



**TOWN OF HAMBURG**  
**HAMBURG GATEWAY**  
**REVITALIZATION DESIGN PROJECT**  
**SEPTEMBER 2022**



# **HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT**

SEPTEMBER 2022

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This document was developed by the Town of Hamburg and was supported by funding from the Community Foundation for Greater Buffalo. The document was prepared by LaBella Associates



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# INTRODUCTION & EXECUTIVE SUMMARY



## HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT

The Hamburg Gateway Revitalization Design project's goal is to provide design concepts and data to propel the revitalization of the South Park Avenue and Camp Road Corridors. There has been a desire in the community to reimagine the corridors to better reflect the needs of the shifting demographics and market preferences of the population. Moreover, the market for physical retail sites, which historically dominated the corridor has changed dramatically over the last decade. This trend of a shrinking retail real estate sector has accelerated following the recent Covid pandemic, which has left formerly active shopping plazas underutilized or vacant.

A Project Advisory Committee (PAC) worked with LaBella Associates to develop concepts and strategies to advance revitalization in the corridors. The Camp Road corridor was divided into two corridors – north and south – to aid in the evaluation. Consequently, three strategic focus areas were established:

- South Park Corridor – from the Village Line to Quinby Drive
- Camp Road South – including Lake Street in the Village, extending from Staley Drive to Scranton Road
- Camp Road – extending from Scranton Road to the Thruway, with the Thruway interchange as the main focus area

Some of the big picture items the PAC wanted to consider for the corridors included:

- Road Diets & Trails – reducing pavement and lane widths, creating safer opportunities for pedestrians and bicyclists, enhanced crosswalks, pedestrian/bike trails, and additional landscaping and/or streetscaping improvements
- Re-purposing sites – redevelopment of underutilized plazas or sites, construction of new buildings, improved aesthetics (sites & buildings), and exploration of a greater mix of uses

The overarching purpose of evaluating the alternatives was to create a community of place in the corridors that meet the needs of current and future residents. Similarly, the new concepts can be shared with current landowners and developers to ensure investment in the corridor aligns with the vision.

### TOWN DEMOGRAPHICS ARE SHIFTING

The makeup of the Town's population has changed significantly over the last two decades and continues to change:

- **The population continues to grow** (6.9% growth) reaching 60,085, making Hamburg the 5<sup>th</sup> largest Town in the County and likely gaining ground on the shrinking Town of Tonawanda population which is the fourth largest Town
- **Household sizes continue to decline** - owner-occupied households have declined to 2.54 persons/household from 2.72; renter-occupied households have declined to 1.71 from 1.93
- **The Town is aging** – median age increased from 38.9 to 44.3
- Median Household income in the Town is more than \$10,000 higher than Erie County

### ZONING UPDATES ARE NEEDED

To align with changing demographics and market preferences recommended zoning updates include:

- **The general commercial zoning (C-2) in the Town is outdated.** It is based on a market (retail) that has declined. South Park's traffic counts also do not support national retail tenants. Moreover, the zoning allows warehousing and manufacturing which is unique and not typical among other western New York communities.

## HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT

- **The zoning for the cement plant on Camp Road also should be rezoned** to allow more compatible uses to complement adjacent retail, office, and residential uses. It is in a prime location which would support a greater mix of uses.
- **Design guidelines are also needed** to regulate exterior changes to buildings and site plan design.

### HAMBURG'S REAL ESTATE MARKET IS STRONG

The growth in population coupled with great access to the Buffalo metro and a high quality of life are contributing the demand for Hamburg real estate over the next 10 years:

- **The strength of the office market is significant** – conservative projections suggest the market demand exceeds 145,000 square feet, even with the post covid office culture, and partly due to the Buffalo Niagara Region's growth
- **Industrial and restaurant demand is limited but healthy**, as both show a demand for more than 25,000 square feet
- **Retail demand overall is weak**, but there may be opportunities for certain retail sectors
- **Hotel demand is recovering** post-pandemic as occupancy is slowly improving to a viable 70% level
- **The housing market is robust but changing**, with more than 5,000 new owner-occupied and rental-occupied units expected over the next two decades and trending toward a greater share of smaller homes and townhomes

### CORRIDOR RECOMMENDATIONS: SOUTH PARK CORRIDOR

Proposed enhancements (more details in recommendations section) include:

- Linear mixed-use buildings in underutilized parking lots
- New multi-modal trail system
- New sidewalks along South Park
- Enhanced crosswalks at signalized intersections
- Add entrance/welcome signs at the Village/Town boundary
- Re-purpose underutilized plaza buildings



### CORRIDOR RECOMMENDATIONS: CAMP ROAD SOUTH CORRIDOR

Proposed enhancements (more details in recommendations section) include:

- Develop a Town Square development on the cement lot
- Include a mix of residential building types: town homes, loft apartments, and residential on second floors
- Provide space for professional offices & light industrial uses
- Put Camp Road on a road diet including smaller lane width and pavement widths, along with increased space for pedestrians



### CORRIDOR RECOMMENDATIONS: CAMP ROAD NORTH CORRIDOR

Proposed enhancements (more details in recommendations section) include:

- Develop the surplus Thruway site along camp for a regional complex
- Develop trails along utility rights-of-way
- Improve the gateway with landscaped median and landscaping
- Add entrance/welcome/directional signs at the Thruway interchange







## EXISTING CONDITIONS



## PAST AND CURRENT PLANNING EFFORTS

Recent reports prepared for the Town of Hamburg and its regional partners included recommendations which are relevant for the Town of Hamburg Gateway Revitalization Strategy. A summary of the key relevant recommendations of each follow.

### TOWN OF HAMBURG UPDATED COMPREHENSIVE PLAN (ONGOING)

The Town is in the process of updating their 2007 Comprehensive Plan. To date a public survey has been completed, and some preliminary observations have been published following an audit of the current comprehensive plan and zoning code.

#### Relevant Goals and Recommendations

##### Relevant Guiding Principles

- Help to encourage a strong economic base that leads to a sustainable future.
- Focus on re-use and revitalization
- Maintain and revitalize where necessary our infrastructure
- Regulate, control, invest in, and encourage growth in any way that supports these principles.

##### Survey Relevant Findings:

- Respondents identify empty retail space as a major concern
- Roads, highways, and other infrastructure were identified as a challenge.

##### Public Projects

- The Hamburg Gateway Revitalization Plan was identified as an ongoing project which would shape and/or inform the new comprehensive plan.

##### Zoning Opportunities

- The properties at the intersection of Camp Rd. and the former Thruway exit were identified as properties where a re-zoning may be warranted. Currently adjacent parcels are zoned C-1 (Local Retail) and C-2 (General Commercial).
- The properties located Lake from Legion Dr. to Norwood Ave have been identified as potential sites for a re-zoning. Currently the properties along that corridor are zoned M-2 (Light Industrial) and M-3 (General Industrial)

## TOWN OF HAMBURG COMPREHENSIVE PLAN (2007)

The last adopted Comprehensive Plan for the Town of Hamburg was adopted in 2007. This plan proposed several components relating to the revitalization of the corridors examined within the Hamburg Gateway Revitalization Strategy.

### Relevant Goals and Recommendations

#### Future Land Use

- The future Land use map envision the frontage of entire length of the three examined corridors as being Business (Regional/Local) with Residential (High Density/Mixed) located behind.

#### Relevant Goals and Objectives

- Accommodate a variety of residential housing types in the community
- Retain commercial business through adaptive re-use of existing commercial areas
- Evaluate future development patterns along some of the Town's major transportation corridors including Southwestern Blvd; McKinley Pkwy; South Park Avenue; Camp Road; and Route 5.
- Promote the adequate design of the road system to ensure efficient access to developed areas and adequate movement of traffic
- Develop multi-use trail connections
- Encourage traffic calming, where appropriate
- Support and encourage access management along developed highways to improve traffic flow and protect public safety.

#### Relevant Recommendations

- Recommendation 4: Strive to improve an integrated transportation system to provide for the movement of residents, workers, visitors, and goods in a safe and efficient manner
  - Work with NYSDOT to develop access management plans for Southwestern, Camp Road, south Park, and Route 5.
- Recommendation 5: Strive to protect, maintain, and improve aesthetic character of the various neighborhoods and communities in the Town
  - Adopt design standards to improve the aesthetic quality of development
  - Develop gateway designs for various points of entry into the Town to provide a more aesthetically pleasing 'welcome' to travelers.

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**BIKE BUFFALO NIAGARA- REGIONAL BICYCLE MASTER PLAN (2020)**

This study was developed by GBNRTC (Greater Buffalo-Niagara Regional Transportation Council) to provide a transportation system that safely and holistically integrates bicyclists into the system. The stated goal of the plan was to “make bicycling a more viable form of transportation, befitting residents and visitors alike.” Within the plan there were two proposed bicycle routes which would be situated in portions of the Hamburg Gateway study area.

**Relevant Recommended Routes and Infrastructure Investment****Recommended Route 62: Lackawanna- Hamburg Trail**

- A 7.9 mile, off-road, corridor which would connect Lackawanna, Blasdell, and Hamburg.
- This Route was listed as one of the Top 15 off-road routes to invest in within the WNY region.
- Proposed investment along the trail may include: shared-use paths; Paved side paths; bridge crossing (where applicable); Median crossings; enhanced crossings with beacons; side path crossings; and basic path crossings.

**Recommended Route 41: South Park Ave., US 62**

- A 7.2 mile, on-road, corridor which would connect the City of Buffalo, Lackawanna, Blasdell, and Hamburg.
- This Route was listed as one of the Top 10 on-road routes to invest in within the WNY region.
- This trail would serve as an interim north/south connection prior to the development of the Southern Tier Connector Trail
- Proposed investment along the trail may include: separated bike lanes; sidewalk-level separated bike lane; neighborhood bikeway; two-way separated bike lanes; enhanced shoulders; bridge crossings (where applicable).

## HAMBURG UNDERUTILIZED SITES STRATEGY ANALYSIS (2018)

The Village of Hamburg selected LaBella Associates to create an investment strategy for the underutilized sites located throughout the Village. Several of the sites identified for development lie within both the Village and Town of Hamburg, with many of the focus areas additionally falling within the Hamburg Gateway study area.

### Relevant Goals and Objectives

- Create positive first impressions for travelers entering the village through the placement of welcoming signs, landscaping, and gateway features at Village entrances.

### Lake/Camp Corridor

- This corridor aligns with one of the Gateway study areas
- The East End Gateway Development Site was proposed within this corridor (at the Great Lake Cement site), and recommended:
  - Infill retail development
  - Class A Offices
  - Townhouses
  - Mixed Use Development – approximately 150k sq ft.
  - Commuter Train Station
  - Warehouse/Light Industrial- approximately 90k sq. ft.

### Strategies for Lake/Camp Corridor:

- Redevelop vacant corner/ car repair into mixed use development
- Retail or mixed-use infill development on parking area of plaza
- New roundabout and redevelopment of underutilized sites

### Zoning Requirement

- The current industrial zoning prohibits residential uses and would need to be amended to fulfill this redevelopment strategy.



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## VILLAGE OF HAMBURG COMPREHENSIVE PLAN (2011)

The Village of Hamburg last updated their Comprehensive Plan in 2011-2012. Due to its shared history and relationship with the Town, as well as the fact that several of the sites located within The Gateway Revitalization Strategy fall within the Villages boundaries, an analysis of this plan was undertaken.

### Relevant Plan Observations

- Weak Village Gateways: “It will be important to strengthen all of the Village’s gateways and ensure arrival into the village is obvious, pleasant and memorable... the Village should identify themes or signature streetscape elements that can be incorporated into future improvements to improve the Village’s character, promote its identity and create a sense of arrival”
- Lake Street- community input found that Lake Street was a priority target area for capital improvements. “The corridors mix of land uses, residential conversions, predominately suburban styled development, varying lot sizes, range of property maintenance, and hostile pedestrian environment does not reflect the Villages character and support its goal for walkability and sense of place.”

### Future Land Use:

- Many of the properties located within the former Thruway exit zone are adjacent to properties identified as Gateway Commercial. According to the plan “future development or redevelopment in these areas should better reflect the villages character and promote complementary design standards. Despite their suburban character, great efforts should be made to ensure future development and redevelopment is more attractive, comfortable and safe”

## DEMOGRAPHICS

### TOWN OF HAMBURG POPULATION: 2020

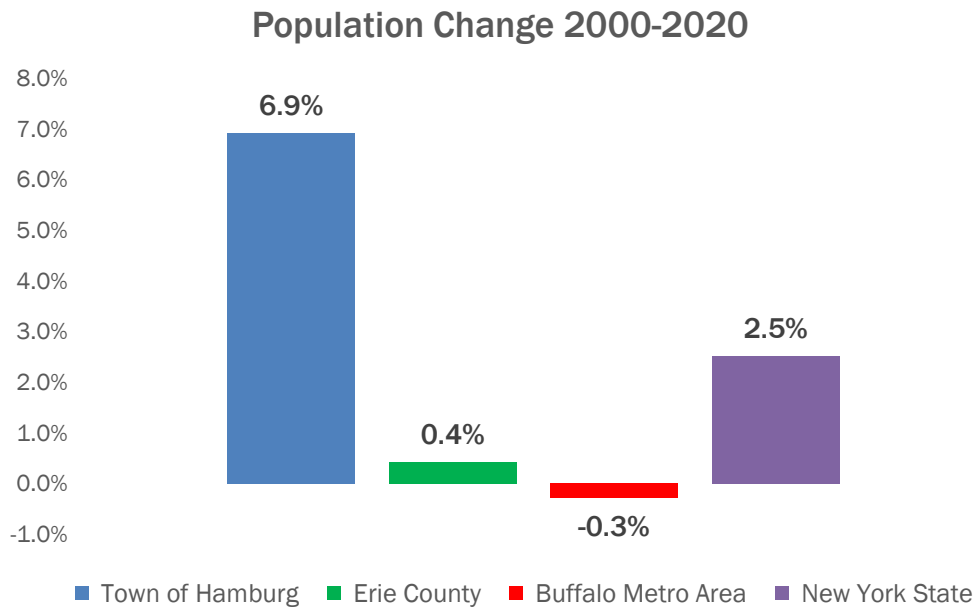


Source: U.S. Bureau of Census (2020)

The Town of Hamburg is one of the largest Towns in Erie County with a population of 60,085. A population of 60,085 can support a variety of commercial, residential, and mixed-use development projects.

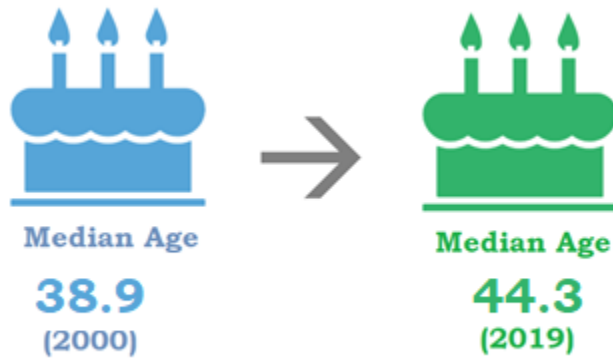
### TOWN OF HAMBURG, ERIE COUNTY, BUFFALO METROPOLITAN AREA, & STATE POPULATION CHANGES: 2000 TO 2019

The Town of Hamburg's change in population of 6.9 percent exceeds the population gains in both Erie County and New York State as a whole.



Source: U.S. Bureau of Census (2000, 2010, 2020)

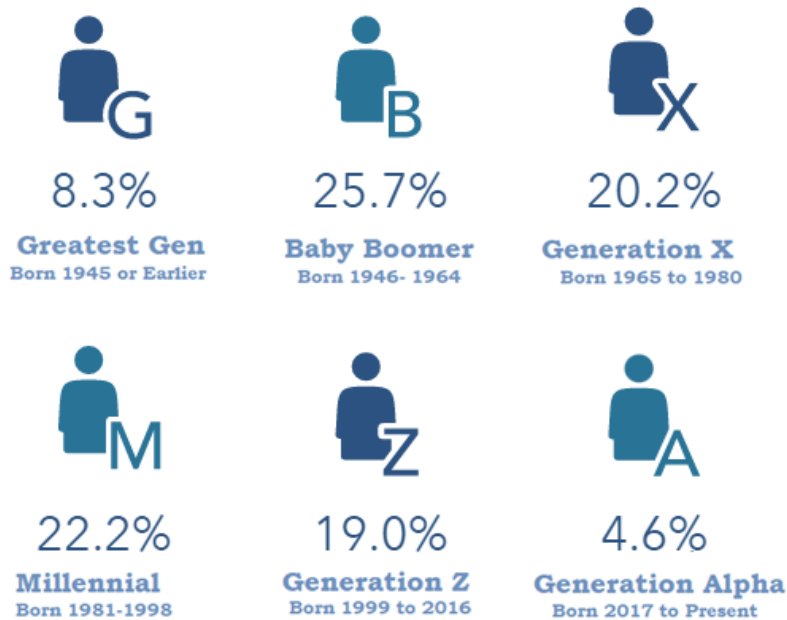
TOWN OF HAMBURG MEDIAN AGE: 2000 TO 2019



Source: U.S Bureau of the Census, American Community Survey

Overall, the median age in the Town of Hamburg has increased significantly from 38.9 years of age in 2000 to 44.3 years of age in 2019. At the same time, the median age throughout Erie County only increased from 38 years of age in 2000 to 40.3 by 2019.

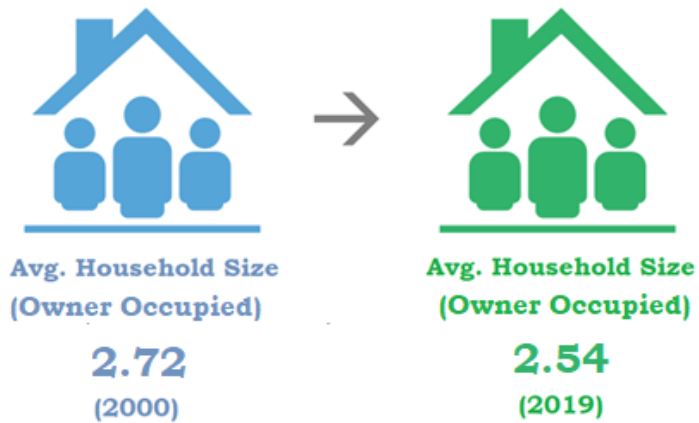
TOWN OF HAMBURG AGE COHORTS: 2019



Source: ESRI Community Analyst

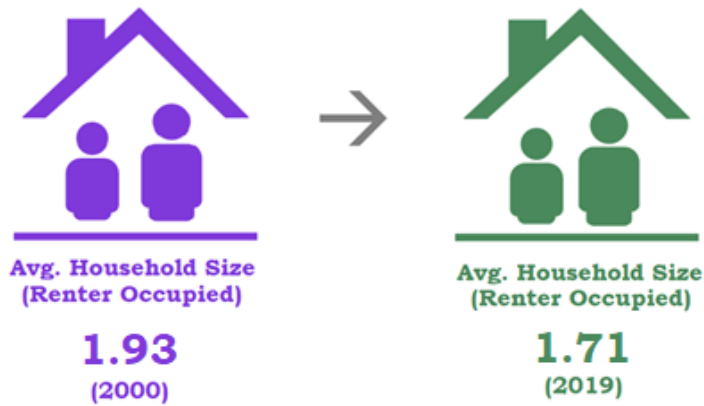
Currently, the Baby Boomer and Millennial Generations are the two largest age cohort groups represented throughout the Town of Hamburg. This is closely followed by Generation X and Z, respectively.

**AVERAGE OWNER-OCCUPIED HOUSEHOLD SIZE: 2000 – 2019**



Source: U.S Bureau of the Census, American Community Survey

**AVERAGE RENTER OCCUPIED HOUSEHOLD SIZE: 2000 – 2019**

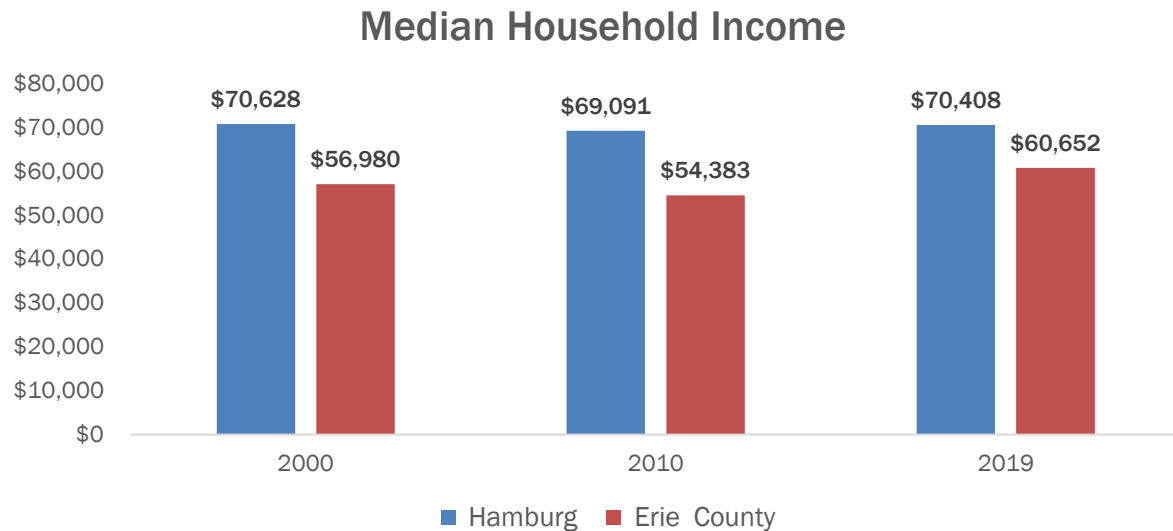


Source: U.S Bureau of the Census, American Community Survey

The average household size of owner-occupied and renter-occupied units has declined between 2000 and 2019.



**MEDIAN HOUSEHOLD INCOME (ADJUSTED FOR INFLATION), TOWN OF HAMBURG AND ERIE COUNTY:  
2000 – 2019**



Source: U.S Bureau of the Census, American Community Survey

The average household size of owner-occupied and renter-occupied units has declined between 2000 and 2019. While Erie County has witnessed the median household income raise by 6.4 percent since 2000, the median income in Hamburg has stayed flat.

#### TAKEAWAYS

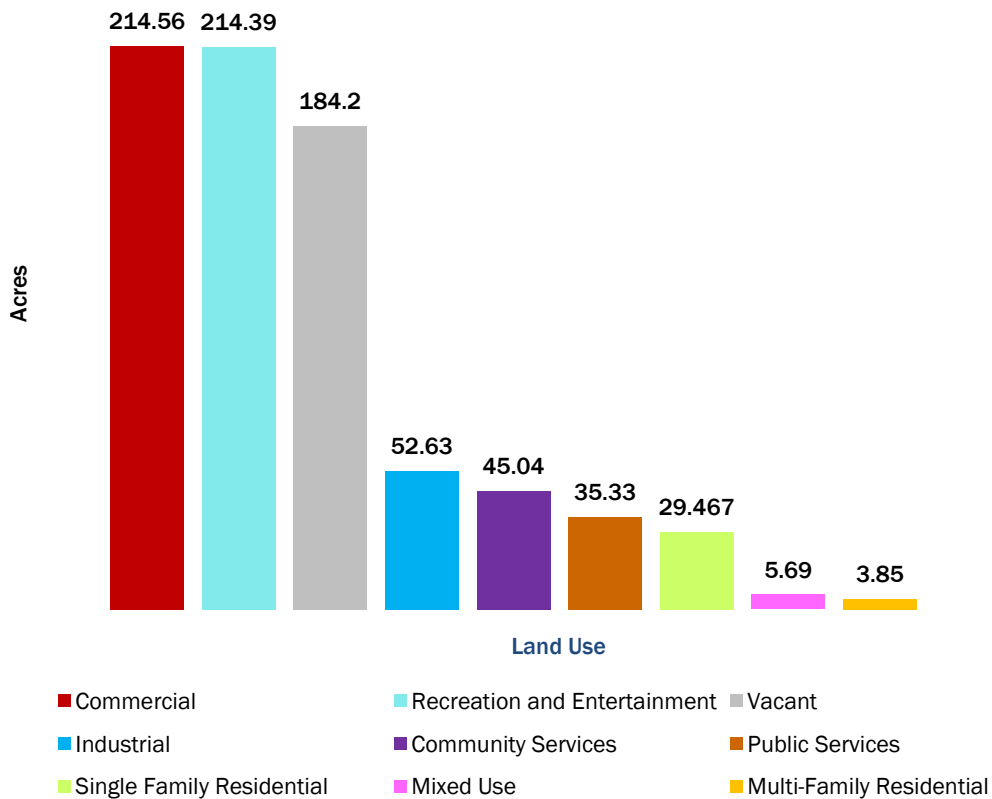
- The Town of Hamburg has experienced a population increase over the last two decades
- The average household size has decreased, implying that changes in housing preference and development may shift to address this market alteration.
- Household income has stayed relatively flat over the last two decades which may impact the buying power of local residents.
- The main age cohorts within the town of Hamburg are Baby Boomers and Millennials. Both cohorts have current consumer preferences which have altered the development patterns of the last 50+ years.

## LAND USE AND ZONING

## LAND USE

The total acreage within all three project areas is 785.16 acres. Chart 1 below shows the breakdown of current land use by total acreage throughout the Project Area.

**Chart 1: Land Use by Total Area in Project Areas**

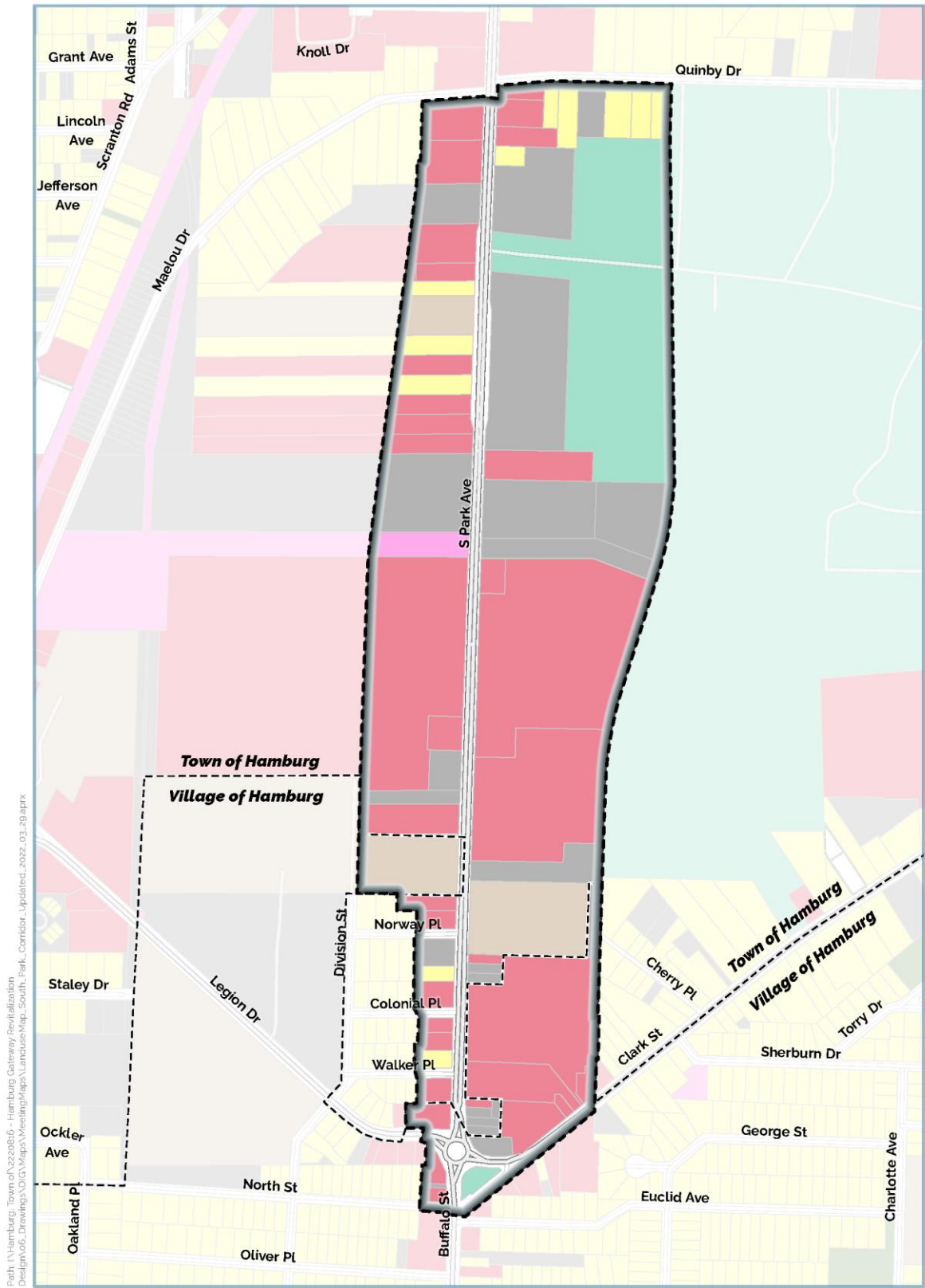


Source: Town of Hamburg Real Property Data as provided by Erie County with minor updates by LaBella Associates

#### TAKEAWAYS:

- Commercial; and Recreation & Entertainment land accounts for the largest portion of land, with each accounting for 27.3% of the land, or 54.6% of the land accumulatively.
- The third largest land use is Vacant land which comprise 23.5% of the land within the Project Area.
- Mixed-use and Residential land, both single family and multi-unit, accounts for only 5% of the total land area.

# South Park Corridor



Legend

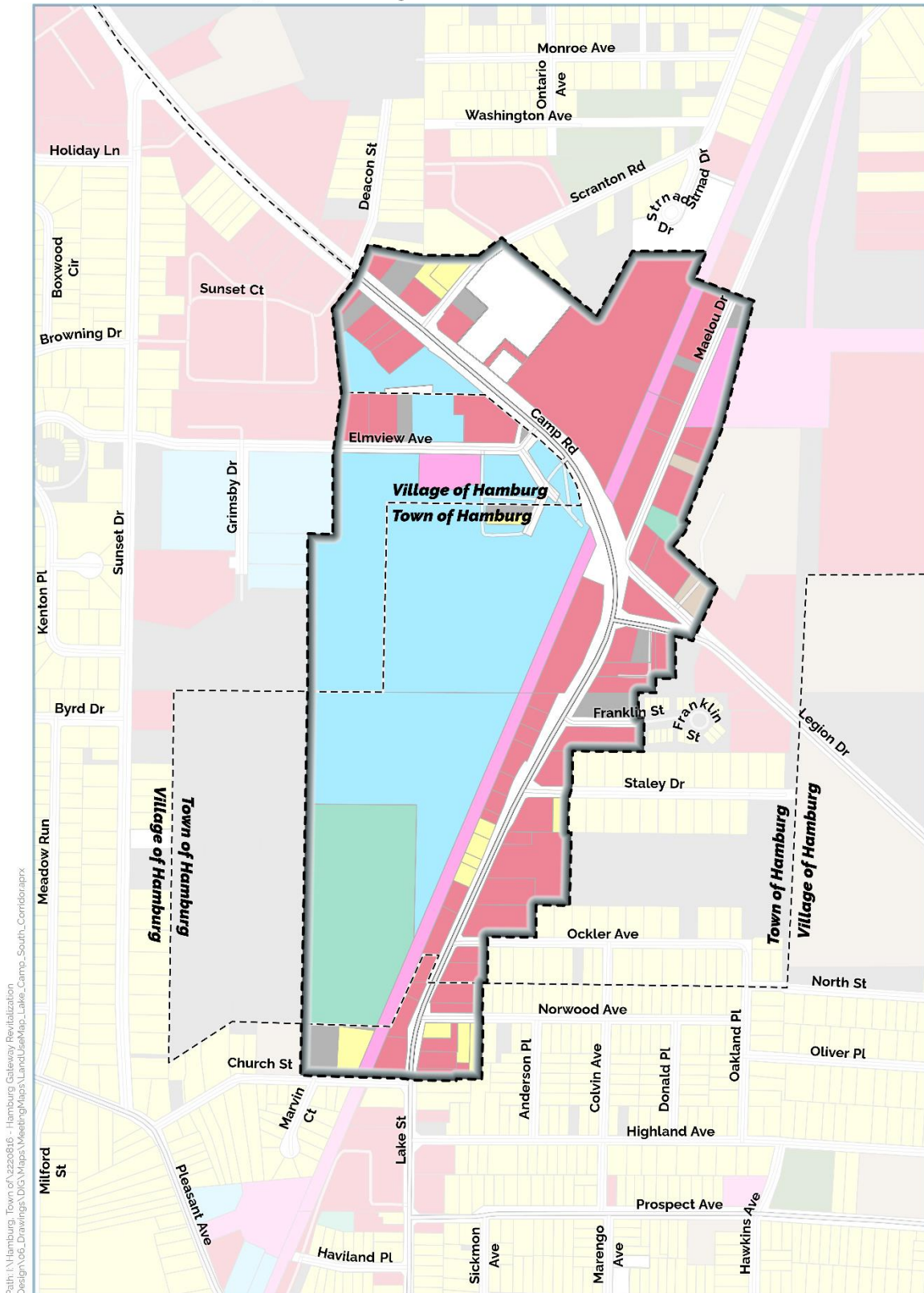
- |                       |   |
|-----------------------|---|
| Hamburg Gateway Areas | Vacant Land   |
| Erie County Parcels   | Commercial  |
| Village Boundary      | Recreation and Entertainment                        |
| Land Use              | Community Services                                  |
| Unknown               | Public Services                                     |
| Residential           | Wild, Forested, Conservation Lands and Public Parks |

Land Use Map

South Park Corridor  
Village of Hamburg, New York  
March 24, 2022



# Lake Ave./Camp Rd. Corridor - South



Path: \\Hamburg\_Town\2020\2020-2021\_Hamburg\_Corridor\_Revitalization\_Design\06\_Drawings\06\_Maps\Meeting\Map\_Lake\_Camp\_South\_Corridor.aprx

## Legend

	Hamburg Gateway Areas		Commercial
	Erie County Parcels		Recreation and Entertainment
	Village Boundary		Community Services
	Land Use		Industrial
	Unknown		Public Services
	Residential		Wild, Forested, Conservation Lands and Public Parks
	Vacant Land		

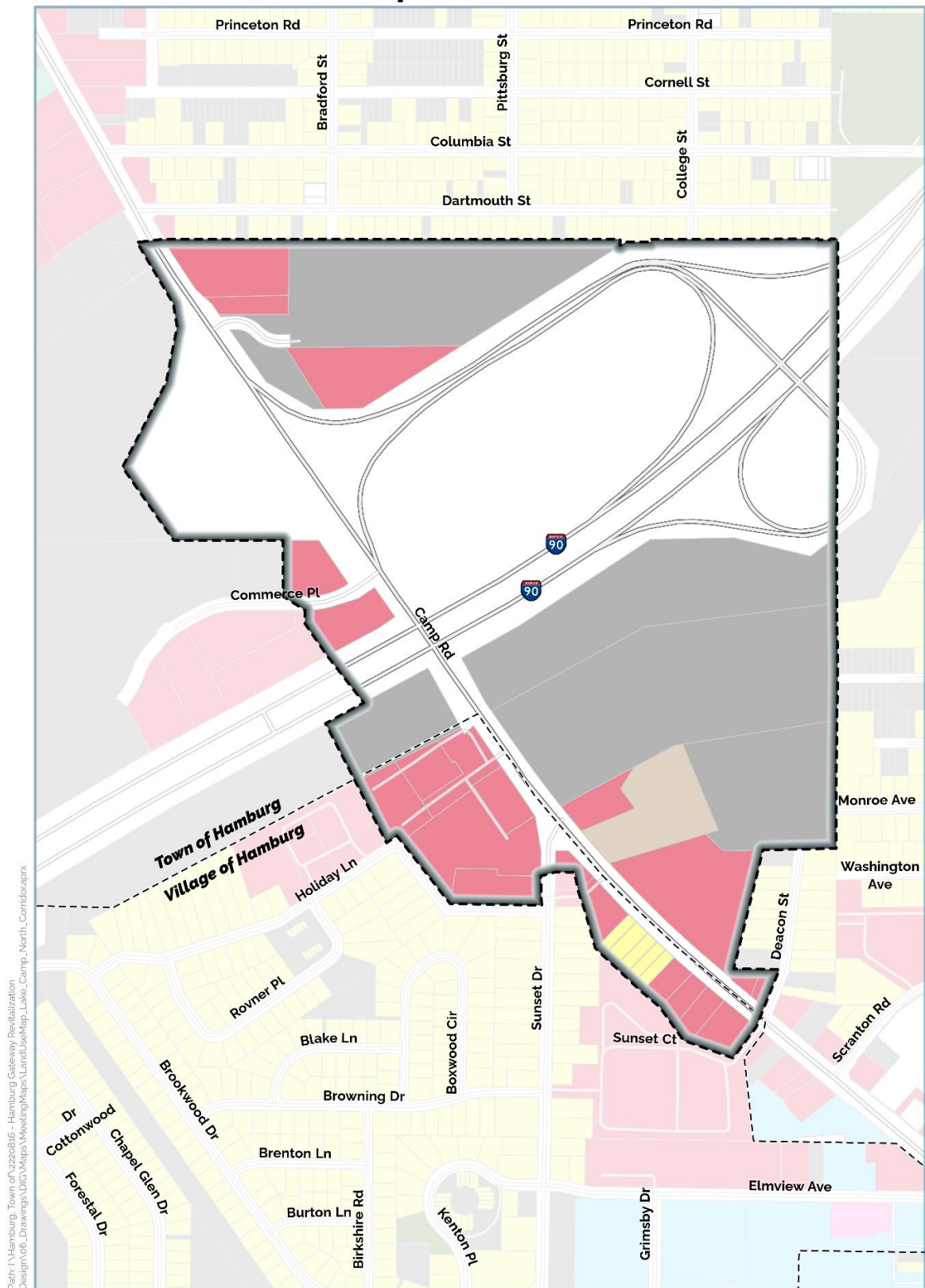
## Land Use Map

Lake Ave./Camp Rd. Corridor - South  
Village of Hamburg, New York  
March 24, 2022





# Lake Ave./Camp Rd. Corridor - North



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Design\06\_Drawings\06a\Map\Map Use Map\_Lake\_Camp\_North\_Corridor.aprx

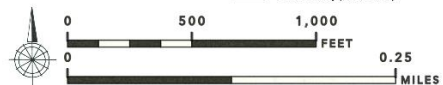
## Legend

	Hamburg Gateway Areas		Commercial
	Erie County Parcels		Recreation and Entertainment
	Village Boundary		Community Services
	Unknown		Industrial
	Residential		Public Services
	Vacant Land		Wild, Forested, Conservation Lands and Public Parks

## Land Use Map

Lake Ave./Camp Rd. Corridor - North  
Village of Hamburg, New York  
March 24, 2022

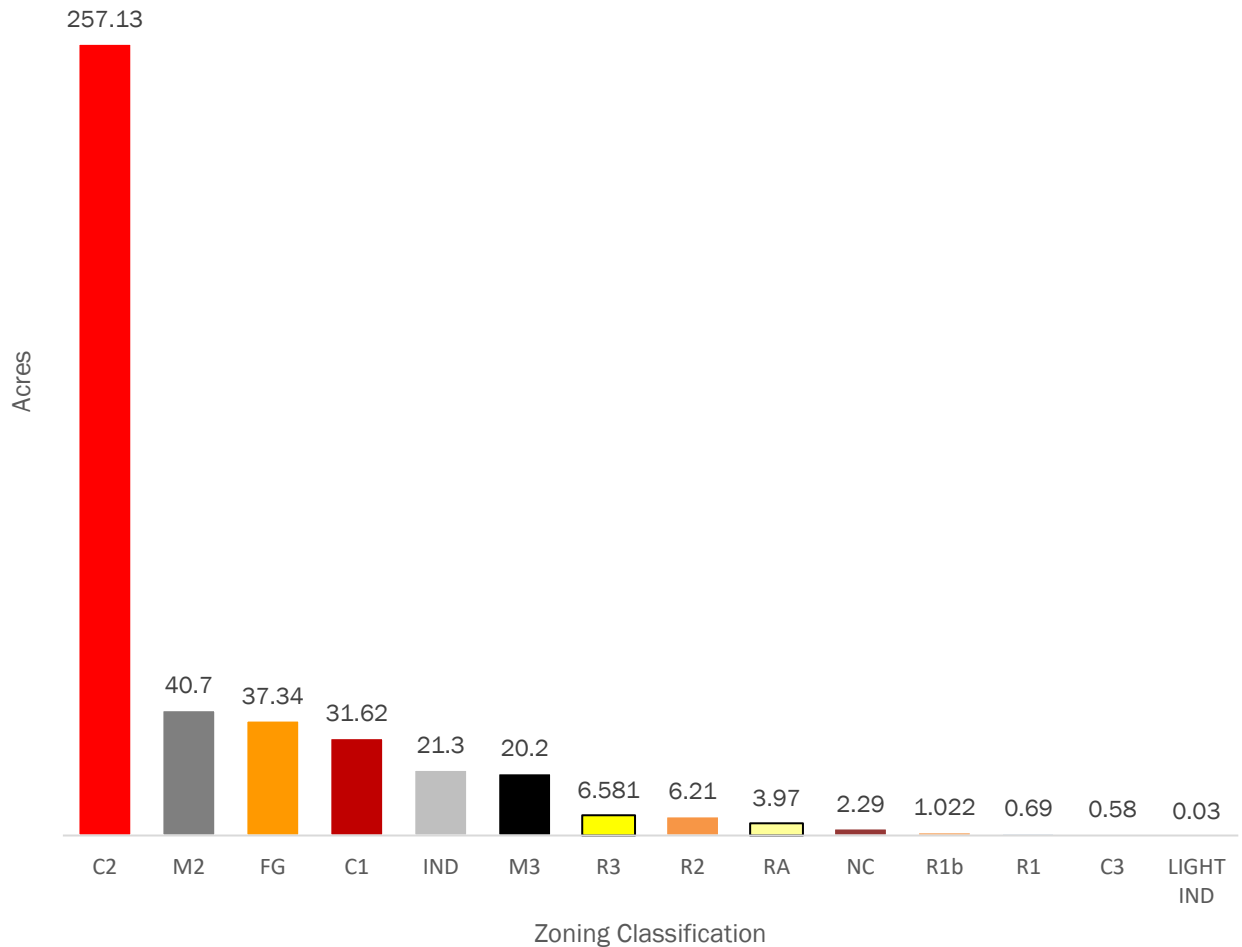
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## EXISTING ZONING

Between the Town and Village of Hamburg there are currently fourteen distinct zoning districts present within the Project Area. These districts range in intensity from low density residential to industrial.

**Chart 2: Zoning Classification by Total Area in Project Areas**

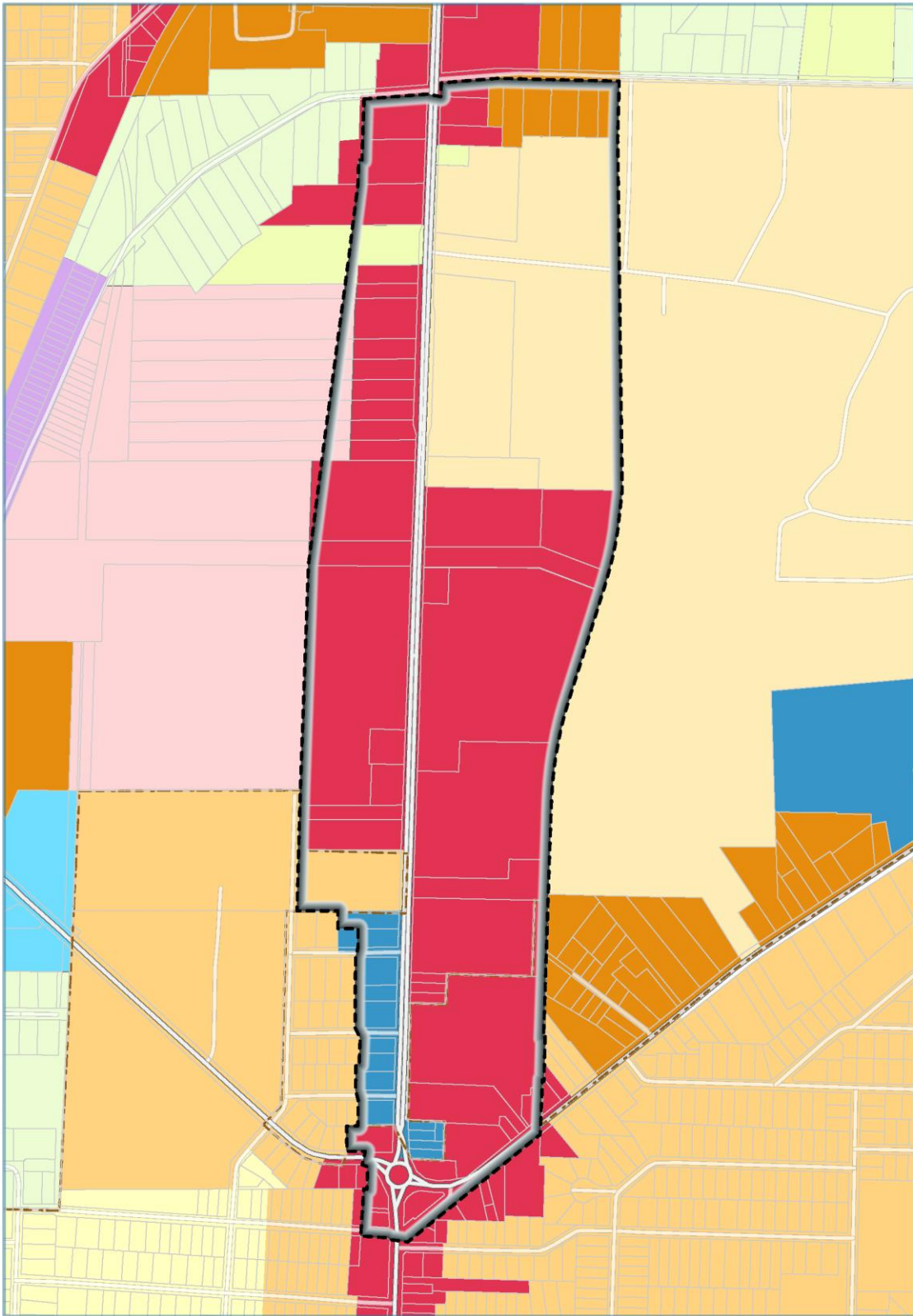


Source: Town of Hamburg Real Property Data as provided by Erie County with minor updates by LaBella Associates



# South Park Corridor

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Design\06\_Drawings\GIS\Map\Hamburg\_Village\_South\_Park\_Corridor.aprx



- Legend**
- Hamburg Gateway Areas
  - Erie County Parcels
  - Zoning (Town of Hamburg)**
    - C1: Local Retail Business District
    - C2: General Commercial District
    - C3: Office District
    - FG: Fairgrounds
    - M2: Light Industrial District
    - NC: Neighborhood Commercial, General Residence District
    - R1: Single-Family Residence District
    - R2: Single-Family Residence, Attached District
  - Zoning (Village of Hamburg)**
    - R3: Multifamily District
    - RA: General Residence, Mobile Home Court District
    - Commercial C2
    - Residential R1B
    - Residential R2

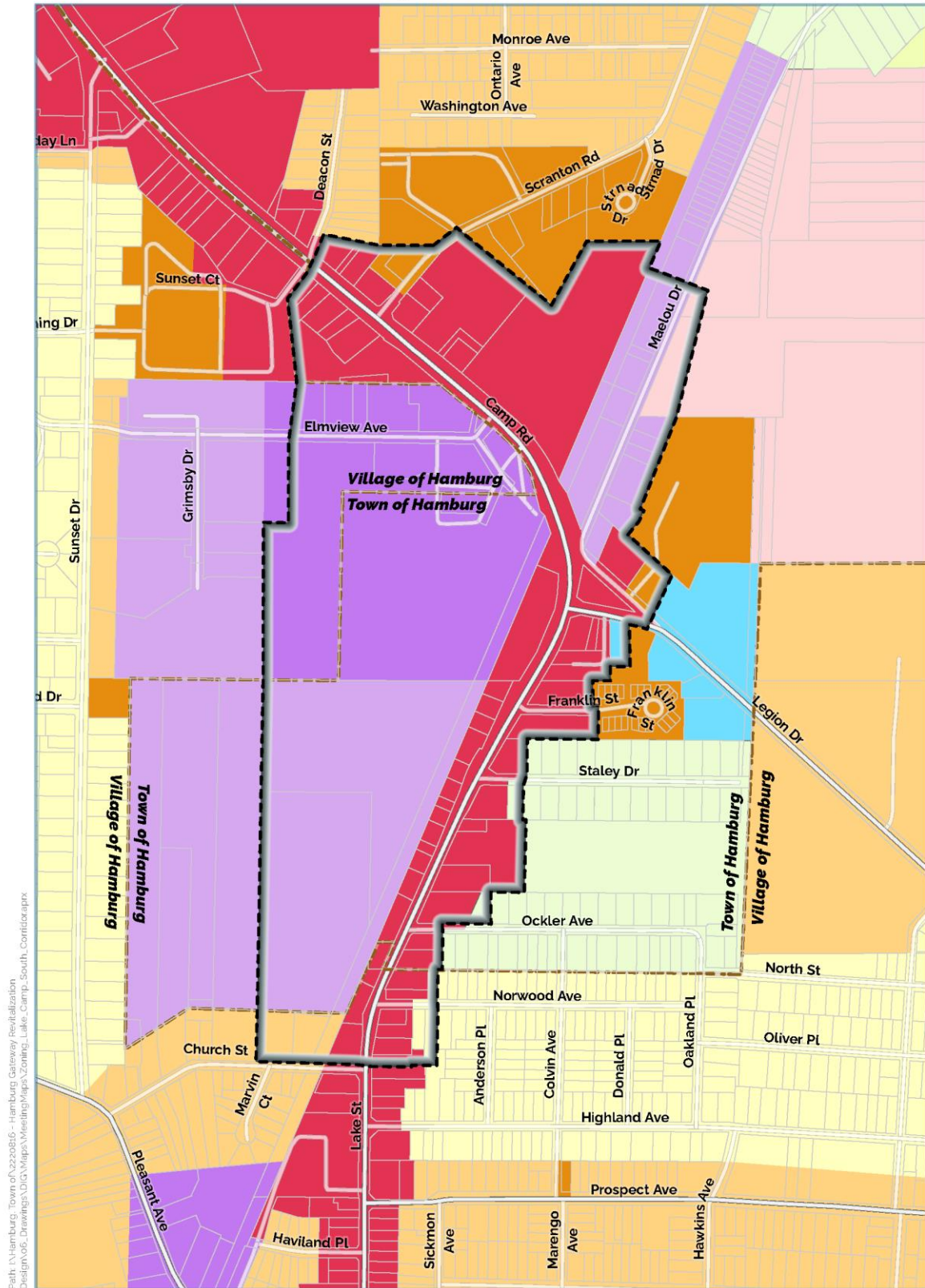
## Zoning Map

South Park Corridor  
Village of Hamburg, New York  
March 24, 2022

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# Lake Ave./Camp Rd. Corridor - South



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Design\06\_Drawings\DOT\Maps\Meeting\Maps\_Zoning\_Lake\_Camp\_South\_Corridor.aprx

## Legend

Hamburg Gateway Areas

Erie County Parcels

## Zoning (Town of Hamburg)

C2: General Commercial District

C3: Office District

M2: Light Industrial District

M3: General Industrial District

NC: Neighborhood Commercial, General Residence District

R1: Single-Family Residence District

R2: Single-Family Residence, Attached District

R3: Multifamily District

RA: General Residence, Mobile Home Court District

## Zoning (Village of Hamburg)

Commercial C2

Industrial

Light Industrial

Residential R1B

Residential R2

Residential R3

## Zoning Map

Lake Ave./Camp Rd. Corridor - South

Village of Hamburg, New York

March 24, 2022

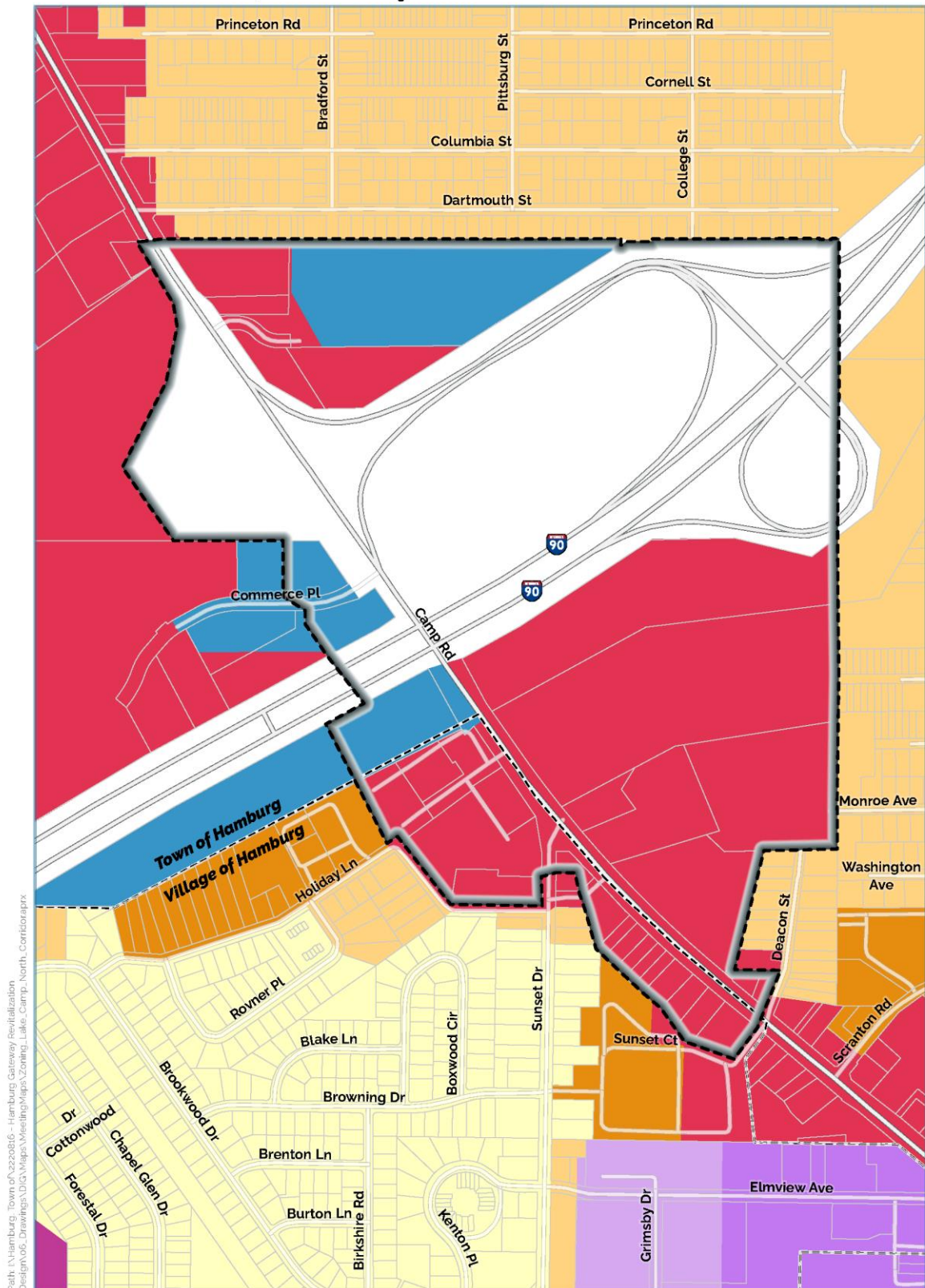


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# Lake Ave./Camp Rd. Corridor - North



Path: I:\Hamburg\_Town of Hamburg Gateway Revitalization Design\06\_Drawings\DIG\Maps\Meeting\Maps\Zoning\_Lake\_Camp\_North\_Corridor.aprx

## Legend

Hamburg Gateway Areas

Erie County Parcels

## Zoning (Town of Hamburg)

C1: Local Retail Business District

C2: General Commercial District

M2: Light Industrial District

M3: General Industrial District

R2: Single-Family Residence, Attached District

R3: Multifamily District

## Zoning (Village of Hamburg)

Commercial C2

Industrial

Light Industrial

Planned Unit Development District PUD

Residential R1B

Residential R2

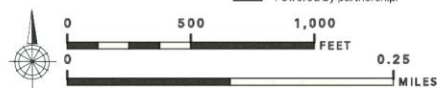
Residential R3

## Zoning Map

Lake Ave./Camp Rd. Corridor - North  
Village of Hamburg, New York

March 24, 2022

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## HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT

The following defines the goals for each zoning district relevant to this study which falls within the **Town of Hamburg**:

Local Retail Business District C-1: This district allows for a majority of retail and commercial uses at a medium-scale density with a limit of 75% lot coverage and 35 ft. maximum building height.

General Commercial District C-2: The General Commercial District also allows for all commercial uses, as well as wholesale and warehouse uses with a limit of 85% lot coverage and 35 ft. maximum building height. Some manufacturing uses are also allowed. Residential uses are not allowed in this district.

Light Industrial District M2: This district allows offices, research facilities and light industrial uses, with no regulations on lot coverage or building height.

General Industrial District M3: The M3 district allows heavy industrial uses and allows outside storage, with no regulations on lot coverage or building height.

Hamburg Commercial District HC: Small-scale (6,000 sq. ft. max) retail, office and restaurants allowed with a limit of 70% lot coverage and 30 ft. maximum height.

Fairgrounds District FG: The Fairgrounds zoning district is special zoning which acknowledges the current uses within the facility including the fair, event center, accommodations, and facilities for animals, there are no minimum lot coverage requirements because it is unique, but it does have a maximum height limit of 75 ft.

While site plan review is required for most districts, there does not appear to be any design requirements, however, each use has a “reserve” architectural section in the ordinance but with no regulations.

Planned Unit development proposals are also permitted in most districts which allows for a mix of uses at varying densities subject to review.

The following defines the goals for each relevant zoning district in the Project Area which falls within the **Village of Hamburg**:

Commercial District C-2: This district allows for small-scale (7,500 sq. ft. max) retail and commercial uses as well as residential (1-2 family & multi-family) with a zero-lot frontage, two story minimum height and three story maximum height.

Industrial: The district allows only enclosed industrial uses and outside storage is only allowed by special use permit. Requires a minimum 15-acre lot, and 35% maximum coverage with a 35 ft. maximum height.

### TAKEAWAYS:

- Nearly 60% of the land within the Project Area is zoned Commercial-C2
- Roughly 19% of the land is zoned for industrial uses (light industrial, industrial, Light Industrial-M2, General Industrial-M3)

## ECONOMIC AND REAL ESTATE ANALYSIS

## OFFICE

The employment projections by industry provide a clue into which type and the approximate square footage (SF) of additional building space that will be needed in the future. This study looked at projections for both the Buffalo Metro Area and within the 14075 Zip code.

Two important considerations concerning the gross annual demands include:

1. Not all the projected growth in employment would result in demand for new or additional space, as some demand could be met by existing vacancies.
2. The projected gross annual demand for additional building space is for the entire Buffalo Metro Region or the entire 14075 Zip code. As only a small portion of the Region and Zip Code area, the Town of Hamburg would capture the additional building space demand only on a proportional basis. However, it could potentially attract an industry or employer that would have a catalytic impact on the local economy and absorb the regional demand. This will require the appropriate infrastructure is in place to achieve this goal.

## PROJECTED GROSS ANNUAL DEMAND (SQUARE FEET - SF) BY INDUSTRY – 14075 ZIP CODE

2018-2028

Industry	Average SF per Employee	Employment			14075 ZIP Code Gross Annual Demand (SF)
		2018	2028	Change	
Accommodation & Food Services	300	1,616	802	-815	-24,436
Arts, Entertainment, & Recreation	500	841	411	-430	-21,508
Wholesale Trade	750	438	285	-154	-11,520
Retail Trade	300	2,246	1,897	-350	-10,486
Health Care & Social Assistance	300	2,612	2,309	-303	-9,098
Other Services	300	1,342	1,067	-275	-8,257
Government	300	3,154	3,015	-139	-4,162
Information	300	122	31	-91	-2,731
Manufacturing	1000	849	825	-25	-2,452
Admin. & Waste Management	300	389	326	-63	-1,888
Construction	500	1,234	1,200	-34	-1,680
Real Estate & Rental & Leasing	250	282	260	-22	-544
Educational Services	300	412	404	-8	-230
Management of Companies	300	0	0	0	0
Professional, Scientific, & Tech Services	300	557	567	9	284
Finance & Insurance	250	771	827	56	1,399
Transportation & Warehousing	500	329	454	125	6,252
<b>Total:</b>					-91,054

Source: New York State Department of Labor – Long Term Industry Projections; ITE; LaBella Associates, D.P.C

**HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT**

**PROJECTED GROSS ANNUAL DEMAND (SQUARE FEET - SF) BY INDUSTRY – BUFFALO METRO**

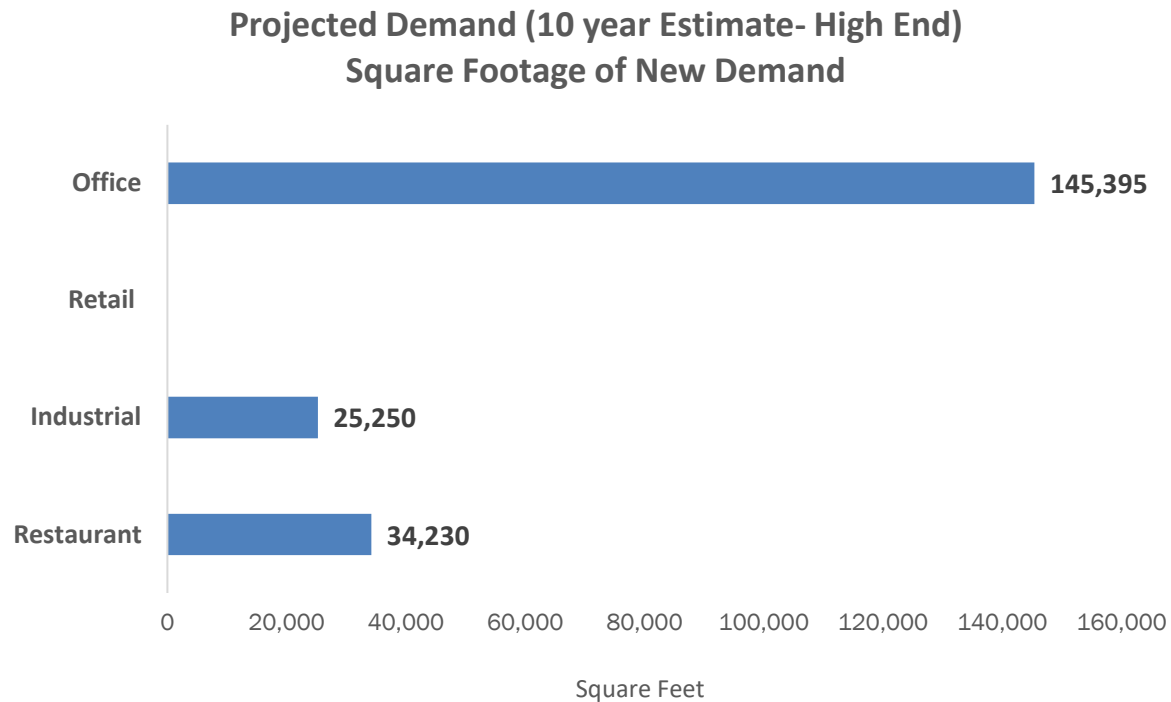
**2018-2028**

Industry	Average SF per Employee	Employment			WNY Gross Annual Demand (SF)
		2018	2028	Change	
Retail Trade	300	72,290	66,250	-6,040	-181,200
Manufacturing	1000	65,960	64,980	-980	-98,000
Wholesale Trade	750	22,640	21,520	-1,120	-84,000
Information	300	8,250	8,160	-90	-2,700
Other Services	300	31,710	31,960	250	7,500
Arts, Entertainment, & Recreation	500	14,320	14,500	180	9,000
Accommodation & Food Services	300	60,860	62,220	1,360	40,800
Finance & Insurance	250	38,920	41,050	2,130	53,250
Construction	500	23,360	25,160	1,800	90,000
Government	300	51,570	54,610	3,040	91,200
Transportation & Warehousing	500	19,010	22,870	3,860	193,000
Educational Services	300	78,920	87,980	9,060	271,800
Professional & Business Services	300	75,120	85,330	10,210	306,300
Health Care & Social Assistance	300	107,810	132,030	24,220	726,600
<b>Total:</b>					<b>1,423,550</b>

Source: New York State Department of Labor – Long Term Industry Projections; ITE; LaBella Associates, D.P.C.



## COMMERCIAL



### TAKEAWAYS

After evaluating the gross demand of both the Buffalo Metro Area and the local 14075 Zip code high end projections for office, retail, restaurant, and industrial spaces were created as part of this analysis.

The analysis found that there is anticipated additional space being required for office, industrial, food and restaurant, and hospitality uses. The market analysis assumed that the Project Area could absorb 1% of the WNY regions demand for Office space and 2.5% of the regional demand for Industrial space.

The analysis also assumed that roughly 34k square feet of restaurant and food service space would be warranted if the Project area could absorb 5% of the leakage occurring within Erie County.

No demand for new retail space was found, however. This is likely due to changing national trends which show a higher utilization of mail order retail and less large-scale retail such as malls and big box stores. It should be noted that much of the new demand may utilize existing spaces which often can be retrofitted to meet new consumer demands.

# HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT

## RETAIL

The retail analysis presented here was performed with data obtained from ESRI's Community Analyst. Data for Erie County and the Town of Hamburg. When excluding restaurants and food services it is found that no additional square footage is warranted.

### RETAIL DEMAND AND SALES – TOWN OF HAMBURG – 2017

Merchandise Lines	Demand (\$)	Supply (\$)	Opportunity Gap/Surplus (\$)	Leakage / Surplus Index	Estimated Supportable New SF of Retail through Recapture		
					5%	15%	25%
Automobile Dealers	\$143,928,911	\$331,549,707	(\$187,620,796)	2.30	(37,524)	(112,572)	(187,621)
Other Motor Vehicle Dealers	\$13,219,192	\$14,767,826	(\$1,548,634)	1.12	(310)	(929)	(1,549)
Auto Parts, Accessories & Tire Stores	\$13,581,811	\$20,758,801	(\$7,176,990)	1.53	(1,435)	(4,306)	(7,177)
Furniture Stores	\$15,510,375	\$8,866,882	\$6,643,493	0.57	1,329	3,986	6,643
Home Furnishings Stores	\$14,941,109	\$8,972,242	\$5,968,867	0.60	1,194	3,581	5,969
Electronics & Appliance Stores	\$31,015,596	\$32,311,075	(\$1,295,479)	1.04	(259)	(777)	(1,295)
Bldg Material & Supplies Dealers	\$49,010,337	\$48,445,793	\$564,544	0.99	113	339	565
Lawn & Garden Equip & Supply Stores	\$4,572,251	\$11,679,987	(\$7,107,736)	2.55	(1,422)	(4,265)	(7,108)
Grocery Stores	\$122,196,517	\$229,105,114	(\$106,908,597)	1.87	(21,382)	(64,145)	(106,909)
Specialty Food Stores	\$9,490,956	\$8,873,968	\$616,988	0.93	123	370	617
Beer, Wine & Liquor Stores	\$11,993,732	\$6,238,318	\$5,755,414	0.52	1,151	3,453	5,755
Health & Personal Care Stores	\$70,807,549	\$82,855,657	(\$12,048,108)	1.17	(2,410)	(7,229)	(12,048)
Gasoline Stations	\$82,612,532	\$57,117,615	\$25,494,917	0.69	5,099	15,297	25,495
Clothing Stores	\$47,379,928	\$52,546,612	(\$5,166,684)	1.11	(1,033)	(3,100)	(5,167)
Shoe Stores	\$7,737,480	\$11,162,535	(\$3,425,055)	1.44	(685)	(2,055)	(3,425)
Jewelry, Luggage & Leather Goods Stores	\$11,968,613	\$3,618,048	\$8,350,565	0.30	1,670	5,010	8,351
Sporting Goods / Hobby / Musical Instrument Stores	\$20,119,168	\$74,453,368	(\$54,334,200)	3.70	(10,867)	(32,601)	(54,334)
Book, Periodical & Music Stores	\$3,781,712	\$3,289,228	\$492,484	0.87	98	295	492
General Merchandise Stores	\$98,137,417	\$146,623,557	(\$48,486,140)	1.49	(9,697)	(29,092)	(48,486)
Department Stores Excluding Leased Depts.	\$60,805,232	\$76,012,376	(\$15,207,144)	1.25	(3,041)	(9,124)	(15,207)
Other General Merchandise Stores	\$37,332,185	\$70,611,181	(\$33,278,996)	1.89	(6,656)	(19,967)	(33,279)
Florists	\$3,060,129	\$1,791,584	\$1,268,545	0.59	254	761	1,269
Office Supplies, Stationery & Gift Stores	\$9,607,745	\$8,582,256	\$1,025,489	0.89	205	615	1,025
Used Merchandise Stores	\$3,932,714	\$4,294,088	(\$361,374)	1.09	(72)	(217)	(361)
Other Miscellaneous Store Retailers	\$15,157,090	\$8,992,906	\$6,164,184	0.59	1,233	3,699	6,164
Electronic Shopping & Mail-Order Houses	\$21,389,584	\$6,495,618	\$14,893,966	0.30	2,979	8,936	14,894
Vending Machine Operators	\$432,408	\$224,733	\$207,675	0.52	42	125	208
Direct Selling Establishments	\$3,569,930	\$389,671	\$3,180,259	0.11	636	1,908	3,180
Special Food Services	\$4,082,474	\$10,792,223	(\$6,709,749)	2.64	(1,342)	(4,026)	(6,710)
Drinking Places -Alcoholic Beverages	\$5,464,158	\$2,122,040	\$3,342,118	0.39	668	2,005	3,342
Restaurants/Other Eating Places	\$80,119,487	\$113,612,497	(\$33,493,010)	1.42	(6,699)	(20,096)	(33,493)
<b>Total:</b>	<b>1,016,958,322</b>	<b>1,457,157,506</b>	<b>(440,199,184)</b>	<b>1.43</b>	<b>(88,040)</b>	<b>(264,120)</b>	<b>(440,199)</b>

Source: ESRI 2017 Retail MarketPlace Report via Community Analyst; LaBella Associates

**HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT**

**RETAIL DEMAND AND SALES – ERIE COUNTY – 2017**

Merchandise Lines	Demand (\$)	Supply (\$)	Opportunity Gap/Surplus (\$)	Opportunity Gap/Surplus (\$)	Leakage/ Surplus Index	Estimated Supportable New SF of Retail through Recapture		
						5%	15%	25%
Automobile Dealers	\$2,109,457,746	\$2,000,130,294	109,327,452	(109,327,452)	0.95	21,865	65,596	109,327
Other Motor Vehicle Dealers	\$190,631,988	\$189,669,428	962,560	(962,560)	0.99	193	578	963
Auto Parts, Accessories & Tire Stores	\$197,656,102	\$209,808,254	(12,152,152)	12,152,152	1.06	(2,430)	(7,291)	(12,152)
Furniture Stores	\$227,365,388	\$263,032,777	(35,667,389)	35,667,389	1.16	(7,133)	(21,400)	(35,667)
Home Furnishings Stores	\$213,365,918	\$160,125,995	53,239,923	(53,239,923)	0.75	10,648	31,944	53,240
Electronics & Appliance Stores	\$449,711,214	\$401,650,087	48,061,127	(48,061,127)	0.89	9,612	28,837	48,061
Bldg Material & Supplies Dealers	\$691,114,273	\$647,847,610	43,266,663	(43,266,663)	0.94	8,653	25,960	43,267
Lawn & Garden Equip & Supply Stores	\$64,742,272	\$74,199,984	(9,457,712)	9,457,712	1.15	(1,892)	(5,675)	(9,458)
Grocery Stores	\$1,800,981,689	\$2,376,068,177	(575,086,488)	575,086,488	1.32	(115,017)	(345,052)	(575,086)
Specialty Food Stores	\$140,008,889	\$159,626,608	(19,617,719)	19,617,719	1.14	(3,924)	(11,771)	(19,618)
Beer, Wine & Liquor Stores	\$173,905,855	\$115,753,974	58,151,881	(58,151,881)	0.67	11,630	34,891	58,152
Health & Personal Care Stores	\$1,035,783,440	\$1,093,250,159	(57,466,719)	57,466,719	1.06	(11,493)	(34,480)	(57,467)
Gasoline Stations	\$1,218,882,245	\$723,037,140	495,845,105	(495,845,105)	0.59	99,169	297,507	495,845
Clothing Stores	\$691,191,142	\$514,288,010	176,903,132	(176,903,132)	0.74	35,381	106,142	176,903
Shoe Stores	\$112,711,467	\$83,684,854	29,026,613	(29,026,613)	0.74	5,805	17,416	29,027
Jewelry, Luggage & Leather Goods Stores	\$172,451,618	\$80,222,473	92,229,145	(92,229,145)	0.47	18,446	55,337	92,229
Sporting Goods/Hobby/Musical Instr Stores	\$291,977,195	\$489,485,292	(197,508,097)	197,508,097	1.68	(39,502)	(118,505)	(197,508)
Book, Periodical & Music Stores	\$55,882,563	\$28,222,848	27,659,715	(27,659,715)	0.51	5,532	16,596	27,660
General Merchandise Stores	\$1,434,524,002	\$1,638,754,546	(204,230,544)	204,230,544	1.14	(40,846)	(122,538)	(204,231)
Department Stores Excluding Leased Depts.	\$886,527,831	\$1,133,555,402	(247,027,571)	247,027,571	1.28	(49,406)	(148,217)	(247,028)
Other General Merchandise Stores	\$547,996,171	\$505,199,144	42,797,027	(42,797,027)	0.92	8,559	25,678	42,797
Florists	\$42,878,516	\$32,954,883	9,923,633	(9,923,633)	0.77	1,985	5,954	9,924
Office Supplies, Stationery & Gift Stores	\$139,384,478	\$105,157,987	34,226,491	(34,226,491)	0.75	6,845	20,536	34,226
Used Merchandise Stores	\$57,827,286	\$44,791,780	13,035,506	(13,035,506)	0.77	2,607	7,821	13,036
Other Miscellaneous Store Retailers	\$222,557,844	\$199,346,020	23,211,824	(23,211,824)	0.90	4,642	13,927	23,212
Electronic Shopping & Mail-Order Houses	\$310,107,580	\$100,761,327	209,346,253	(209,346,253)	0.32	41,869	125,608	209,346
Vending Machine Operators	\$6,363,563	\$7,637,488	(1,273,925)	1,273,925	1.20	(255)	(764)	(1,274)
Direct Selling Establishments	\$51,792,374	\$47,249,509	4,542,865	(4,542,865)	0.91	909	2,726	4,543
Special Food Services	\$58,920,214	\$45,546,779	13,373,435	(13,373,435)	0.77	2,675	8,024	13,373
Drinking Places -Alcoholic Beverages	\$78,495,084	\$51,199,431	27,295,653	(27,295,653)	0.65	5,459	16,377	27,296
Restaurants/Other Eating Places	\$1,167,543,124	\$1,379,361,126	(211,818,002)	211,818,002	1.18	(42,364)	(127,091)	(211,818)
<b>Total:</b>	<b>14,842,739,071</b>	<b>14,901,619,386</b>	<b>(58,880,315)</b>	<b>58,880,315</b>	<b>1.00</b>	<b>(11,776)</b>	<b>(35,328)</b>	<b>(58,880)</b>

Source: ESRI 2017 Retail MarketPlace Report via Community Analyst; LaBella Associate

## TAKEAWAYS

A comparison of the Community Analyst. data for Erie County and the Town of Hamburg reveals the while no additional square footage is required for retail that the Town may target certain enterprises based on the following observations:

1) Several retail sectors are experiencing high leakage within the Town and County. These retail sectors have existing businesses within both the Town and the County. Expansion of these existing businesses will likely be less risky as compared to opening a new business, while facing only limited competition within the County. These retail sectors include:

- Home Furnishings Stores
- Building Material & Supplies Dealers
- Beer, Wine & Liquor Stores
- Gasoline Stations
- Jewelry, Luggage & Leather Goods Stores
- Book, Periodical & Music Stores
- Florists
- Office Supplies, Stationery & Gift Stores
- Other Miscellaneous Store Retailers
- Electronic Shopping & Mail-Order Houses
- Direct Selling Establishments
- Drinking Places -Alcoholic Beverages

2) Few retail sectors are experiencing high leakage within the Town but also experiencing high surplus within the County. Expansion of these existing businesses could capture some demand from the Town residents due to their convenient location but may face stiff competition from establishments outside of the Town:

- Furniture Stores
- Specialty Food Stores
- Vending Machine Operators

3) Several retail sectors are experiencing surplus within the Town and experiencing leakage within the County. While these existing Town businesses are outperforming the needs of Town residents, there is additional untapped demand for these goods from County residents. These existing Town businesses could expand by marketing to the greater County. These retail sectors include:

- Automobile Dealers
- Other Motor Vehicle Dealers
- Electronics & Appliance Stores
- Clothing Stores
- Shoe Stores
- Other General Merchandise Stores
- Used Merchandise Stores
- Special Food Services

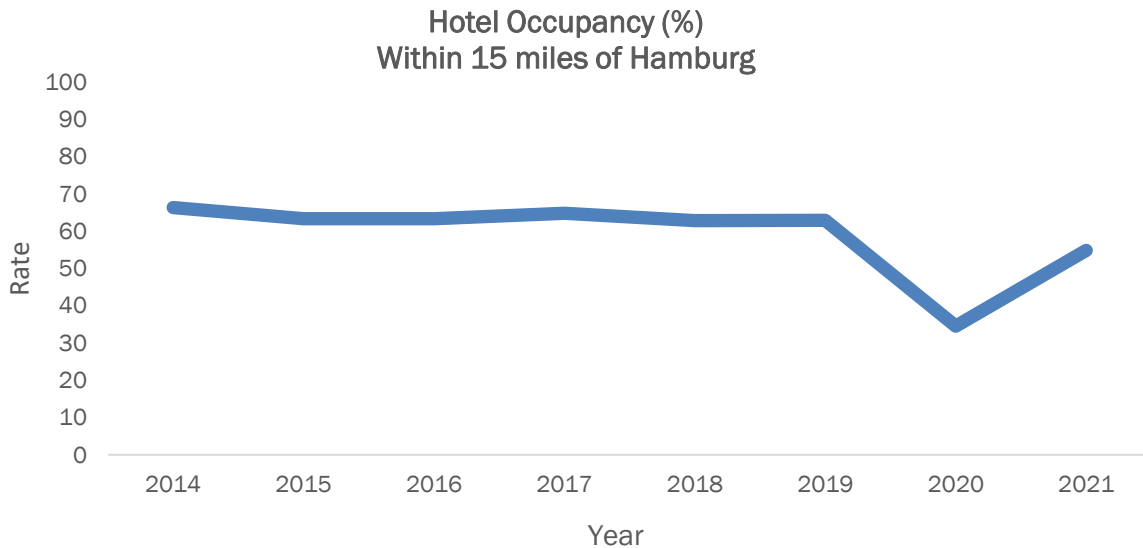
## HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT

4) A couple of retail sectors are experiencing surplus within the Town of Seneca Falls and Seneca County. These are the existing retailers for whom the Town and County should consider crafting retention strategies. These retail sectors include:

- Auto Parts, Accessories & Tire Stores
- Lawn & Garden Equip & Supply Stores
- Grocery Stores
- Health & Personal Care Stores
- Sporting Goods/Hobby/Musical Instrument Stores
- General Merchandise Stores
- Department Stores Excluding Leased Depts.
- Restaurants/Other Eating Places

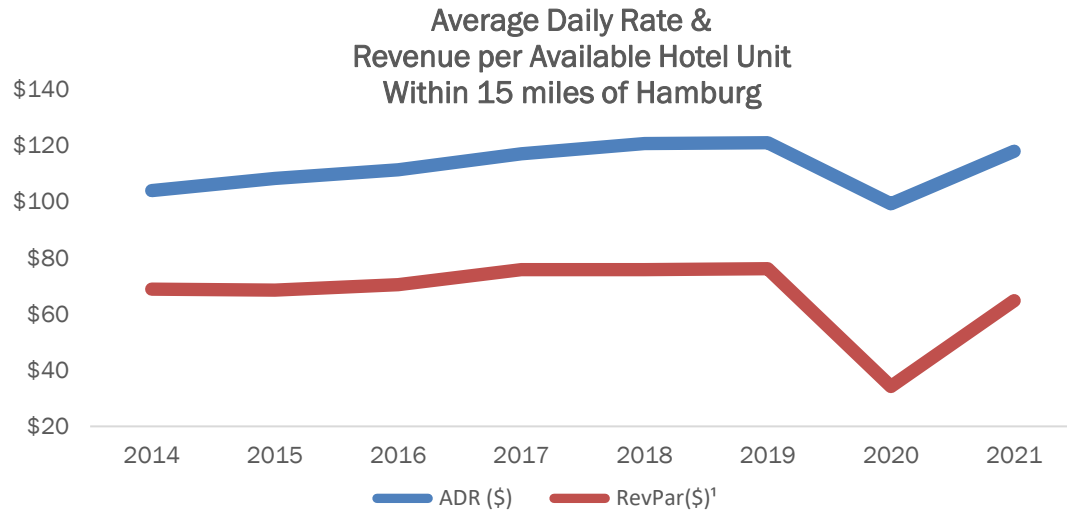
### HOSPITALITY

As of January 2022, there are forty-five hotels within 15 miles of the Town of Hamburg offering 146,940 rooms. This is an increase as compared to January 2014 when the same search radius had thirty-four hotels offering 117,955 rooms. The market includes a mixture of economy, luxury, midscale, upper midscale, upscale, and upper upscale accommodations.



Source: Smith Travel Research, Custom Report – 15 Miles, starting in 2014.

## HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT



Source: Smith Travel Research, Custom Report - 15 Miles, starting in 2014.

### TAKEAWAYS

Typically, the market must achieve a 60 percent occupancy rate before more rooms are needed. While the occupancy rate is currently not at this threshold, that is likely due to the Covid pandemic which occurred in 2020. Currently the rates appear to be rebounding to current pre-pandemic levels and will likely meet that 60% threshold within a year or two. Therefore, at this time additional hotels are marginally justified.

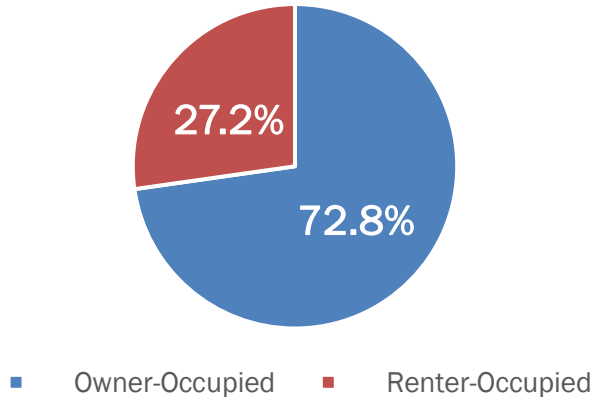
In addition, this study only covers major hotel chains, boutique hotels and B&B's may additionally be in demand, but further study would need to be undertaken to determine.



## HOUSING MARKET

Currently there is limited housing within the Hamburg Gateway Revitalization target areas. However, there is a demand and preference by many for more mixed-use development along the corridors that would include a housing component. This section will review the current housing market and the projected demand for new housing.

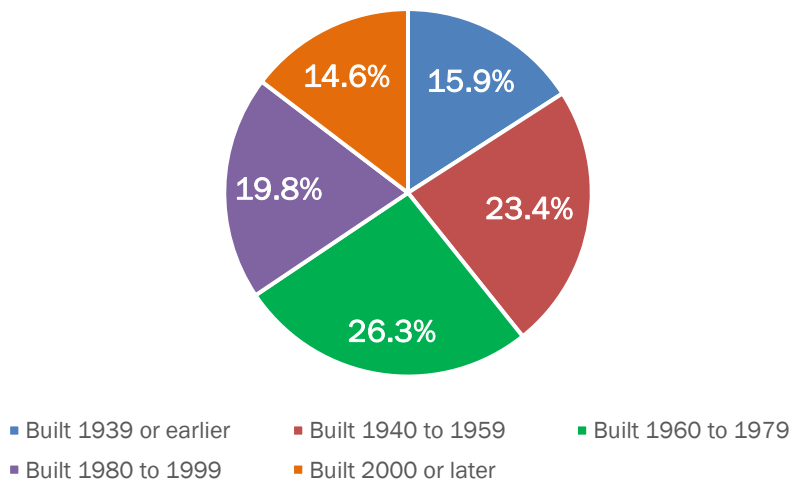
### HOUSING TENURE: 2020



Source: U.S. Bureau of Census, American Community Survey

Most housing units in Hamburg are owner-occupied.

### AGE OF HOUSING STOCK IN ERIE COUNTY: 2019

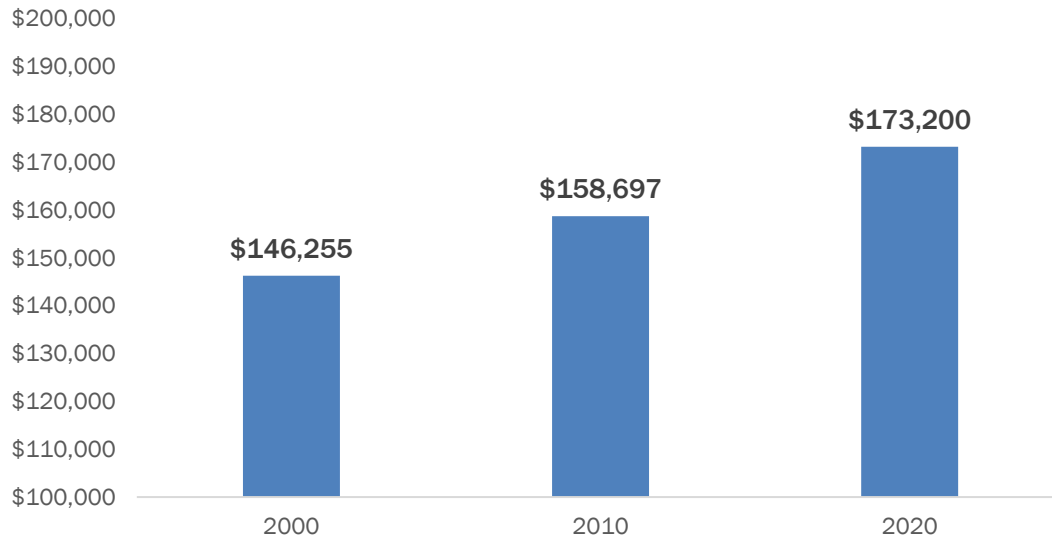


Source: U.S. Bureau of Census, American Community Survey

39.3 percent of the housing units in the Town of Hamburg were built before 1960; only 14.6 percent of housing has been constructed in the last two decades.

## HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT

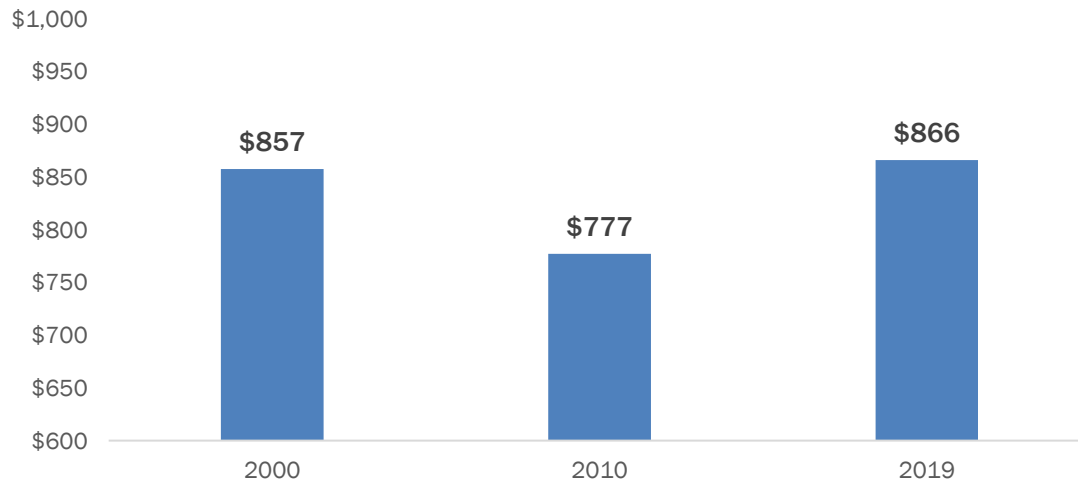
### MEDIAN HOUSING VALUE: IN 2019 DOLLARS



Source: U.S. Bureau of Census (2000), Census American Community Survey (2010, 2020), LaBella Associates (2020 values calculated using US Bureau of Labor Statistics CPI inflation calculator).

Using inflation adjusted values, the median housing value of Hamburg homes has increased by 18.4 percent since 2000.

### MEDIAN GROSS RENT: IN 2019 DOLLARS



Source: U.S. Bureau of Census (2000), Census American Community Survey (2010 & 2020), LaBella Associates (2020 values calculated using US Bureau of the Census CPI inflation calculator).

Using inflation adjusted values, the gross rent of Hamburg rental rates have only increased by one percent since 2000.

## TAKEAWAY

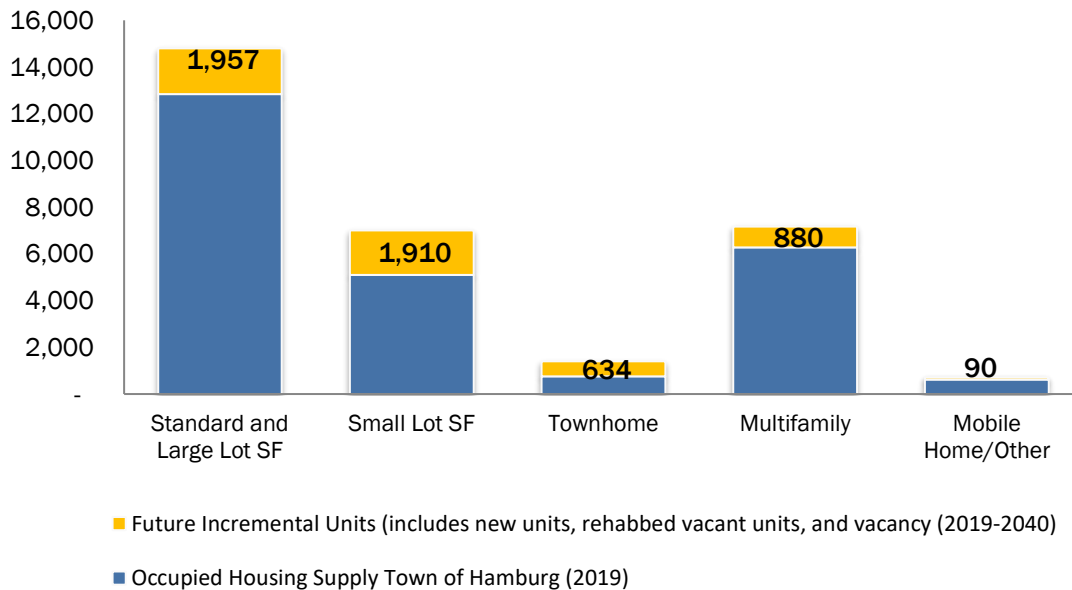
While Hamburg's housing market is still growing, the rate of growth is beginning to slow. That may be a result of lack of suitable land for development, existing zoning laws, or shifting preferences. Existing zoning or land regulations may need to change to reflect the shift in demographics and market preferences outlined earlier in this report.

## RESIDENTIAL MARKET PROJECTIONS

LaBella Associates developed projections for future housing demand in the Town of Hamburg using scenario software that considers demographic and market preference. The output of the software provides projected incremental units between 2019 and 2040 by housing type.

Based on the analysis exhibited in the graph below there will be growth in all housing unit types. Large and small lot single family homes will be in greatest demand, but there is a healthy demand for townhome and multi-family units.

### Future Balanced Housing Profile

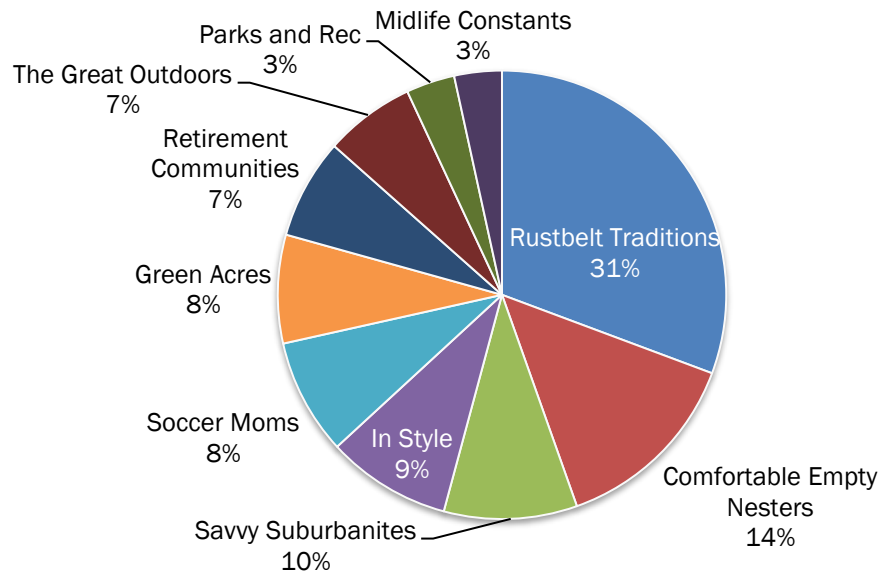


Source: ESRI & Envision Tomorrow

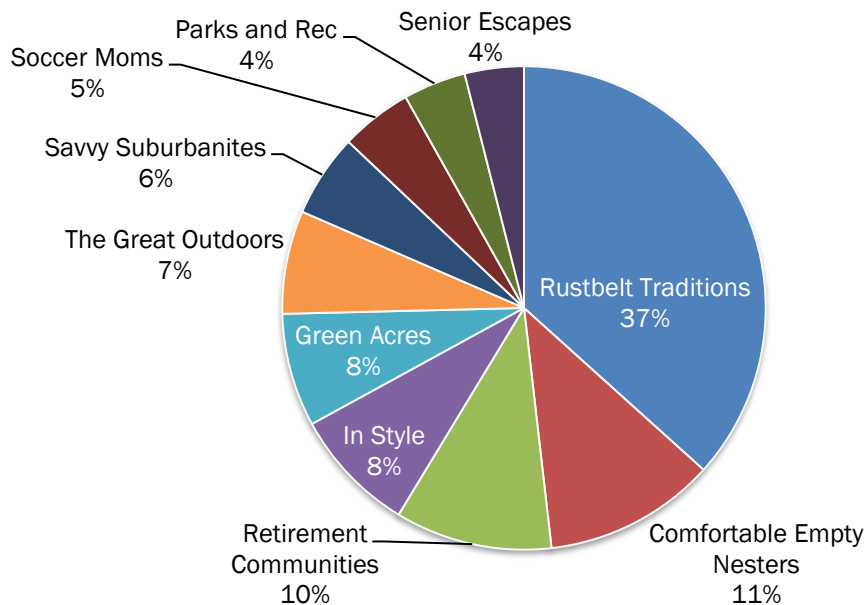
## HOUSEHOLD MARKET SEGMENTATION PROFILE 2019 &amp; 2040

The market preferences that influence originate from Tapestry market segmentation data. Tapestry segmentation combines the "who" of lifestyle demography with the "where" of local geography to create a classification model with sixty-seven distinct, behavioral market segments. The top 10 market segments in the Town of Hamburg are shown below for 2019 and 2040. Detailed descriptions of each segment are included in Appendix A.

### Top 10 Tapestry Segments by Total Households (2019)



### Top 10 Tapestry Segments by Total Households (2040)

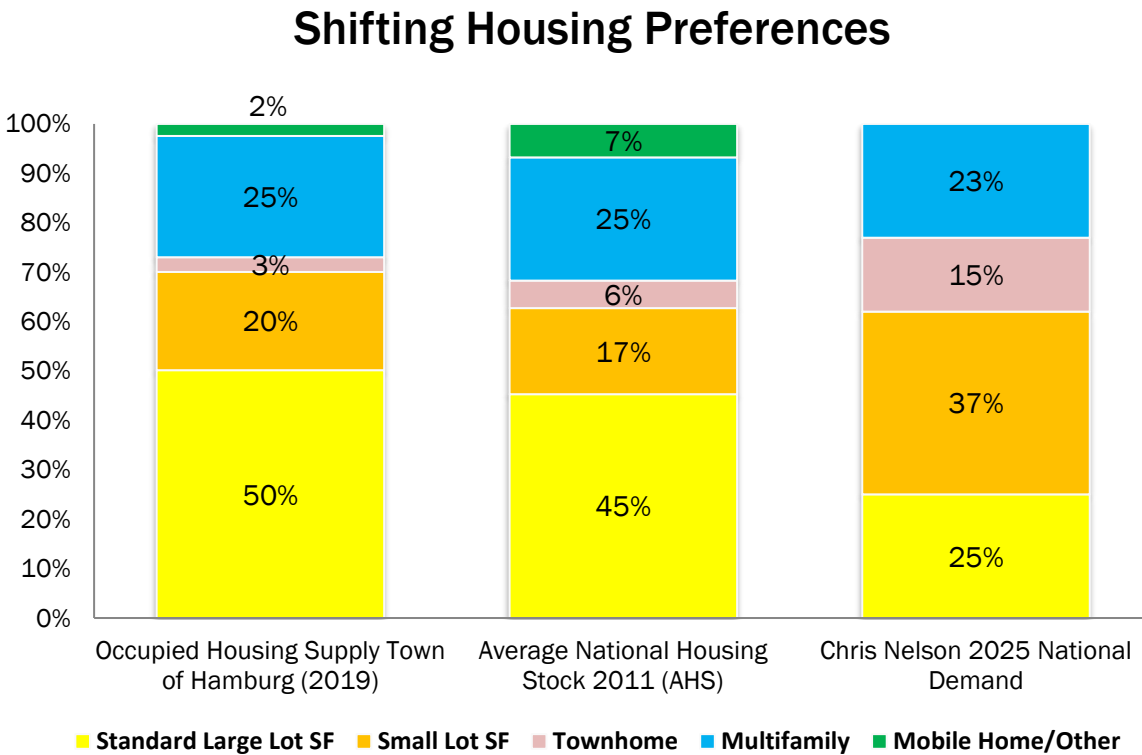


Source: ESRI & Envision Tomorrow

## HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT

Based on the market preferences, the share of housing unit types in Hamburg is anticipated to change. Most of the change would be attributed to the aging population as the number of seniors and retirees will increase in the Town over the next 30 years. Seniors and retirees typically prefer smaller homes on smaller lots to reduce maintenance.

The graph below reflects the changes in preferences. Based on national trends in housing (Chris Nelson 2025 Demand), the types of housing most consumers will demand will shift to small lot single family homes, townhomes, and multi-family homes.



### TAKEAWAY

The preferences in mix of housing types will change significantly between 2019 and 2040. The preference for Single family housing on small lots and Townhouses will grow, while preference for mobile homes and single-family homes on large lots will decrease, with no preference for mobile homes in the future. The preference for multifamily housing will stay relatively the same. While the housing preferences will change there are still projected increased in all housing types over this period

## TRANSPORTATION SYSTEMS

The Town of Hamburg is served by an extensive transportation system. State Routes 75 (Camp Road and Lake Street) and U.S. Route 62 (South Park) are the focus of this application and provide access into the Buffalo-Niagara Falls metro area. Route 75 connects to the Thruway and both routes provide access to western New York's southtowns and rural areas, including Pennsylvania. Both are classified as principal arterials according to the New York State Department of Transportation's Urban Functional Classification System.

Annual Average Daily Traffic (AADT) counts for both roadways vary:

- South Park (US Route 62) – 12,953 AADT
- Camp Road/Lake Street (NY Route 75) – Main Street to Legion Drive – 14,767 AADT
- Camp Road – Legion Drive to the Thruway – 27,720 AADT

The figure below provides characteristics of each roadway segment. AADT figures provide information regarding design of each roadway. Roadways with AADTs below 15,000 can function with two travel lanes (one in each direction) and potentially a turning lane. Both South Park and Camp Road/Lake Street south of Legion Drive fit this profile. However, sections of Camp Road south of Legion, prior to entering the Village include four lanes, which is not necessary.

Roadways with AADT figures above 15,000 require more than one lane in each direction, and in the case of Camp Road north of Legion Drive, two lanes in each direction are required to facilitate the large volume of traffic. However, reduction in lane widths could be explored if traffic calming is desired.

Roadway	Segment	Functional Class	Speed Limit	Number of Travel Lanes	Average Daily Traffic (Year)	% of Truck Traffic Volume	Dedicated Bicycle Facilities
South Park (US 62)	Village Line to Route 20	Urban Principal Arterial - Other	45 mph	2 (one each direction) and turning lane	12,953 (2019)	3%	No
Camp Road/Lake Street (NY 75)	Main Street to Legion Drive	Urban Principal Arterial - Other	30 mph	2 (one each direction) with portions including turning lanes; 4 north of Staley Dr.	14,767 (2019)	5%	No
Camp Road (NY 75)	Legion Drive to NY Thruway	Urban Principal Arterial - Other	45 mph	4 (two each direction)	27,720 (2019)	4%	No

Sidewalks are included on both sides of Camp Road/Lake Street with some minor gaps near Elmview Drive and the railroad overpass. On South Park, there are sidewalks on the east side up to the Fairgrounds. On the west side, a short stretch of sidewalk has been installed between the Village line and Walker Place.



## HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT

There are also public transportation systems on both South Park and Camp Road/Lake Street provided by the Niagara Frontier Transportation Authority (NFTA). NFTA Route 16 provides daily service along South Park with multiple stops and frequent service. Hamburg is the end of the line for the route so the trip into Downtown Buffalo is long, but it does provide access to Blasdell, South Buffalo, and other locations along the route.

The Route 74 “Hamburg Express” provides direct service from Hamburg into Downtown Buffalo during the week with two buses in the morning and one in the afternoon. Stops are limited and travel time is expedited, but it does provide access to the Woodlawn section of Hamburg as well as Lackawanna.

### ISSUES AND OPPORTUNITIES

Based on a review of existing conditions and input received from the project advisory committee several needs, and opportunities emerged during the study. A summary of the issues and opportunities are listed below for each segment and illustrated in the accompanying figures on the subsequent pages.

#### SOUTH PARK (VILLAGE LINE TO QUINBY DRIVE)

Issues and opportunities include:

1. Safe pedestrian amenities - lack of sidewalks and need for new sidewalks:
  - a. West Side from Walker Place to Quinby Drive
  - b. East Side from Council Opticians to Quinby Drive
2. Safe bicycle amenities - no bike lanes
3. Town Hall on-street head-in parking is not needed as there is sufficient space in off-street spaces on the Town Hall Campus
4. Need for increased landscaped buffers or potentially buildings to block the view of large, underutilized parking lots
5. Safe pedestrian and bike access from neighborhoods to South Park and the Hamburg CSD campus on Legion is needed and no dedicated or enhanced crosswalks exist along the route for pedestrians
6. Overall streetscape amenities including decorative lighting, trees, and landscaping.
7. Need for building and site design guidelines

#### CAMP ROAD/LAKE STREET (MAIN STREET TO SCRANTON ROAD)

Issues and opportunities include:

1. Overall width of road acts as a “moat” between the eastern and western sections of the Town and Village. Are there opportunities for a road diet?
2. The four lanes of traffic south of Legion Drive seem unnecessary for the volume of traffic. A reduction in speed to 30 from 45 is also warranted in that section.
3. The Intersection of Elmview Avenue and Camp Road is unsafe for vehicular left hand turns from Camp Road and very dangerous for pedestrians
4. Need for building and site design guidelines
5. Opportunities to re-envision the concrete plant property
6. Overall streetscape amenities including decorative lighting, trees, and landscaping.

## HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT

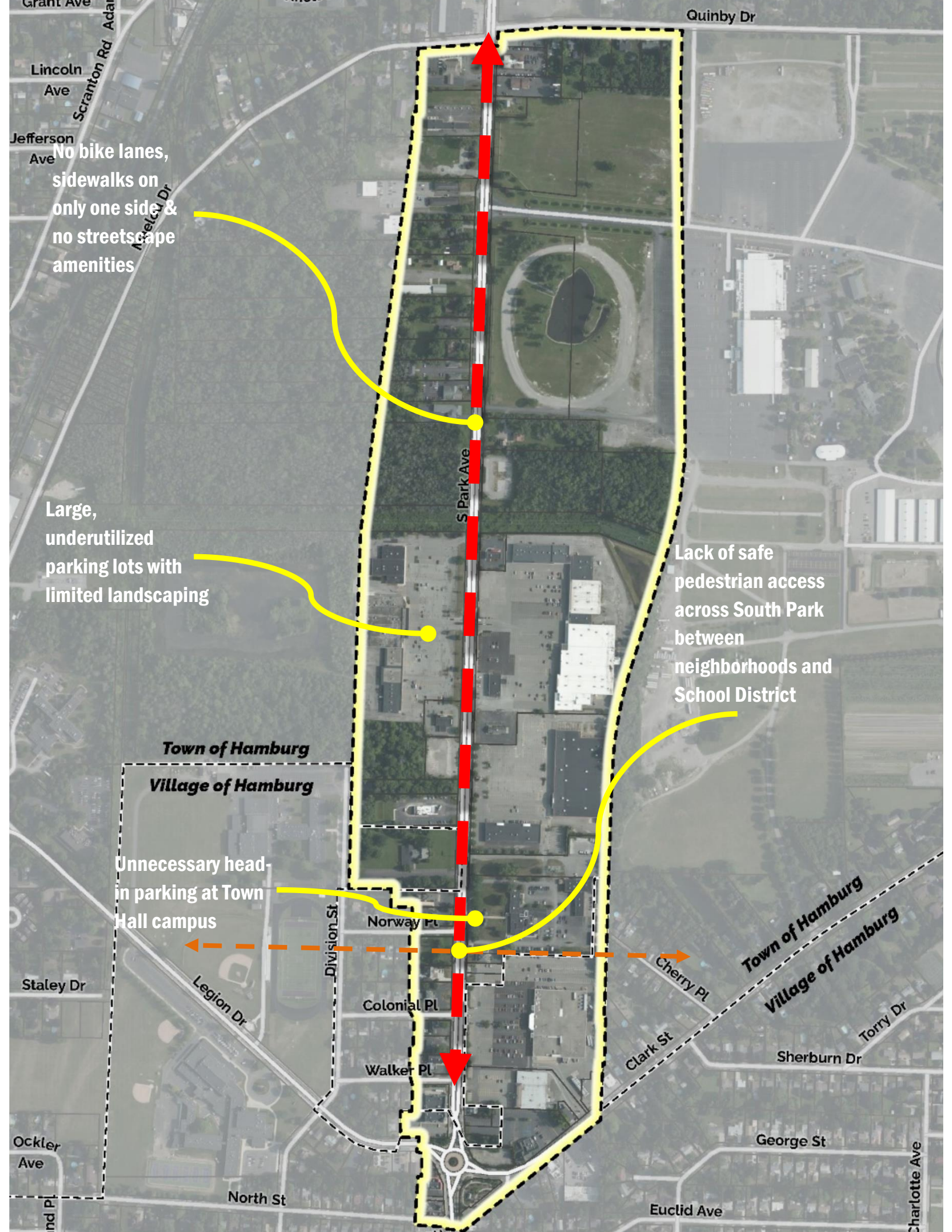
### CAMP ROAD (SCRANTON ROAD TO NYS THRUWAY)

Issues and opportunities include:

1. As a result of the reconfiguration of the on/off ramps from the Thruway, which eliminated a significant portion of the cloverleaf, an approximate 16-acre parcel is vacant and potentially available for regional development
2. This section of Camp Road is THE primary entrance into the Town and Village of Hamburg. Are there opportunities for enhanced landscaping and gateway features?
3. Overall streetscape amenities including decorative lighting, trees, and landscaping.
4. Need for building and site design guidelines







No bike lanes,  
sidewalks on  
only one side &  
no streetscape  
amenities

Large,  
underutilized  
parking lots with  
limited landscaping

Lack of safe  
pedestrian access  
across South Park  
between  
neighborhoods and  
School District

Unnecessary head-  
in parking at Town  
Hall campus

**Town of Hamburg**  
**Village of Hamburg**

**Town of Hamburg**  
**Village of Hamburg**





Road width acts as “moat” between Hamburg neighborhoods; need for traffic calming

Opportunity to repurpose sites for new mixed-use development

Elmview Ave/Camp Road intersection is unsafe for cars & pedestrians

Four lanes unnecessary in this section



Opportunity for regional development

Bradford St

Pittsburg St

Cornell St

Columbia St

College St

Dartmouth St

Commerce Pl

Camp Rd

90

90

Monroe Ave

Washington Ave

Deacon St

Scranton Rd

Sunset Ct

Sunset Dr

Boxwood Cir

Browning Dr

Blake Ln

Rovner Pl

Holiday Ln

Town of Hamburg  
Village of Hamburg

Brenton Ln

Brookwood Dr

Chapman





## RECOMMENDATIONS



## SOUTH PARK CORRIDOR

South Park Avenue is ripe for new development strategies and upgrades for pedestrian and bicyclists. While the corridor is suburban in appearance, the roadway pavement is not excessively wide and there are sidewalks on one side of the road in the Town.

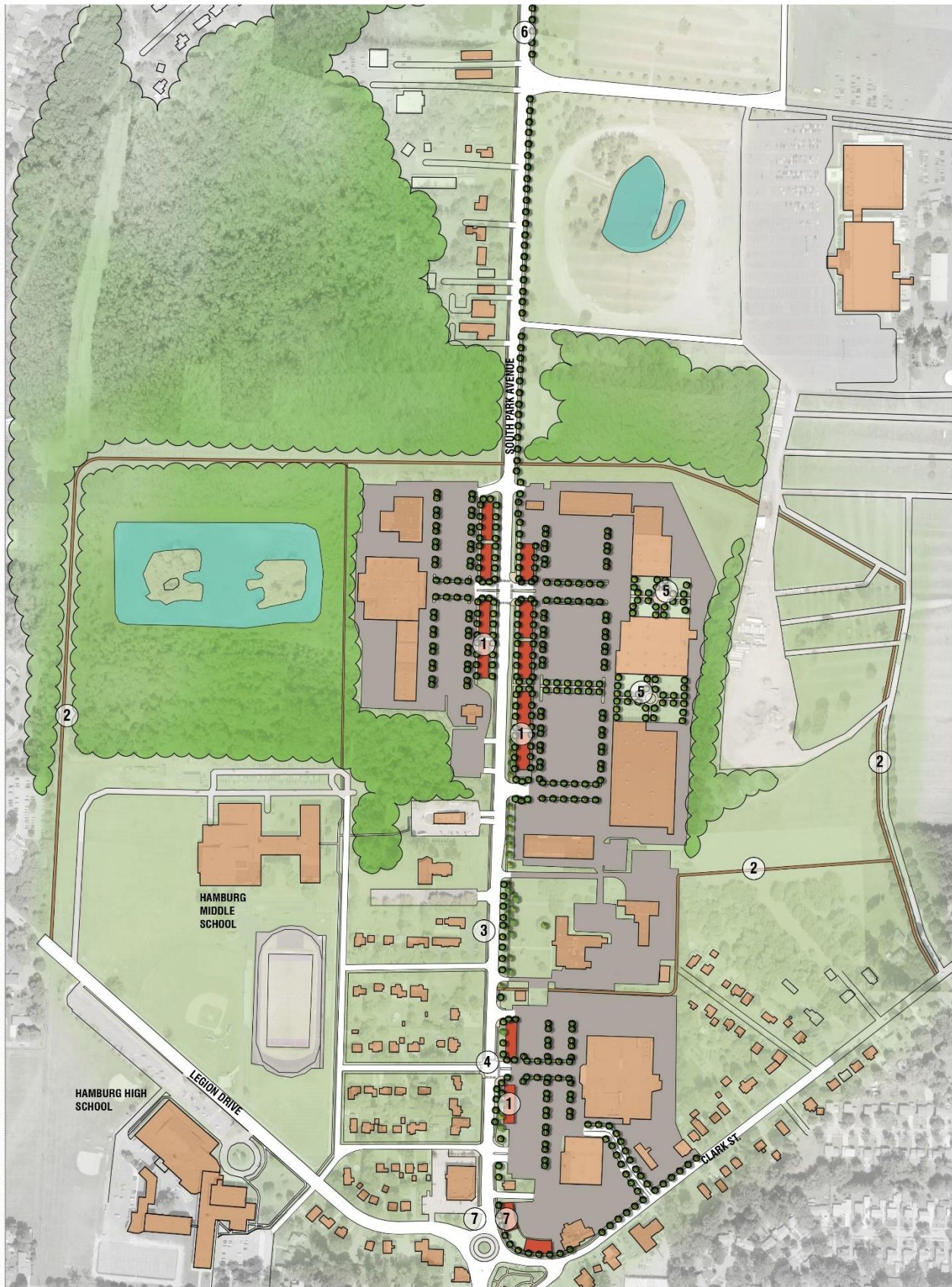
However, land uses that line the corridor are predominately suburban in nature and likely developed between 1970 and 1990. One-story buildings are set back in front of large parking lots with minimal landscaping and limited buffering along the roadway. The lack of bike lanes and sidewalks also limit pedestrian and bicycle access.

Now many of the buildings are vacant. This may partly be due to the low traffic count of 12,953 average daily traffic. Most large national (and some regional) retailers require at least 25,000 – 30,000 to locate in a suburban area.

Consequently, South Park Avenue presents an incredible opportunity for the Town to reimagine its future! It is adjacent to the successful Buffalo Avenue redevelopment momentum occurring in the Village, traffic is sufficient for many regional and local businesses, and neighborhood income levels will attract retail, restaurant, and service businesses to the district. There are also opportunities for innovative housing options.

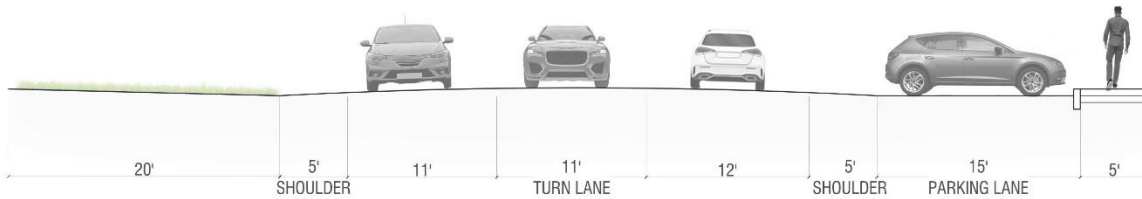
Proposed enhancements to the South Park Corridor include (numbers correspond to plan on following page):

1. Linear mixed-use buildings – parking lots along South Park are significantly underutilized and provide an opportunity to develop small mixed-use buildings fronting the roadway. The buildings would take up minimal parking spaces, and there would be sufficient parking to service existing buildings in the plazas
2. New multi-modal trail system – the lack of access between the east and west sides of South Park present pedestrian safety issues, especially for schoolchildren walking to and from the Hamburg School campus on Legion Drive. A new trail system could take advantage of undeveloped land near the raceway and a utility right of way, as well as access along the Town Campus property line for a new trail. It would provide safe daily access for pedestrian and bicycle transportation to the school system, but also act as a recreational resource for residents.
3. New sidewalks – add sidewalks to the west side of the road, and on both sides north of Town Hall plaza (#6).
4. Enhanced crosswalk – add an enhanced crosswalk at the signalized intersection near Tops Plaza at Colonial circle, including improved crosswalks, corner bump outs and signage.
5. Plaza Commons – repurpose select vacant or underutilized buildings for internal landscaped commons to encourage a conversion of buildings, and their facades, to a “lifestyle” center to encourage attraction of more restaurants and similar uses to respond to the changing demographics in the neighborhood.
6. Install streetscape improvements along the corridor including decorative lighting and landscaping.
7. Add entrance/welcome signs at the Village/Town boundary

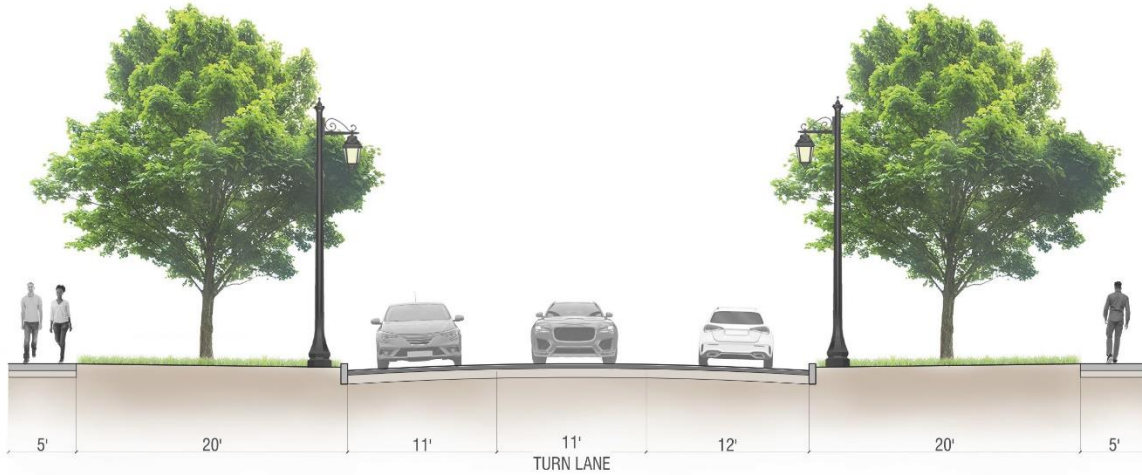


- |  |                                |                               |
|--|--------------------------------|-------------------------------|
| ① LINEAR MIXED-USE COMMERCIAL BUILDING | ④ ENHANCED CROSSWALKS          | ⑦ WELCOME / DIRECTIONAL SIGNS |
| ② NEW MULTI-MODAL TRAIL SYSTEM         | ⑤ PLAZA COMMONS                |                               |
| ③ NEW SIDEWALKS                        | ⑥ NEW SIDEWALKS AND BIKE LANES |                               |

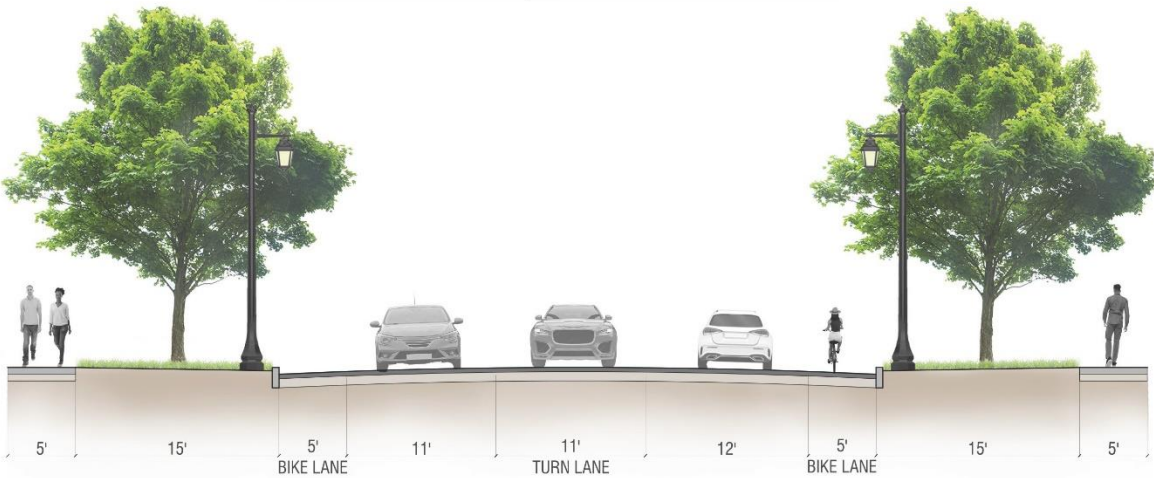




**EXISTING SECTION AT SOUTH PARK CORRIDOR**



**PROPOSED SECTION AT SOUTH PARK CORRIDOR - OPTION 1**



**PROPOSED SECTION AT SOUTH PARK CORRIDOR - OPTION 2**



**PROPOSED DETAIL PLAN OF SOUTH PARK CORRIDOR**



## PROPOSED



## EXISTING





## CAMP ROAD SOUTH CORRIDOR

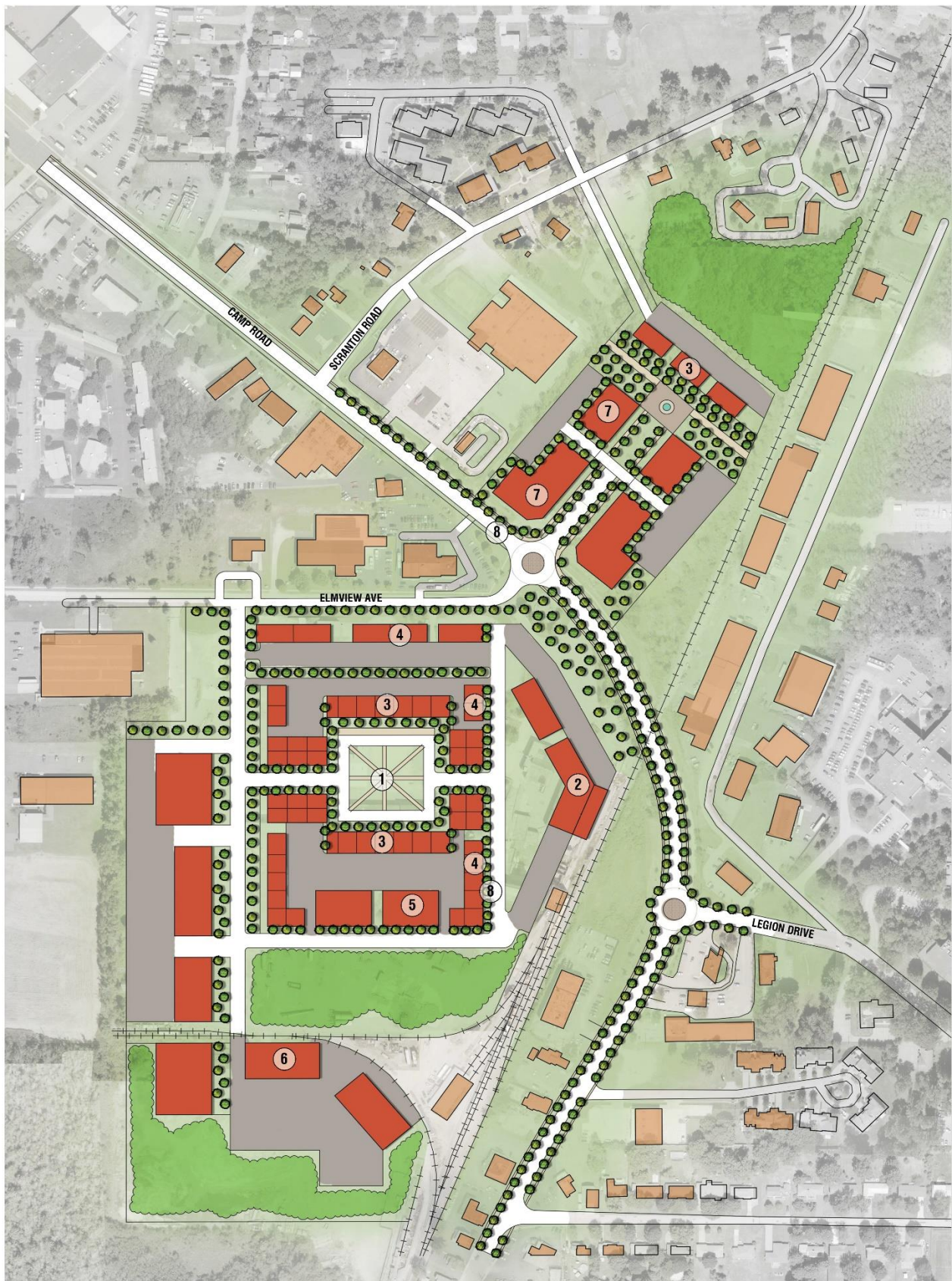
The Camp Road/Lake Avenue corridor between Staley Drive and Scranton is a mix of urban and suburban as well as a hybrid of both. It was likely one of the first roadways to experience suburban expansion in this part of the Town of Hamburg.

It includes one of the major intersections in the Town at Legion Drive and Camp Road, which provides access to the Hamburg School campus as well as the South Park corridor. This section of Camp Road and Lake Avenue is also unique because it includes two large, underutilized properties including a concrete plant and a former junkyard. Finally, the area includes properties in the Village and Town, and some in both the Village and Town (concrete plant), which advocates for collaborative zoning and design policies between the Town and Village.

Traffic also varies in this section. north of Legion Drive the traffic counts exceed 27,000 cars daily, while south of Legion has roughly half the volume. This is emphasized south of Legion where the number of traffic lanes is four lanes and the speed limit is 45 miles per hour, both of which appear unnecessary.

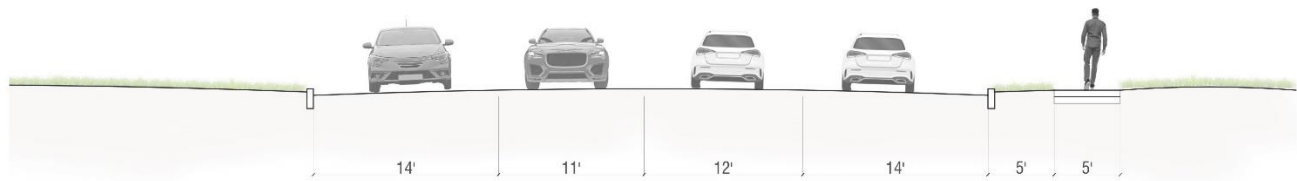
Proposed enhancements to the Camp Road South Corridor include (numbers correspond to plan on following page):

1. Town Square – center all the development around a new Town Square that would attract new residents to this pedestrian-oriented square
2. Future Commuter Train Station – reserve land for a future commuter train station to take riders between Hamburg and Downtown Buffalo
3. Town Homes – construct two-story Town Homes around the Town Square (and in a section of the lot across Camp Road), which provides smaller housing units, on a smaller lot, with less maintenance that is attractive to seniors, retirees, and empty nesters.
4. Mixed-use development – develop mixed use buildings with commercial on the first floor and housing on the second floor.
5. Loft Apartments – construct loft housing units on the periphery
6. Light-industrial/offices – along the rear of the property utilize the large lots for offices or light-industrial buildings with uses regulated by zoning that do not interfere with residential neighborhoods. Maintain rail spurs as they are invaluable for some light-industrial industries and would limit truck deliveries.
7. Professional offices – provide opportunities for class A professional offices for tech companies, financial companies, and other services
8. Road diet:
  - a. North of Legion Drive – narrow the lane widths to a minimum of 11 ft. each and convert the gained space into a larger planting strip landscaped with trees to provide greater separation between vehicular traffic and pedestrians and bicyclists on the sidewalk and narrower. This may also provide an opportunity to extend the sidewalk on the west side of the road from Legion to Elmview.
  - b. South of Legion Drive – eliminate one lane in each direction and convert to a larger planting strip landscaped with trees.
  - c. Install traffic roundabouts at Camp Road and Legion as well as Camp Road and Elmview. A follow-on preliminary engineering study is recommended to evaluate how to install a safe roundabout with a slight change in topography.



- |                        |                                       |
|------------------------|---------------------------------------|
| ① TOWN SQUARE          | ⑤ LOFT APARTMENTS                     |
| ② FUTURE TRAIN STATION | ⑥ LIGHT-INDUSTIAL/OFFICES             |
| ③ TOWN HOMES           | ⑦ PROFESSIONAL OFFICES                |
| ④ MIXED-USE            | ⑧ ROAD DIET (NARROWING & LANDSCAPING) |

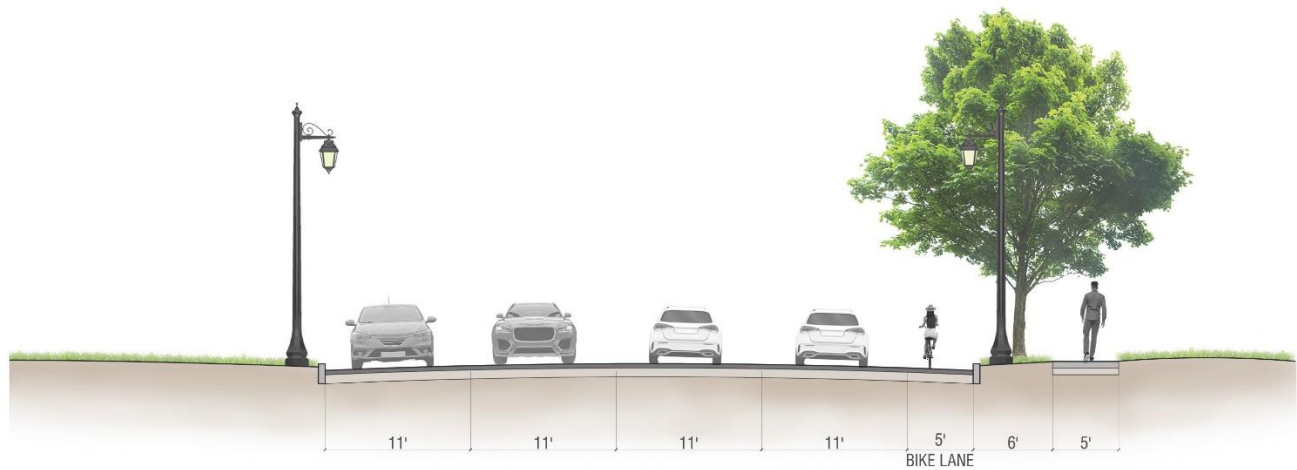




**EXISTING SECTION 1 AT CAMP ROAD SOUTH**



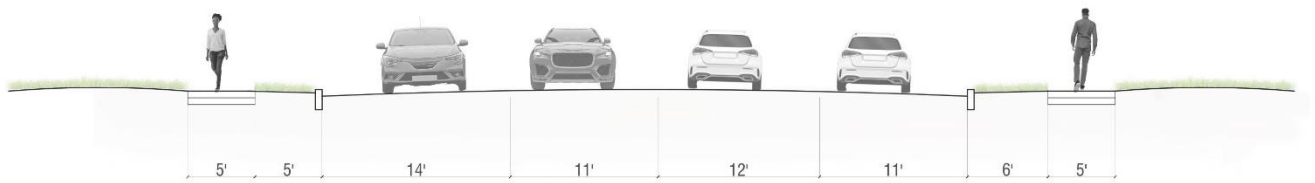
**PROPOSED SECTION 1 AT CAMP ROAD SOUTH - OPTION 1**



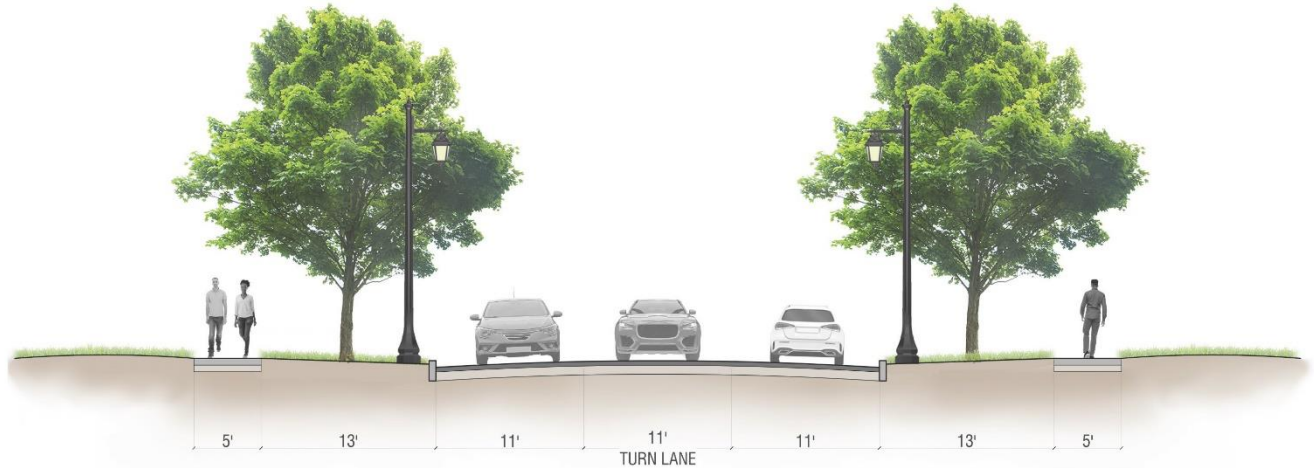
**PROPOSED SECTION 1 AT CAMP ROAD SOUTH - OPTION 2**



**PROPOSED DETAIL PLAN OF CAMP ROAD SOUTH**



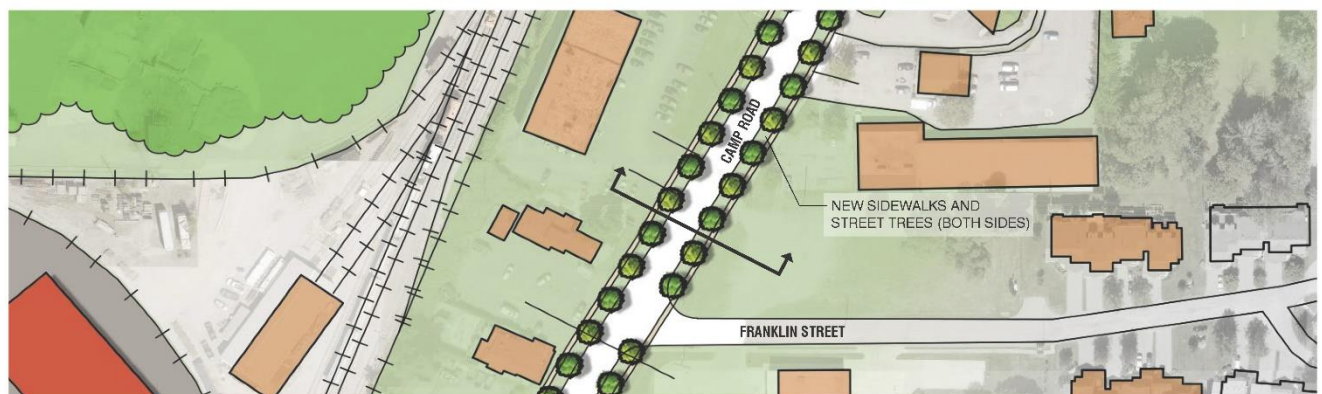
**EXISTING SECTION 2 AT CAMP ROAD SOUTH**



**PROPOSED SECTION 2 AT CAMP ROAD SOUTH - OPTION 1**



**PROPOSED SECTION 2 AT CAMP ROAD SOUTH - OPTION 2**



**PROPOSED DETAIL PLAN OF CAMP ROAD SOUTH**





## CAMP ROAD NORTH CORRIDOR

The Camp Road Corridor area is focused on the area from the Thruway interchange with Camp Road, south to Scranton Road. However, the primary emphasis is the gateway area of Camp Road between the Thruway and Sunset Drive. This is the main entrance into the Hamburg area and currently lacks “gateway” features to welcome local, regional, and national travelers exiting the Thruway.

The roadway widths between the Thruway exit and Sunset Drive are very wide at almost 65 ft with four lanes and a turning lane each approximately 13 ft. wide. A turning lane near Sunset increases the pavement width almost 80 feet. In short, it is not a very inviting entrance into Hamburg. The same conditions exist north of the Thruway interchange.

One recent improvement along the stretch was the elimination of a leg of the entrance/exit cloverleaf roadway from the Thruway. This left a surplus 16-acre parcel available directly across from where travelers now exit the Thruway. It is a prime opportunity to develop a regional center for sports/recreation or medical facilities, or both.

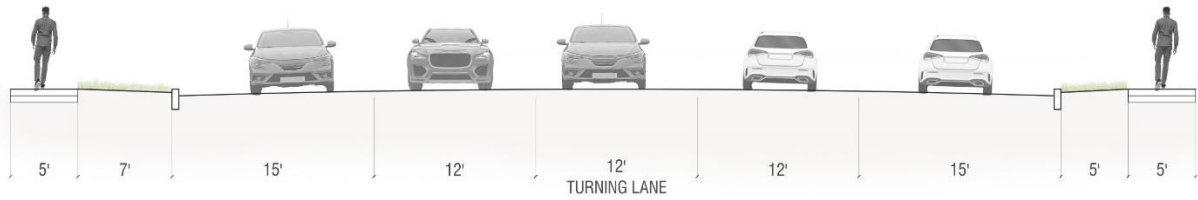
Proposed enhancements to the Camp Road North Corridor include (numbers correspond to plan on following page):

1. Regional Healthy Living Campus - construction of a regional campus for sports/recreation or medical facilities, or both (or something similar that provides regional services). The location is ideal for access both locally and regionally. And the size is ideal – the approximate 16-acre parcel could accommodate a 70,000 – 75,000 square ft. building and have sufficient land left over to accommodate parking and connecting trails.
2. Landscaped Gateway Median and Road Diet – the roadway sections between the Thruway and Sunset Drive do not require a turning lane as there are no businesses on either side of the approach to the Thruway entrance. This provides an opportunity to install/extend (and enhance existing) medians on Camp Road. They could be landscaped, or if that is not feasible due to road salt (or because the bridge portion is not on soil), hardscaped with decorative pavement and complemented with decorative lighting. The roadway pavement could also be narrowed by narrowing lane widths, which is acceptable if there is curbing present. Landscaping including trees could be installed especially in the areas next to the Thruway approach, and the surplus property.
3. Multi-modal trails – install trails along the National Grid right-way adjacent to the Thruway as well as near and around the regional campus site.
4. Add entrance/welcome/directional signage at the Thruway interchange

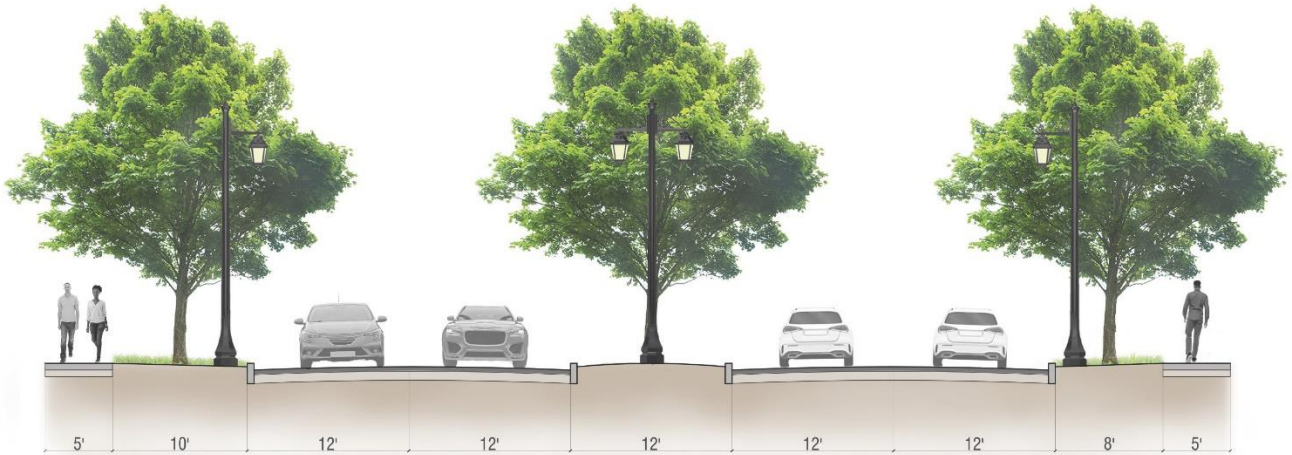








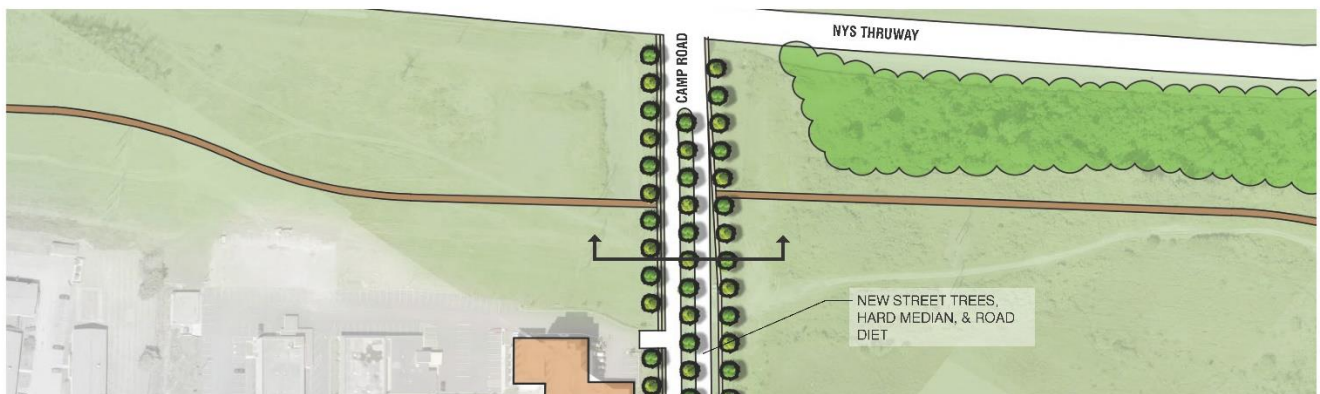
**EXISTING SECTION 1 AT CAMP ROAD NORTH**



**PROPOSED SECTION AT CAMP ROAD NORTH - OPTION 1**



**PROPOSED SECTION AT CAMP ROAD NORTH - OPTION 2**



**PROPOSED DETAIL PLAN OF CAMP ROAD NORTH**





## ZONING RECOMMENDATIONS

The Town of Hamburg zoning ordinance should be looked at comprehensively and revised. Regulations reflect the Town's past development history and do not reflect current economic trends or realities. The most glaring is the C-2 commercial district which allows warehousing and some manufacturing facilities, which seem contradictory to the residential uses which typically abut those districts. Suggested zoning updates include:

### Town of Hamburg

- Revise C-2 General Commercial Zoning:
  - Remove warehousing and manufacturing as a permitted use. Either make those special uses or remove entirely if there are not a significant number of those businesses currently in the C-2 district (ones that are would be grandfathered but could not expand).
  - Permit housing as a special use
    - Small multi-family
    - Townhomes
    - Upper floors above commercial
- Update Industrial Zones
  - Add limits for lot coverage and building/structure height
  - Require site plan review
- Rezone cement plant property – this should be evaluated in more detail. M-3 Industrial is not appropriate for that area of the Town and Village anymore due to changes in development patterns and the nearby residential neighborhoods. This should be done in conjunction with the Village and include the Moose Lodge property, which is directly adjacent to residential neighborhoods and could be up for sale at any time in the future.

### Town and Village of Hamburg

- Update or add design guidelines for review of new development

## POTENTIAL FUNDING

The following grant programs would help advance the corridor recommendations:

- Transportation Alternatives Program (TAP) – released typically every two years (last released in 2021 – but may be released more often due to Bipartisan Infrastructure Law funding); funding limits vary but provides up to \$5 million, with only a 20% match, for alternative transportation projects and/or pedestrian/bike safety projects. Projects that could be funded by the program under this plan:
  - South Park and Camp Road Corridor traffic calming – road narrowing, landscaping, crosswalks, & sidewalks, Thruway gateway treatments
  - Trails from neighborhoods to School campus
- Congestion Mitigation and Air Quality (CMAQ)
  - Roundabouts proposed for Camp Road
- Reconnecting Communities Program
  - New Bipartisan Infrastructure Law (BIL) UD DOT funding provides both planning and construction funds for removing, retrofitting, mitigating, and replacing roadways that divide communities. 80% funding up to \$5 million

## HAMBURG GATEWAY REVITALIZATION DESIGN PROJECT

- Safe Streets & Roads for All – New BIL funding for complete streets – need an action plan first (80% up to \$1M) and then the USDOT will fund implementation (80% up to \$30 million).
- Private development on parking lots:
  - Empire State Development Corporation Capital grants – no grant limit but provides up to 20% funding for projects. Typically, may not allow retail/housing/mixed use, but a complete redevelopment of a site may be attractive to ESD
- Zoning updates
  - Smart Growth grants – the NYS DOS has recently added this grant program for Comprehensive Plans, Area plans and Zoning Updates. Provides up to 90% funding up to \$100,000 for a comprehensive zoning update and up to \$200,000 for an area plan and zoning update if the Town is currently updating a Comprehensive Plan.



## APPENDICES





LifeMode Group: GenXurban

## Rustbelt Traditions

5D

**Households:** 2,716,800

**Average Household Size:** 2.47

**Median Age:** 39.0

**Median Household Income:** \$51,800

### WHO ARE WE?

The backbone of older industrial cities in states surrounding the Great Lakes, *Rustbelt Traditions* residents are a mix of married-couple families and singles living in older developments of single-family homes. While varied, the work force is primarily white collar, with a higher concentration of skilled workers in manufacturing, retail trade, and health care. *Rustbelt Traditions* represents a large market of stable, hard-working consumers with modest incomes but an average net worth of nearly \$400,000. Family oriented, they value time spent at home. Most have lived, worked, and played in the same area for years.



### OUR NEIGHBORHOOD

- Almost half (46%) of the households are married-couple families, similar to the US (48%), most without children (also similar to the US); the slightly higher proportion of singles (Index 105) reflects the aging of the population.
- Average household size is slightly lower at 2.47.
- They are movers, slightly more mobile than the US population (Index 109), but over 70 percent of house holders moved into their current homes before 2010.
- Most residents live in modest, single-family homes in older neighborhoods built in the 1950s (Index 224).
- Nearly three quarters own their homes; nearly half of households have mortgages.
- A large and growing market, Rustbelt Traditions residents are located in the dense urban fringe of metropolitan areas throughout the Midwest and South.
- Most households have 1 to 2 vehicles available.

### SOCIOECONOMIC TRAITS

- Most have graduated from high school or spent some time at a college or university.
- Labor force participation slightly higher than the US at 67%.
- While most income is derived from wages and salaries, nearly 31% of households collect Social Security and nearly 20% draw income from retirement accounts.
- Family-oriented consumers who value time spent at home.
- Most have lived, worked, and played in the same area for years.
- Budget aware shoppers that favor American-made products.
- Read newspapers, especially the Sunday editions.

Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.

### MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Residents take advantage of convenience stores for fueling up and picking up incidentals.
- Watching television is a common pastime; many households have more than four TVs.
- Favorite programming ranges from ABC Family Channel, A&E, and TNT to children's shows on Nickelodeon and the Disney Channel.
- Residents are connected; entertainment activities like online gaming dominate their Internet usage.
- Favorite family restaurants include Applebee's, Arby's, and Texas Roadhouse.
- Radio dials are typically tuned to classic rock stations.

### HOUSING

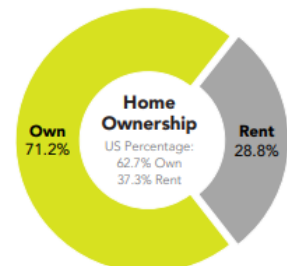
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family

**Median Value:**  
\$123,400

US Median: \$207,300





LifeMode Group: GenXurban

## Comfortable Empty Nesters

5A

**Households:** 3,024,200

**Average Household Size:** 2.52

**Median Age:** 48.0

**Median Household Income:** \$75,000

### WHO ARE WE?

Residents in this large, growing segment are older, with nearly half of all householders aged 55 or older; many still live in the suburbs where they grew up. Most are professionals working in government, health care, or manufacturing. These Baby Boomers are earning a comfortable living and benefitting from years of prudent investing and saving. Their net worth is well above average (Index 314). Many are enjoying the transition from child rearing to retirement. They value their health and financial well-being.

### OUR NEIGHBORHOOD

- Married couples, some with children, but most without (Index 149).
- Average household size slightly higher at 2.52.
- Found throughout the suburbs and small towns of metropolitan areas, where most residents own and live in single-family detached homes (Index 142).
- Most homes built between 1950 and 1990 (Index 131).
- Households generally have one or two vehicles.

### SOCIOECONOMIC TRAITS

- Education: 36% college graduates; nearly 68% with some college education.
- Average labor force participation at 61%.
- Most households' income from wages or salaries, but a third also draw income from investments (Index 150) and retirement (Index 159).
- *Comfortable Empty Nesters* residents physically and financially active.
- Prefer eating at home instead of dining out.
- Home maintenance a priority among these homeowners.

### MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Residents enjoy listening to sports radio or watching sports on television.
- Physically active, they play golf, ski, ride bicycles, and work out regularly.
- Spending a lot of time online isn't a priority, so most own older home computers.
- Financial portfolio includes stocks, certificates of deposit, mutual funds, and real estate.

### HOUSING

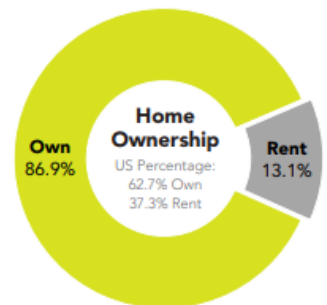
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family

**Median Value:**  
\$203,400

US Median: \$207,300







LifeMode Group: Affluent Estates

## Savvy Suburbanites

1D

**Households:** 3,664,200

**Average Household Size:** 2.85

**Median Age:** 45.1

**Median Household Income:** \$108,700

### WHO ARE WE?

Savvy Suburbanites residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home. Located in older neighborhoods outside the urban core, their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise. They enjoy good food and wine, plus the amenities of the city's cultural events.

### OUR NEIGHBORHOOD

- Established neighborhoods (most built between 1970 and 1990) found in the suburban periphery of large metropolitan markets.
- Married couples with no children or older children; average household size is 2.85.
- 91% owner occupied; 66% mortgaged (Index 160).
- Primarily single-family homes, with a median value of \$362,900 (Index 161).
- Low vacancy rate at 3.8%.

### SOCIOECONOMIC TRAITS

- Education: 50.6% college graduates; 77.6% with some college education.
- Higher labor force participation rate at 67.9% (Index 109) with proportionately more 2-worker households at 62.2%, (Index 120).
- Well-connected consumers that appreciate technology and make liberal use of it for everything from shopping and banking to staying current and communicating.
- Informed shoppers that do their research prior to purchasing and focus on quality.

### MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Residents prefer late model, family-oriented vehicles: SUVs, minivans, and station wagons.
- Gardening and home remodeling are priorities, usually DIY. Riding mowers and power tools are popular, although they also hire contractors for the heavy lifting.
- There is extensive use of housekeeping and personal care services.
- Foodies: They like to cook and prefer natural or organic products.
- These investors are financially active, using a number of resources for informed investing. They are not afraid of debt; many households carry first and second mortgages, plus home equity credit lines.
- Physically fit, residents actively pursue a number of sports, from skiing to golf, and invest heavily in sports gear and exercise equipment.

### HOUSING

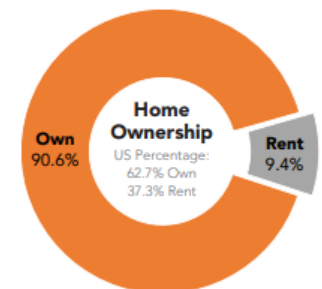
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family

**Median Value:**  
\$362,900

US Median: \$207,300





## LifeMode Group: GenXurban In Style

5B

**Households:** 2,764,500

**Average Household Size:** 2.35

**Median Age:** 42.0

**Median Household Income:** \$73,000

### WHO ARE WE?

*In Style* denizens embrace an urbane lifestyle that includes support of the arts, travel, and extensive reading. They are connected and make full use of the advantages of mobile devices. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older and already planning for their retirement.

### OUR NEIGHBORHOOD

- City dwellers of large metropolitan areas.
- Married couples, primarily with no children (Index 112) or single households (Index 109); average household size at 2.35.
- Home ownership average at 68% (Index 108); nearly half, 47%, mortgaged (Index 114).
- Primarily single-family homes, in older neighborhoods (built before 1980), with a mix of town homes (Index 132) and smaller (5–19 units) apartment buildings (Index 110).
- Median home value at \$243,900.
- Vacant housing units at 8.6%.

### SOCIOECONOMIC TRAITS

- College educated: 48% are graduates (Index 155); 77% with some college education.
- Higher labor force participation rate is at 67% (Index 108) with proportionately more 2-worker households (Index 110).
- Median household income of \$73,000 reveals an affluent market with income supplemented by investments (Index 142) and a substantial net worth (Index 178).
- Connected and knowledgeable, they carry smartphones and use many of the features.
- Attentive to price, they use coupons, especially mobile coupons.

### MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Partial to late model SUVs: compact SUVs are gaining popularity.
- Homes integral part of their style; invest in home remodeling/maintenance, DIY or contractors; housekeeping hired.
- Prefer organic foods, including growing their own vegetables.
- Financially active, own a variety of investments often managed by a financial planner.
- Meticulous planners, both well insured and well invested in retirement savings.
- Generous with support of various charities and causes.
- Actively support the arts, theater, concerts, and museums.

### HOUSING

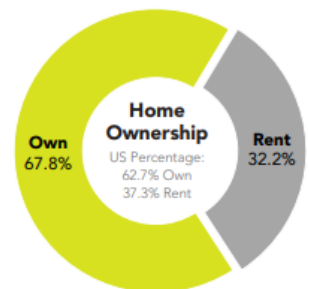
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**Typical Housing:**  
Single Family

**Median Value:**  
\$243,900

US Median: \$207,300







## LifeMode Group: Family Landscapes Workday Drive

4A

**Households:** 3,541,300

**Average Household Size:** 2.97

**Median Age:** 37.0

**Median Household Income:** \$90,500

### WHO ARE WE?

*Workday Drive* is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

### OUR NEIGHBORHOOD

- *Workday Drive* residents prefer the suburban periphery of metropolitan areas.
- Predominantly single family, homes are in newer neighborhoods, 34% built in the 1990s (Index 236), 31% built since 2000.
- Owner-occupied homes have high rate of mortgages at 68% (Index 164), and low rate vacancy at 4%.
- Median home value is \$257,400.
- Most households are married couples with children; average household size is 2.97.
- Most households have 2 or 3 vehicles; long travel time to work including a disproportionate number commuting from a different county (Index 132).

### SOCIOECONOMIC TRAITS

- Education: 40.5% college graduates; more than 72% with some college education.
- High labor force participation rate at 71%; 2 out of 3 households include 2+ workers (Index 124).
- Connected, with a host of wireless devices —anything that enables convenience, like banking, paying bills, or even shopping online.
- Well insured and invested in a range of funds, from savings accounts or bonds to stocks.
- Carry a higher level of debt, including first (Index 149) and second mortgages (Index 154) and auto loans (Index 149).

### MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Most households own at least 2 vehicles; the most popular types are minivans and SUVs.
- Family-oriented purchases and activities dominate, like 4+ televisions (Index 154), movie purchases or rentals, children's apparel and toys, and visits to theme parks or zoos.
- Outdoor activities and sports are characteristic of life in the suburban periphery. They attend sporting events, as well as participate in them like bicycling, jogging, golfing, and boating.
- Home maintenance services are frequently contracted, but these families also like their gardens and own the tools for minor upkeep, like lawn mowers, trimmers, and blowers.

### HOUSING

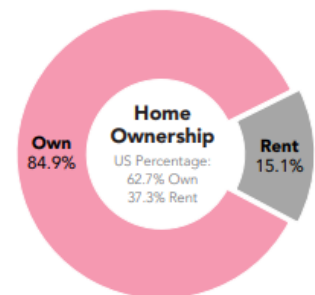
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**Typical Housing:**  
Single Family

**Median Value:**  
\$257,400

US Median: \$207,300







LifeMode Group: Cozy Country Living

## Green Acres

6A

**Households:** 3,923,400

**Average Household Size:** 2.70

**Median Age:** 43.9

**Median Household Income:** \$76,800

### WHO ARE WE?

The *Green Acres* lifestyle features country living and self-reliance. Avid do-it-yourselfers, they maintain and remodel their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf.

### OUR NEIGHBORHOOD

- This large segment is concentrated in rural enclaves in metropolitan areas.
- Primarily (not exclusively) older homes with acreage; new housing growth in the past 15 years.
- Single-family, owner-occupied housing, with a median value of \$235,500.
- An older market, primarily married couples, most with no children.

### SOCIOECONOMIC TRAITS

- Education: More than 60% are college educated.
- Labor force participation rate is high at 66.8% (Index 107).
- Income is derived not only from wages and salaries but also from self-employment (more than 13% of households), investments (27% of households), and increasingly, from retirement.
- They are cautious consumers with a focus on quality and durability.
- Comfortable with technology, more as a tool than a trend: banking or paying bills online is convenient; but the Internet is not viewed as entertainment.
- Economic outlook is professed as pessimistic, but consumers are comfortable with debt, primarily as home and auto loans, and investments.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.

### MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Purchasing choices reflect *Green Acres* residents' country life, including a variety of vehicles, from trucks and SUVs to ATVs and motorcycles, preferably late model.
- Homeowners favor DIY home improvement projects and gardening.
- Media of choice are provided by satellite service, radio, and television, also with an emphasis on country and home and garden.
- *Green Acres* residents pursue physical fitness vigorously, from working out on home exercise equipment to playing a variety of sports.
- Residents are active in their communities and a variety of social organizations, from charitable to veterans' clubs.

### HOUSING

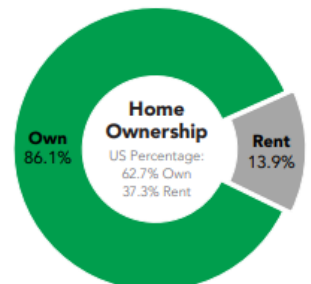
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**Typical Housing:**  
Single Family

**Median Value:**  
\$235,500

US Median: \$207,300





LifeMode Group: Senior Styles

## Retirement Communities

9E

**Households:** 1,501,100

**Average Household Size:** 1.88

**Median Age:** 53.9

**Median Household Income:** \$40,800

### WHO ARE WE?

Retirement Communities neighborhoods are evenly distributed across the country. They combine single-family homes and independent living with apartments, assisted living, and continuous care nursing facilities. Over half of the housing units are in multiunit structures, and the majority of residents have a lease. This group enjoys watching cable TV and stays up-to-date with newspapers and magazines. Residents take pride in fiscal responsibility and keep a close eye on their finances. Although income and net worth are below national averages, residents enjoy going to the movies, fishing, and taking vacations. While some residents enjoy cooking, many would rather dine out.

### OUR NEIGHBORHOOD

- Much of the housing was built in the 1970s and 1980s—a mix of single-family homes and large multiunit structures that function at various levels of senior care.
- Small household size; many residents have outlived their partners and live alone.
- Over half of the homes are renter occupied.
- Average rent is slightly below the US average.
- Nearly one in five households has no vehicle.

### SOCIOECONOMIC TRAITS

- Brand loyal, this segment will spend a little more for their favorite brands, but most likely they will have a coupon.
- Frugal, they pay close attention to finances.
- They prefer reading magazines over interacting with computers.
- They are health conscious and prefer name brand drugs.

### MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Enjoy hard-cover books, book clubs, crossword puzzles, and Sudoku.
- Contribute to political organizations and other groups.
- Entertainment preferences: playing cards and reading books.
- Prefer watching cable TV, including premium channels like HBO and Cinemax.
- Like to travel—including visits to foreign countries.
- Shop at diverse, large retail chains like Sears, Family Dollar, Target, and Walmart for convenience.

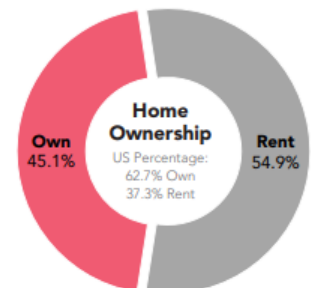
### HOUSING

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**Typical Housing:**  
Multi-Units; Single Family

**Average Rent:**  
\$1,013  
US Average: \$1,038







LifeMode Group: Cozy Country Living

## The Great Outdoors

6C

Households: 1,908,600

Average Household Size: 2.44

Median Age: 47.4

Median Household Income: \$56,400

### WHO ARE WE?

These neighborhoods are found in pastoral settings throughout the United States. Consumers are educated empty nesters living an active but modest lifestyle. Their focus is land. They are more likely to invest in real estate or a vacation home than stocks. They are active gardeners and partial to homegrown and home-cooked meals. Although retirement beckons, most of these residents still work, with incomes slightly above the US level.



### OUR NEIGHBORHOOD

- Over 55% of households are married-couple families; 36% are couples with no children living at home.
- Average household size is slightly smaller at 2.44.
- Typical of areas with rustic appeal, the housing inventory features single-family homes (77%) and mobile homes (15%); a significant inventory of seasonal housing is available (Index 397).
- Residents live in small towns and rural communities throughout the West, South, and Northeast regions of the country.
- More than half of all homes were constructed between 1970 and 2000.
- Most households have one or two vehicles; average travel time to work is slightly higher (28 minutes) despite a disproportionate number that work from home (Index 149).

### SOCIOECONOMIC TRAITS

- 60% have attended college or hold a degree.
- Labor force participation is low at 60%.
- Typical of neighborhoods with older residents, income from retirement and Social Security is common, but residents also derive income from self-employment and investments.
- Residents are very do-it-yourself oriented and cost conscious.
- Many service their own autos, work on home improvement and remodeling projects, and maintain their own yards.
- They prefer domestic travel to trips abroad.

Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.

### MARKET PROFILE

(Consumer preferences are estimated from data by MRI-Simmons.)

- Satellite dishes and riding lawn mowers are familiar sights in these rural settings, along with multiple vehicles; four-wheel drive trucks are popular, too.
- Residents are members of AARP and veterans' clubs and support various civic causes.
- Technology is not central in their lives: light use of Internet connectivity for shopping to entertainment.
- Most households have pets—dogs or cats.
- Television channels such as CMT, History, and Fox News are popular.
- They enjoy outdoor activities such as hiking, hunting, fishing, and boating.

### HOUSING

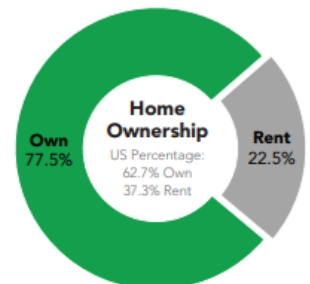
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**Typical Housing:**  
Single Family

**Median Value:**  
\$239,500

US Median: \$207,300





Source: ESRI & Envision Tomorrow

### TAKEAWAY

The preferences in mix of housing types will change significantly between 2019 and 2040. The preference for Single family housing on small lots and Townhouses will grow, while preference for mobile homes and single-family homes on large lots will decrease, with no preference for mobile homes in the future. The preference for multifamily housing will stay relatively the same. While the housing preferences will change there are still projected increased in all housing types over this period