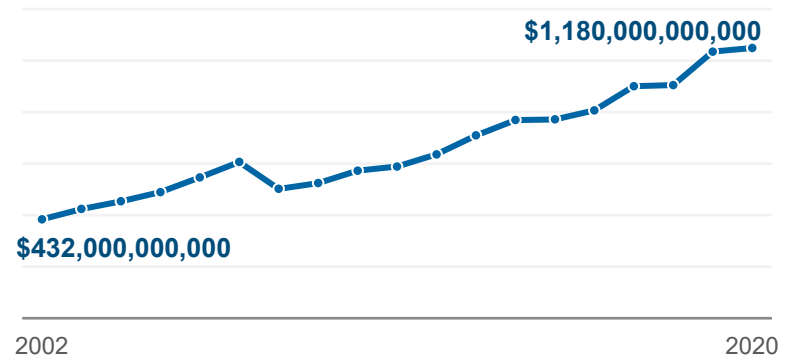
In 2020, the Community Foundation for Greater Buffalo was the second largest community foundation in New York State by total giving, total assets, and gifts received. By total assets, the Community Foundation for Greater Buffalo was the 41st largest community foundation in the U.S. (out of over 211 community foundations that responded to the Candid CF Insights Annual Survey in 2020).⁹⁰ **From 2002 to 2020, the Community Foundation's assets grew by 492% from \$113 million to \$669 million—an annualized growth rate of over 27%, far outstripping national averages.**

⁸⁸ Data for 2002-2015 from <http://data.foundationcenter.org/>; 2016-2020 from direct correspondence with Candid, Data Services

⁸⁹ Ibid.

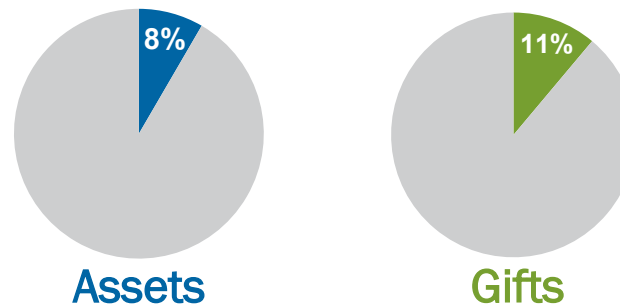
⁹⁰ <https://annualsurvey.cfinsights.org/dashboard/year/2020/tab/data-lists/>

FIGURE 37
Total U.S. Foundation Assets, 2002-2020
(rounded to the nearest billion)



SOURCE: The Foundation Center and Candid

FIGURE 38
Community Foundation Total Assets & Gifts as % of All Foundations, 2020



SOURCE: The Foundation Center and Candid

Appendix: Foundation Focus Area Matrix

(page 1)

Foundation Name	Total Annual Grant Estimate	Education				Health						Equity		
		Early	K-12	Post-Secondary	Underemployed/technical/Jobs/Workforce	Mental	Physical	Aging	Children	Access & Equity	Healthy Places	Racial/Ethnic	Gender	Income
National Foundations														
Bill & Melinda Gates Foundation	\$4.9 B	X	X	X	X		X		X	X	X	X	X	
Mackenzie Scott	\$2.7 B											X	X	X
Open Society Foundations	\$1.4 B	X	X	X		X	X	X	X	X		X	X	X
Ford Foundation	\$916 M				X					X		X	X	X
Robert Wood Johnson	\$434 M	X				X	X	X	X	X		X		
W. K. Kellogg Foundation	\$403 M	X							X			X		X
John D. and Catherine T. MacArthur Foundation	\$311 M													
Kresge Foundation	\$153 M										X	X		X
Wal-Mart Foundation	\$125 M		X		X							X	X	X
Casey Family Programs	\$111 M													
Annie E. Casey	\$103 M	X	X		X							X		X
Surdna	\$41 M				X							X		X
Local Foundations														
Mother Cabrini Health Foundation	\$147 M					X	X	X	X	X	X	X		
Ralph C. Wilson, Jr Foundation	\$107 M	X	X	X	X			X	X		X			X
M&T Charitable Foundation	\$30 M	X	X				X							
KeyBank Foundation	\$13 M		X	X	X							X		X
John R. Oishei Foundation	\$11.9 M	X	X	X		X	X			X		X		X
Peter and Elizabeth C. Tower Foundation	\$6.3 M					X	X				X			
Cullen Foundation	\$5.8M		X											
Highmark Western New York	\$4.8 M				X		X		X	X	X	X		
Health Foundation for Western and Central New York	\$3.0 M						X	X	X	X	X			
Redlich-Horwitz Foundation	\$3.0 M													
Cameron and Jane Baird Foundation	\$2.9 M		X					X						
Margaret L. Wendt Foundation	\$1.9 M		X	X										
National Grid Foundation	\$1.8 M		X		X									
Patrick P. Lee Foundation	\$1.7 M			X	X	X								
Western New York Foundation	\$1.6 M		X				X					X		
East Hill Foundation	\$707k													
Buffalo Bills Foundation	\$685k						X		X			X		
Baird Foundation	\$497k		X				X							
Bank of America Charitable Foundation	n/a		X		X									
Evans Bank	n/a		X		X									
First Niagara / KeyBank Foundation	n/a		X		X						X			
Foundation 214	n/a		X					X	X					
Independent Health Foundation	n/a					X	X		X	X				

Appendix: Foundation Focus Area Matrix (page 2)										
Foundation Name	Other									
	Environment	Neighborhoods	Housing	Criminal Justice Reform	Civic Engagement	Arts	Journalism / Media	Foster Care/ Child Welfare	Basic Human Needs	Impact Investing/ PRI
National Foundations										
Bill & Melinda Gates Foundation					X				X	
Mackenzie Scott	X								X	
Open Society Foundations	X			X	X		X			
Ford Foundation	X	X			X	X				X
Robert Wood Johnson		X								
W. K. Kellogg Foundation										
The John D. and Catherine T. MacArthur Foundation	X	X		X			X			X
The Kresge Foundation	X	X				X			X	X
Wal-Mart Foundation	X	X								
Casey Family Programs								X		
Annie E. Casey		X		X				X		
Surdna	X	X				X				X
Local Foundations										
Mother Cabrini Health Foundation									X	
Ralph C. Wilson, Jr Foundation		X				X				
M&T Charitable Foundation		X	X			X				
KeyBank Foundation		X	X							
John R. Oishei Foundation		X	X		X	X				
Peter and Elizabeth C. Tower Foundation										
Cullen Foundation						X				
Highmark Western New York										
Health Foundation for Western and Central New York										
Redlich-Horwitz Foundation								X		
Cameron and Jane Baird Foundation	X					X	X		X	
Margaret L. Wendt Foundation						X				
National Grid Foundation	X									
Patrick P. Lee Foundation									X	
Western New York Foundation									X	
East Hill Foundation	X								X	
Buffalo Bills Foundation								X		
Baird Foundation	X				X	X			X	
Bank of America Charitable Foundation		X	X					X	X	
Evans Bank		X								
First Niagara / KeyBank Foundation		X								
Foundation 214										
Independent Health Foundation		X	X							