

the state of the downtown 2014

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2014 State of the Downtown Report



Downtown Madison, Inc. (DMI) is proud to present its fourth annual State of the Downtown, a data driven report that provides timely, objective and accurate data about downtown Madison. We now have four years of data and we are seeing trends along with a look into the future.

Madison has always been a good city. We are mentioned in many publications as a good place to live, work, play, retire, etc. But something else is happening—we are on the cusp of being great! Our demographics are shifting. There is a young, smart, confident, self-expressive, educated and open-to-change population who are looking for a quality of life they think they will find in Madison and our downtown. Their values are around happiness, passion, diversity, sharing and discovery. It is these values that need to drive the vision of this community (and downtown Madison) for the next 10-20 years.

We need to be prepared and willing to take some bold steps to become a great city—and a great city is one that is diverse, and urban with a robust public transportation system. That is why we at DMI take our work so seriously. We need to be a downtown that is accessible to everyone from everywhere. We need to have a plethora of options for people to be entertained and engaged in a safe, walkable, livable, fun and beautiful downtown environment. DMI is committed to this vision and to Madison becoming a great city with the best downtown in the country!

We thank our nearly 500 members and the hundreds of people they represent for supporting us financially and for sharing your expertise through our five active committees—we could not do the work that we do without you! We also want to thank the many people who assist us with this project, including many from the City of Madison staff—you are amazing to work with and we appreciate all you do for our city and downtown Madison.

Susan Schmitz
DMI President



In my State of the Downtown message last year I reported, “The Constellation is open, there is now a gigantic hole carved out of the 400 block of W. Johnson and Dayton streets...”. I am happy to report this year that we broke ground on the Galaxie, the gigantic hole on Johnson is now a gigantic building, and construction of the Hub at the corner of State and Frances Street is underway.

In 2014, Madison is leading the state in economic growth, employment increases, and new development, particularly multi-family housing. Moreover, downtown Madison is leading the city and the region.

The explosion in quality housing construction has been followed by interest in high quality office space. The city is working with Urban Land Interests on a significant remodel of the Anchor Bank property. Hovde Properties is moving forward on an exciting reuse of the AT&T building on West Washington Avenue, which will add private sector activation of the northwest quadrant of the square already buttressed by Overture and the Madison Central Library.

In the meantime, more than one hot organization put Madison at the top of their lists. Livability.com said we were the most livable medium size city in the United States, just a month after NerdWallet said we were the best city for Quality of Life, also proclaiming us the Greenest City last spring. In addition, Forbes reported we were the fifth best city for young professionals.

This kind of recognition does not come by accident or through advertising. It comes from hard work, laborious committee meetings and the skill and talent of the people of Madison like those enlisted in the services of DMI.

Let us continue to work for a healthy, vibrant Madison, equitable and appreciative of every citizen and every neighborhood.

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.



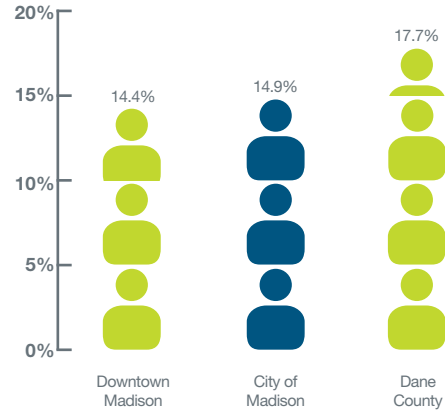
DEMOGRAPHICS

Population

Area	2000	2010	2012	2014
Downtown Madison	22,168	24,009	24,275	25,357
City of Madison	208,054	233,209	237,654	239,122
Dane County	426,526	488,073	498,215	502,227

Source: U.S. Census Bureau: 2000, 2010 Census and ESRI estimates: 2012, 2014*

Percentage Change in Population from 2000 to 2014



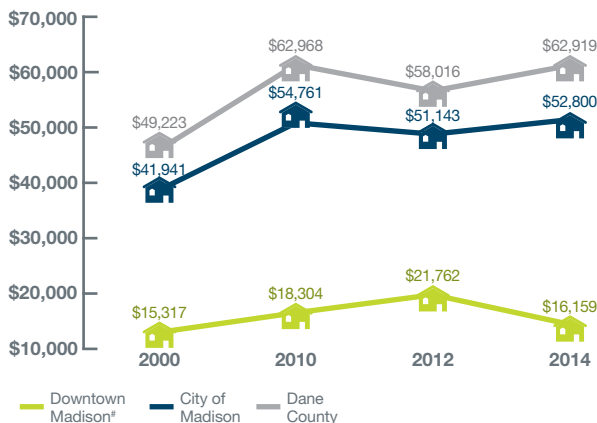
Source: U.S. Census Bureau: 2000, 2010 Census and ESRI estimates: 2012, 2014*

Population by Age in Downtown Madison

Age Cohort	2000	2010	2012	2014
Under 15 years	0.8%	0.8%	0.7%	0.6%
15 to 24 years	74.1%	68.8%	68.7%	69.7%
25 to 34 years	13.3%	17.0%	17.0%	16.5%
35 to 44 years	4.8%	4.0%	3.9%	3.7%
45 to 64 years	4.2%	6.3%	6.4%	6.1%
65 years and over	2.8%	3.1%	3.2%	3.3%
Total	22,168	24,009	24,275	25,357

Sources: U.S. Census Bureau: 2000, 2010 Census and ESRI estimates: 2012, 2014*

Median Household Income



Source: U.S. Census Bureau: 2000 Census and ESRI estimates: 2010, 2012, 2014* (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 is lower because it includes student population.

In 2014, over
86%
 of the downtown Madison
 population was in the
 15 to 34 year-old age range

*ESRI data are estimates only that may not include local changes or factors such as the increase of population due to recent development projects. These estimates and Census figures are also not direct comparisons due to differences in the sources and data collection methodologies. Comparisons are for estimates only.

HOUSING

Average Assessed Value of Single-Family Residential Property



From 2011 to 2014,
average home values
in downtown Madison
increased by over

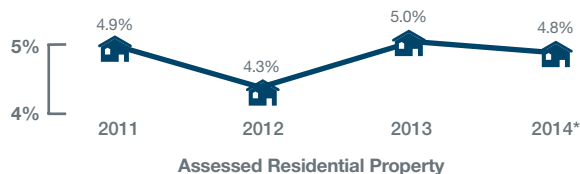
\$4,000

Source: City of Madison Assessor's Office (*Compiled by DMI)

Total Assessed Value of Residential Property* (in millions)

	Downtown Madison	City of Madison
2011 [^]	\$676.2	\$13,705.4
2012	\$574.4	\$13,317.9
2013	\$656.7	\$13,220.3
2014*	\$676.0	\$14,041.2

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



Source: City of Madison Assessor's Office (*Compiled by DMI)

[^]Includes about \$100M that changed classifications from residential to commercial property after 2011

[#]Residential defined as Single-Family, Condominium, 2-unit and 3-7 unit properties only. Larger apartment buildings are defined as commercial properties

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*	157	1,245	7,950	242	9,594
2014*	155	1,244	8,352	242	9,993
% Change from 2011 to 2014	-8.8%	5.3%	12.5%	-3.6%	10.7%

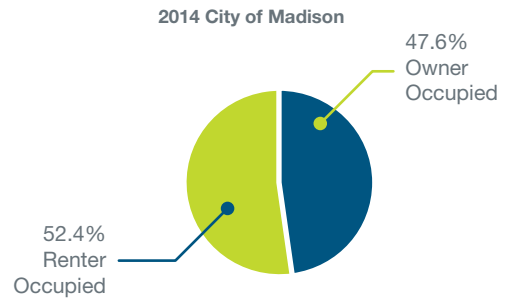
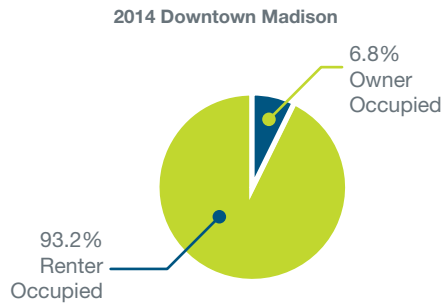
Source: City of Madison Assessor's Office (*Compiled by DMI)

As of August 2014, there were an estimated 1,217 new residential units currently under construction in downtown Madison as reported by the City of Madison Department of Planning & Community & Economic Development

Occupied Housing Units by Tenure

	Owner Occupied 2010	Renter Occupied 2010	Owner Occupied 2012	Renter Occupied 2012
Downtown Madison	7.6%	92.4%	7.3%	92.7%
City of Madison	49.3%	50.7%	47.8%	52.2%

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



Source: ESRI estimates: 2014

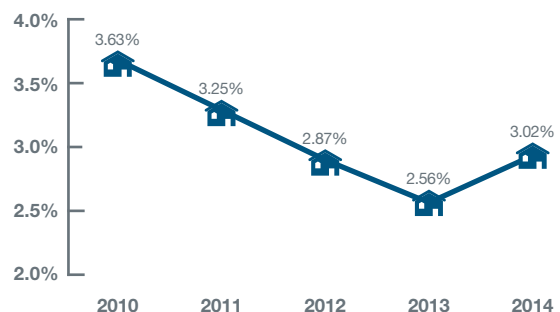
In 2014, multi-family rental vacancy rates in downtown Madison slightly increased to **3.02%**

Downtown Madison Multi-Family Rental Vacancy Rates

Total Units	2010	2011	2012	2013	2014
Rental	10,728	10,998	11,039	11,361	11,548
Vacant	390	358	317	291	349

Source: Madison Gas & Electric, www.mge.com,
Q2 figures for 53703 zip code area

Percentage of Vacant Multi-Family Rental Units in Downtown Madison



Source: Madison Gas & Electric, www.mge.com,
Q2 figures for 53703 zip code area

CRIME AND SAFETY

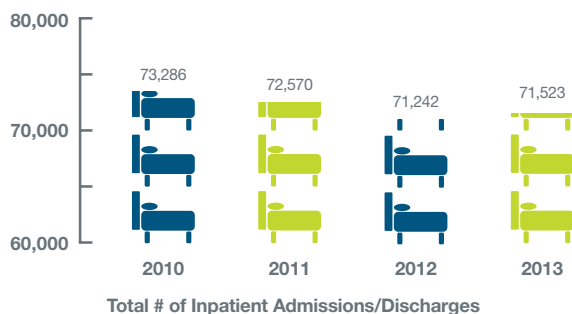
Top Criminal Offenses in Downtown Madison

Offense	2010	2011	2012	2013	% Change from 2010 to 2013
Trespass of Real Property	222	269	251	271	22.1%
Battery Simple Assault	225	183	175	205	-8.9%
Theft from Vehicle	245	142	166	212	-13.5%
Theft from Building	252	338	308	346	37.3%
Burglary	263	215	334	292	11%
All Other Larceny	269	261	324	446	65.8%
Drug/Narcotic Violations	290	259	310	374	29%
Damage/Vandalism of Property	401	374	440	319	-20.4%
Disorderly Conduct	678	624	600	600	-11.5%
Liquor Law Violations	890	735	715	570	-36%
Total	3,735	3,400	3,623	3,635	-2.7%

Source: City of Madison Police Department

HEALTH CARE

Hospital Admissions in Downtown Madison



Sources: Meriter Hospital (inpatient admissions), St. Mary's Hospital (inpatient discharges), UW Hospital & Clinics (inpatient admissions during Fiscal Year July 1 – June 30)

On average, over

6,300
people

attend weekly services
at places of worship in
downtown Madison

WORSHIP

Places of Worship in Downtown Madison*

# of Members ¹		Average Weekly Service Attendance ¹		# of People Served at Onsite Food Pantries ²
2013	2014	2013	2014	2013
13,475	18,692	4,337	6,343	30,757

¹Sources: Bethel Lutheran Church, Blackhawk Church-Downtown (2014 attendance only), Calvary Lutheran Chapel (2014 only), Faith Community Bible Church (2014 only), First United Methodist Church, Grace Episcopal Church, Harvest Church of Madison (2014 only), Pres House, Madison Catholic Diocese (St. Raphael Cathedral Parish and St. Paul University Catholic Center), St. John's Lutheran Church (2012 numbers used for 2013 and 2013 numbers used for 2014), UW Hillel (2014 only), Wisconsin Lutheran Chapel (2014 only).

²Sources: Bethel Lutheran Church, First United Methodist Church, Grace Episcopal Church

*Additional places of worship may be located in downtown Madison that are not included in these numbers

EDUCATION

Higher Education Enrollment in Greater Downtown Madison

Institution	2010-11	2011-12	2012-13	2013-14
Edgewood College ¹	2,611	2,635	2,759	2,780
Madison College — Downtown Campus ²	7,968	8,153	8,082	6,700
University of Wisconsin-Madison ³	42,595	42,441	42,820	43,275
Total Enrollment	53,174	53,229	53,661	52,755

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

²Source: Madison College (downtown campus)

³Source: University of Wisconsin-Madison

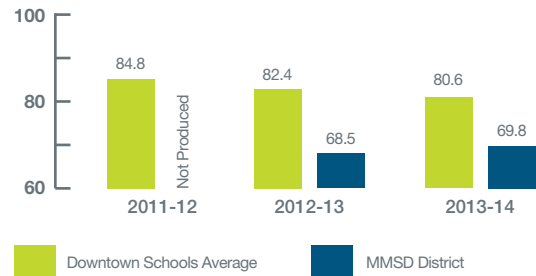
Madison Metropolitan School District (MMSD) Enrollment in Greater Downtown Madison Schools*

School	2010-11	2011-12	2012-13	2013-14
Total downtown (K-5)	1,189	1,231	1,235	1,214
Total district (K-5)	11,960	12,252	12,305	12,416
% of K-5 Enrollment in Downtown Schools	9.94%	10.05%	10.04%	9.78%

Source: Madison Metropolitan School District, www.madison.k12.wi.us

*Downtown schools include: Lapham (K-2), Marquette (3-5), Franklin (K-2) and Randall (3-5) elementary schools.

MMSD Overall Accountability Scores & Ratings*



Source: Wisconsin Department of Public Instruction, <http://oea.dpi.wi.gov/acct/resources>. Scores & ratings are based on factors such as student achievement, student growth, closing gaps, and on-track & postsecondary readiness and are defined as follows: 83-100: Significantly Exceeds Expectations, 73-82.9: Exceeds Expectations, 63-72.9: Meets Expectations, 53-62.9: Meets Few Expectations, 0-52.9: Fails to Meet Expectations

For the 2013-2014 school year, downtown schools received an average accountability score of

80.6

CHILDCARE

Childcare Facilities in Downtown Madison*

	2014
Daytime Capacity	456

Source: Wisconsin Department of Children & Families, YoungStar Program, <http://dcf.wi.gov/youngstar/>.

*Downtown facilities include: Bernie's Place Inc., Creative Learning Preschool Inc., MATC Child and Family Center, Meriter Children's Center, Red Caboose Day Care Center, and St. Mary's Child Care Center. Additional childcare facilities may be located in downtown Madison that are not included in these numbers.



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 employers. This dynamic mix provides the basis for attracting a well-educated workforce and developing an economically strong urban core.



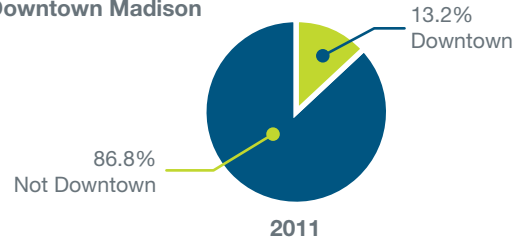
EMPLOYMENT

At the time this report was produced, updated employment figures for 2012 and 2013 had not been released by the U.S. Census Bureau. Updated figures will hopefully be included in future State of the Downtown reports.

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

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 2011)*

Worker Earnings

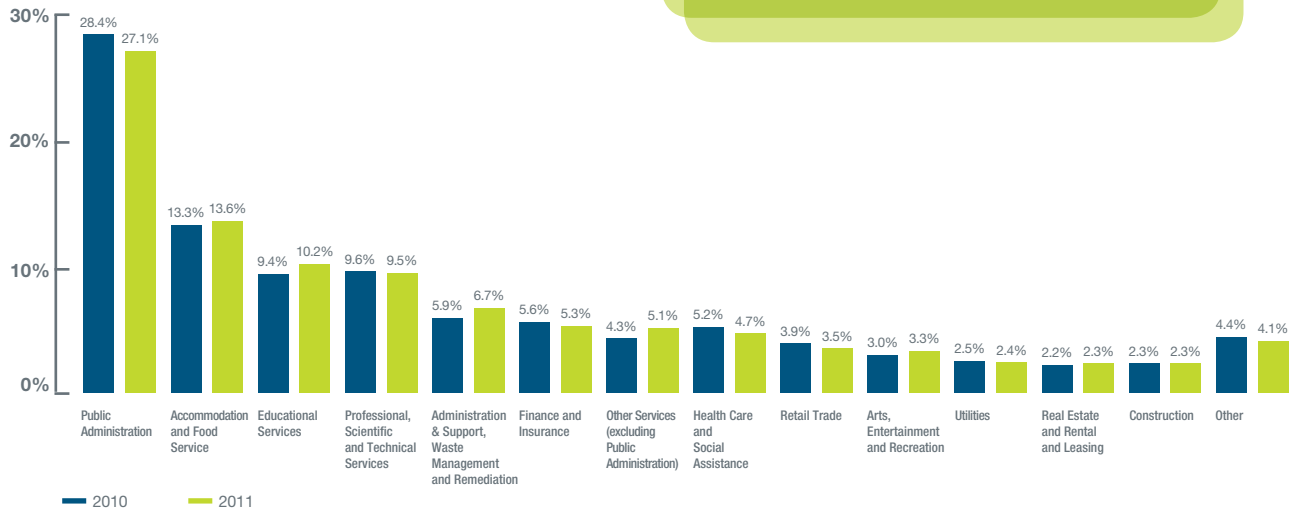
Earnings	2010	2011
\$1,250 per month or less	20.6%	20.3%
\$1,251 to \$3,333 per month	31.3%	28.7%
More than \$3,333 per month	48.1%	51%

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%

Employment by Industry in Downtown Madison



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.

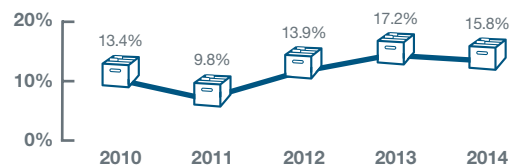
COMMERCIAL PROPERTY

Office Space by Class in Downtown Madison

Class	Number of Buildings	Inventory (SF)	Total Vacant (SF)	Vacancy Rate
Class A	14	1,507,654	112,924	7.5%
Class B	34	1,472,794	275,770	18.7%
Class C	19	541,927	169,487	31.3%
Total	67	3,522,375	558,181	15.8%

Source: Broadwing Advisors, LLC, Xceligent: Q2 2014

Office Space Vacancy Rates in Downtown Madison



Source: Broadwing Advisors, LLC, Xceligent: Q3 2010, Q3 2011, Q2 2012, Q2 2013, Q2 2014

In 2014, the vacancy rate for downtown Madison office space slightly decreased to

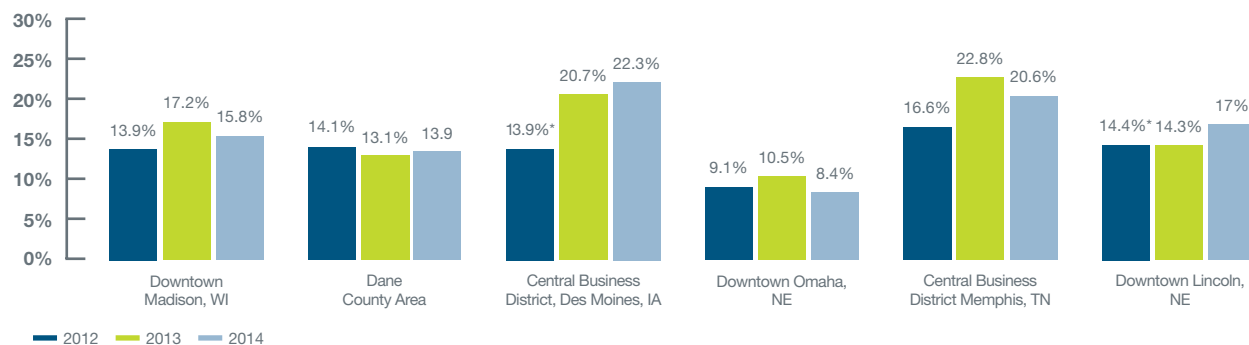
15.8%

Office Space Comparisons

Location	Inventory (SF)	Percent Of Total Market Area	Total Vacant (SF)
Madison, WI Downtown	3,522,375	23.8%	558,181
Dane County Area	14,825,078	100%	2,061,189
Des Moines, IA Central Business District	4,928,872	35.7%	1,097,145
Omaha, NE Downtown	4,608,777	8.4%	388,188
Memphis, TN Central Business District	3,049,175	15.8%	627,138
Lincoln, NE Downtown	2,748,990	N/A	466,089

Source: Broadwing Advisors, LLC, Xceligent: Q2 2014

Office Space Vacancy Rate Comparisons

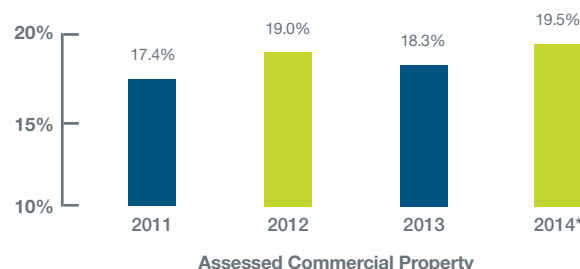


Source: Broadwing Advisors, LLC, Xceligent: Q2 2012, *Q3 2012, Q2 2013, Q2 2014

Total Assessed Value of Commercial Property* (in millions)

	Downtown Madison	City of Madison
2011^	\$1,201.3	\$6,907.4
2012	\$1,306.5	\$6,890.6
2013	\$1,299.8	\$7,102.5
2014*	\$1,353.1	\$6,944.1

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



Source: City of Madison Assessors Office (*Compiled by DMI)

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

#Commercial defined as all properties excluding Single-Family, Condominium, 2-unit and 3-7 unit residential properties

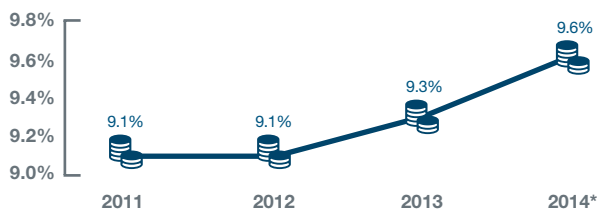
TAX BASE

Real Estate and Personal Property Taxes Generated

Total Amount of	2011		2012		2013		2014*	
	Downtown Madison	City of Madison	Downtown Madison	City of Madison	Downtown Madison	City of Madison	Downtown Madison	City of Madison
Real Estate (in millions)	\$41.6	\$457.5	\$42.7	\$469.8	\$45.0	\$485.0	\$48.1	\$501.0
Personal (in millions)	\$1.4	\$17.0	\$1.4	\$14.6	\$1.5	\$14.3	\$1.5	\$14.0
Total (in millions)	\$43.0	\$474.5	\$44.1	\$484.4	\$46.5	\$499.3	\$49.6	\$515.0

Source: City of Madison Assessor's Office (*Compiled by DMI)

Percentage of Taxes in the City of Madison Generated from Downtown



Source: City of Madison Assessor's Office (*Compiled by DMI)

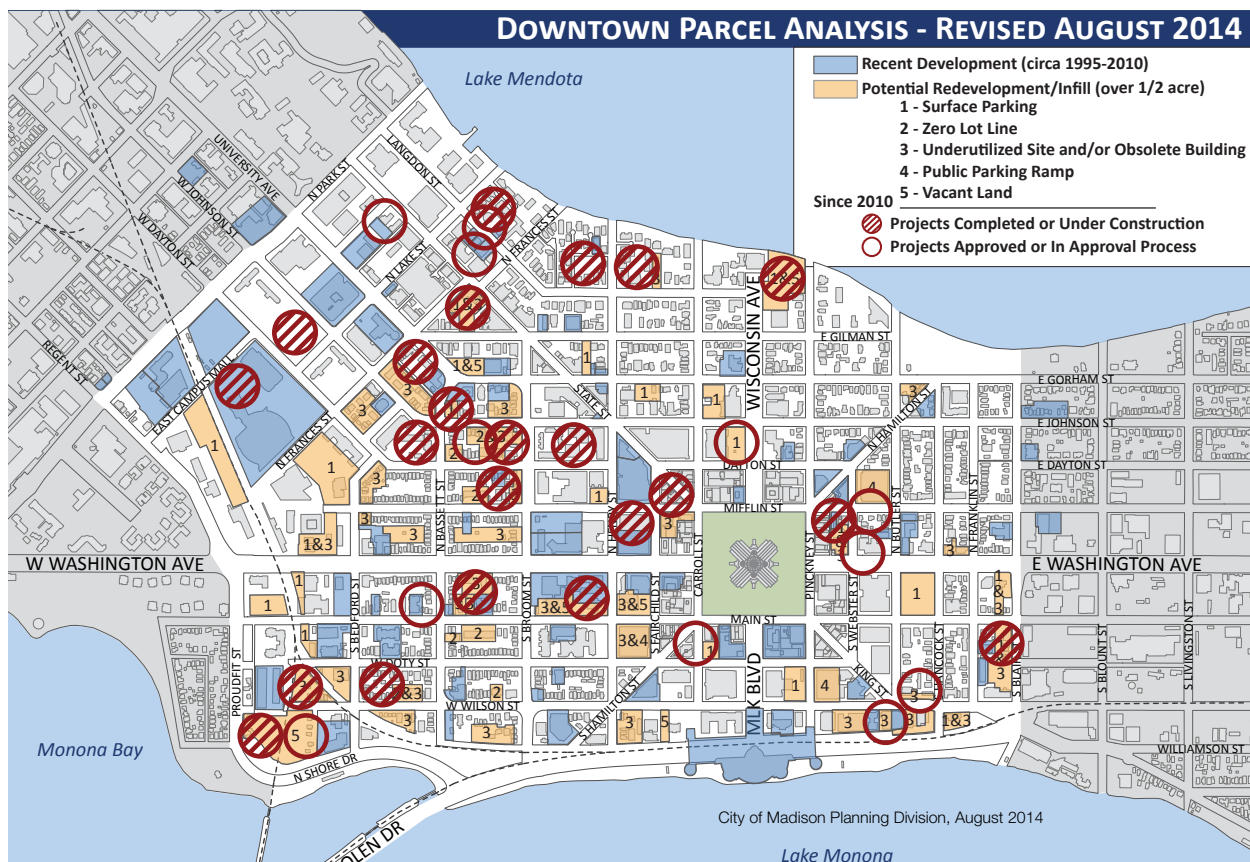
In 2014,

37.1%

of parcels in downtown
Madison were tax exempt

Source: City of Madison Assessor's Office, compiled by DMI

DEVELOPMENT



Total New Construction# (in millions)

	2011		2012		2013		2014	
	Downtown Madison	City of Madison	Downtown Madison	City of Madison	Downtown Madison	City of Madison	Downtown Madison*	City of Madison
Residential	\$2.5	\$90.6	\$1.4	\$98.9	\$0.7	\$91.0	\$3.7	\$140.1
Commercial	\$26.8	\$90.7	\$17.1	\$63.5	\$22.2	\$133	\$32.3	\$251.7
Total	\$29.3	\$181.3	\$18.5	\$162.4	\$22.9	\$224.0	\$36.0	\$392

Source: City of Madison Assessor's Office (*Compiled by DMI)

#Residential defined as Single-Family, Condominium, 2-unit and 3-7 unit properties only.

All other properties including large apartment buildings defined as commercial

As of August 2014,
there were an estimated

1,217

new residential units currently under construction in downtown Madison

Source: City of Madison Department of Planning & Community & 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 Street area only)
 BID Business Mix Reports March 2010, March 2011, March 2012, May 2013, March 2014

Since 1998, the percentage of Food & Drink businesses in the BID has remained consistent at around **39%**
 while Retail has decreased to **27%**
 and Service has increased to **34%**

Types of Food & Drink Businesses vs. Total Businesses

Type	1998	2010	2011	2012	2013	2014
Restaurants	47 (22%)	85 (23.5%)	88 (24%)	84 (23.5%)	86 (24%)	92 (26%)
Bars, Taverns, Pubs^	20 (9%)	31 (8.5%)	31 (8.5%)	30 (8.5%)	28 (8%)	27 (8%)
Coffee Shops & Cafés	8 (4%)	12 (3.5%)	11 (3%)	13 (3.5%)	14 (4%)	14 (4%)
Total Businesses	212*	360	365	356	355	352

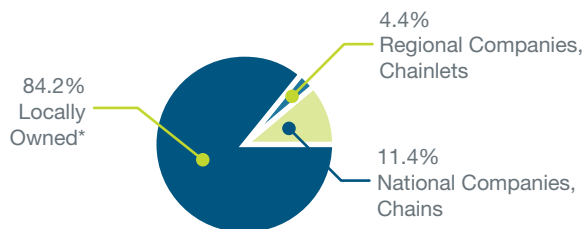
Source: Madison's Central BID: Gibbs Report 1998 (*Greater State Street area only),
 BID Business Mix Reports March 2010, March 2011, March 2012, May 2013, March 2014.
 ^Self-defined (not per liquor license classification)

Ownership Mix (Businesses Only)

	2010	2011	2012	2013
Locally Owned*	83%	86%	84.5%	86%
Regional Companies, Chainlets	4%	4%	3.5%	3%
National Companies, Chains	13%	10%	12%	11%

Source: Madison's Central BID: BID Business Mix Reports
March 2010, March 2011, March 2012, May 2013, March 2014.
*Includes Wisconsin Ownership, Locally Owned Franchises

2014 Ownership Mix (Businesses Only)



Source: Madison's Central BID: BID Business Mix Reports
March 2010, March 2011, March 2012, May 2013, March 2014.
*Includes Wisconsin Ownership, Locally Owned Franchises

In 2014,

84%

of businesses in the
BID were locally owned

Downtown Visitors

Customers Helped by the Downtown Information Ambassador Program

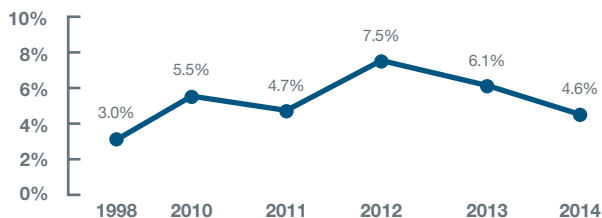
2010	36,638
2011	45,258
2012	42,591
2013	42,841
Total	167,328

Source: Madison's Central BID

Number of Businesses vs. Spaces

	2010	2011	2012	2013	2014
Total Businesses/ Organizations	360	365	356	355	352
Approximate Total Spaces*	381	383	385	378	369

Business Space Vacancy Rate Percentage*



Source: Madison's Central BID: Gibbs Report 1998, BID Business Mix Reports March 2010, March 2011, March 2012 and May 2013, March 2014
*Excludes properties held for development



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



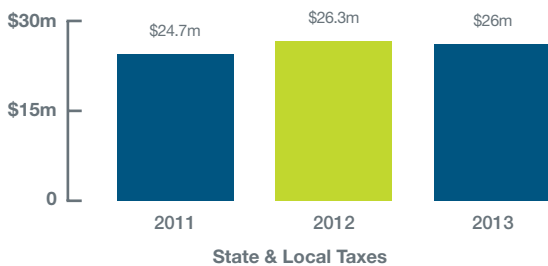
TOURISM

Economic Impact of Tourism in Downtown Madison

	2011	2012	2013
Direct Visitor Spending Generated By Tourism (<i>in millions</i>)	\$199.0	\$217.4	\$232.9
Jobs Directly Engaged In Tourism Industry	2,588	3,825	3,929

Source: *The Economic Impact of Tourism in Madison, WI, May 2012, May 2013, May 2014 Tourism Economics (Downtown Madison defined as 53703 zip code)*

Generated Taxes from Tourism in Downtown Madison (Direct Impact)



Source: *The Economic Impact of Tourism in Madison, WI, May 2012, May 2013, May 2014 Tourism Economics (Downtown Madison defined as 53703 zip code)*

From 2011 to 2013, the number of jobs in downtown Madison directly engaged in the tourism industry increased by

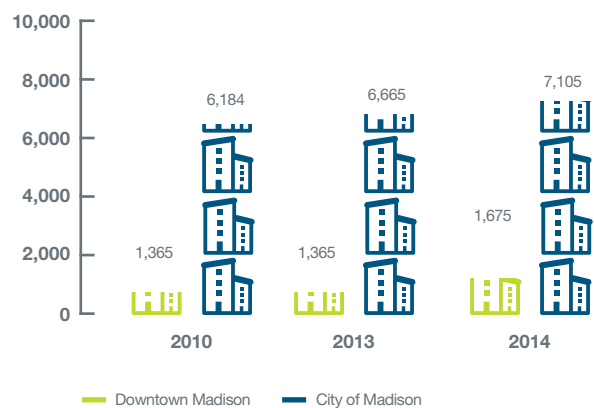
52%

Direct Visitor Spending Breakdown (*in millions*)

Expenditures	2011	2012	2013
Food and Beverage	\$58	\$63.2	\$69.7
Lodging	\$52	\$57.7	\$61.3
Retail	\$51	\$52.8	\$55.2
Transportation	\$23	\$26.9	\$29.1
Recreation	\$15	\$16.8	\$17.6
Total	\$199	\$217.4	\$232.9

Source: *The Economic Impact of Tourism in Madison, WI, May 2012, May 2013, May 2014 Tourism Economics (Downtown Madison defined as 53703 zip code)*

Number of Hotel Rooms



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

Visits to Destinations in Greater Downtown Madison*

Destination	2010	2011	2012	2013
Overture Center for the Arts ¹	505,731	515,973	528,454	557,396
Monona Terrace Community & Convention Center ²	403,653	426,071	429,434	458,582
UW-Madison Athletic Facilities ³	1,831,521	1,815,307	1,704,791	1,740,553
Madison Central Library ⁴	453,436	397,033	144,493	252,324
Madison Children's Museum ⁵	128,190	238,898	210,547	199,533
Madison Museum of Contemporary Art ⁶	183,921	168,659	207,321	200,492
Memorial Union ⁷	2,429,465	2,612,175	2,018,290	1,500,000
Union South ⁷	363,660	1,454,910	2,987,330	2,374,000
Wisconsin Historical Museum ⁸	78,291	77,017	72,311	74,213
Wisconsin Institutes for Discovery ⁹	N/A	N/A	83,500	84,500
Wisconsin State Capitol Tours ¹⁰	95,689	82,314	94,550	99,171
Wisconsin Veterans Museum ¹¹	147,346	81,362	93,690	99,816
Henry Vilas Zoo ¹²	725,823	533,073	732,768	726,520
Alliant Energy Center Facilities ¹³	831,005	775,036	825,807	798,559
Total	8,177,731	9,177,828	10,133,286	9,165,659

Sources:

1. Overture Center for the Arts Annual Report (July 1–June 30 calendar year used)
2. Monona Terrace Community & Convention Center Annual Report 2011, 2012, 2013
3. UW Athletic Department (includes all UW Athletic facilities. July 1–June 30 calendar year used)
4. Madison Public Library
5. Madison Children's Museum
6. Madison Museum of Contemporary Art
7. Wisconsin Union (academic calendar year used)
8. Wisconsin Historical Museum
9. Wisconsin Institutes for Discovery
10. Wisconsin State Capitol Tours and Information
11. Wisconsin Veterans Museum
12. Henry Vilas Zoo
13. Alliant Energy Center

*Additional destinations may be located in downtown Madison that are not included in these numbers.

From 2010 to 2013, there were an estimated

36.7 million

visits to major destinations in greater downtown Madison

CONVENTIONS

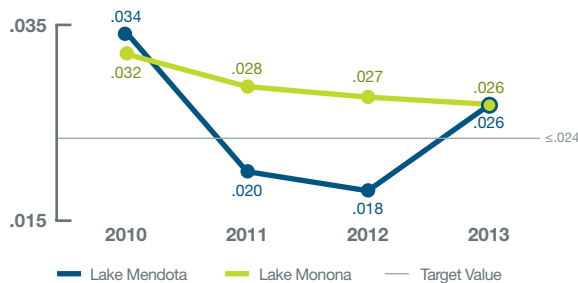
Monona Terrace Community & Convention Center, Conferences and Conventions

	2009	2010	2011	2012	2013	Total
Total Number	68	62	62	65	67	324
Average Attendance	475	660	659	716	675	637
Economic Impact (in millions)	\$33.3	\$37.6	\$46.5	\$52.5	\$52	\$221.9
Room Nights Generated	N/A	N/A	42,684	46,492	44,746	133,922

Source: Monona Terrace Community & Convention Center Annual Report 2011, 2012, 2013

LAKES

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



Source: Clean Lakes Alliance, State of the Yahara Lakes report 2012, 2013

*Phosphorus is a natural part of the lake system but in excess 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, disruption to the native food web, 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.

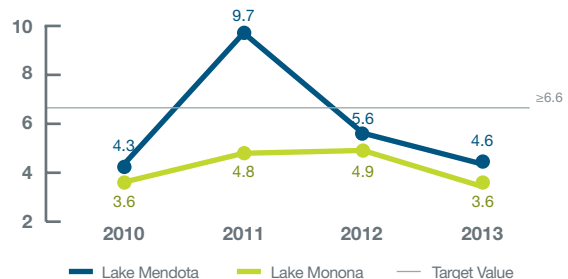
From 2010 to 2013, the median total phosphorus decreased by

19%
in Lake Monona
and
24%
in Lake Mendota

In 2013, the water clarity in Lake Mendota and Lake Monona once again did not reach the target depth

6.6 feet

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



Source: Clean Lakes Alliance, State of the Yahara Lakes report 2012, 2013

*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.

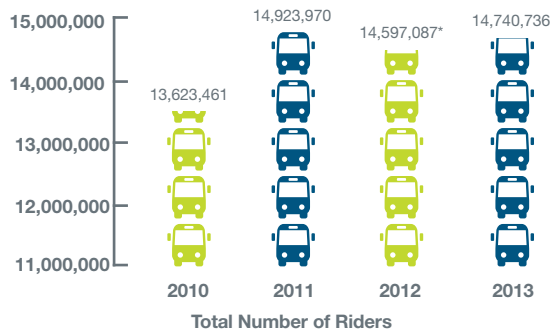


Downtown Madison is the center of the Madison Region's transportation network consisting of pedestrian, bicycle, public bus, automobile and air transit modes. Transportation and access are what make living, working, shopping and playing in downtown Madison possible for people from the region and beyond.



PUBLIC TRANSIT

Madison Metro Bus System



Source: Madison Metro.

*Decrease in 2012 due to UW cutting 10% service.

From 2010 to 2014, Madison Metro ridership increased by

7.6%

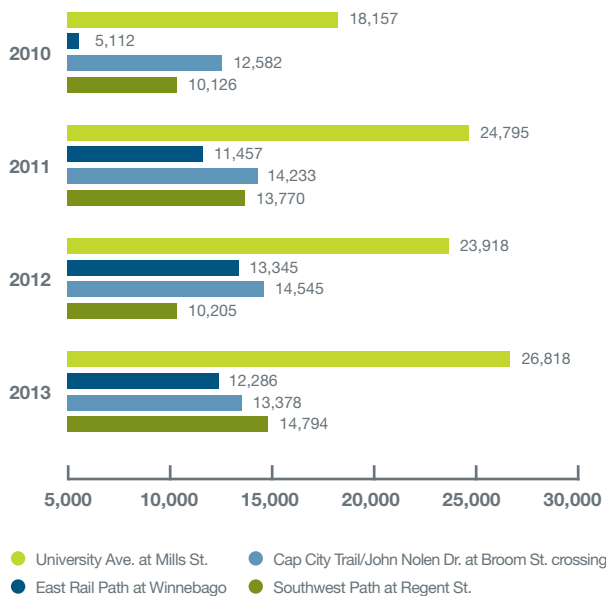
BICYCLE

Madison B-Cycle (Bicycle-Sharing Program)

	2011	2012	2013
Total Trips	18,501	63,325	81,662
Miles Biked	39,618	94,402	173,000
Casual Users	5,965	11,710	15,360
Annual Members	475	2,150	1,843

Source: Madison B-cycle

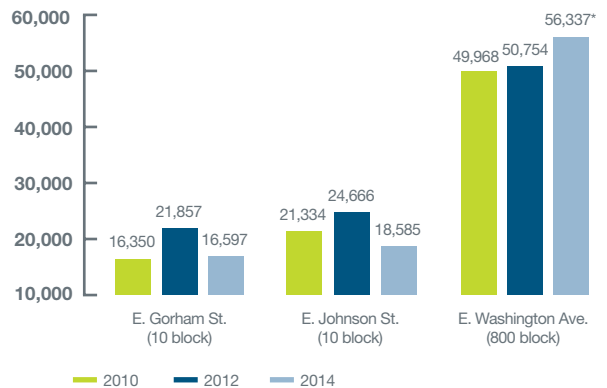
Annual Bicycle Counts in Downtown Madison



Source: City of Madison Traffic Engineering

AUTOMOBILE

Traffic Counts in Downtown Madison



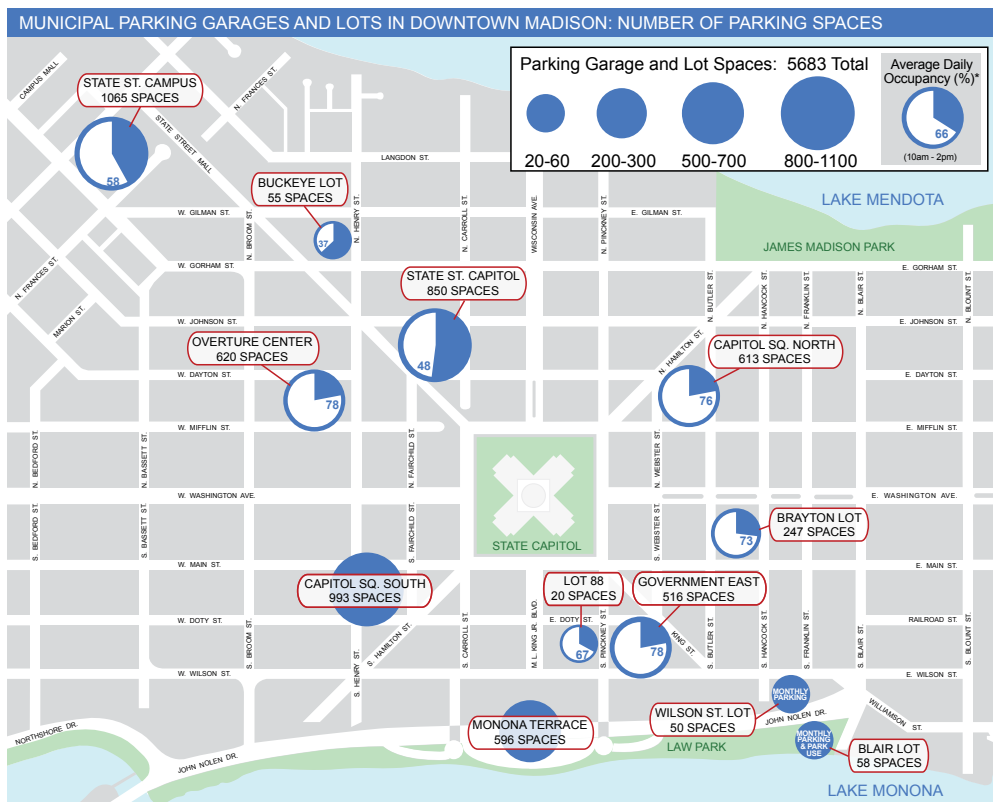
Source: City of Madison Traffic Engineering

(*Traffic count may have been impacted by E. Johnson St. reconstruction)

Community Car (Car-Sharing Program)

	2012	2013	2014
Total # of Drivers	1,400	1,260	1,100
Total # of Vehicle Locations	14	13	13
Total # of Vehicles	15	13	13

Source: Community Car September 2012, August 2013, August 2014



Downtown Madison parking-meter revenue amounted to **93%** of parking-meter revenue collected for the entire city in 2013.

Source: City of Madison Parking Utility, 2014.

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

*Occupancy rates for Capitol Square South garage, Monona Terrace garage, Wilson St. lot & Blair St. lot not available.

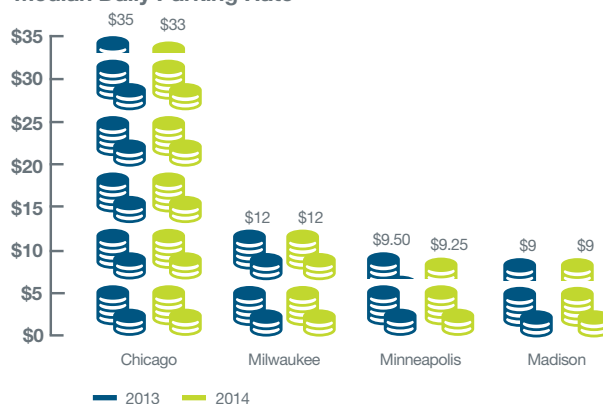
Occupancy Rates for Garages and Lots in Downtown Madison

Garage/Lot	2012	2013	2014
State Street Campus	56%	58%	58%
Buckeye Lot	45%	55%	37%
Overture Center	70%	63%	78%
State Street Capitol	45%	42%	48%
Capitol Square North	79%	72%	76%
Brayton Lot	83%	71%	73%
Government East	76%	73%	78%
Lot 88	N/A	68%	67%

Source: City of Madison Parking Utility

(Occupancy rates measured from 10am-2pm)

Median Daily Parking Rate



Sources: City of Milwaukee, City of Minneapolis, City of Madison, chicagoparkingmap.com, parkme.com (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. Early-bird special rates were not considered.)

AIR

Dane County Regional Airport

	2010	2011	2012	2013
Total # of Airport Passengers	1,514,927	1,519,747	1,615,841	1,685,919

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 is bounded by Lake Mendota, Lake Monona, Blair Street and the Yahara River (see map on page 3).

Demographics

Year	Population ¹	Median Household Income ²
2000	7,930	\$33,459
2010	7,962	\$43,041
2012	8,175	\$37,858
2014	8,167	\$41,949

1. U.S. Census Bureau: 2000, 2010 Census and ESRI estimates: 2012, 2014*

2. U.S. Census Bureau: 2000 Census and ESRI estimates: 2010, 2012, 2014 (Figures are in current year dollars and are not adjusted for inflation)*

From 2000 to 2014, the population of the Capitol East District increased by

3.0%

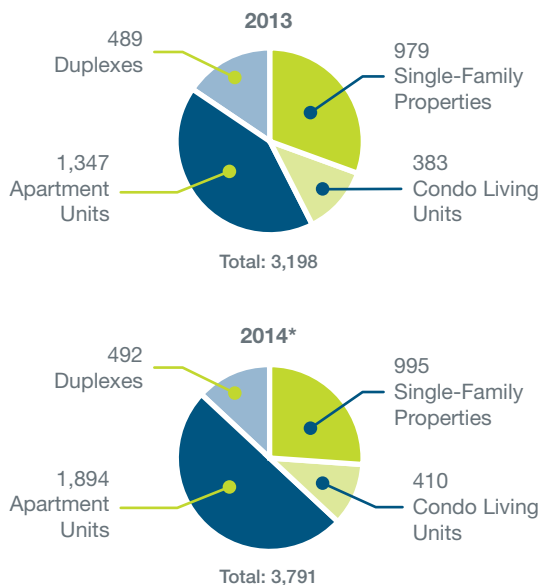
Population by Age

Age Cohort	2000	2010	2012	2014
Under 15 years	9.3%	8.6%	8.4%	7.8%
15 to 24 years	22.9%	19.4%	19.9%	18.5%
25 to 34 years	33%	36.8%	37%	37.4%
35 to 44 years	15.8%	11.8%	11.3%	12.5%
45 to 64 years	15.3%	19.6%	19.4%	18.9%
65 years and over	3.8%	3.8%	3.9%	4.9%
Total	7,930	7,962	8,175	8,167

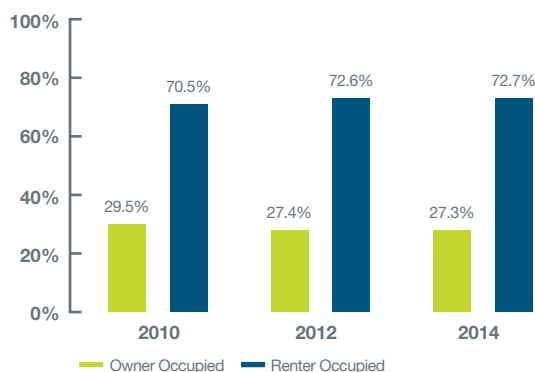
Sources: U.S. Census Bureau: 2000, 2010 Census and ESRI estimates: 2012, 2014*

*ESRI data are estimates only that may not include local changes or factors such as the increase of population due to recent development projects. These estimates and Census figures are also not direct comparisons due to differences in the sources and data collection methodologies. Comparisons are for estimates only.

Types of Units



Occupied Housing Units by Tenure





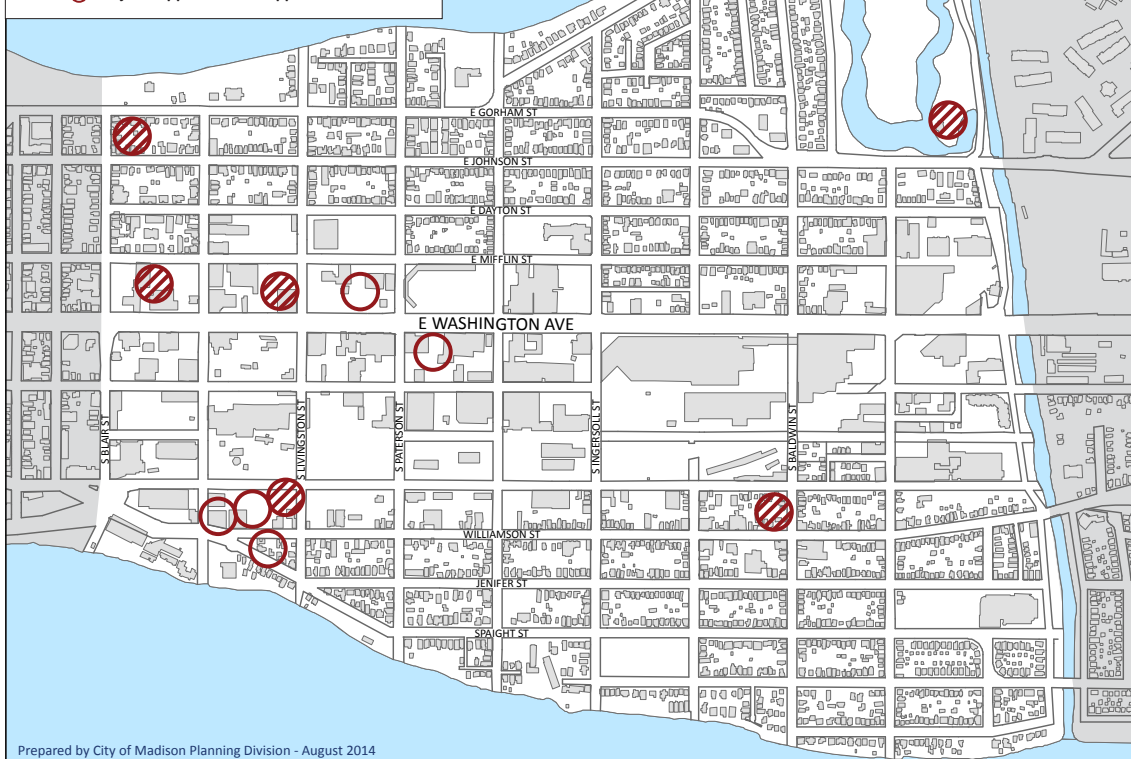
Source: U.S. Census Bureau: 2010 Census and ESRI estimates: 2012, 2014

Source: City of Madison Assessor's Office (*Compiled by DMI)

CAPITOL GATEWAY CORRIDOR PARCEL ANALYSIS - REVISED AUGUST 2014

Since 2010

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



Prepared by City of Madison Planning Division - August 2014

Source: City of Madison Planning Division, August 2014

Total New Construction (in millions)

	Residential	Commercial	Total
2013	\$2.5	\$5.9	\$8.4
2014*	\$3.3	\$4.6	\$7.9

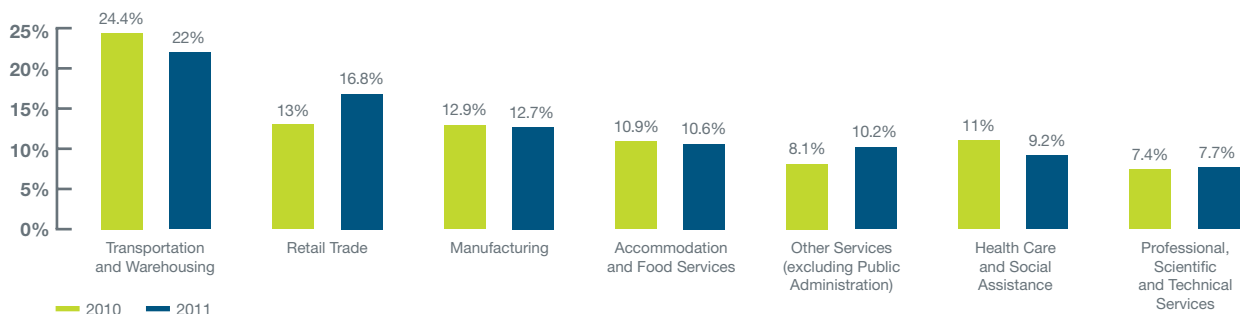
Source: City of Madison Assessor's Office (*Compiled by DMI)

Workers[^]

	2009	2010	2011
Workers	2,391	2,404	2,490

Source: U.S. Census Bureau: OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, Q2 2009, Q2 2010, Q2 2011). See note under Employment by Industry on page 11.

Employment by Top Industries[^]



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.

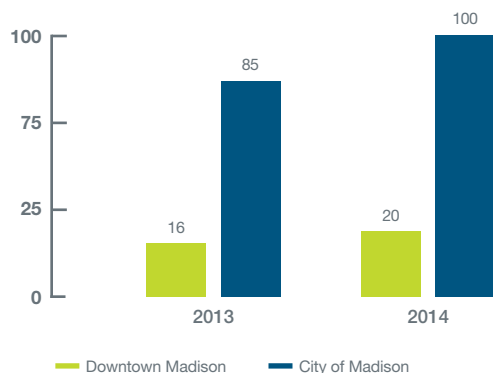
[^]At the time this report was produced, updated employment figures for 2012 and 2013 had not been released by the U.S. Census Bureau. Updated figures will hopefully be included in future State of the Downtown reports.



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.

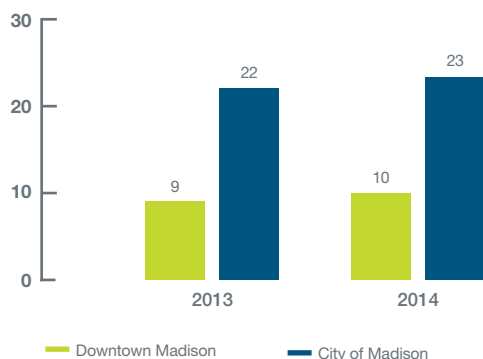


LEED Certified and Registered Projects



Source: U.S. Green Building Council, www.usgbc.org, Public LEED Project Directory, July 2013, September 2014 (Downtown Madison defined as 53703 zip code)

Travel Green Wisconsin Certified Businesses



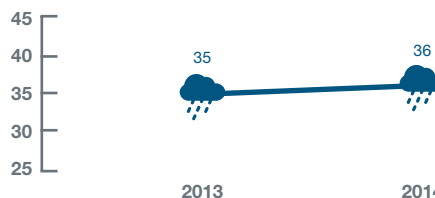
Source: Wisconsin Department of Tourism, www.travelwisconsin.com, Travel Green Wisconsin Certified Business Directory, August 2013, 2014 (Downtown Madison defined as 53703 zip code)

Number of Green Roofs in Downtown Madison

	Quantity
2013	15
2014	15

Source: Greening Madison, www.greeningmadison.com, Green Roof Map, August 2013, 2014

Number of Rain Gardens in Downtown Madison



Source: City of Madison, www.cityofmadison.com, Rain Garden Map, August 2013, 2014

Number of Solar Installations in Downtown Madison

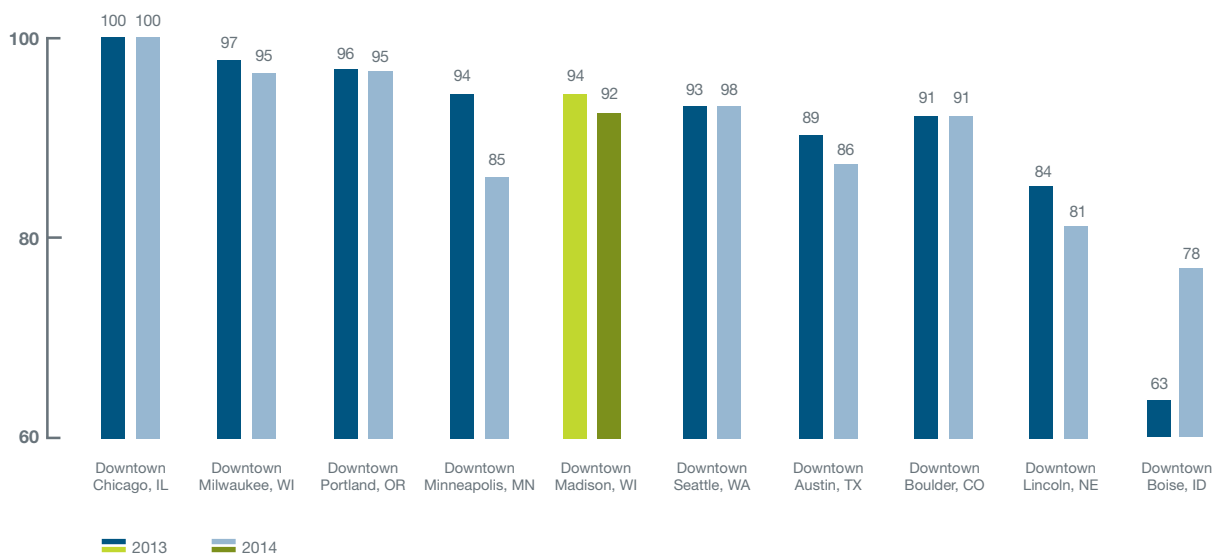
	Quantity
2013	18
2014	18

Sources: City of Madison, 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, August 2013, 2014

In 2014, **1/5th**

of LEED certified and registered projects in the City of Madison were located downtown

Walkability Ranking



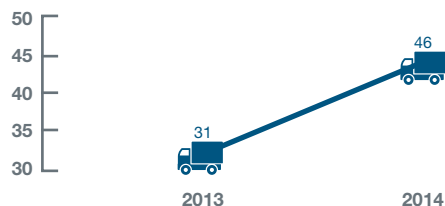
Source: Walk Score®, www.walkscore.com, August 2013, 2014 (Walk Score is a walkability index that assigns a numerical score from 1-100 (100 high, 1 low) to any address, neighborhood or city on its proximity to local amenities, restaurants, parks, stores, etc.)

Number of Community Gardens in Downtown Madison

	Quantity
2013	2
2014	4

Source: Dane County Community Gardens, www.danecountycommunitygardens.org, August 2013, 2014

Number of Community-Supported Agriculture Farm Pick-up Locations in Downtown Madison



Source: Fair Share CSA Coalition, www.csacoalition.org, Farm Pick-up Location Map, August 2013, 2014

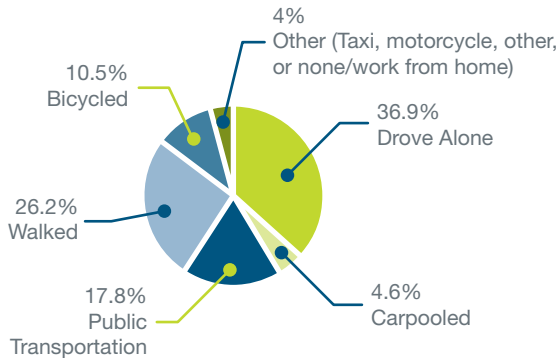
Means of Transportation to Work in Downtown Madison

Transportation Mode	2011	2012
Drove Alone	40.1%	36.9%
Carpooled	3.4%	4.6%
Public Transportation	15.2%	17.8%
Walked	27.5%	26.2%
Bicycle	10.1%	10.5%
Taxicab, motorcycle, or other means	0.3%	0.5%
None (work at home)	3.4%	3.5%

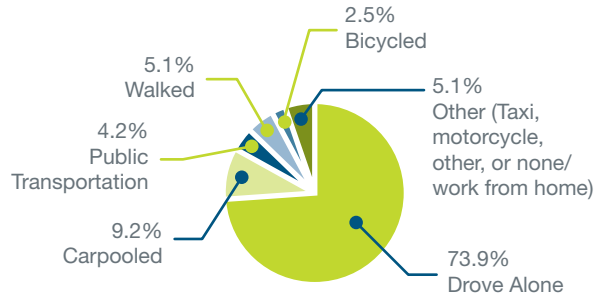
Source: 2007-2011 and 2008-2012 American Community Survey 5-Year Estimates (Downtown Madison defined as 53703 zip code)

Means of Transportation to Work Comparison

Downtown Madison 2012



Madison Metro Area 2012



Source: 2008-2012 American Community Survey 5-year estimates (Downtown Madison defined as 53703 zip code)

THANK YOU

A special thank you to the following people, organizations and departments for their contributions and assistance with the compilation of the 2014 State of the Downtown report:

- 2014 State of the Downtown Advisory Committee Members and/or Presenters:
 - o Matt Carlson, Michael Best & Friedrich (DMI Board Chair)
 - o Mary Carbine, Madison's Central Business Improvement District
 - o Diane Morgenthaler, Greater Madison Convention & Visitors Bureau
 - o Stacy Nemeth, Fiore Companies
 - o Anne Neujahr Morrison, Urban Land Interests
 - o Craig Stanley, Broadwing Advisors
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- **And all other people, businesses and data sources who contributed time and information to 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.

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