



# STATE OF THE DOWNTOWN MADISON 2016

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## ACKNOWLEDGEMENTS

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And all other people, businesses and data sources who contributed time and information to this report!

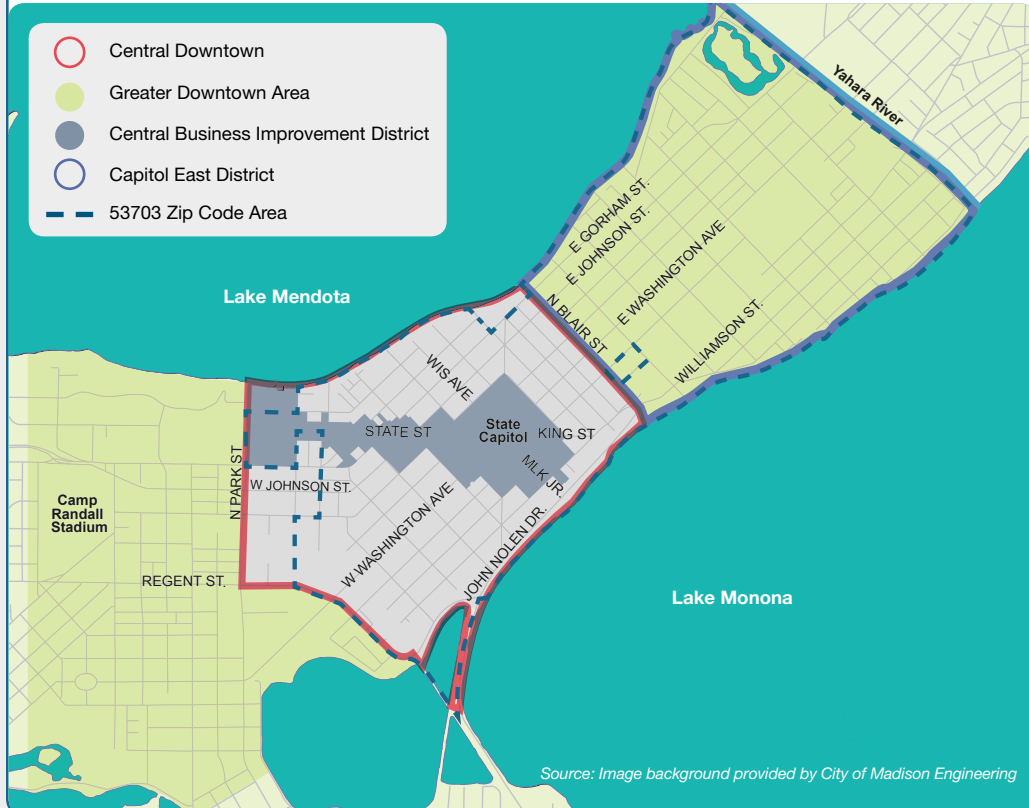
## INTRODUCTION

Downtown Madison, Inc. (DMI) is proud to present its sixth annual State of the Downtown, a data driven report that provides timely, objective and accurate information about downtown Madison. Six years of data has provided us a wealth of information to better understand the current state of our downtown and to help plan for future projects, growth, challenges and opportunities to maintain a healthy and vital central city.

The continued growth and investment in downtown Madison is positioning us to be one of the best downtowns in the country. In order to reach that goal, we need to ensure our downtown is safe, walkable, livable, fun, diverse and beautiful as well as a place that is accessible and welcoming for all. We encourage residents, businesses, organizations, property owners, city officials and the community as a whole to use the information in this report to help advance downtown Madison to be the best place for everyone to live, work and visit for generations to come!

## BOUNDARIES & MAP

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. The geographic boundaries of Madison's Central Business Improvement District (BID), 53703 zip code area as well as the Capitol East District are also used in the report.





# DEVELOPMENT & INVESTMENT

→ New development completed in downtown Madison in 2015:

- **8** projects
- **1,349** residential units
- **114,800** commercial square footage

→ Residential units constructed or approved for construction in downtown Madison since 2010: **2,894** which is about **38%** of residential units constructed or approved citywide

→ Acres in downtown Madison: **420** which is about **1%** of acres citywide\*

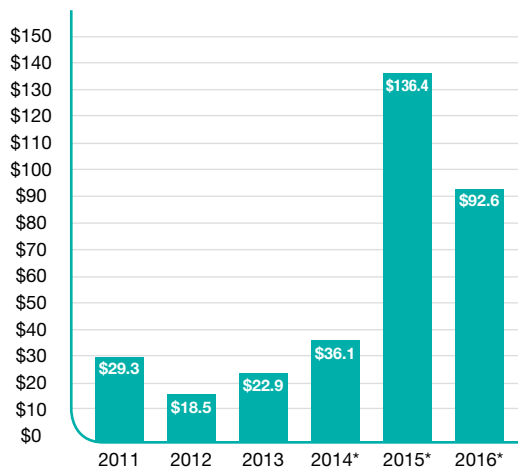
→ Percentage of tax exempt parcel acres in downtown Madison: **39%\***

*Sources: City of Madison Planning Division, as of July 2016, City of Madison Assessor's Office*

Since 2010 the tax base in downtown Madison has increased by over **\$1 billion**, or **81%**, much due to rising property values, but also due to new construction

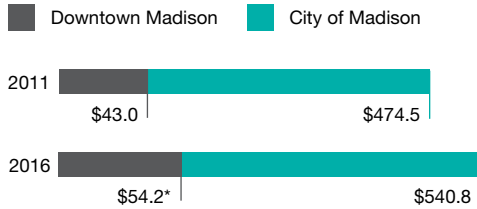
*Source: City of Madison Planning Division, as of July 2016*

New Commercial & Residential Construction in the Central Downtown Madison area (in millions)



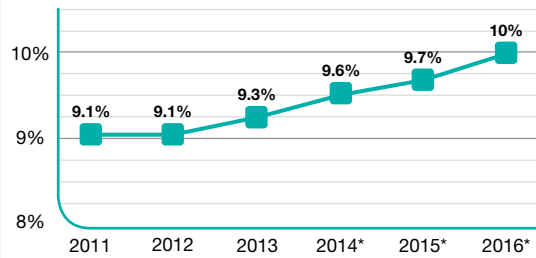
*Source: City of Madison Assessor's Office (\*compiled by DMI)*

## Real Estate and Personal Property Taxes Generated (in millions)



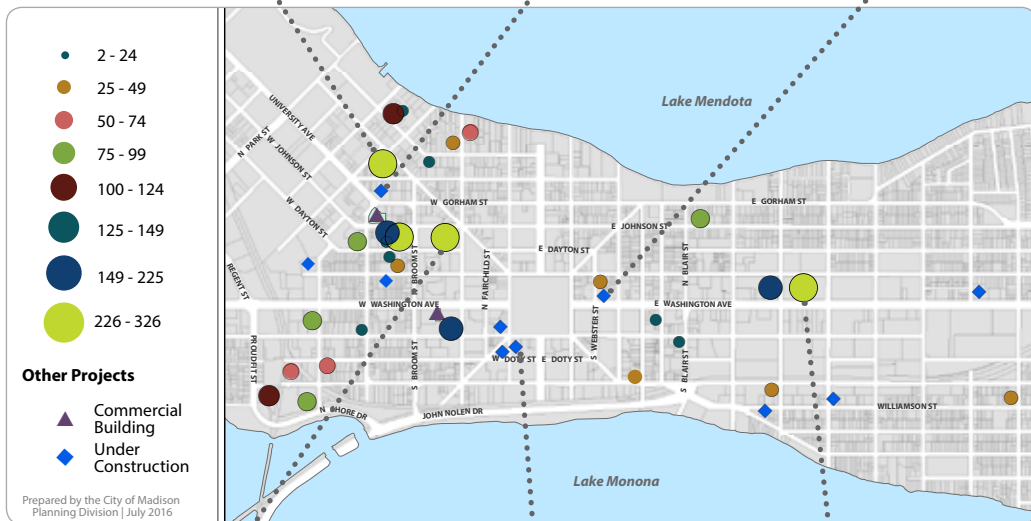
Source: City of Madison Assessor's Office (\*compiled by DMI)

## Citywide Taxes Generated from Downtown Madison



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

## Multi-Family Buildings Constructed 2010-2016

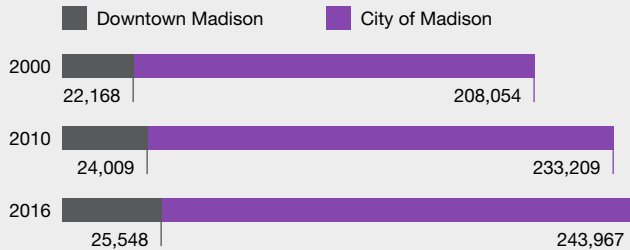


Source and images courtesy of: City of Madison Planning Division, July 2016



## RESIDENTS

### Population



Source: U.S. Census Bureau, 2000, 2010 Census;  
ESRI estimates, 2016\*

### Age in Downtown Madison

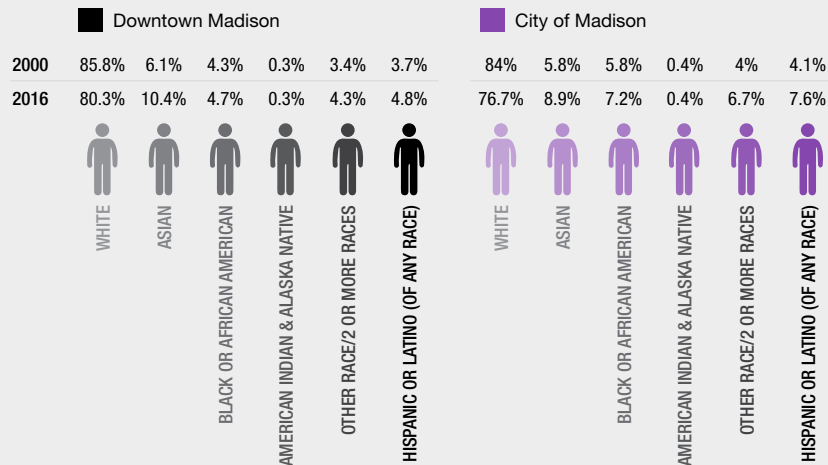
Age Cohort	2000	2016
Under 15 years	0.8%	0.7%
15 to 34 years	87.4%	85.9%
35 to 54 years	7.7%	6.9%
55 to 64 years	2.1%	4.7%
75 years and older	2.0%	1.7%

Source: U.S. Census Bureau, 2000, 2010 Census;  
ESRI estimates, 2016\*

In 2015, **85.9%** of the population in downtown Madison were between the ages of 15-34 years, compared with only **39.9%** of the population citywide

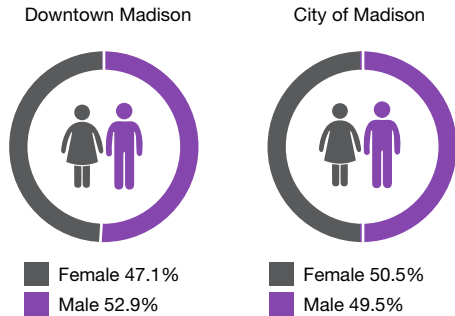
Source: U.S. Census Bureau, ESRI estimates, 2016\*

### Race/Ethnicity



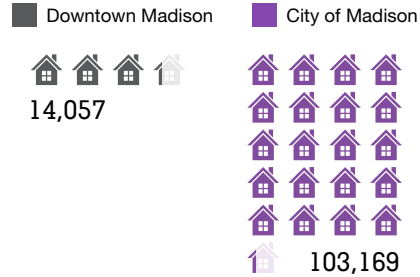
Source: U.S. Census Bureau, 2000 Census; ESRI estimates, 2016\*

## Gender



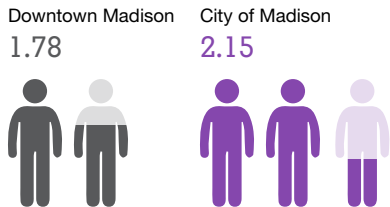
Source: U.S. Census Bureau, ESRI estimates, 2016\*

## Occupied Housing Units



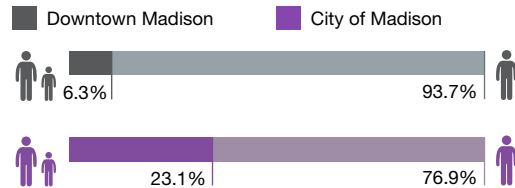
Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year estimates\*

## Average Household Size



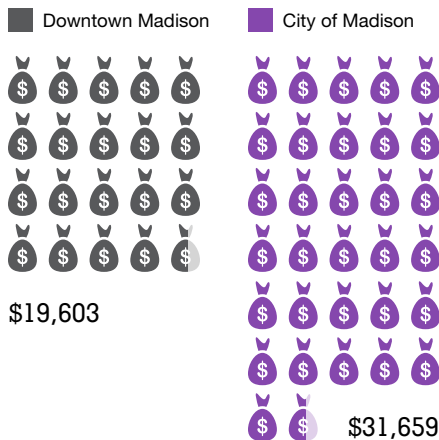
Source: U.S. Census Bureau, ESRI estimates, 2016\*

## Households with vs. without Related Children under 18 Years



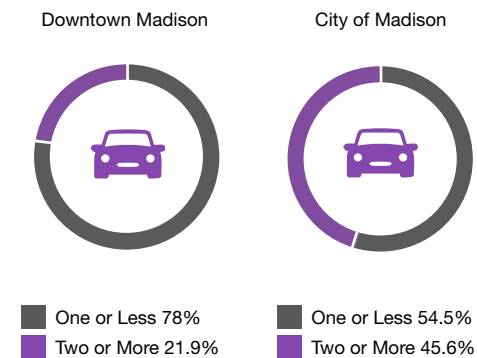
Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year estimates\*

## Per Capita Income



Source: U.S. Census Bureau, ESRI estimates, 2016\*

## Vehicles Available per Household



Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year estimates\*

\*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. U.S. Census Bureau, 2010-2014 American Community Survey 5-year estimate figures are subject to a margin of error based on a 90 percent confidence interval. Per capita income figures are based on periods that contain overlapping years. Differences in the figures may not be statistically significant. Income for downtown includes student population. Downtown defined as 53703 zip code for occupied housing units, available vehicles and related children under 18 years data.



# HOUSING

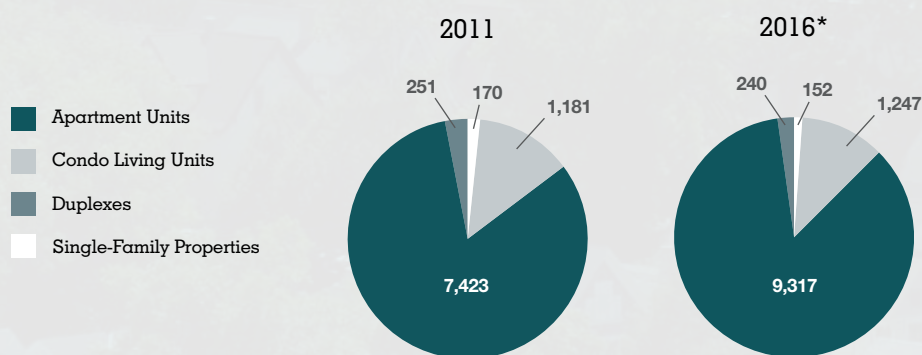
- Central downtown Madison neighborhoods: **6** (Bassett, First Settlement, James Madison Park, Mansion Hill, Mifflin West and State-Langdon)
- Greater downtown Madison area neighborhoods: **6** (Greenbush, Marquette, Monona Bay, South Campus, Tenney-Lapham and Vilas)

Apartment units in downtown Madison: **9,317**,  
an increase of **26%** from 2011

New residential units constructed in downtown  
Madison in 2015: **1,349**

Sources: City of Madison Assessor's Office, City of Madison Planning Division, July 2016

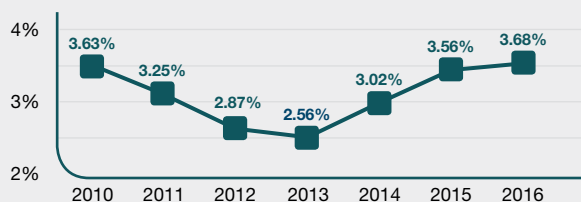
## Types of Units in Downtown Madison



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

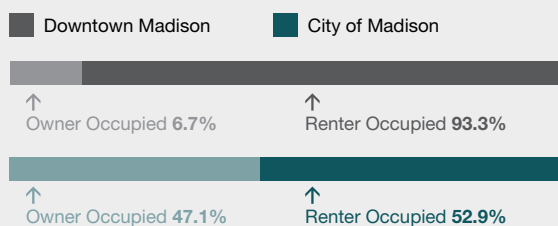


## Multi-Family Rental Vacancy Rates in Downtown Madison



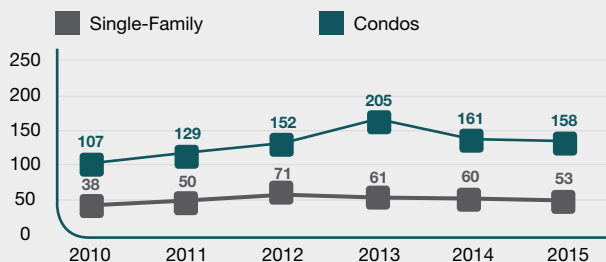
Source: Madison Gas & Electric, [www.mge.com](http://www.mge.com),  
Q2 figures for 53703 zip code area

## Occupied Housing Units by Tenure



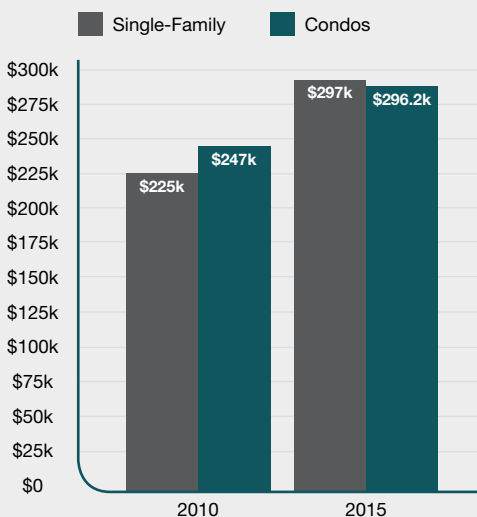
Source: U.S. Census Bureau, ESRI estimates, 2016\*

## Home Sales in Greater Downtown Madison



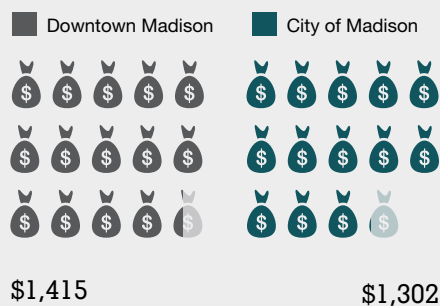
Source: REALTORS® Association of South Central Wisconsin/South Central MLS

## Median Sales Price in Greater Downtown Madison



Source: REALTORS® Association of South Central Wisconsin/  
South Central MLS

## Average Rental Rate



Source: Rent Jungle

Since 2010, single-family home and condo sales in downtown Madison have increased by: **46%**

Source: REALTORS® Association of South Central Wisconsin/South Central MLS

# QUALITY OF LIFE & SAFETY



## → Childcare Facilities in Greater Downtown Madison

- Spots available: **749**

Sources: Wisconsin Department of Children & Families, YoungStar Program. Facilities include: Bernie's Place Inc., Creative Learning Preschool Inc., MATC Child and Family Center, Meriter Children's Center, Play Haven Vilas LLC, Red Caboose Day Care Center, St. Mary's Child Care Center, University Avenue Day Care Inc., UW Preschool Lab, Tenney Nursery & Parent Center, Inc., and Wil-Mar Neighborhood Center. Additional childcare facilities may be located in downtown that are not included in these numbers.



## → Places of Worship in Greater Downtown Madison

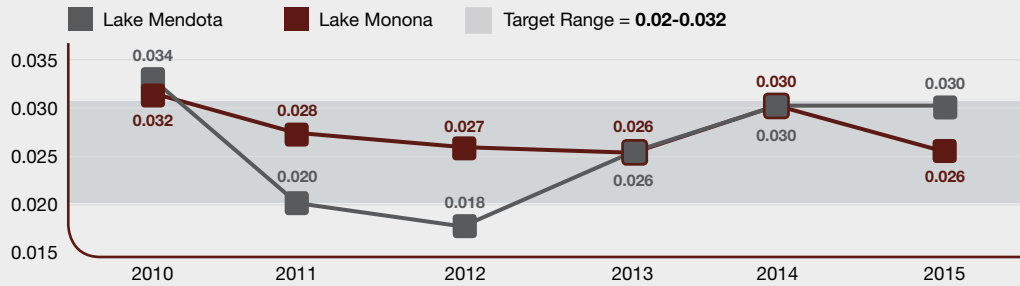
- Members: **19,197**
- Average weekly service attendance: **5,415**
- Meals/people served at onsite food pantries/meal programs in 2015: **47,366**

Sources: Bethel Lutheran Church\*, Blackhawk Church-Downtown, Calvary Lutheran Chapel, Faith Community Bible Church, First United Methodist Church\*, Grace Episcopal Church\*, Harvest Church of Madison, Pres House, Madison Catholic Diocese (St. Raphael Cathedral Parish and St. Paul University Catholic Center), St. John's Lutheran Church, UW Hillel, and Wisconsin Lutheran Chapel. Additional places of worship may be located in downtown that are not included in these numbers. \*Place of worship included in onsite food pantry/meal program figure.



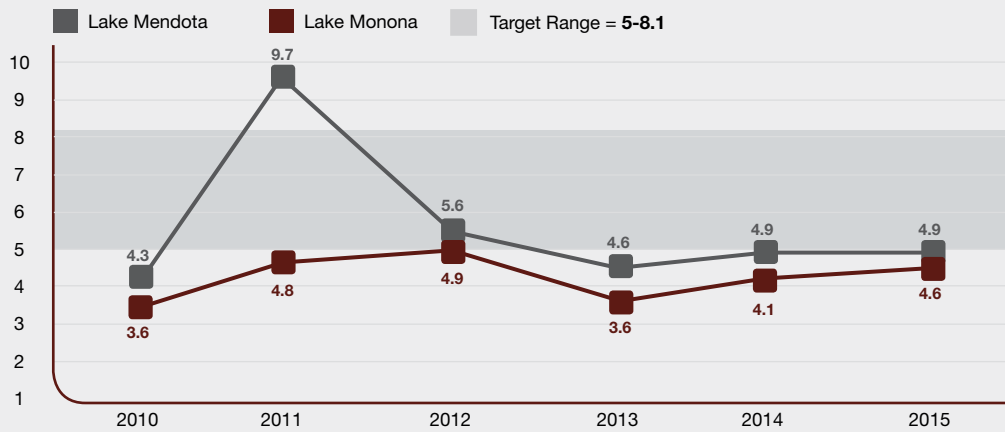
## Lakes in Downtown Madison

### Median Total Phosphorus (mg/L)



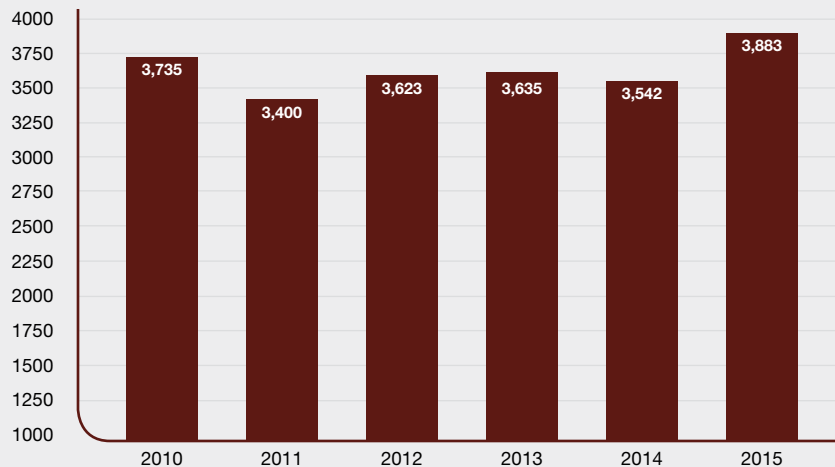
Source: Clean Lakes Alliance, State of the Yahara Lakes report 2012-2015

### Water Clarity/Secchi Visibility Depth (ft)



Source: Clean Lakes Alliance, State of the Yahara Lakes report 2012-2015

### Top Criminal Offenses in Downtown Madison



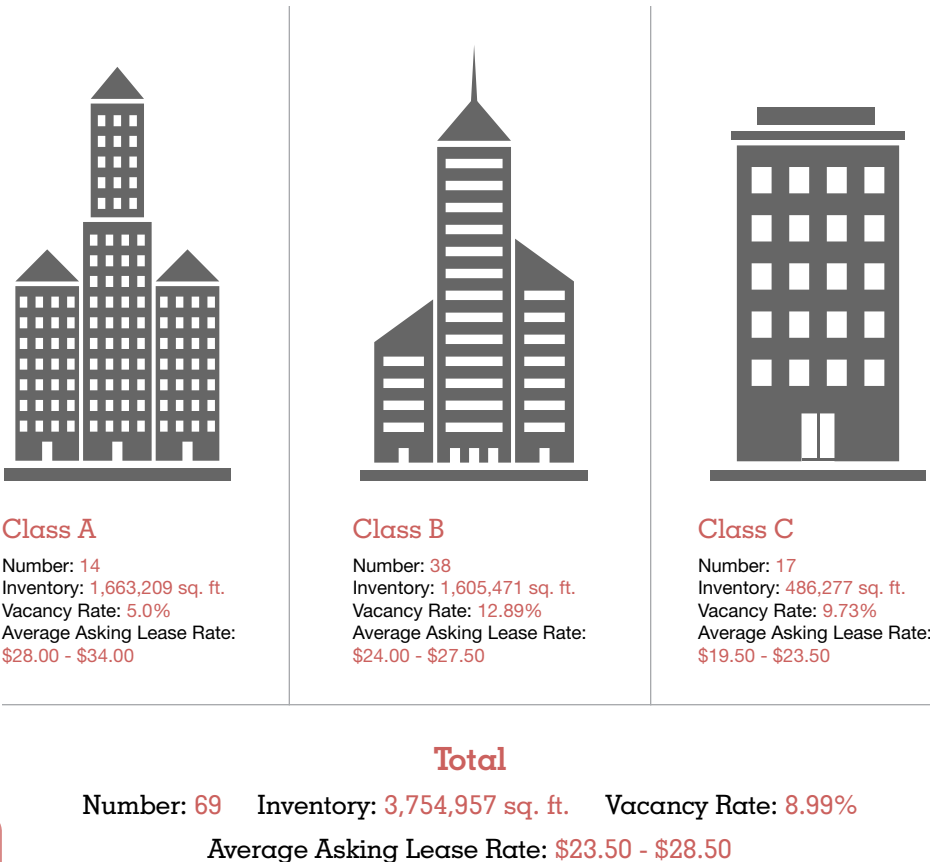
Source: City of Madison Police Department (offenses include: trespass of real property, battery simple assault, theft from vehicle, theft from building, burglary, all other larceny, drug/narcotic violations, damage/vandalism of property, disorderly conduct, and liquor law violations)

# OFFICE MARKET

- Vacancy rate for office space in downtown Madison: **8.99%**, down from **13.4%** in 2010
- Average asking lease rate for office space in downtown Madison: **\$23.50 - \$28.50**, compared to **\$14.50 - \$18.50** for Dane County
- Downtown Madison is comprised of **44%** Class A, **43%** Class B, and **13%** Class C office space

Source: Broadwing Advisors, LLC, Xceligent, Q3 2010, Q2 2016

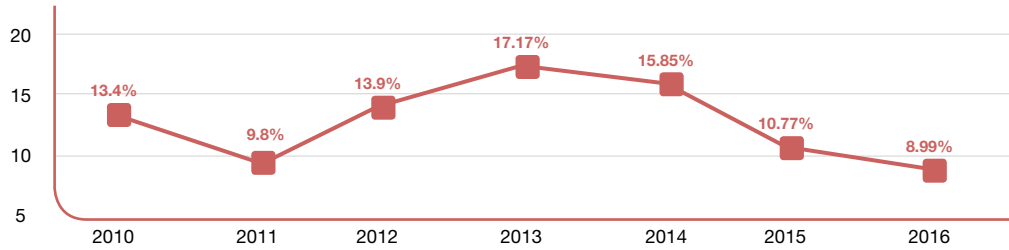
## Office Space by Class in Downtown Madison



Source: Broadwing Advisors, LLC, Xceligent, Q2 2016



## Office Space Vacancy Rates in Downtown Madison

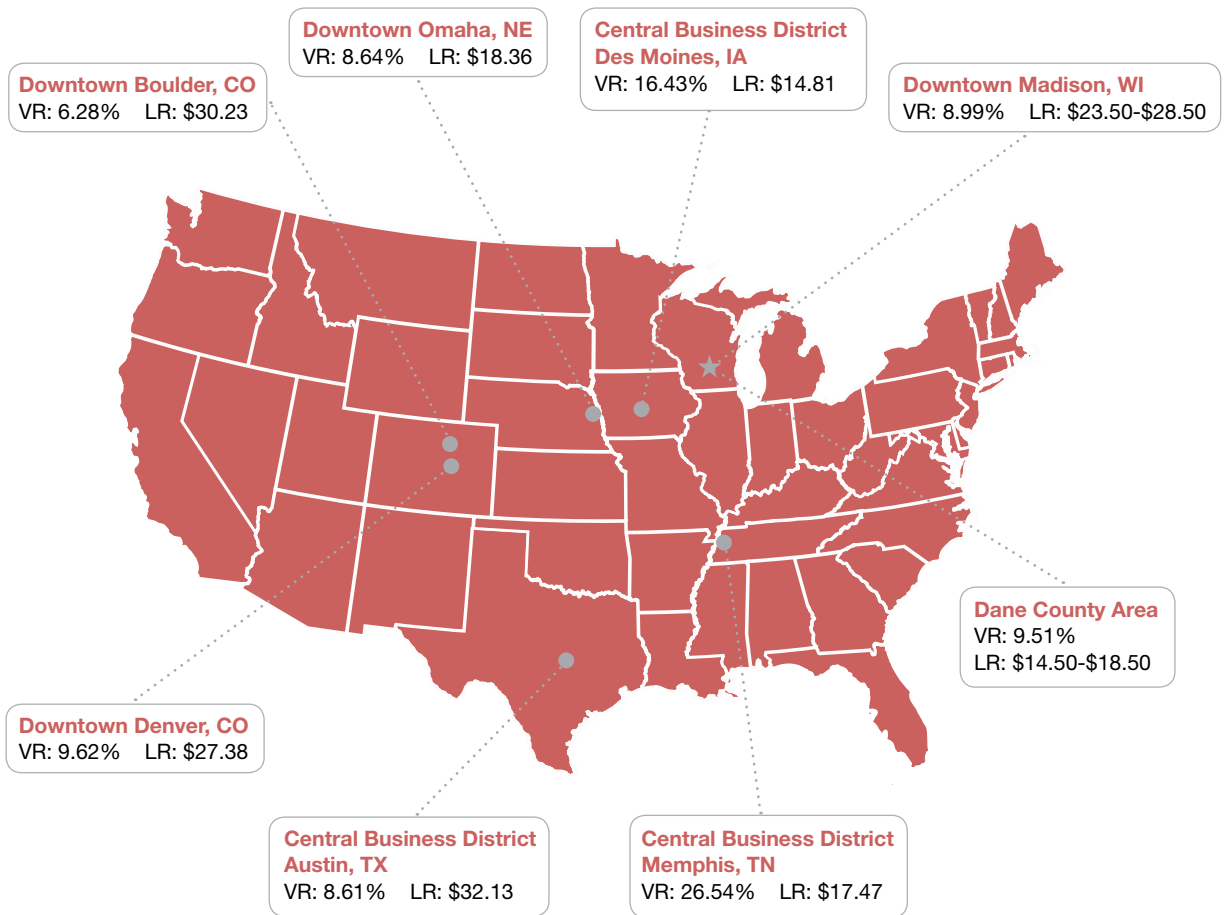


Source: Broadwing Advisors, LLC, Xceligent, Q3 2010-2011, Q2 2012-2016

## Office Space Comparisons in 2016

VR - Vacancy Rate

LR - Average Asking Lease Rate



Source: Broadwing Advisors, LLC, Xceligent, Q3 2010-2011, Q2 2012-2016

# WORKFORCE

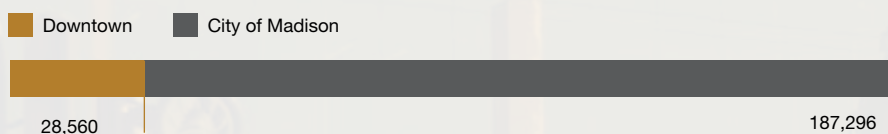
→ Percentage of workers citywide located in downtown Madison: **15.2%**

→ Top 3 employment industries in downtown Madison are:

- Public Administration: **41%**
- Accommodation and Food Services: **13%**
- Professional, Scientific, and Technical Services: **10%**

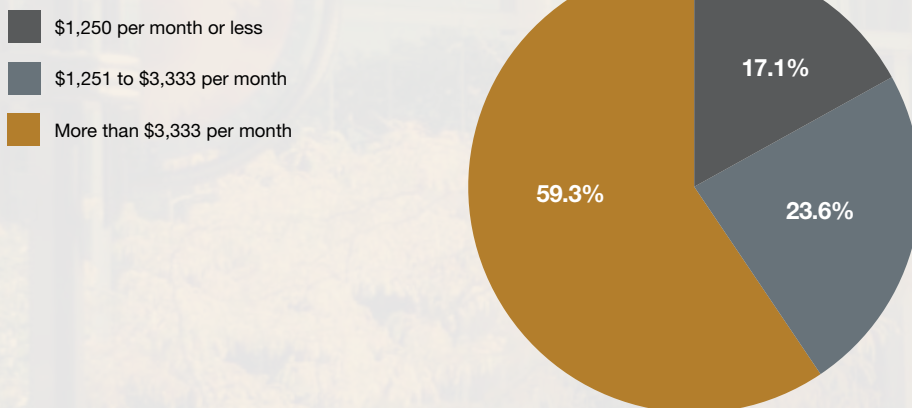
*Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics, Beginning of Quarter Employment, 2nd Quarter of 2014*

## Number of Workers



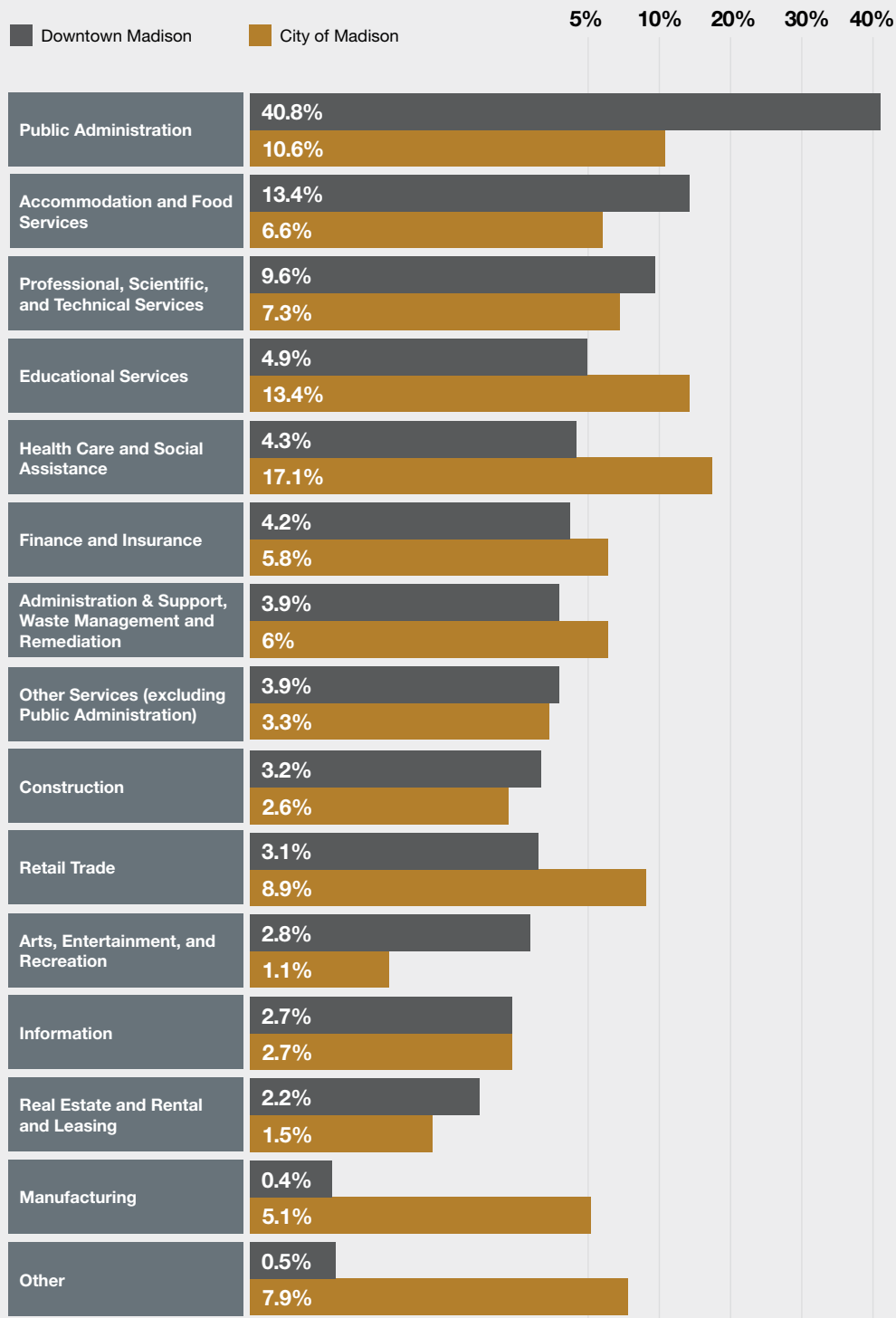
*Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics, Beginning of Quarter Employment, 2nd Quarter of 2014*

## Worker Earnings in Downtown Madison



*Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics, Beginning of Quarter Employment, 2nd Quarter of 2014*

## Employment by Industry



Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics, Beginning of Quarter Employment, 2nd Quarter of 2014. \*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 and figures are for estimates only. 2014 employment figures are the most recent data released by the U.S. Census Bureau and are reflected in the workforce data in this section.

# EDUCATION

## Higher Education in Downtown Madison

### University of Wisconsin-Madison Enrollment



43,389  
Students

*Source: University of Wisconsin-Madison, 2015-16 academic calendar year*

Enrollment at the University of Wisconsin-Madison has increased by **2%** since the 2010-2011 academic year

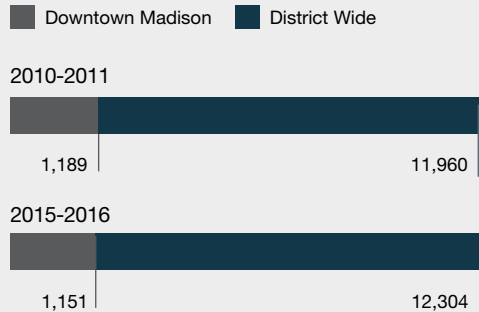
*Source: University of Wisconsin-Madison*





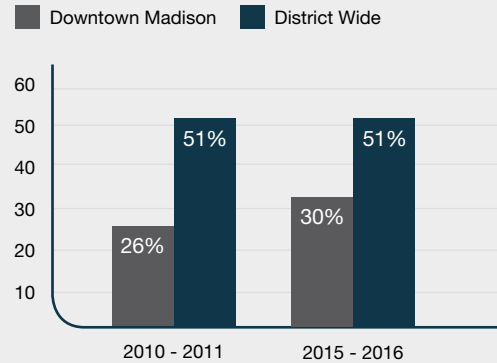
## Primary/Secondary Education in Downtown Madison

### Madison Metropolitan School District (MMSD) K-5 Enrollment



Source: Madison Metropolitan School District, [www.madison.k12.wi.us](http://www.madison.k12.wi.us).\*

### MMSD K-5 Students Receiving Free/Reduced Lunch

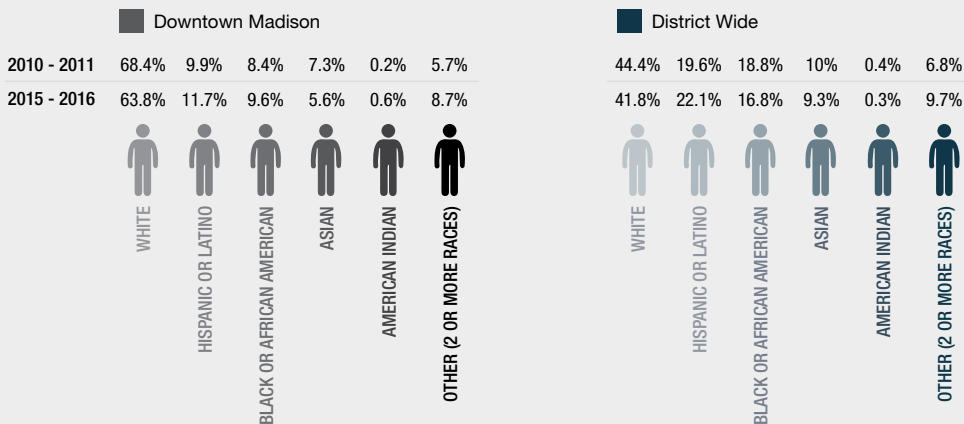


Source: Madison Metropolitan School District, [www.madison.k12.wi.us](http://www.madison.k12.wi.us).\*

**36%** of K-5 students at MMSD schools in the greater downtown Madison area are of a race other than white compared to **58%** of students citywide

Source: Madison Metropolitan School District, [www.madison.k12.wi.us](http://www.madison.k12.wi.us).\*

### MMSD K-5 Enrollment by Race



Source: Madison Metropolitan School District, [www.madison.k12.wi.us](http://www.madison.k12.wi.us).\*Downtown Madison schools include: Lapham (K-2), Marquette (3-5), Franklin (K-2) and Randall (3-5) elementary schools. Figures exclude 4K and PK programs.

## RETAIL & RESTAURANTS

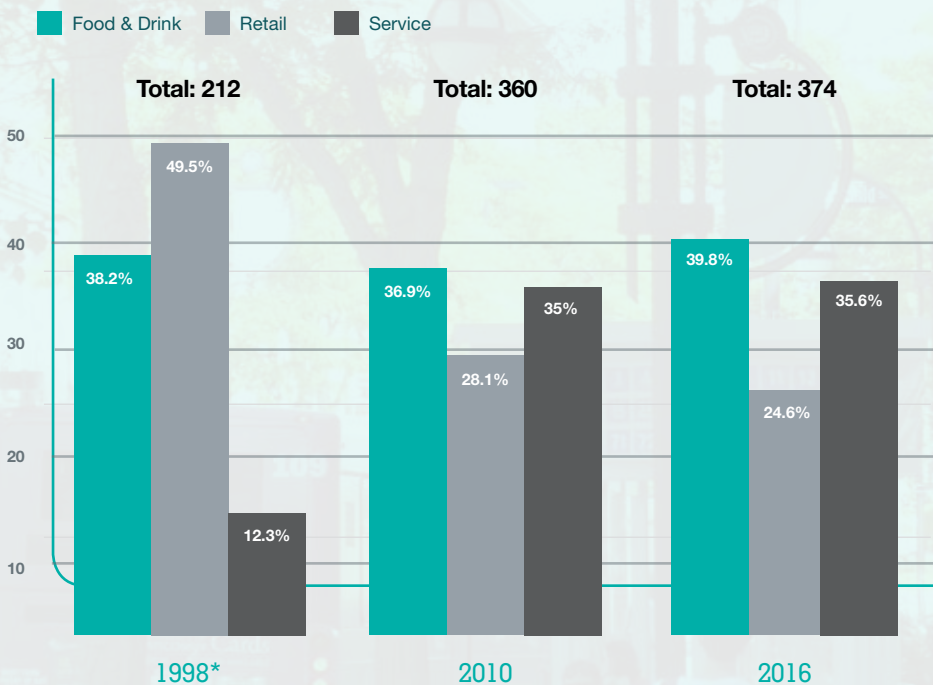
- Vacancy rate for retail space in downtown Madison: **5.66%**, compared to **5.26%** in Dane County
- Inventory of retail space in downtown Madison: **1,136,393** square feet
- Customers helped by the BID's Downtown Information Ambassador Program in 2015: **44,217**
- Customers helped at the BID's Visitor Center on State Street since opening in 2010: **100,000+**

Sources: Broadwing Advisors, LLC, Xceligent: Q2 2016, Madison's Central BID

### Madison's Central Business Improvement District (BID)

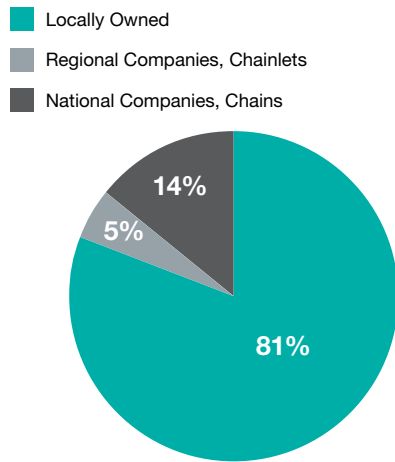
Madison's Central BID is at the heart of downtown's retail/restaurant area and encompasses the greater State Street, Capitol Square and King Street areas (see map on page 3).

### BID Business Type Mix



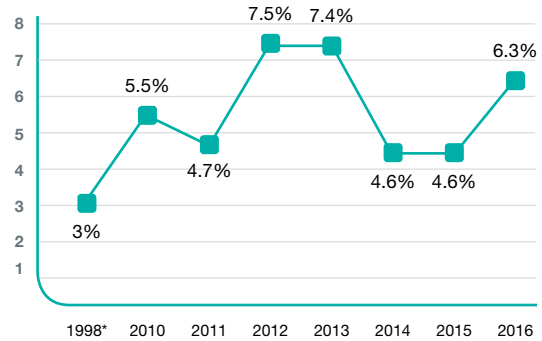
Sources: Madison's Central BID and Gibbs Report 1998 (\*greater State Street area only)

## BID Business Ownership Mix



Source: Madison's Central BID (Ownership mix figures do not include non-profits. Locally owned includes Wisconsin ownership, locally owned franchises.)

## BID Business Space Vacancy Rates



Sources: Madison's Central BID and Gibbs Report 1998 (\*greater State Street area only)

## Pedestrian Counts

100 block State Street, North Side



100 block State Street, South Side



Source: City of Madison Traffic Engineering, Visio eco counter data from 7/2015-6/2016



# TOURISM & ATTRACTIONS

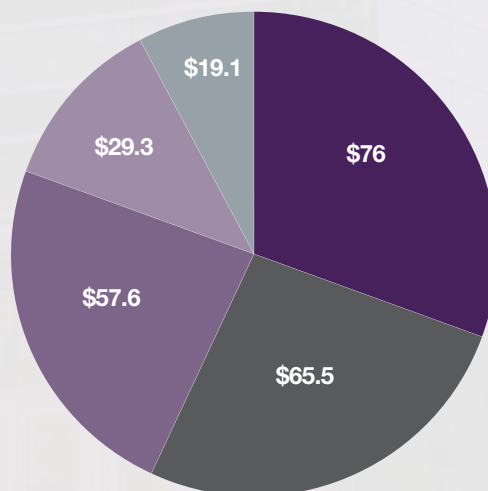
- State and local taxes generated from tourism in downtown Madison: **\$14.5** million
- Tourism generated **\$247.5** million in direct visitor spending in downtown Madison, an increase of **4%** since 2014
- Jobs directly engaged in the tourism industry: **4,056**, an increase of **57%** since 2011
- Conferences and conventions at Monona Terrace Community & Convention Center in 2015:
  - Number: **63**
  - Average Attendance: **743**
  - Economic Impact: **\$38.8** million
  - Room Nights Generated: **34,679**

Sources: Greater Madison Convention & Visitors Bureau, *The Economic Impact of Tourism in Madison, WI, May 2012-2016 Tourism Economics*, Monona Terrace Community & Convention Center Annual Report 2015

## Direct Visitor Spending Breakdown for Downtown Madison in 2015 (in millions)

Recreation Food and Beverage Lodging Retail Transportation

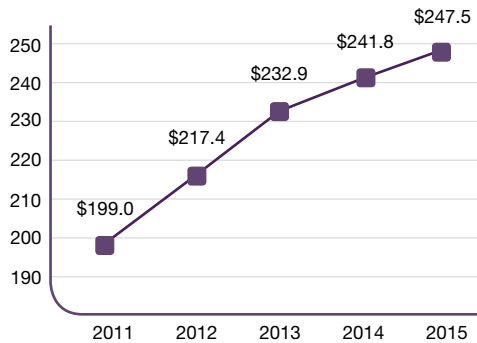
Total: \$247.5



Source: Greater Madison Convention & Visitors Bureau, *The Economic Impact of Tourism in Madison, WI, May 2016 Tourism Economics* (downtown defined as 53703 zip code)

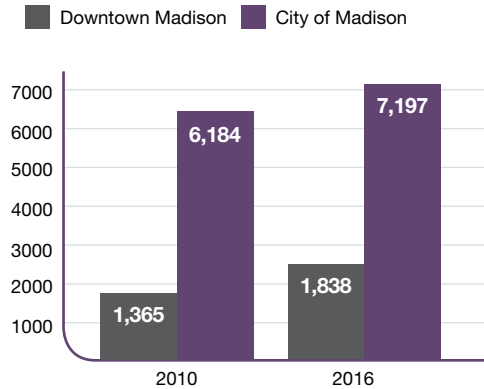


## Direct Visitor Spending Generated by Tourism in Downtown Madison (in millions)



Source: Greater Madison Convention & Visitors Bureau, *The Economic Impact of Tourism in Madison, WI, May 2012-2016 Tourism Economics*

## Number of Hotel Rooms



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

## Visits to Destinations in Greater Downtown Madison for 2015\*

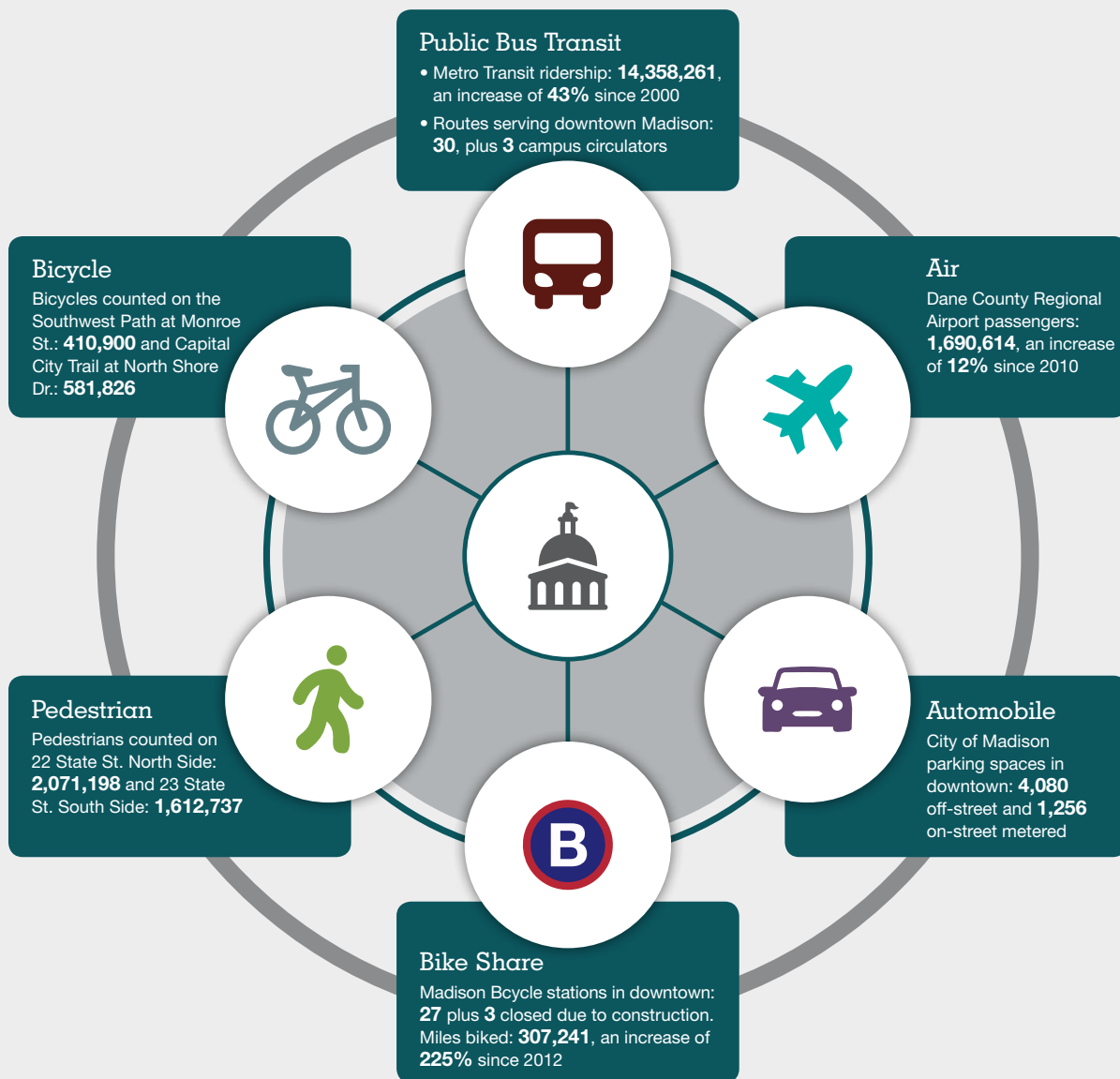


Sources: Alliant Energy Center, City of Madison Parks Division provided approximation for Breese Stevens Field, Henry Vilas Zoo, Madison Children's Museum, Madison Museum of Contemporary Art, Madison Public Library, Monona Terrace Community & Convention Center Annual Report, Overture Center for the Arts Annual Report (July 1-June 30), UW Athletic Department (all facilities, July 1-June 30), Wisconsin Historical Museum, Wisconsin Institutes for Discovery, Wisconsin State Capitol Tours and Information, Wisconsin Union (academic calendar year), Wisconsin Veterans Museum. \*Additional destinations may be located in downtown Madison that are not included in these numbers.



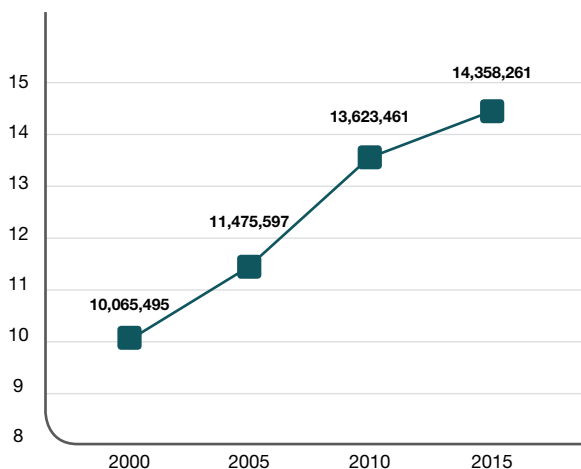
# MOBILITY

→ Mobility in Downtown Madison in 2015



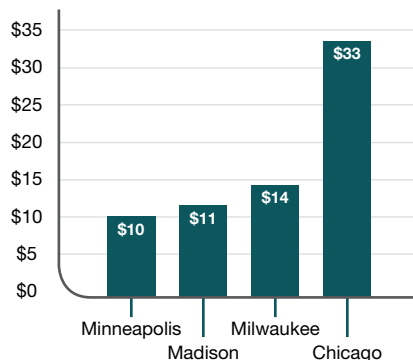
Sources: Metro Transit, Madison Bicycle, Dane County Regional Airport, City of Madison Traffic Engineering, Visio eco counter data from 7/2015-6/2016, City of Madison Parking Utility

## Metro Transit Bus System Ridership



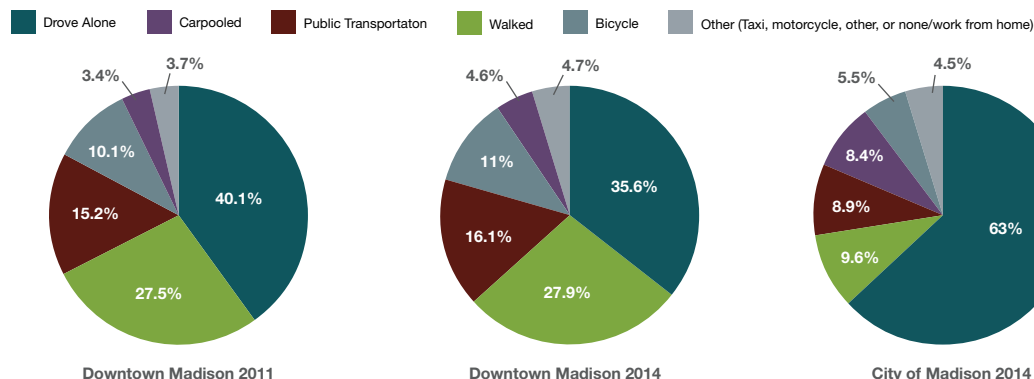
Source: Metro Transit

## Median Daily Parking Rates Comparison in 2016



Sources: City of Milwaukee, [impark.com](http://impark.com), City of Minneapolis, [City of Madison](http://CityofMadison.gov), [parkme.com](http://parkme.com). Rates are from covered parking facilities owned by each city. There are 4 in Milwaukee, 16 in Minneapolis, and 5 in Madison. Chicago's garages are all leased to commercial enterprises. Early-bird special rates were not considered. Rounded to the nearest dollar.

## Means of Transportation to Work in Downtown Madison



Source: U.S. Census Bureau, 2007-2011, 2010-2014 American Community Survey 5-Year estimates; figures are subject to a margin of error. Downtown Madison defined as 53703 zip code.

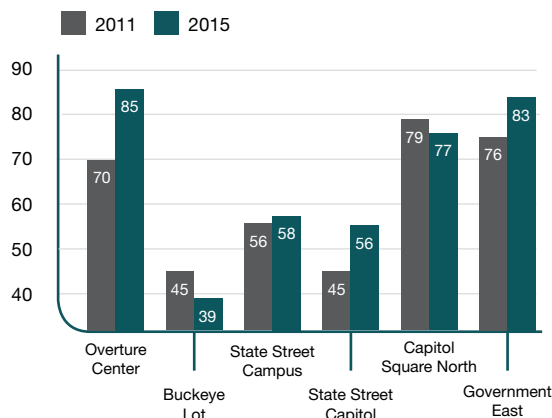
## Walk, Transit & Bike Score Comparison

Location	Walk	Transit	Bike
Downtown Portland, OR	95	92	92
Downtown Minneapolis, MN	92	95	93
<b>Downtown Madison, WI</b>	<b>92</b>	<b>61</b>	<b>97</b>
Downtown Austin, TX	90	68	93
Downtown Boulder, CO	83	59	93

Source: Walk Score®, [www.walkscore.com](http://www.walkscore.com), July 2016\*

\*Walk Score measures the walkability of any address based on the distance to nearby places and pedestrian friendliness. Transit Score measures how well a location is served by public transit based on the distance and type of nearby transit lines. Bike Score measures whether an area is good for biking based on bike lanes and trails, hills, road connectivity, and destinations. 100=high, 0=low

## Occupancy Rates for Garages and Lots in Downtown Madison



Source: City of Madison Parking Utility (occupancy rates measured from 10am-2pm)

# SUSTAINABILITY

## → LEED Certified and Registered Projects:

- Downtown Madison: **24**
- City of Madison: **108**

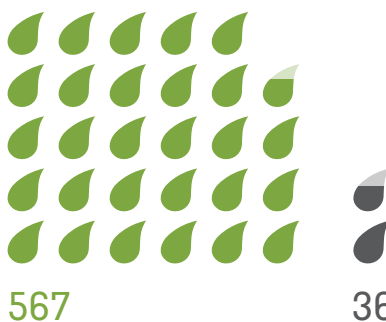
Source: U.S. Green Building Council, [www.usgbc.org](http://www.usgbc.org), Public LEED Project Directory, July 2016 (downtown Madison defined as 53703 zip code)

Out of all the  
LEED Certified  
and Registered  
Projects in the City of  
Madison, **22%** are  
located downtown

Source: U.S. Green Building Council, [www.usgbc.org](http://www.usgbc.org), Public LEED Project Directory, July 2016  
(downtown Madison defined as 53703 zip code)

### Rain Gardens

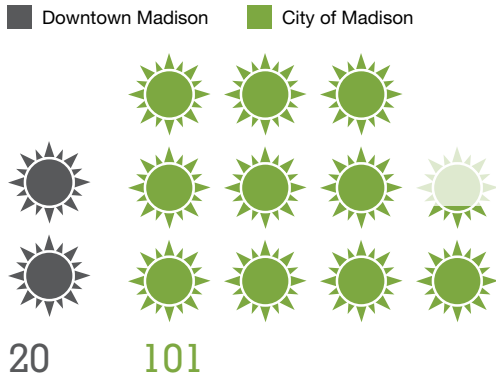
■ City of Madison ■ Downtown Madison



Source: City of Madison, [www.cityofmadison.com](http://www.cityofmadison.com),  
Rain Garden Map, May 2014

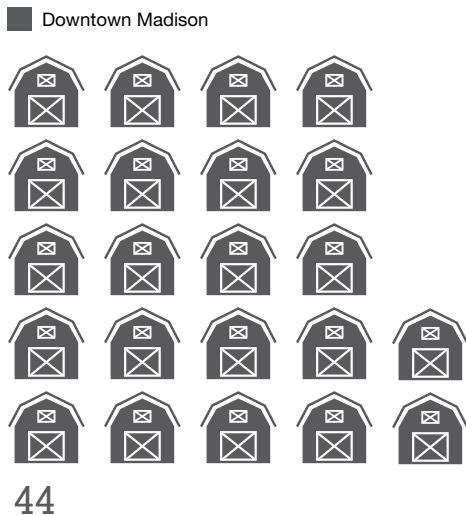


## Solar Installations



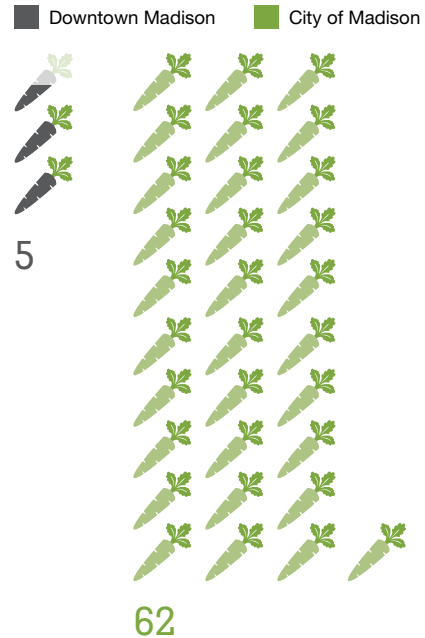
Sources: City of Madison, [www.cityofmadison.com](http://www.cityofmadison.com), MadiSUN Solar Map and Madison Gas & Electric solar projects: Dane County Henry Vilas Zoo, Madison Children's Museum, Solar parking canopy City of Madison Municipal Building, and Wisconsin State Capitol, as listed on [www.mge.com](http://www.mge.com), July 2016

## Community-Supported Agriculture Farm Pick-up Locations



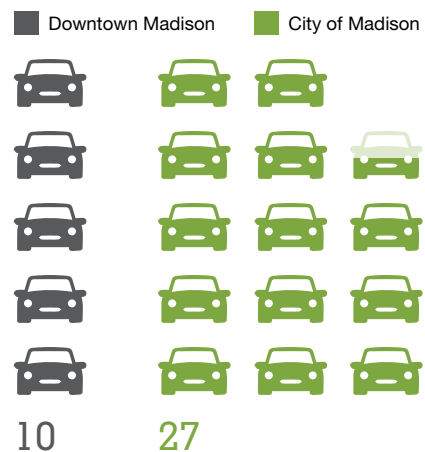
Source: Fair Share CSA Coalition, [www.csacoalition.org](http://www.csacoalition.org), Farm Pickup Location Map, July 2016

## Community Gardens



Source: Dane County Community Gardens, [www.danecountycommunitygardens.org](http://www.danecountycommunitygardens.org), July 2016

## Electric Vehicle Charging Stations



Source: Madison Gas & Electric, [www.mge.com](http://www.mge.com), July 2016

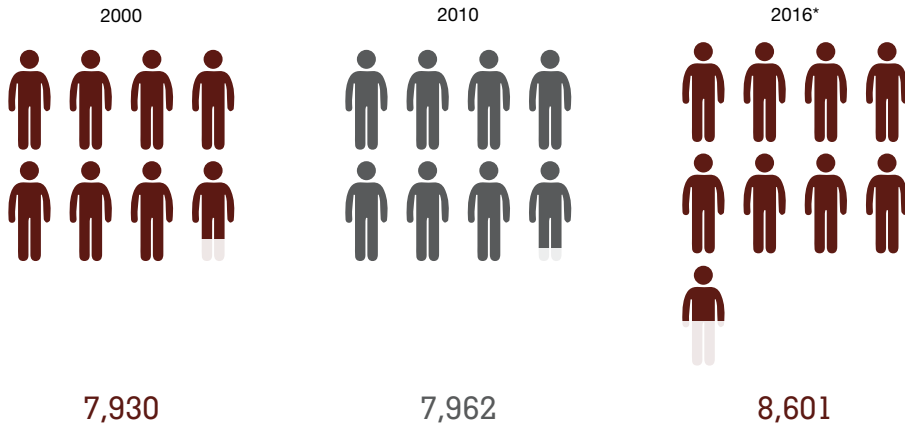
# CAPITOL EAST DISTRICT

- The Capitol East District is directly east of the central downtown and is bounded by Lake Mendota, Lake Monona, Blair Street and the Yahara River (see map on page 3)
- New development completed in the Capitol East District in 2015:
  - **2** projects
  - **354** residential units
  - **132,500** commercial square footage

*Source: City of Madison Planning Division, July 2016*



## Population



Source: U.S. Census Bureau: 2000, 2010 Census and ESRI estimates, 2016. \*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.

From 2000 to 2016, the population of the Capitol East District has increased by **8.5%**

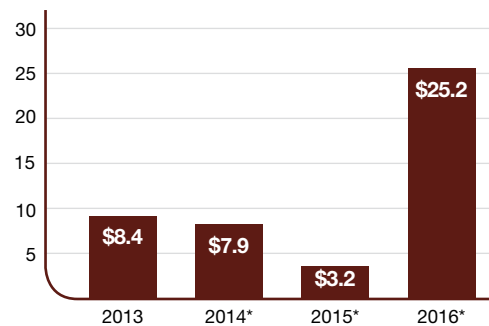
Source: U.S. Census Bureau: 2000 Census and ESRI estimates, 2016\*

## Workers



Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics, Beginning of Quarter Employment, 2nd Quarter of 2014. 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 and figures are for estimates only.

## New Construction (in millions)



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

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