



# the state of the downtown 2013

LIVE | WORK | SHOP | PLAY | MOVE | BEYOND | GREEN



# 2013 State of the Downtown Report



Downtown Madison, Inc. (DMI) is proud to present its third annual *State of the Downtown*, a data driven report that provides timely, objective and accurate data about downtown Madison. And since this is the third year, the data is beginning to show us some trends. This year we also added the Capitol East District to our footprint. With the attention and investment that is taking place in this burgeoning area, we thought it was time to expand.

We are all aware of the changing/shifting demographics taking place in cities around the country, and Madison is no exception. There is a young, smart, confident, self-expressive, educated and open-to-change population who want to live their lives differently than their parents or grandparents did. They want an urban lifestyle that connects them with opportunities to interact daily with others of their generation. They want a denser environment that allows them to walk, bike or use public transportation to get around. Basically, they want access to more cool places to hang out and they want to get there quicker!

DMI has worked (along with its partners) to respond to this group and we found that creating a vibrant center city with continual activity, entertainment/retail options is drawing all generations—including visitors. We know that our work is never finished because lifestyles and uses/users continue to change. Our vision for a healthy downtown Madison is a place that attracts people from far and wide—a place that is created for people to live, work, play, shop, worship and move around—all in a healthy, clean environment.

We thank our nearly 500 members and the hundreds of people they represent—we exist because of and for you—our customers. We thank you for supporting us financially and for supporting us by sharing your expertise through our six active committees. We also want to thank the many people who assisted us with this project including many from the City of Madison staff—you are amazing to work with and we appreciate your assistance.

Susan Schmitz  
DMI President



When we looked into 2013, we had reason to be optimistic. With three quarters of the year behind us, that optimism was well founded and we have every reason to expect great opportunities in 2014.

The Constellation is open, there is now a gigantic hole carved out of the 400 block of W. Johnson and Dayton streets. There are another dozen downtown projects either completed or under construction, including the Hovde plan for Johnson Street and the new hotel two blocks to the west. Soon the Mullins parking lot at State, Gilman and Frances will be a memory.

All of this was no accident. It was not luck. It is a combination of committed leadership in the private and the public sectors. Before the development came the partnerships. Those partnerships lead to a new zoning code and a new Downtown Plan. They lead to a new level of trust as we made application and permit systems more fluid and certain.

The job is not done. The way we thank DMI for its robust devotion to our inclusive economic, social and cultural commitments is to ask for more.

Thank you to all of DMI's members and staff.

Mayor Paul R. Soglin  
City of Madison

## ***Downtown Madison***

The central downtown is defined in this report as the area bounded by Lake Mendota, Lake Monona, Blair Street and Park Street. The majority of data compiled in this report focuses on the central downtown area. On a broader scale, downtown Madison is often viewed as the Madison isthmus from Camp Randall Stadium on the west to the Yahara River on the east. This broader definition is reflected in various metrics throughout the report, but the primary focus is the central downtown area. The geographic boundaries of Madison's Central Business Improvement District (BID), as well as the 53703 zip code area, are also used in the report.



Source: Image background courtesy of City of Madison Engineering



The greater downtown Madison area is made up of many neighborhoods, including: Bassett, First Settlement, Greenbush, James Madison Park, Mansion Hill, Marquette, Mifflin West, Monona Bay, State-Langdon, South Campus, Tenney-Lapham and Vilas. Each neighborhood offers a distinct character and a variety of living options that make downtown Madison attractive to thousands of residents of all ages.



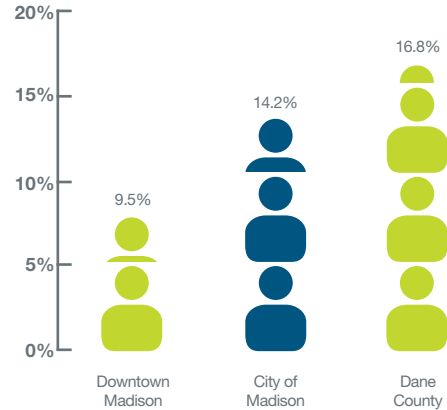
## DEMOGRAPHICS

### Population

| Area             | 2000    | 2010    | 2012    |
|------------------|---------|---------|---------|
| Downtown Madison | 22,168  | 24,009  | 24,275  |
| City of Madison  | 208,054 | 233,209 | 237,654 |
| Dane County      | 426,526 | 488,073 | 498,215 |

Source: U.S. Census Bureau: 2000, 2010 Census and ESRI estimates: 2012\*

### Percentage Change in Population from 2000 to 2012



Source: U.S. Census Bureau: 2000, 2010 Census and ESRI estimates: 2012\*

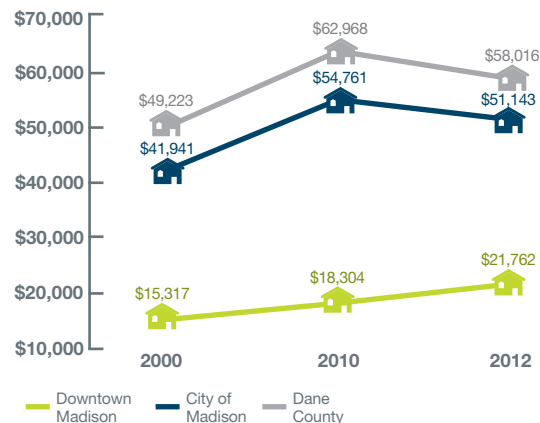
### Population by Age in Downtown Madison

| Age Cohort        | 2000          | 2010          | 2012          |
|-------------------|---------------|---------------|---------------|
| Under 15 years    | 0.8%          | 0.8%          | 0.7%          |
| 15 to 24 years    | 74.1%         | 68.8%         | 68.7%         |
| 25 to 34 years    | 13.3%         | 17.0%         | 17.0%         |
| 35 to 44 years    | 4.8%          | 4.0%          | 3.9%          |
| 45 to 64 years    | 4.2%          | 6.3%          | 6.4%          |
| 65 years and over | 2.8%          | 3.1%          | 3.2%          |
| <b>Total</b>      | <b>22,168</b> | <b>24,009</b> | <b>24,275</b> |

Sources: U.S. Census Bureau: 2000, 2010 Census and ESRI estimates: 2012\*

\*2011 and 2012 estimates from ESRI and 2000/2010 Census figures are not direct comparisons due to differences in the sources and data collection methodologies. Comparisons are for estimates only.

### Median Household Income

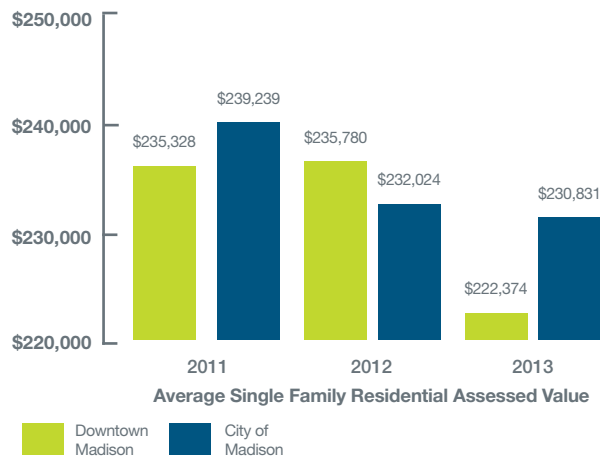


Source: U.S. Census Bureau: 2000 Census and ESRI estimates: 2010, 2012 (Figures are in current year dollars and are not adjusted for inflation. Estimates from ESRI will differ from those reported in the American Community Survey from the U.S. Census Bureau. Income for downtown also includes student population.)

In 2012, over  
**85%**  
 of the downtown Madison  
 population was 15–34 years old

## HOUSING

### Home Values



From 2011 to 2013, average home values in downtown Madison decreased by almost

**\$13,000**

Source: City of Madison Assessor's Office

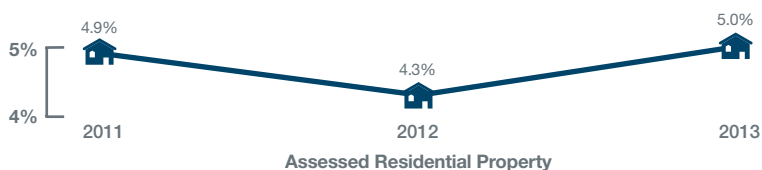
### Residential Property Values

|  | Downtown Madison 2011 | City of Madison 2011 | Downtown Madison 2012 | City of Madison 2012 | Downtown Madison 2013 | City of Madison 2013 |
|--|-----------------------|----------------------|-----------------------|----------------------|-----------------------|----------------------|
| Total Assessed Value of Residential Property | \$676,201,200*        | \$13,705,417,500*    | \$574,365,800         | \$13,317,937,300     | \$656,732,300         | \$13,220,267,500     |

Source: City of Madison Assessor's Office

\*Includes about \$100M that changed classifications from residential to commercial property after 2011.

### Percentage of Residential Property in the City of Madison Located Downtown



Source: City of Madison Assessor's Office

### Types of Units in Downtown Madison

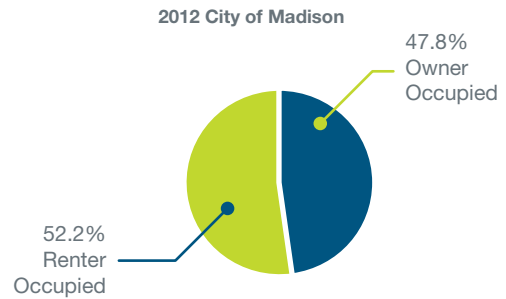
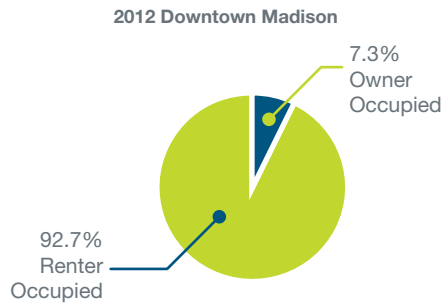
|      | Single Family Properties | Condo Living Units | Apartment Units | Duplexes | Total |
|------|--------------------------|--------------------|-----------------|----------|-------|
| 2011 | 170                      | 1,181              | 7,423           | 251      | 9,025 |
| 2012 | 172                      | 1,215              | 7,472           | 245      | 9,104 |
| 2013 | 155                      | 1,215              | 7,950           | 242      | 9,562 |

Source: City of Madison Assessor's Office

## Occupied Housing Units by Tenure

|                  | Owner Occupied<br>2010 | Renter Occupied<br>2010 | Owner Occupied<br>2011 | Renter Occupied<br>2011 |
|------------------|------------------------|-------------------------|------------------------|-------------------------|
| Downtown Madison | 7.6%                   | 92.4%                   | 7.8%                   | 92.2%                   |
| City of Madison  | 49.3%                  | 50.7%                   | 48.9%                  | 51.1%                   |

Source: U.S. Census Bureau: 2010 Census and ESRI estimates: 2011, 2012



Source: U.S. Census Bureau: 2010 Census and ESRI estimates: 2011, 2012

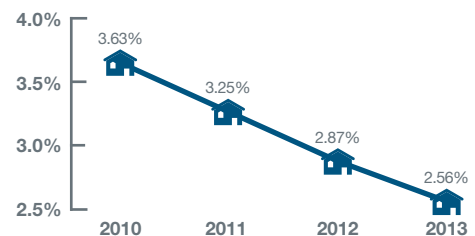
In 2013, multi-family rental vacancy rates in downtown Madison fell to **2.56%**

## Downtown Madison Multi-Family Rental Vacancy Rates

|                    | 2010   | 2011   | 2012   | 2013   |
|--------------------|--------|--------|--------|--------|
| Total Rental Units | 10,728 | 10,998 | 11,039 | 11,361 |
| Total Vacant Units | 390    | 358    | 317    | 291    |

Source: Madison Gas & Electric, [www.mge.com](http://www.mge.com),  
Q2 figures for 53703 zip code area

## Percentage of Vacant Rental Units in Downtown



Source: Madison Gas & Electric, [www.mge.com](http://www.mge.com),  
Q2 figures for 53703 zip code area

## CRIME AND SAFETY

### Top Criminal Offenses in Downtown Madison

| Offense                      | 2010         | 2011         | 2012         | % Change from 2010 to 2012 |
|------------------------------|--------------|--------------|--------------|----------------------------|
| Trespass of Real Property    | 222          | 269          | 251          | 13.1%                      |
| Battery Simple Assault       | 225          | 183          | 175          | -22.2%                     |
| Theft from Vehicle           | 245          | 142          | 166          | -32.2%                     |
| Theft from Building          | 252          | 338          | 308          | 22.2%                      |
| Burglary                     | 263          | 215          | 334          | 27.0%                      |
| All Other Larceny            | 269          | 261          | 324          | 20.4%                      |
| Drug/Narcotic Violations     | 290          | 259          | 310          | 6.9%                       |
| Damage/Vandalism of Property | 401          | 374          | 440          | 9.7%                       |
| Disorderly Conduct           | 678          | 624          | 600          | -11.5%                     |
| Liquor Law Violations        | 890          | 735          | 715          | -19.7%                     |
| <b>Total</b>                 | <b>3,735</b> | <b>3,400</b> | <b>3,623</b> | <b>-3.0%</b>               |

Source: City of Madison Police Department

## HEALTH CARE

### Hospital Inpatient Admissions in Downtown Madison

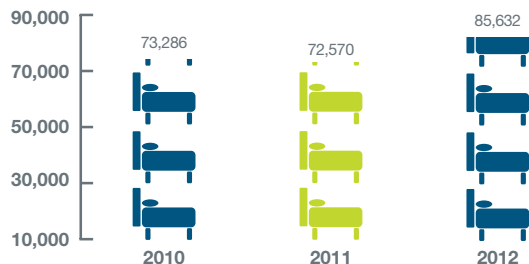
| Hospital                           | 2010   | 2011   | 2012   |
|------------------------------------|--------|--------|--------|
| Meriter Hospital <sup>1</sup>      | 21,461 | 21,457 | 35,060 |
| St. Mary's Hospital <sup>2</sup>   | 25,924 | 24,316 | 23,247 |
| UW Hospital & Clinics <sup>3</sup> | 25,901 | 26,797 | 27,325 |

1. Source: Meriter Hospital

2. Source: St. Mary's Hospital

3. Source: UW Hospital & Clinics (UWHC), fiscal year July 1 – June 30 used

### Total Hospital Inpatient Admissions in Downtown Madison



1. Source: Meriter Hospital

2. Source: St. Mary's Hospital

3. Source: UW Hospital & Clinics (UWHC), fiscal year July 1 – June 30 used

## WORSHIP

### Churches in Downtown Madison

| Church   | Number of Members | Average Weekend/ Sunday Service Attendance |
|--|-------------------|--|
| Bethel Lutheran Church <sup>1</sup>              | 5,108             | 1,089                                      |
| St. Raphael Cathedral Parish <sup>2</sup>        | 3,104             | 1,500                                      |
| St. Paul University Catholic Center <sup>2</sup> | 2,534             | 1,050                                      |
| First United Methodist Church <sup>3</sup>       | 950               | 350  |
| St. John's Lutheran Church <sup>4</sup>          | 829               | 98   |
| Grace Episcopal Church <sup>5</sup>              | 500               | 190  |
| Pres House <sup>6</sup>                          | 450               | 60   |
| <b>Total</b>                                     | <b>13,475</b>     | <b>4,337</b>                               |

1. Source: Bethel Lutheran Church, 2013

2. Source: Madison Catholic Diocese, 2013

3. Source: First United Methodist Church, 2013

4. Source: St. John's Lutheran Church, 2012

5. Source: Grace Episcopal Church, 2013

6. Source: Pres House, 2013 (students served each year)

On average, over

# 4,300 people

attend weekend/Sunday services

at major downtown churches

## EDUCATION

### Higher Education Enrollment in Greater Downtown Madison

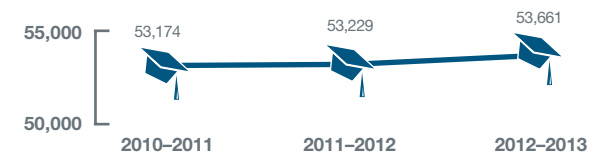
| Institution                                    | 2010–2011 | 2011–2012 | 2012–2013 |
|--|-----------|-----------|-----------|
| Edgewood College <sup>1</sup>                  | 2,611     | 2,635     | 2,759     |
| Madison College – Downtown Campus <sup>2</sup> | 7,968     | 8,153     | 8,082     |
| University of Wisconsin-Madison <sup>3</sup>   | 42,595    | 42,441    | 42,820    |

1. Source: Edgewood College (includes Adult Accelerated, Graduate & Undergraduate Enrollment)

2. Source: Madison College

3. Source: University of Wisconsin-Madison

### Total Higher Education Enrollment in Greater Downtown Madison



1. Source: Edgewood College (includes Adult Accelerated, Graduate & Undergraduate Enrollment)

2. Source: Madison College

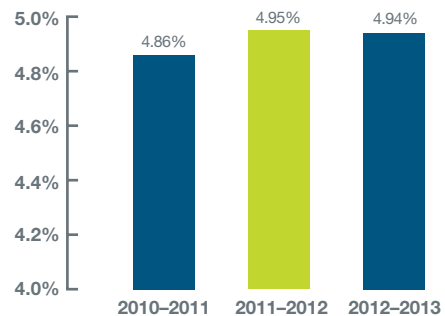
3. Source: University of Wisconsin-Madison

### MMSD Enrollment In or Near Downtown Madison

| School                           | 2010–2011     | 2011–2012     | 2012–2013     |
|----------------------------------|---------------|---------------|---------------|
| Lapham Elementary (K-2 grade)    | 218           | 226           | 238           |
| Marquette Elementary (3-5 grade) | 231           | 249           | 241           |
| Franklin Elementary (K-2 grade)  | 369           | 373           | 368           |
| Randall Elementary (3-5 grade)   | 371           | 383           | 388           |
| <b>Total Downtown Enrollment</b> | <b>1,189</b>  | <b>1,231</b>  | <b>1,235</b>  |
| <b>Total District Enrollment</b> | <b>24,471</b> | <b>24,861</b> | <b>25,011</b> |

Source: Madison Metropolitan School District official third Friday enrollment numbers (figures exclude 4K and PK programs)

### Percentage of MMSD Enrollment in Downtown Schools



Source: Madison Metropolitan School District official third Friday enrollment numbers (figures exclude 4K and PK programs)



Downtown is the employment center of the Madison Region and is home to state and local government, educational institutions and a range of private sector companies. This dynamic mix provides the basis for attracting a well-educated workforce and developing an economically strong urban core.

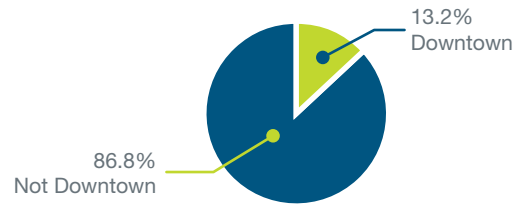


## EMPLOYMENT

### Number of Workers

| Area             | 2009    | 2010    | 2011    |
|------------------|---------|---------|---------|
| Downtown Madison | 24,589  | 25,680  | 26,381  |
| City of Madison  | 186,412 | 178,540 | 199,241 |
| Dane County      | 272,780 | 269,782 | 282,683 |

### 2011 City of Madison Workers Employed in Downtown Madison



Source: U.S. Census Bureau: OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, Q2 2009, Q2 2010, Q2 2011)\*

Source: U.S. Census Bureau: OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, Q2 2009, Q2 2010, Q2 2011)\*

### Worker Earnings

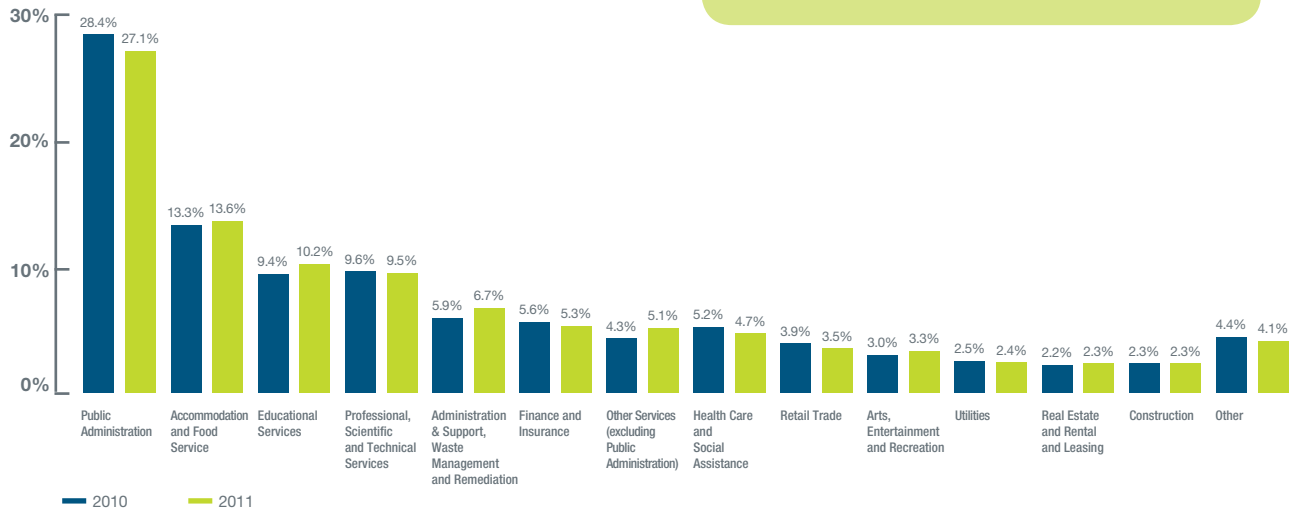
| Earnings                     | 2010  | 2011  |
|------------------------------|-------|-------|
| \$1,250 per month or less    | 20.6% | 20.3% |
| \$1,251 to \$3,333 per month | 31.3% | 28.7% |
| More than \$3,333 per month  | 48.1% | 51%   |

Source: U.S. Census Bureau: OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, Q2 2010, Q2 2011)\*

From 2009 to 2011,  
the number of workers  
in downtown Madison  
increased by

**7.3%**

### Downtown Madison Employment by Industry



Source: U.S. Census Bureau: OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, Q2 2010, Q2 2011)\*

\*Based on primary jobs or the highest paying job for an individual worker for the year. The count of primary jobs is the same as the count of workers. Due to data aggregation methodology, employment at MG&E facilities are reported in the Downtown Study Area rather than the Capitol East District. The employment data used in this application are also derived from Unemployment Insurance Wage Records reported by employers and maintained by each state for the purpose of administering its unemployment insurance system. Coverage under these datasets currently excludes several groups of workers including: Uniformed Military, Self-Employed Workers, and Informally Employed Workers.

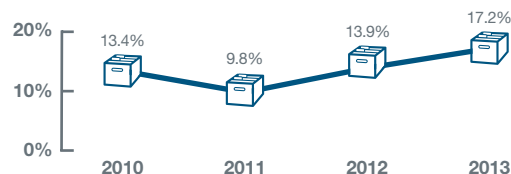
## COMMERCIAL PROPERTY

### Downtown Office Space by Class

| Class        | Number of Buildings | Inventory (SF)   | Total Vacant (SF) | Vacancy Rate |
|--------------|---------------------|------------------|-------------------|--------------|
| Class A      | 14                  | 1,561,209        | 152,065           | 9.7%         |
| Class B      | 32                  | 1,388,756        | 294,717           | 21.2%        |
| Class C      | 20                  | 575,177          | 158,376           | 27.5%        |
| <b>Total</b> | <b>66</b>           | <b>3,525,142</b> | <b>605,158</b>    | <b>17.2%</b> |

Source: Broadwing Advisors, LLC, Xceligent: Q2 2013

### Downtown Vacancy Rates



Source: Broadwing Advisors, LLC, Xceligent: Q3 2010, Q3 2011, Q2 2012, Q2 2013

In 2013, the vacancy rate for downtown Madison office space increased to

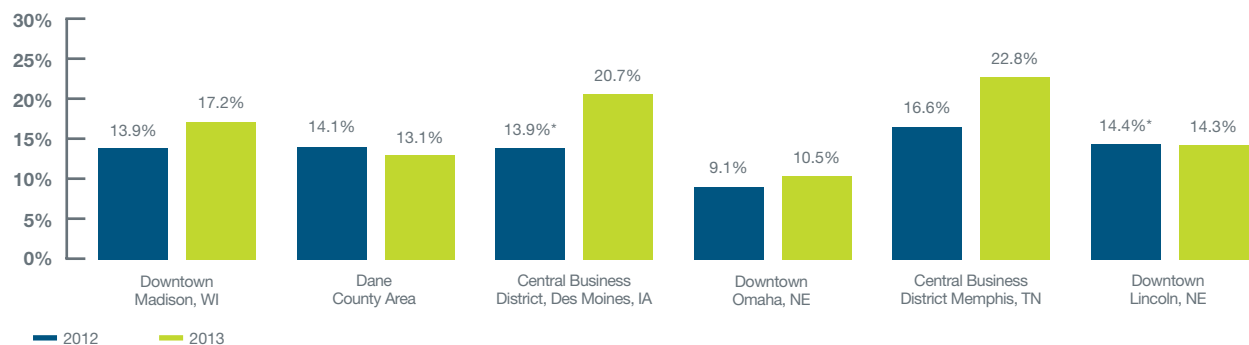
# 17.2%

### Downtown Office Space Comparisons

| Location                                 | Inventory (SF) | Percent Of Total Market Area | Total Vacant (SF) |
|--|----------------|------------------------------|-------------------|
| Madison, WI Downtown                     | 3,525,142      | 23.9%                        | 605,158           |
| Dane County Area                         | 14,761,500     | 100%                         | 1,934,782         |
| Des Moines, IA Central Business District | 4,250,491      | 31.2%                        | 880,483           |
| Omaha, NE Downtown                       | 4,517,078      | 10.5%                        | 474,815           |
| Memphis, TN Central Business District    | 3,555,551      | 18%                          | 811,522           |
| Lincoln, NE Downtown                     | 5,301,797      | N/A                          | 757,662           |

Source: Broadwing Advisors, LLC, Xceligent: Q2 2013

### Downtown Vacancy Rate Comparisons



Source: Broadwing Advisors, LLC, Xceligent: Q2 2012, \*Q3 2012, Q2 2013

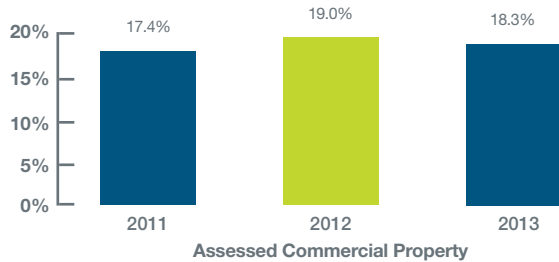
## Commercial Property Values

|   | Downtown Madison 2011 | City of Madison 2011 | Downtown Madison 2012 | City of Madison 2012 | Downtown Madison 2013 | City of Madison 2013 |
|---|-----------------------|----------------------|-----------------------|----------------------|-----------------------|----------------------|
| Total Assessed Value of Commercial Property | \$1,201,351,800*      | \$6,907,361,400*     | \$1,306,532,000       | \$6,890,562,900      | \$1,299,783,300       | \$7,102,452,800      |

Source: City of Madison Assessor's Office

\*Does not include about \$100M that changed classifications from residential to commercial property after 2011.

## Percentage of Commercial Property in the City of Madison Located Downtown



Source: City of Madison Assessor's Office

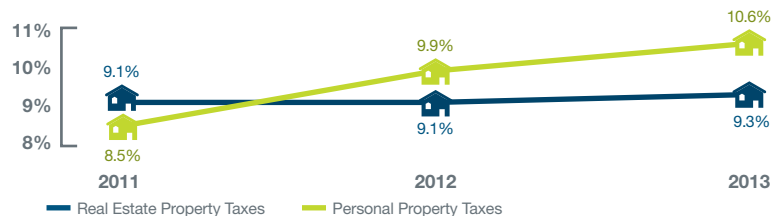
## TAX BASE

### Tax Values

|  | Downtown Madison 2011 | City of Madison 2011 | Downtown Madison 2012 | City of Madison 2012 | Downtown Madison 2013 | City of Madison 2013 |
|--|-----------------------|----------------------|-----------------------|----------------------|-----------------------|----------------------|
| Total Amount of Real Estate Property Taxes Generated | \$41,553,315          | \$457,515,105        | \$42,744,283          | \$469,803,387        | \$44,986,488          | \$484,962,034        |
| Total Amount of Personal Property Taxes Generated    | \$1,446,328           | \$17,008,153         | \$1,442,209           | \$14,606,144         | \$1,516,166           | \$14,303,092         |

Source: City of Madison Assessor's Office

## Percentage of Taxes in the City of Madison Generated from Downtown



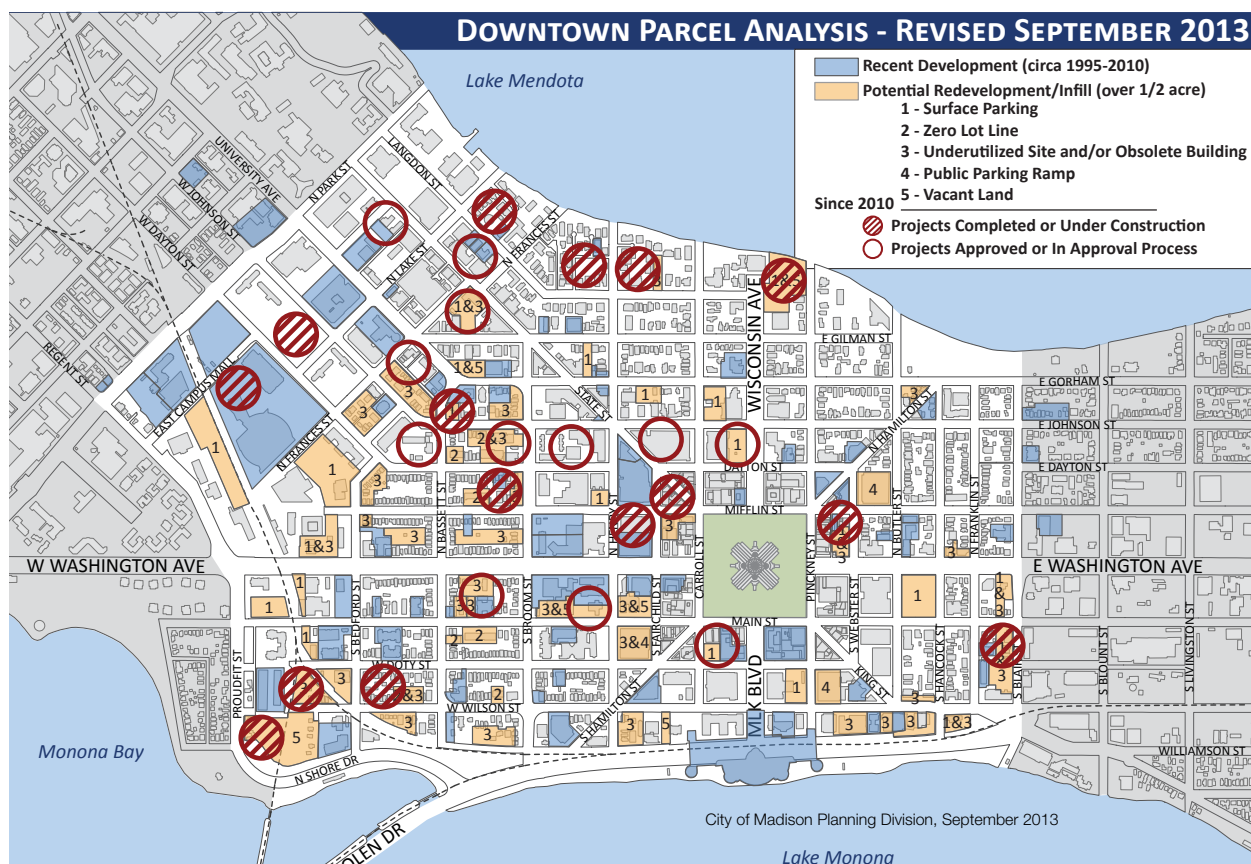
Source: City of Madison Assessor's Office

## Parcel Breakdown

|                               | Downtown Madison 2011 | City of Madison 2011 | Downtown Madison 2012 | City of Madison 2012 | Downtown Madison 2013 | City of Madison 2013 |
|-------------------------------|-----------------------|----------------------|-----------------------|----------------------|-----------------------|----------------------|
| Acreage of Tax-Exempt Parcels | 151                   | 16,999               | 146                   | 15,803               | 162                   | 15,742               |
| Total Acreage of Parcels      | 414                   | 40,609               | 413                   | 40,866               | 424                   | 40,953               |

Source: City of Madison Assessor's Office

## DEVELOPMENT



## Total New Construction

|             | Downtown<br>Madison 2011 | City of<br>Madison 2011 | Downtown<br>Madison 2012 | City of<br>Madison 2012 | Downtown<br>Madison 2013 | City of<br>Madison 2013 |
|-------------|--------------------------|-------------------------|--------------------------|-------------------------|--------------------------|-------------------------|
| Residential | \$2,451,100              | \$90,557,800            | \$1,379,600              | \$98,862,700            | \$694,800                | \$91,001,000            |
| Commercial  | \$26,812,300             | \$90,744,800            | \$17,105,700             | \$63,537,800            | \$22,225,500             | \$132,969,300           |

Source: City of Madison Assessor's Office

There are an estimated **1,700** new residential units in downtown Madison and **500** new units in the Capitol East District scheduled to be completed in the next two years

Source: City of Madison Department of Planning and Community and Economic Development



Downtown Madison offers a range of local and national retail, restaurant and service-related businesses. Madison's Central Business Improvement District (BID) is at the heart of downtown's retail area and draws hundreds of thousands for an urban shopping, dining and entertainment experience. Businesses and organizations in the following counts are primarily street-level retail, restaurant, bar/tavern, service, arts, entertainment and cultural businesses located within the BID. The district encompasses the greater State Street, Capitol Square and King Street areas (see map on page 3).



## MADISON'S CENTRAL BID

### General Business Mix



Source: Madison's Central BID: Gibbs Report 1998 (\*greater State St. area only), BID Business Mix Reports March 2010, March 2011, March 2012 and May 2013

Since 1998, the percentage of Food & Drink businesses in Madison's Central BID have stayed consistent at around **39%** while Retail has decreased to **26%** and Service has increased to **35%**

### Types of Food & Drink Businesses vs. Total Businesses

| Type                    | 1998        | 2010       | 2011       | 2012       | 2013       |
|-------------------------|-------------|------------|------------|------------|------------|
| Restaurants             | 47 (22%)    | 85 (23.5%) | 88 (24%)   | 84 (23.5%) | 86 (24%)   |
| Bars, Taverns, Pubs^    | 20 (9%)     | 31 (8.5%)  | 31 (8.5%)  | 30 (8.5%)  | 28 (8%)    |
| Coffee Shops & Cafes    | 8 (4%)      | 12 (3.5%)  | 11 (3%)    | 13 (3.5%)  | 14 (4%)    |
| <b>Total Businesses</b> | <b>212*</b> | <b>360</b> | <b>365</b> | <b>356</b> | <b>355</b> |

Source: Madison's Central BID: Gibbs Report 1998 (\*greater State St. area only), BID Business Mix Reports March 2010, March 2011, March 2012 and May 2013

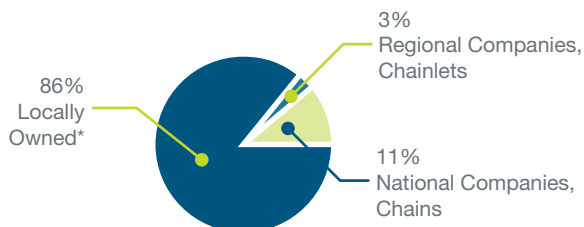
^Self-defined (not per liquor license classification)

## Ownership Mix (Businesses Only)

|                               | 2010 | 2011 | 2012  |
|-------------------------------|------|------|-------|
| Locally Owned*                | 83%  | 86%  | 84.5% |
| Regional Companies, Chainlets | 4%   | 4%   | 3.5%  |
| National Companies, Chains    | 13%  | 10%  | 12%   |

Source: Madison's Central BID: BID Business Mix Reports  
March 2010, March 2011, March 2012 and May 2013  
\*Includes Wisconsin ownership, locally owned franchises

## 2013 Ownership Mix (Businesses Only)



Source: Madison's Central BID: BID Business Mix Reports  
March 2010, March 2011, March 2012 and May 2013  
\*Includes Wisconsin ownership, locally owned franchises

In 2013,

# 86%

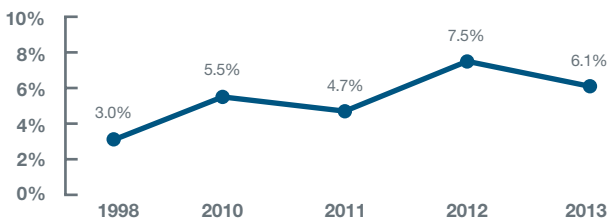
of businesses in  
Madison's Central BID  
were locally owned

## Number of Businesses vs. Spaces

|                                    | 2010 | 2011 | 2012 | 2013 |
|------------------------------------|------|------|------|------|
| Total Businesses/<br>Organizations | 360  | 365  | 356  | 355  |
| Approximate Total<br>Spaces*       | 381  | 383  | 385  | 378  |

Source: Madison's Central BID: Gibbs Report 1998, BID Business Mix  
Reports March 2010, March 2011, March 2012 and May 2013  
\*Excludes properties held for development

## Vacancy Rate Percentage\*



Source: Madison's Central BID: Gibbs Report 1998, BID Business Mix  
Reports March 2010, March 2011, March 2012 and May 2013  
\*Excludes properties held for development

## Downtown Visitors

### Customers Helped By Madison Central Bid's Downtown Information Ambassador Program

|              |                |
|--------------|----------------|
| 2010         | 36,638         |
| 2011         | 45,258         |
| 2012         | 42,591         |
| <b>Total</b> | <b>124,487</b> |

Source: Madison's Central BID



Downtown Madison has long been an attraction for visitors and residents throughout the region and the world. A vibrant entertainment district and amenities like the lakes and state-of-the-art conference facilities help to support the local economy and contribute to the high quality of life for residents and visitors of all ages.



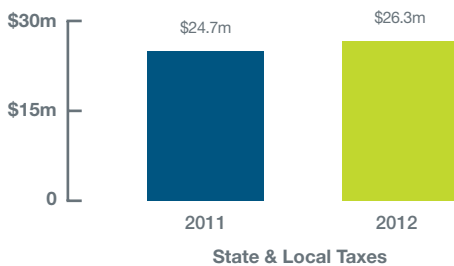
## TOURISM

### Economic Impact of Tourism in Downtown Madison

|  | 2011          | 2012          |
|--|---------------|---------------|
| Direct Visitor Spending Generated By Tourism | \$199,000,000 | \$217,000,000 |
| Jobs Directly Engaged In Tourism Industry    | 2,588         | 3,825         |

Source: *The Economic Impact of Tourism in Madison, WI, May 2012 Tourism Economics, May 2013 Tourism Economics*  
(Downtown Madison defined as 53703 zip code)

### Tourism Generated Taxes (direct impact) for Downtown Madison



Source: *The Economic Impact of Tourism in Madison, WI, May 2012 Tourism Economics, May 2013 Tourism Economics*  
(Downtown Madison defined as 53703 zip code)

From 2011 to 2012, the number of jobs directly engaged in the tourism industry increased by

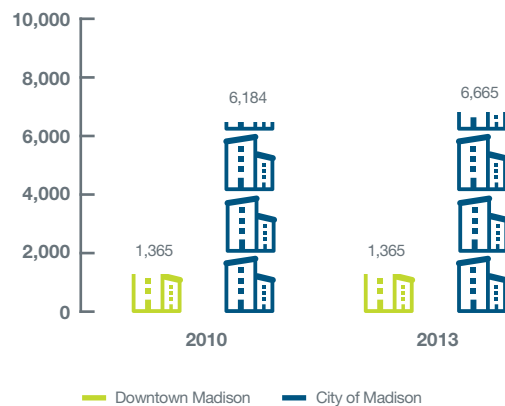
# 48%

### Direct Visitor Spending Breakdown for Downtown Madison

| Expenditures                   | 2011                 | 2012                   |
|--------------------------------|----------------------|------------------------|
| Food and Beverage Expenditures | \$58 million         | \$63.2 million         |
| Lodging Expenditures           | \$52 million         | \$57.7 million         |
| Retail Expenditures            | \$51 million         | \$52.8 million         |
| Transportation Expenditures    | \$23 million         | \$26.9 million         |
| Recreation Expenditures        | \$15 million         | \$16.8 million         |
| <b>Total</b>                   | <b>\$199 million</b> | <b>\$217.4 million</b> |

Source: *The Economic Impact of Tourism in Madison, WI, May 2012 Tourism Economics, May 2013 Tourism Economics*  
(Downtown Madison defined as 53703 zip code)

### Number of Hotel Rooms



Source: *Greater Madison Convention & Visitors Bureau, Smith Travel Research*  
(Downtown Madison defined as 53703 zip code)

## Visits to Destinations in the Greater Downtown Area

| Destination   | 2010             | 2011             | 2012              |
|---|------------------|------------------|-------------------|
| Overture Center for the Arts <sup>1</sup>                 | 505,731          | 515,973          | 598,000           |
| Monona Terrace Community & Convention Center <sup>2</sup> | 403,653          | 426,071          | 429,434           |
| UW-Madison Athletic Facilities <sup>3</sup>               | 1,831,521        | 1,815,307        | 1,704,791         |
| Madison Central Library <sup>4</sup>                      | 453,436          | 397,033          | 144,493           |
| Madison Children's Museum <sup>5</sup>                    | 128,190          | 238,898          | 210,547           |
| Madison Museum of Contemporary Art <sup>6</sup>           | 183,921          | 168,659          | 207,321           |
| Memorial Union <sup>7</sup>                               | 2,429,465        | 2,612,175        | 2,018,290         |
| Union South <sup>7</sup>                                  | 363,660          | 1,454,910        | 2,987,330         |
| Wisconsin Historical Museum <sup>8</sup>                  | 78,291           | 77,017           | 72,311            |
| Wisconsin Institutes for Discovery <sup>9</sup>           | N/A              | N/A              | 83,500            |
| Wisconsin State Capitol Tours <sup>10</sup>               | 95,689           | 82,314           | 94,550            |
| Wisconsin Veterans Museum <sup>11</sup>                   | 147,346          | 81,362           | 93,690            |
| Henry Vilas Zoo <sup>12</sup>                             | 725,823          | 533,073          | 732,768           |
| Alliant Energy Center Facilities <sup>13</sup>            | 831,005          | 775,036          | 825,807           |
| <b>Total</b>  | <b>8,177,731</b> | <b>9,177,828</b> | <b>10,202,832</b> |

1. Source: Overture Center for the Arts (includes all community performances, gallery visits, private events, ticketed performances and non-ticketed events using July 1–June 30 calendar year; 2012 is an estimate only)

2. Source: Monona Terrace Community & Convention Center Annual Report 2011 & 2012 (includes guests served at all catered functions)

3. Source: UW Athletic Department (includes all athletic events, non-athletic events and tours at all UW Athletic facilities using July 1–June 30 calendar year)

4. Source: Madison Public Library (Central Library closed in Nov. 2011 and opened at a temporary location in Dec. and for all of 2012)

5. Source: Madison Children's Museum

6. Source: Madison Museum of Contemporary Art

7. Source: Wisconsin Union (academic calendar year used)

8. Source: Wisconsin Historical Museum

9. Source: Wisconsin Institutes for Discovery (does not include attendance of event bookings in rental space)

10. Source: Wisconsin State Capitol Tours and Information

11. Source: Wisconsin Veterans Museum

12. Source: Henry Vilas Zoo

13. Source: Alliant Energy Center (attendance figures compiled through ticket sales, promoter reports, catering counts and registration numbers)

From 2010 to 2012, there were an estimated

# 27.6 million

visits to major destinations in the greater downtown area

## CONVENTIONS

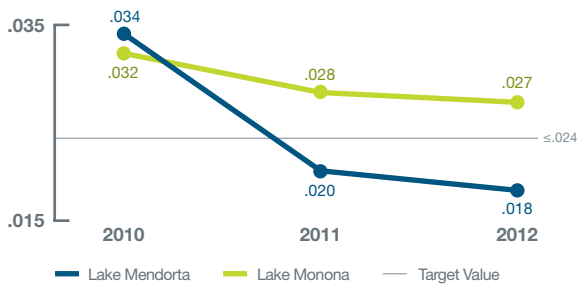
### Monona Terrace Community & Convention Center, Conferences and Conventions

|                       | 2009         | 2010         | 2011         | 2012         | Total         |
|-----------------------|--------------|--------------|--------------|--------------|---------------|
| Total Number          | 68           | 62           | 62           | 65           | 257           |
| Average Attendance    | 475          | 660          | 659          | 716          | 628           |
| Economic Impact       | \$33,314,662 | \$37,630,656 | \$46,515,496 | \$52,536,848 | \$169,997,662 |
| Room Nights Generated | N/A          | N/A          | 42,684       | 46,492       | 89,176        |

Source: Monona Terrace Community & Convention Center Annual Report 2011 & 2012

## LAKES

### Median Total Phosphorus (mg/L) in Downtown Madison Lakes\*



Source: Clean Lakes Alliance, State of the Yahara Lakes 2012 report

\*Phosphorus is known to promote the growth of noxious blue-green algae blooms that can sometimes produce toxins of human health concern. Phosphorus levels in each lake vary annually depending on the amount of rainfall/runoff and summer temperatures. The target median phosphorus level for Lake Mendota and Lake Monona is 0.024 milligrams per liter (mg/L), which is the boundary between moderately fertile (mesotrophic) and fertile (eutrophic) conditions.

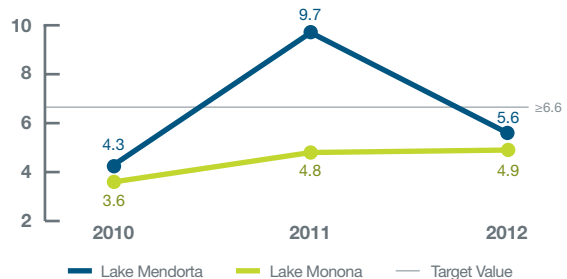
From 2010 to 2012,  
the median total  
phosphorus  
in Lake Mendota  
decreased by

**47%**

In 2012, the water clarity  
in both Lake Mendota  
and Lake Monona failed  
to reach the target level of

**6.6 feet**

### Water Clarity/Secchi Visibility Depth (ft) of Downtown Madison Lakes\*



Source: Clean Lakes Alliance, State of the Yahara Lakes 2012 report

\*Secchi disc transparency is achieved by lowering a Secchi disk into the water and recording the depth at which the disk remains visible. In relatively deep lakes like the Yahara River chain of lakes, ranges for Secchi depth are: poor clarity (less than 3 ft), fair clarity (3–6 ft), good clarity (6–10 ft) and excellent clarity (greater than 10 ft). The target for the deeper Yahara lakes is greater than or equal to 6.6 feet visibility depth.

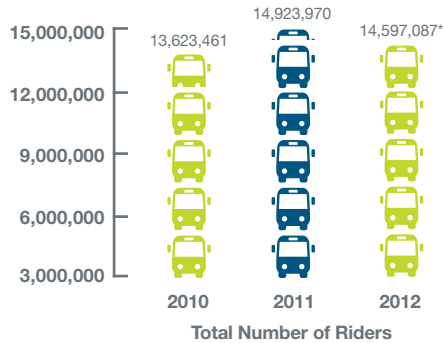


Downtown Madison is the center of the Madison Region's transportation network consisting of pedestrian, bicycle, public bus, automobile and air transit modes. Transportation and access are what make living, working, shopping and playing in downtown Madison possible for people from the region and beyond.



## PUBLIC TRANSIT

### Madison Metro Bus System



Source: Madison Metro

\*Decrease from 2011 due to UW cutting 10% service. All other routes up 2%.

From 2010 to 2012, Madison Metro ridership increased by

**7.2%**

## BICYCLE

### Madison B-Cycle (Bicycle Sharing Program)

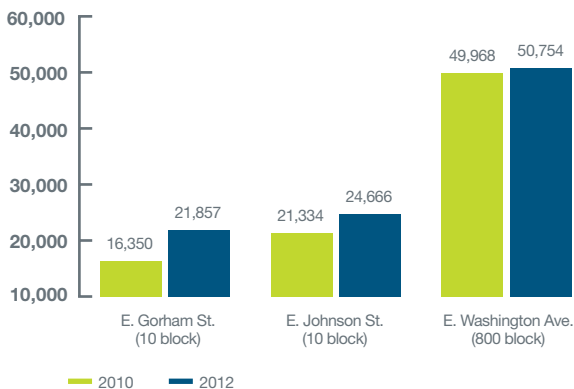
|                | 2011   | 2012   | 2013*  |
|----------------|--------|--------|--------|
| Total Trips    | 18,501 | 63,325 | 43,359 |
| Miles Biked    | 39,618 | 94,402 | 41,654 |
| Casual Users   | 5,965  | 11,710 | 13,446 |
| Annual Members | 475    | 2,150  | 2,912  |

Source: Madison B-cycle 2013 August Report.

\*2013 data is from Jan. 1– Aug. 3

## AUTOMOBILE

### Downtown Madison Traffic Counts

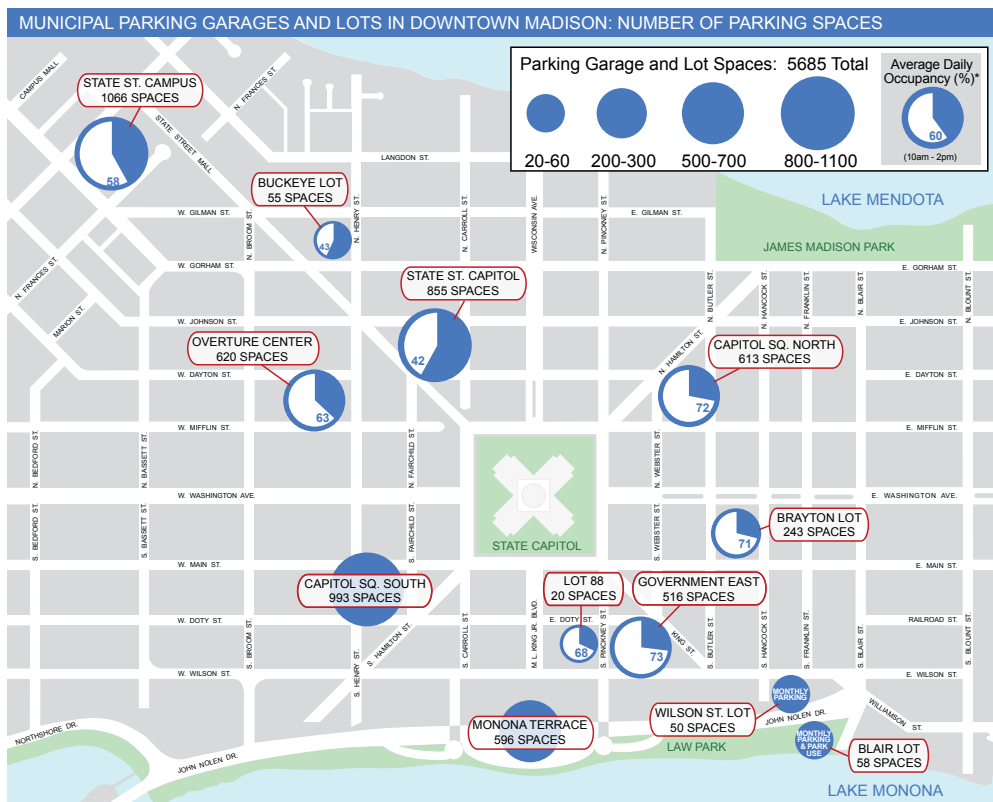


Source: City of Madison Traffic Engineering, 2013

### Community Car (Car Sharing Program)

|                              | 2012  | 2013  |
|------------------------------|-------|-------|
| Total # of Drivers           | 1,400 | 1,260 |
| Total # of Vehicle Locations | 14    | 13    |
| Total # of Vehicles          | 15    | 13    |

Source: Community Car (data from September 2012 and August 2013)



Downtown Madison parking-meter revenue amounted to 93% of parking-meter revenue collected for the entire city in 2012.

Source: City of Madison Parking Utility, 2013.

\*Capitol Square South and Monona Terrace Garages are not operated by the City of Madison Parking Utility

\*Occupancy rates for Capitol Square South & Monona Terrace garages. Wilson St. & Blair St. Lots not available.

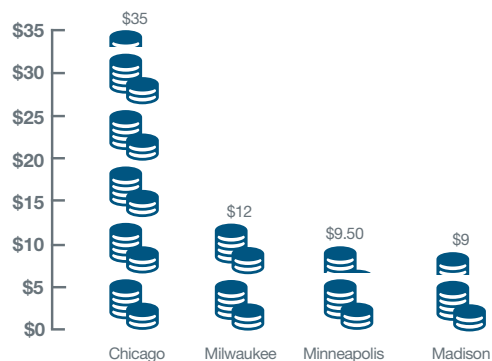
## Occupancy Rates for Downtown Garages and Lots

| Garage/Lot           | 2012 | 2013 |
|----------------------|------|------|
| State Street Campus  | 56%  | 58%  |
| Buckeye Lot          | 45%  | 55%  |
| Overture Center      | 70%  | 63%  |
| State Street Capitol | 45%  | 42%  |
| Capitol Square North | 79%  | 72%  |
| Brayton Lot          | 83%  | 71%  |
| Government East      | 76%  | 73%  |
| Lot 88               | N/A  | 68%  |

Source: City of Madison Parking Utility

(Occupancy rates measured from 10 a.m.–2 p.m.)

## Downtown Median Daily Parking Rate



Sources: Colliers International, City of Milwaukee, City of Minneapolis and City of Madison. (Rates are from covered parking facilities owned by each city. There are 4 in Milwaukee, 17 in Minneapolis and 5 in Madison. Chicago's garages are all leased to commercial enterprises.)

## AIR

### Dane County Regional Airport

|                               | 2010      | 2011      | 2012      |
|-------------------------------|-----------|-----------|-----------|
| Total # of Airport Passengers | 1,514,927 | 1,519,747 | 1,615,841 |

Source: Dane County Regional Airport



The downtown Madison footprint is often viewed as encompassing adjacent areas to the central district. These areas have their own distinct character and attributes, but their growth and development are significant to the overall health and vitality of Madison's urban core.



## CAPITOL EAST DISTRICT

The Capitol East District is an emerging area of the Madison isthmus that is directly east of the central downtown. The district goes from Lake Mendota to Lake Monona, from Blair Street to just past the Yahara River (see map on page 3).

### Demographics

| Year | Population <sup>1</sup> | Median Household Income <sup>2</sup> |
|------|-------------------------|--------------------------------------|
| 2000 | 7,930                   | \$33,459                             |
| 2010 | 7,962                   | \$43,041                             |
| 2012 | 8,175                   | \$37,858                             |

1. Source: U.S. Census Bureau: 2000, 2010 Census and ESRI estimates: 2011, 2012\*

2. Source: U.S. Census Bureau: 2000 Census and ESRI estimates: 2010, 2011, 2012 (Figures are in current year dollars and are not adjusted for inflation)\*

From 2000 to 2012, the population of the Capitol East District increased by

# 3.1%

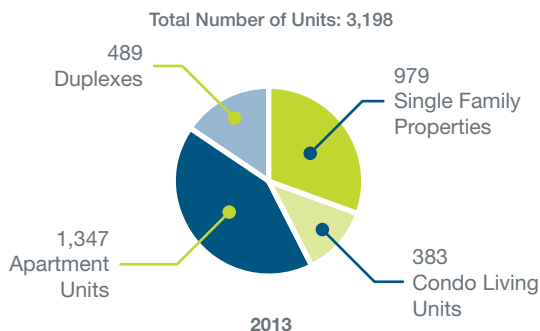
### Population by Age

| Age Cohort        | 2000         | 2010         | 2012         |
|-------------------|--------------|--------------|--------------|
| Under 15 years    | 9.3%         | 8.6%         | 8.4%         |
| 15 to 24 years    | 22.9%        | 19.4%        | 19.9%        |
| 25 to 34 years    | 33%          | 36.8%        | 37%          |
| 35 to 44 years    | 15.8%        | 11.8%        | 11.3%        |
| 45 to 64 years    | 15.3%        | 19.6%        | 19.4%        |
| 65 years and over | 3.8%         | 3.8%         | 3.9%         |
| <b>Total</b>      | <b>7,930</b> | <b>7,962</b> | <b>8,175</b> |

Sources: U.S. Census Bureau: 2000, 2010 Census and ESRI estimates: 2012\*

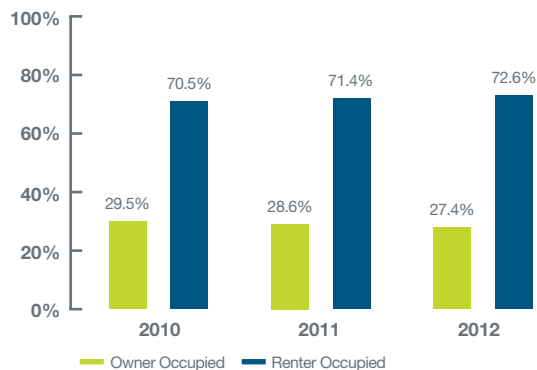
\*Estimates from ESRI and Census figures are not direct comparisons due to differences in the sources and data collection methodologies. Comparisons are for estimates only.

### Types of Units



Source: City of Madison Assessor's Office

### Occupied Housing Units by Tenure



Source: U.S. Census Bureau: 2010 Census and ESRI estimates: 2011, 2012


### CAPITOL GATEWAY CORRIDOR PARCEL ANALYSIS - SEPTEMBER 2013

Since 2010

- Projects Completed or Under Construction
- Projects Approved or In Approval Process

The map displays a grid of parcels along the Capitol Gateway Corridor. Streets shown include E GORHAM ST, E JOHNSON ST, E DAYTON ST, S MIFFLIN ST, E WASHINGTON AVE, S BLAIR ST, S LIVINGSTON ST, S PATTERSON ST, S INGERSOLL ST, S CALDWELL ST, WILLIAMSON ST, JENIFER ST, and S AGHT ST. A large body of water is visible on the right side of the map. Several parcels are marked with red circles containing diagonal lines, indicating projects completed or under construction. Other parcels are marked with red circles, indicating projects approved or in approval process.

Prepared by City of Madison Planning Division - September 2013

 Projects Completed or Under Construction  
 Projects Approved or In Approval Process

Prepared by City of Madison Planning Division - September 2013

## Total New Construction

## Workers

Source: City of Madison Assessor's Office

Source: U.S. Census Bureau: OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, Q2 2009, Q2 2010, Q2 2011)\*

| Sector   | 2010 (%) | 2011 (%) |
|--|----------|----------|
| Transportation and Warehousing                   | 24.4%    | 22%      |
| Retail Trade                                     | 13%      | 16.8%    |
| Manufacturing                                    | 12.9%    | 12.7%    |
| Accommodation and Food Services                  | 10.9%    | 10.6%    |
| Other Services (excluding Public Administration) | 8.1%     | 10.2%    |
| Health Care and Social Assistance                | 11%      | 9.2%     |
| Professional, Scientific and Technical Services  | 7.4%     | 7.7%     |

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, Q2 2010, Q2 2011)

\*See note under *Employment by Industry* on page 11.



Downtown Madison is a geographically compact and inherently sustainable area. Dense dwelling units and living amenities, locally sourced food and sustainable development all contribute to creating a “green” downtown that can be enjoyed for generations. The majority of these metrics focus on the greater downtown Madison area unless noted otherwise.



## LEED Certified and Registered Projects

|                  | 2012 | 2013 |
|------------------|------|------|
| Downtown Madison | 26   | 30   |
| City of Madison  | 72   | 85   |

Source: U.S. Green Building Council, [www.usgbc.org](http://www.usgbc.org),  
Public LEED Project Directory, 2012 and July 2013

## Travel Green Wisconsin Certified Businesses

|                  | 2013 |
|------------------|------|
| Downtown Madison | 9    |
| City of Madison  | 22   |

Source: Wisconsin Department of Tourism, [www.travelwisconsin.com](http://www.travelwisconsin.com),  
Travel Green Wisconsin Certified Business Directory, August 2013  
(Downtown Madison defined as 53703 zip code)

# 15

## Number of Green Roofs in Downtown Madison

Source: Greening Madison, [www.greeningmadison.com](http://www.greeningmadison.com), Green Roof Map, August 2013



## Number of Rain Gardens in Downtown Madison

Source: City of Madison, [www.cityofmadison.com](http://www.cityofmadison.com), Rain Garden Map, August 2013

# 35

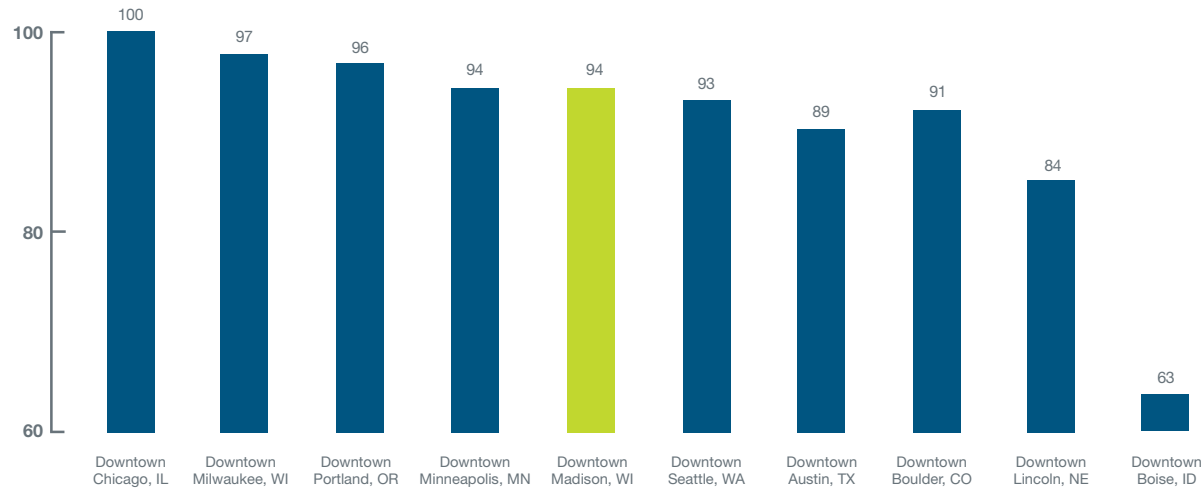
# 18

## Number of Solar Installations in Downtown Madison

Sources: City of Madison, [www.cityofmadison.com](http://www.cityofmadison.com), MadiSUN Solar  
Map and Madison Gas & Electric solar projects: Dane County Henry Vilas Zoo,  
Madison Children's Museum, Solar parking canopy City of Madison Municipal  
Building, and Wisconsin State Capitol, as listed on [www.mge.com](http://www.mge.com), August 2013



# Walkability Ranking in 2013



Source: Walk Score®, [www.walkscore.com](http://www.walkscore.com), August 2013 (Walk Score is a walkability index that assigns a numerical score from 1-100 (100 high, 1 low) to any address, neighborhood or city on its proximity to local amenities, restaurants, parks, stores, etc.)



## Number of Community Gardens in Downtown Madison

(Reynolds: 26 community garden plots  
and Bayview: 4 plots)

2

Source: Community Action Coalition for South Central Wisconsin, Inc., [www.cacscw.org](http://www.cacscw.org), Find a Garden map, August 2013

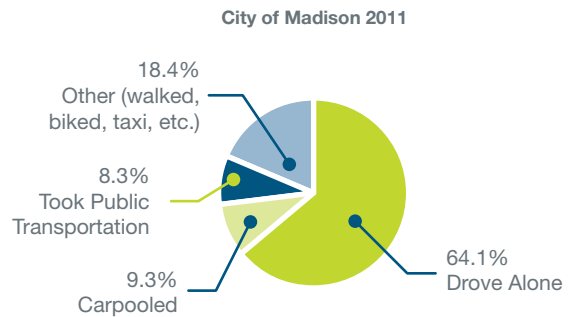
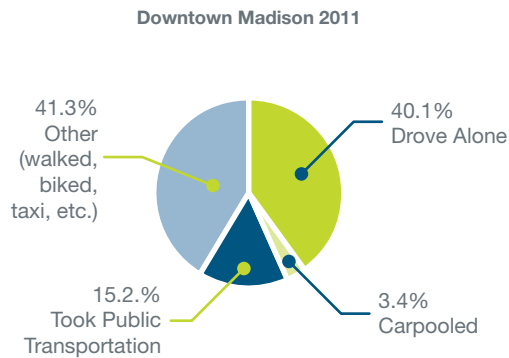
31

## Number of Community-Supported Agriculture Farm Pickup Locations in Downtown Madison



Source: Fair Share CSA Coalition, [www.csacoalition.org](http://www.csacoalition.org), Farm Pickup Location Map, August 2013

## Means of Transportation to Work



Source: American Community Survey 5-year estimates, 2011 (Downtown Madison defined as 53703 zip code tabulation area)

# THANK YOU

A special thanks to the following people for their contributions and assistance with the compilation of the 2013 State of the Downtown report:

- 2013 State of the Downtown Advisory Committee:
  - o Matt Carlson, Michael Best & Friedrich (Chair)
  - o Brad Cantrell, downtown resident
  - o Mary Carbine, Madison's Central Business Improvement District
  - o Diane Morgenthaler, Greater Madison Convention & Visitors Bureau
  - o Stacy Nemeth, Fiore Companies
- Mayor Paul Soglin, City of Madison
- Bill Fruhling, City of Madison Department of Planning & Community & Economic Development
- Mark Hanson, City of Madison Assessor's Office
- David Dryer, City of Madison Traffic Engineering
- Michael Brenneis, City of Madison Parking Utility
- Chuck Kamp, Madison Metro
- Daniel Haueter, City of Madison Police Department
- Matt Kures, UW-Extension
- Craig Stanley, Broadwing Advisors, LLC
- Jela Trask, Michele Essma, Ike Roell, DeeAnna Tuma, Megan Gaza and Erin Giedd, Nelson Schmidt
- **And all other people and sources who contributed time and data for this report!**



Downtown Madison, Inc. is committed to planning for, sustaining and growing downtown Madison as a thriving regional economic engine that offers a best-in-class quality of life for businesses, residents and visitors.

Downtown Madison, Inc. | 122 W. Washington Ave., Suite 250 Madison, WI 53703 | [www.downtownmadison.org](http://www.downtownmadison.org)

## Thank you to the 2013 State of the Downtown sponsors!

### Major Sponsor:



### Supporting Sponsors:



your community energy company



HOVDE PROPERTIES



### Associate Sponsors:



### Designed By:

