

# Needs and Perspectives of Business Operators

*A survey of downtown business operators was conducted to gather insights, perspectives and input from the downtown Madison business community. The study analyzed opportunities to improve downtown Madison as a place to operate a business, and generated data to support business retention, expansion and recruitment efforts.*

## Survey Overview

The Downtown Madison Business Operators Survey collected data from businesses that operate in downtown Madison, specifically in and around State Street and the Capitol Square area. The comprehensive survey was conducted in March and April, 2007.

### Types of Questions

The survey was designed to gather background information from businesses on their needs and opportunities, business characteristics, and market and marketing data. The overall goal of these questions was to learn how to make downtown Madison a more profitable place to do business. Questions were grouped in the following categories:

- Background Information on each business
- Satisfaction with their Downtown Location and Future Plans
- Business Sales Patterns, Seasonality and Events
- Importance of Various Consumer Segments
- Advertising and Promotion Effectiveness
- Competitive Position in the Madison Area
- Preferences for New Businesses in Downtown Madison
- Challenges in Running a Business in Madison
- Ways to Improve Downtown as a Place to do Business

The survey was based in part on the standardized business operator's survey developed by the Wisconsin Main Street program. This survey was modified extensively by the study committee to reflect research questions specific to Madison.

### Survey Distribution

A total of 572 surveys were mailed to local businesses on March 5, 2007. Recipients of the survey were invited to share their feedback using either a hardcopy survey (see Appendix 5A) or a web-based survey accessible through [www.visitdowntownmadison.com](http://www.visitdowntownmadison.com) (click the "Doing Business" link). All online survey responses went directly to UW Extension and were kept confidential.

Of the 572 total surveys, 52 were craft vendors who only vend downtown during a limited number of Saturdays, while the outdoor Farmer's Market is in session. These vendors have such a minimal presence in downtown, they have been omitted from the survey results, bringing

the final number of businesses surveyed to 520. It is important to note this number does include food vendors, as they are present downtown, and on the Library Mall, seven days a week throughout the majority of the year.

Due to an initial low response rate, a follow-up postcard was mailed to the businesses in the middle of April. This effort was further augmented by email reminders from the BID, as well as personal follow-up phone calls by volunteers from the ad hoc Downtown dynamic Study Advisory committee.

## **Survey Response**

At the end of May, a total of 128 responses had been received. Of these, 76 were hard-copy responses, and 54 were online responses. The final return rate was 25percent. While the study committee was disappointed with this rate, the responses received provided useful information valuable to the overall study.

## **Survey Results**

### **Background Information**

Various questions were asked to better understand general characteristics of the business operators responding to the survey. These questions are used to understand who responded to the survey. These questions and responses are as follows:

#### How long have you been in operation (at this or previous location)? (Q2A)

Over half of responding businesses (52.38 percent) have been in business over 20 years. The next most frequent tenure category is between 1 and 5 years (19.1 percent).

#### How long has your business been at present location? (Q2B)

The most frequent response to length of time at present location is with businesses over 20 years, similar to the length in operation, (33.33 percent) and the next highest frequency is with businesses at their present location between 1 and 5 years (23.02 percent).

#### How long have you been the operator of your business? (Q2C)

Tied for length of tenure at operating, there were those who have operated their businesses over 20 years (29.84 percent) and those who have operated their businesses between one and 5 years (29.84 percent). The data from Q2 suggests the responding businesses tended to be older businesses who have tended to be relatively consistent in where they are located and who has operated them.

#### Does your business own or lease the space in which it is located? (Q4)

Over two thirds of responding businesses (69.60 percent) lease their space, while just over one quarter own their space (26.40 percent).

#### Does your business have direct street access? (Q6)

The overwhelming majority of responding businesses have direct street access (87.40 percent). Just under three quarters of businesses responding to the question concerning access through a common entrance (73.33 percent ) had access through a common entrance. Just over forty percent of respondents to the survey (41.41 percent) did not respond to this question.

## **Satisfaction with Their Downtown Location and Future Plans**

As location is a key factor in business success, specific questions were asked to gauge the business operator's satisfaction with locations and plans to move or expand elsewhere. These questions and responses are as follows:

### How satisfied are you with the present location of your business? (Q9, 10)

Roughly (49.22 percent) half of responding businesses were very satisfied with the present location of their business. More revealing is that 8 of 10 responding businesses (83.6 percent) were either very satisfied or satisfied with the location of their businesses. This data suggests responding businesses do not consider location a major concern.

The most consistent write-in answer to this question appears to be that business are satisfied/very satisfied due to a central location close to the university, the Capitol and government offices. Additionally, businesses are satisfied/very satisfied due to the amount of foot traffic.

Other businesses are unsatisfied/neutral with their location primarily due to lack of business, high rent, and lack of parking. Lack of business seemed to be related to students' seasonality, off-street or upper floor location, and decrease in the number of retailers. Not all were unhappy with parking; while high rent was mentioned by a few. It is important to note, as Question#9 shows, a small number of businesses are unsatisfied or highly unsatisfied.

### Do you have plans to expand or move your business in the next year? (Q11)

Given the responses to the previous question, it is no surprise that just over three quarters of responding businesses had no plans to move their business in the next year. However, ten percent (10 percent) of responding businesses are considering a second location outside of downtown. While this may be a rational strategy of the business, it might be helpful to explore expansion of their existing business or another location downtown.

## **Business Sales Patterns, Seasonality and Events**

Seasonal, daily and hourly sales patterns help describe the sales the variability of sales in the study area. Further, special events impact downtown business activity. Responses to questions that describe current sales patterns were asked in part to determine how adjustments in operating hours might better serve the targeted market segments. These questions and responses are as follows:

### What are the three busiest and three slowest months of the year for this business? (Q12)

Although the question was worded in such a way that respondents could not rank-order months by their level of business. The most frequently selected month was September (39.50 percent), followed closely by August (38.66 percent), October (36.97 percent), December (32.77 percent), and November and July (26.89 percent). This data suggests shopping activity corresponds with the return of students in the fall. The level of activity remains high through the fall, drops off significantly during the spring, and then builds through the summer. Consistent with this data, the slowest months for responding businesses tend to be January and February.

### During a typical week, what are the seven busiest times for your business? (Q17)

Weekdays between 11:00 am and 2:00 pm are the busiest. These times correspond with the traditional lunch period for downtown workers (an important consumer segment) during the week while business activity includes, but is not limited to, the traditional lunch period on

Saturdays. Given downtown Madison's diverse market segments, these responses may suggest an opportunity to build evening business activity in character with other vibrant 24-7 districts.

#### What are your thoughts on store hours? (Q18)

Almost two thirds (64.35 percent) of respondents felt that they were open all the hours they needed to be. Interestingly, over a third (37.39 percent) indicated a willingness to be open more hours if they were sure that expanded hours would result in expanded sales. This data suggests that, while many businesses are comfortable with their hours, there is a fairly large group of businesses who would be open to expanding their hours provided there would be a return on such an investment.

#### Rate the impact on your sales from the following events - during or following the event? (Q19)

Events related to the University are viewed as having the most positive impact upon sales. When numbers from "high impact" and "medium impact" were combined, and with the exception of Maxwell Street Days, University-related events tended to be seen among respondents as having the most significant, positive impact on sales. In order of perceived impact, the following results were obtained:

1. UW Spring Commencement (54.78 percent)
2. UW Parents Weekend (51.28 percent)
3. Maxwell Street Days (49.14 percent)
4. Football Games at Camp Randall (46.09 percent)
5. WIAA High School Championships (40.18 percent)
6. Halloween (38.26 percent)
7. Kohl Center events (37.93 percent)
8. Summer Farmer's Market (37.72 percent)
9. Art Fair On/Off the Square (36.28 percent)
10. Taste of Madison (33.05 percent)
11. Ironman WI (32.46 percent)
12. Overture Center Events (26.89 percent)
13. Concerts on the Square (25.89 percent)
14. World Dairy Expo (24.35 percent)
15. Crazy Legs Classic (23.01 percent)
16. Paddle and Portage (14.04 percent)
17. Jazz at Five (11.50 percent)
18. Capitol Sprints (7.90 percent)
19. Dane Dances, Monona Terrace Rooftop (4.31 percent)

Note: These events represent combined percentages for High and Medium Impact

These numbers support earlier survey data concerning the busiest months for responding businesses which concentrates in the fall. The data support the idea that the University has an observable, positive impact on downtown business. The high impact events identified provide continuing opportunities for joint-effort marketing initiatives to target these particular event attendees.

#### What three conventions had the most noticeable and positive impact on your foot traffic or sales? (Q20)

For the most part, many respondents either did not answer this question at all, or specifically stated that none of the conventions significantly increased sales. This is the most prevalent answer. Of those who chose to answer, the World Dairy Expo is the most frequently cited #1 choice, followed by an array of UW-related events. The #2 choice again often cites UW-related events, as well as multiple mentions of both Halloween and Maxwell St. Days. The #3 slot is dominated by the Iron Man; however, there are so few responses this hardly merits mentioning.

It will be interesting to compare this limited list with the answers to question #19. Over-all I think the largest take-away message is the events do not appear to significantly impact businesses.

### **Importance of Various Consumer Segments**

Certain consumer groups are more important in generating sales for downtown businesses than others. The following questions examine current market segments and may not fully reflect potential or emerging market segments that may be important in downtown's future.

#### How important are the following consumer segments to your business? (Q21)

In terms of the impact of gender on sales, respondents indicated females (78.18 percent very important; 19.09 percent important) have a greater positive impact on sales than do males (60.91 percent very important; 30.91 percent important). In terms of the impact on sales among age categories, the 25-44 age categories was viewed as having the greatest impact. Results, in order of choice of very important, are as follows:

1. Age 25-44 (69.03 percent)
2. Age 45-54 (59.46 percent)
3. Age 18-24 (55.36 percent)
4. Age 55-64 (43.12) percent
5. Age Over 64 (24.30 percent)
6. Under 18 (9.17 percent)

This data suggest the 25-44 age segments is the most important age segment, the over 64 age segment is less important, and the under 18 age segment is relatively unimportant to responding businesses.

This data points to a low level of capture of the teen market. For malls, capturing teen spending on apparel, accessories, electronics, cosmetics, video games, and dining is critical. While teen retailers such as Hollister, American Eagle Outfitters, and West Coast Brands typically locate in malls, downtown Madison may have an opportunity to attract younger shoppers in other ways.

In terms of the location characteristics of shoppers, the data indicates respondents view downtown residents and students as very, and almost equally, important. Findings are as follows when considering the frequency of very important responses:

1. Downtown Residents (61.47 percent)
2. Students (60.71 percent)
3. Tourists and Visitors (52.68 percent)
4. Downtown Office Workers (48.62 percent)
5. Area/regional Residents (35.24 percent)

Overall, while some consumer segments may be viewed as highly important, the data suggests respondents consider most consumer segments to be important.

### **Advertising and Promotion Effectiveness**

Current advertising and promotion methods used by downtown businesses help describe where businesses invest their marketing resources. Indirectly, they also help describe the target consumer reached through these methods (i.e. subscribers, listeners, attendees, etc.). The following questions examine current advertising and promotion practices to the extent possible given the limited responses.

### What media has produced the best results for you? (Q23)

Direct mail (18.18 percent), general newspaper advertising (18.18 percent), the Internet (16.67 percent) and the Isthmus (13.64 percent) lead the way in producing results for responding businesses. Television (.8 percent), radio (.6 percent) and yellow page (.9 percent) advertising are not seen as productive advertising tools by responding businesses.

### Which publications are included in your annual advertising budget? (Q25)

The Isthmus received the largest net budget allocation among the publications listed. It should be noted, however, the question did not ask respondents to rate the publications or order their responses but simply asked them to indicate the percentage of their advertising budget applied to each publication. The most frequently identified publications are listed below:

1. The Isthmus (57.78 percent)
2. WI State Journal (41.11 percent)
3. Madison Magazine (32.22 percent)
4. BID Downtown map and Guide (30.00 percent)
5. The Onion (28.89 percent)
6. The Capital Times (26.67 percent)

What can be seen from the data is the responding businesses advertise with some consistency but they utilize a relatively small number of publications. We can also see the Isthmus is a commonly used venue for print advertising.

### Radio, Television and Website-specific Advertising (Q26, Q27, Q28, Q29, Q30, Q32, Q33)

A very high (over 70 percent) missing response did not provide sufficient data to address these questions.

### Specific Incentive Tools (Q29)

A very high (over 40 percent) missing response did not provide sufficient data to address these questions.

### Website Use (Q30, Q32, Q33)

A very high (over 40 percent) missing response did not provide sufficient data to address these questions.

### Do you communicate with your customers via email? (Q36)

Almost three quarters (70.59 percent) of respondents reported communicating with customers through email.

These data suggest the use of internet technology is not predominant among responding businesses with the exception of email. Since there were no question asking respondents whether email was used as an advertising tool, we cannot draw an inference from the data. However, if we are willing to assume that correspondence from a business owner to a customer might reasonably contain advertising or promotional messages, we might conclude email is a widely used form of technology-based advertising among responding businesses.

## **Competitive Position in the Madison Area**

The business mix and consumer segments utilizing downtown Madison is far different than traditional regional and neighborhood shopping centers in the area. It can be argued downtown Madison is one of the most unique commercial centers in the country. Nevertheless, it is important to examine downtown's competitive position in the Madison market area as a way to

identify opportunities to increase market capture in various business categories. The following questions examine the current competitive position identified by business operators for both their business and the downtown area as a whole. These questions and responses are as follows:

Relative to the other retailers in the central downtown area... (Q37)

Responding businesses considered their pricing niche to be far more quality-focused with fewer/seasonal discounts relative to other retailers in the central downtown area (80.43 percent with 28.13 missing), and relative to their direct competition in the broader Madison area (66.99 percent with 19.53 percent missing). We found it interesting over half of respondents considered themselves to have a quality focus relative to each other.

Relative to your direct competition in the broader Madison area... (Q38)

Respondents tend not to see themselves as competing much with at least some of the area's malls and other shopping districts.

What three existing downtown businesses complement your business the most? (Q39)

In general, businesses tended to choose either their neighboring businesses, or businesses in the same genre as their own business. Those businesses frequently mentioned included the University Book Store, Overture Center, BOP, GAP, B. Side, Jaman, Karen & Co., and Soap Opera.

Thinking regionally, how much do you compete with the following shopping destinations? (Q40)

From among competing shopping areas listed below, respondents tend to view their competition as coming mostly from the Monroe Street and Williamston/Atwood districts, and Hilldale Mall. However, the responses in the "Not At All" category seems to suggest responding businesses don't consider these other shopping districts as major competitors.

When responses for "A Little" and "A Lot" were combined, the following data emerged:

**Table 5.1 – Competitiveness with other Shopping Destinations**

Shopping Destination	A Lot or A Little	Not At All	Don't Know	Missing
Monroe Street	38.5%	53.9%	7.7%	18.8%
Williamson/Atwood	33.7%	59.6%	6.8%	18.8%
Hilldale	33.0%	61.3%	5.7%	17.2%
West Towne	31.1%	63.2%	5.7%	17.2%
Greenway Station	22.1%	72.1%	5.8%	18.8%
East Towne	20.4%	74.5%	4.9%	19.5%
Westgate/Odana Road	19.8%	72.3%	7.9%	21.1%

When combining the "A Lot" and "A Little" response categories, the data suggest responding businesses are aware they compete with at least some of these other shopping districts. They do not appear to consider West Towne a significant competitor.

The data points to downtown's uniqueness. Business operators seem to recognize downtown Madison, with its current independent business mix and more limited and specialized retail is not competing head-to-head with the main-stream retail centers in the city.

To what degree do the following traits help make downtown Madison more competitive versus the competitors listed above? (Q41)

It is clear from the data respondents consider the downtown location to be a significant competitive advantage. Variables such as quality, selection, and price are also considered important but not nearly to the degree as variables including location and character/sense of place.

**Table 5.2 – Traits that make Downtown Madison More Competitive**

Downtown Traits	A Lot	A Little	Not At All	Don't Know	Missing
Location	68.8%	14.3%	13.4%	3.6%	12.5%
Parking	14.4%	9.0%	69.4%	7.2%	13.3%
Hours	17.9%	33.0%	35.9%	13.2%	17.2%
Service	39.6%	34.0%	15.1%	11.3%	17.2%
Name Brands	15.7%	37.3%	28.4%	18.6%	20.3%
Quality	48.6%	36.2%	6.7%	8.6%	18.0%
Selection	40.2%	39.2%	9.8%	10.8%	20.3%
Price	11.7%	48.5%	22.3%	17.5%	19.5%
Character/Sense of Place	84.6%	10.0%	3.6%	1.8%	14.1%

These data suggest responding businesses consider Character/Sense of Place and their location as their biggest competitive advantages over other malls and shopping districts in the area. These data are consistent if Character/Sense of Place is viewed as a location variable. However, parking is considered a major factor that reduces downtown's ability to compete. Assuming these traits hold true from the consumer's perspective, then future marketing efforts should continue to build on these strengths while minimizing these weaknesses.

### Preferences for New Businesses in Downtown Madison

To complement existing businesses, questions were asked to help guide future business expansion and recruitment efforts. These questions and responses are as follows:

What percentage business mix (retail, services and restaurants) would you like to see in downtown Madison? (Q42)

The following mean percentages were reported by responding businesses, in terms of their preferred distribution of business types:

- National Chains: 9 percent
- Regional Chains: 12 percent
- Locally-owned Franchises: 20 percent
- Locally-owner Independents: 55 percent

This data clearly indicates responding businesses favor locally owned independents over franchises, whether locally, regionally, or nationally owned.

With your business in mind, what specific retail stores would you like to see locate in downtown Madison. Please list up to four retail store categories. (Q43)

Businesses who responded expressed a clear and strong desire for a larger downtown department store. The store mentioned most was William Sonoma. Equally desired were more apparel stores. Other business categories mentioned often include a good deli, food market (Whole Foods was specifically mentioned), gourmet food/kitchen store (William Sonoma was specifically mentioned), book store (new, not used books), floral shop, trendy shoe store, art store, etc.

### What specific service businesses would you like to see locate in downtown Madison? (Q44)

There are five requests for dry cleaners. In addition, numerous respondents indicated a need for a U.S. Post Office, a beauty/barber shop, and personal care salons.

### **Challenges in Running a Business in Madison**

To recognize potential “red flags” that might impact the success of businesses, questions were asked to help understand some of the challenges facing business operators. These questions and responses are as follows:

### Please rate the degree you are experiencing the following business challenges? (Q45)

Respondents were asked to indicate the degree to which they are experiencing a number of business challenges. Insufficient parking, expensive rent, suburban competition, and construction were the four leading major challenges listed. Minor challenges were more numerous led by Street-people/panhandling, difficulty recruiting/retaining employees, Perception of safety, and construction.

**Table 5.3 – Types of Challenges Facing Downtown Madison Businesses**

<b>Types of Challenges</b>	<b>Major Challenge</b>	<b>Minor Challenge</b>	<b>No Challenge</b>	<b>Don't Know</b>	<b>Missing</b>
Conflict with building owner or tenant	1.8%	24.6%	71.1%	2.6%	10.9%
Difficulty recruiting/retaining employees	4.4%	50.4%	44.3%	.9%	11.7%
Expensive employee wages and benefits	10.1%	51.4%	35.8%	2.8%	14.8%
Expensive rent	19.8%	36.5%	41.7%	2.1%	25.0%
Product delivery or loading challenges	5.6%	40.7%	52.8%	.9%	15.6%
Insufficient financing	3.7%	16.5%	78.9%	.9%	14.8%
Insufficient parking	28.0%	46.2%	24.7%	1.1%	27.3%
Suburban competition	18.2%	36.4%	42.4%	3.0%	22.7%
Internet competition	15.8%	24.8%	55.5%	4.0%	21.1%
Language barriers	.9%	14.2%	82.3%	2.7%	11.7%
Poor building condition	1.8%	25.5%	71.8%	.9%	14.1%
Restrictive business regulations	10.9%	35.5%	51.8%	1.8%	14.1%
Shoplifting or theft	1.8%	36.6%	60.7%	.9%	12.5%
Unskilled workers	.9%	22.8%	75.4%	.9%	10.9%
Vandalism/Graffiti	13.4%	44.6%	41.1%	.9%	12.5%
Perception of safety	16.7%	49.1%	33.3%	.9%	15.6%
Construction	18.3%	49.0%	31.7%	1.0%	18.8%
Lack of pedestrian traffic	11.0%	27.5%	60.6%	.9%	14.8%
Street closure for events	9.9%	33.3%	55.9%	.9%	13.3%
Smoking ban	4.4%	12.3%	80.7%	2.6%	10.9%
Street-people/panhandling	10.4%	55.7%	33.0%	.9%	17.2%

The data suggest businesses are challenged by issues that have a direct impact on operating profitability (expensive wages, employee turnover, vandalism), and buy issues that deter customer volume (parking, suburban competition, panhandling, etc.) Some of these issues might be addressed through educational programs and business technical assistance.

### **Way to Improve Downtown as a Place to Do Business**

#### Services and Environment (Q46)

Respondents identified fire protection services as an outstanding service, followed by police protection. The data do not suggest respondents feel particularly negative about other services. In terms of the general business environment, respondents express support for behaviors that support each other and the downtown business community. One note of caution, one in five

respondents does not feel safe downtown. The implication of this would be of considerable concern if the same sentiment is felt by shoppers, suggesting a need for further research on this topic among downtown shoppers.

**Table 5.4 – How Downtown Madison Business Operators Feel About Issues**

Statement Describing Downtown	Strongly Agree	Somewh at Agree	Neutral	Somewh at Disagree	Disagree	Missing
Local police protection is outstanding	22.4%	40.0%	28.2%	8.2%	1.2%	33.6%
Local fire protection is outstanding	37.9%	41.1%	21.1%	0.0%	0.0%	25.8%
Local waste management service is outstanding	14.4%	46.9%	27.9%	9.0%	1.8%	13.3%
Sidewalk/street maintenance on State St./Capitol Square is outstanding	14.2%	48.1%	24.5%	11.3%	1.9%	17.2%
Local municipal services are worth the level of local taxation	6.8%	44.7%	35.0%	4.9%	3.9%	19.5%
I feel safe downtown, even at night	13.9%	49.5%	14.9%	18.8%	3.0%	21.1%
I try to buy products and services downtown	26.3%	56.6%	14.1%	3.0%	0.0%	22.7%
I try to direct customers to other downtown businesses	56.5%	36.5%	7.1%	0.0%	0.0%	33.6%
I seek ways to cooperate with complementary Dtn. Businesses	36.2%	44.7%	19.2%	0.0%	0.0%	26.6%
The existing downtown business mix helps my business	24.8%	46.5%	21.8%	5.0%	2.0%	21.1%
My customers complain about parking	29.2%	45.8%	19.8%	2.1%	3.1%	25.0%
Downtown Madison is an excellent place to have a business	28.1%	44.8%	20.8%	5.2%	1.0%	25.0%

Which of the following business incentive or assistance programs have you used for your downtown Madison business? (Q47)

Respondents identified DMI's free assistance offerings as the most often used assistance programs among those listed. The data also indicate knowledge and use of the wide range of incentive and assistance programs available to respondents is modest, at best. These data suggest the need for more aggressive efforts in making downtown businesses aware of programs available to them.

**Table 5.5 – Use and Awareness of Incentive or Assistance Programs**

Incentive or Assistance Program	Used in Past Year	Will Use Next Year	Don't Know About	Won't Use	Missing
Entrepreneurial Training Program-UWEX SBDC	7.6%	4.8%	40.0%	47.6%	18.0%
Free business counseling-SBDC	1.9%	6.5%	43.0%	48.6%	16.4%
Free telephone assistance-SBDC	4.7%	3.8%	44.3%	47.2%	17.2%
Other programs or seminars from SBDC	7.8%	1.9%	45.6%	44.7%	19.5%
WI Entrepreneurs Network Early Planning Grant	0.9%	1.9%	47.2%	50.0%	17.2%
Capital Idea Tech Zone High Tech Tax Credits	0.0%	0.9%	45.8%	53.3%	16.4%
DOC Minority Bus. Dev. Loan Program	0.9%	0.9%	41.7%	56.5%	15.6%
WHEDA Small Business Loan Guarantee	1.0%	1.0%	39.1%	59.1%	18.0%
MATC Business Procurement Assist. Ctr.	1.0%	1.0%	51.4%	46.7%	18.0%
SCORE Free Business Counseling	1.9%	3.8%	39.6%	54.7%	17.2%
WWBIC Loan program	2.8%	0.9%	39.3%	57.0%	16.4%
WWBIC Business Assistance Pgs. & Seminars	1.9%	1.9%	44.9%	51.4%	16.4%
City of Madison Assistance-OBR	0.9%	1.9%	52.8%	44.3%	17.2%
City of Madison Façade Improvement Pgm.	2.8%	7.5%	43.0%	46.7%	16.4%
City of Madison Capital Rev. Loan Fund	0.0%	0.0%	48.6%	51.4%	16.4%
Madison Dev. Corp. financing pgm.	1.9%	0.9%	44.4%	52.8%	15.6%
US SBA loan program	8.4%	2.8%	30.8%	57.9%	16.4%
Free Assistance from DMI	13.6%	16.5%	37.9%	32.0%	19.5%

With your business in mind, how important are the following possible downtown improvements? (Q48)

While most improvements were viewed as important by respondents, some were viewed as more important than others. For example, when combining the “Very Important” and “Important” categories, pedestrian directional signage, exterior landscaping/flowers, and parking ramp space availability signage were viewed as important or very important by over eighty percent of respondents.

**Table 5.6 – Preferences for Possible Downtown Improvements**

Downtown Improvement	Important or Very Important	Not Important	Not Sure	Missing
Exterior landscaping/flowers	80.6%	15.3%	4.1%	23.4%
Public Art	68.2%	26.2%	5.6%	16.4%
Water Features	51.4%	37.4%	11.2%	16.4%
Performing arts stage	55.9%	36.0%	8.1%	13.3%
Pedestrian wayfinding signage	81.4%	14.4%	4.1%	24.2%
Parking ramp stall availability signage	81.2%	15.3%	3.5%	33.6%
Credit card parking meters	59.4%	33.7%	6.9%	21.1%

How useful have each of the following resources been for you? Q49)

As with downtown improvements, many resources were viewed as useful with some being more useful than others. For example, the BID Downtown Map and Guide was viewed as very useful by almost one third of respondents. When “Very Useful” and “Useful” responses were combined, the BID Map and Guide, in particular, was viewed as a useful or very useful resource. Furthermore, over half of respondents considered the BID Ambassadors program and BID Weekly email updates as useful or very useful

**Table 5.7 – Usefulness of Downtown Resources**

Downtown Resources	Very Useful Or Useful	Not Useful	Don't Know Existed	Missing
BID Promotions	44.7%	36.8%	18.4%	10.9%
BID Cooperative Advertising	41.7%	39.8%	18.52%	15.6%
BID Downtown Map and Guide	72.1%	16.2%	11.7%	13.3%
BID Weekly email updates	57.1%	26.8%	16.1%	12.5%
BID Seminars	26.7%	42.9%	30.5%	18.0%
BID Ambassadors program	57.8%	26.6%	15.6%	14.8%
DMI Networking Events	44.3%	31.1%	24.5%	17.2%
Dane County Buy Local Coop Advertising	37.1%	36.2%	26.7%	18.0%
Greater State St Bus. Assn. Meetings/Events	47.2%	34.9%	17.9%	17.2%

Could you use information to assist you with the following topics? (Q50)

Informational needs of respondents were quite varied. However, the data suggest the information on marketing/branding/advertising, business planning, business market analysis may be particularly in demand.

Note: Because of the similar wording used in the scoring of this question, (“some,” and “a little”), differences between these two categories may have made it difficult for respondents to express their preferences properly. Consequently, there is little value in combining the scores from the “A Lot,” “Some,” and “A Little” responses as a way to identify level of need across informational topics.

**Table 5.8 – Usefulness of Various Informational Topics**

Topic	A Lot	Some	A Little	None	Don't Know	Missing
Business planning	14.0%	8.0%	18.0%	57.0%	3.0%	21.9%
Financial management	9.9%	9.9%	10.9%	64.4%	5.0%	21.1%
Inventory management	6.8%	6.8%	10.7%	71.8%	3.9%	19.5%
Marketing/Branding/Advertising	17.4%	13.3%	18.4%	45.9%	5.1%	23.4%
Employee hiring or training	5.0%	14.9%	8.9%	67.3%	4.0%	21.1%
Customer Service or hospitality	6.7%	8.6%	17.1%	63.8%	3.8%	18.0%
Building improvements	8.1%	6.1%	18.2%	64.7%	3.0%	22.7%
Window displays or interior store design	10.8%	7.8%	16.7%	62.8%	2.0%	20.3%
Business market analysis	11.3%	15.5%	15.5%	54.6%	3.1%	24.2%
Internet or E-Commerce	7.3%	7.3%	21.9%	59.4%	4.2%	25.0%
Transfer of ownership/selling a business	5.8%	2.9%	9.7%	75.7%	5.8%	19.5%
Gift cards/loyalty programs	8.7%	4.9%	17.5%	65.1%	3.9%	19.5%

What additional market information should we collect in our study to help your business become more profitable (Q51).

Responses to this question were quite varied. However, one theme did emerge around a desire to examine and know more about issues related to safety, or the perception of safety. This data supports other data within the survey indicating businesses are concerned about the impact safety and/or the perception of safety may be having upon customer traffic downtown during certain time periods and, consequently, upon their business.

## Conclusions

Based on responses to the business operator's survey, a number of conclusions can be drawn.

- The high level of business operator's satisfaction with their downtown location could be used as a powerful business recruitment argument. The value of a downtown location could be captured in short case studies and shared with prospective business operators as part of Madison's business recruitment materials.
- Given the willingness of many business operators to consider extended business hours, a supplemental market analysis phase to examine daily and seasonal activity patterns in the downtown area might be helpful to determine the most promising periods for expanded district-wide operating hours.
- UW special events such as Spring Commencement, UW Parents Weekend, and Football Games at Camp Randall have a significant impact on downtown businesses. Accordingly, the continued strengthening of the connection between downtown and campus, both physically and programmatically may be warranted.
- While downtown residents and students are clearly important market segments, other consumer groups such as tourists/visitors, downtown office workers, and area/regional residents were also identified by business operators as important. Building future business activity downtown should examine the potential of these market segments.
- Opportunities could be explored to further Internet and email advertising, promotion and sales efforts.
- Business development efforts could build on Madison's uniqueness and "sense of place" as they are its biggest competitive advantages over malls and shopping centers in the area. It appears the business community does not want to abandon its mix of

independents (and a few chains) nor try to duplicate the offerings of traditional suburban shopping centers.

- Nevertheless, downtown does compete to some extent with other commercial centers. Accordingly, issues like parking should continually be managed in a consumer-focused and comprehensive manner.
- Downtown retail recruitment efforts should examine the potential for a larger downtown department store, a home gourmet/kitchen store (William Sonoma was specifically mentioned), apparel stores, and other retail stores like a deli, food market (Whole Foods was specifically mentioned), book store (new books), floral shop, trendy shoe store, and art store. Other downtown recruitment efforts should examine the potential for dry cleaners, beauty/barber shop, and personal care salons.
- There is opportunity to work with the business community to mitigate the impact of insufficient parking, expensive rent, suburban competition, and construction, all leading major challenges identified by business operators. Similarly, there is opportunity to work with businesses on possible physical improvements such as pedestrian directional signage, exterior landscaping/flowers, and parking ramp stall availability signage.
- There is opportunity to increase awareness of and participation in the Madison Small Business Development Center's educational programs. Examples include entrepreneurial training, business counseling, and programs and seminars including marketing/branding/advertising, business planning, business market analysis. Similarly, there is opportunity to make businesses more aware of the financing and loan programs available to them.
- The Downtown Madison BID and DMI should continue and expand on its many effective programs such as the BID Map and Guide, BID Ambassadors program and BID Weekly email updates. Examination of safety, or the perception of safety, may be important future programs. The BID and DMI programs are instrumental in strengthening the customer experience and the ability of businesses to work together with focus and direction.

# Appendix 5A – Business Survey Letter and Instrument

**DOWNTOWN MADISON  
BUSINESS OPERATORS SURVEY**

1. Business Name \_\_\_\_\_  
 Business Owner(s) \_\_\_\_\_ Contact Person if Different: \_\_\_\_\_  
 Business Physical Address \_\_\_\_\_  
 Business Mailing Address \_\_\_\_\_  
 Business Phone \_\_\_\_\_ FAX \_\_\_\_\_  
 Email \_\_\_\_\_ Web Site \_\_\_\_\_

Like this: ● Not like this: ☹ ☹ ☹

2. Regarding your business: (● mark ONE for each)

	Under 1 Year	1 - 5 Years	6-10 Years	11-20 Years	Over 20 Years
How long have you been in operation (at this or previous location)? .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How long has your business been at present location? .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How long have you been the operator of your business? .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. If you know the year your business was established, please indicate: \_\_\_\_\_

4. Does your business own or lease the space in which it is located? (● mark ONE)  
 Own     Lease     Lease, want to purchase

Regarding your location:

5. How much space does your business occupy? \_\_\_\_\_ Square Feet

6. Does your business have direct street access?  Yes  No

7. If not located on street level, what floor are you on? \_\_\_\_\_

8. If your business is accessed through a common entrance, is it locked before and after business hours?  Yes  No

9. How satisfied are you with the present location of your business? (● mark ONE)

<input type="radio"/> Very Satisfied <input type="radio"/> Satisfied <input type="radio"/> Neutral <input type="radio"/> Unsatisfied <input type="radio"/> Very Unsatisfied	10. Why? _____ _____ _____ _____
---	--

**OFFICE USE ONLY**

-	-	-
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
◀	◀	◀
▶	▶	▶
▲	▲	▲
▼	▼	▼
◀◀	◀◀	◀◀
▶▶	▶▶	▶▶
◀◀	◀◀	◀◀

**About this Survey:**

This survey is part of a broader market analysis that examines opportunities to continually improve the economic health of downtown Madison. Research partners include: Downtown Madison, Inc. (DMI), the Madison Central Business Improvement District, and the City of Madison Department of Planning and Community and Economic Development, and the University of Wisconsin-Extension.

03-06-07

11. Do you have plans to expand or move your business in the next year? (● mark ALL that apply)

- I plan to open an additional location downtown.
- I plan to open an additional location outside of downtown.
- I plan to move to a new location downtown.
- I plan to move to a new location outside of downtown.
- I don't have any plans for changes.
- I plan to close.

12. To the best of your knowledge, what are the three busiest and three slowest months of the year for this business? (● mark THREE in each column)

Month	Busiest Months	Slowest Months
January.....	<input type="radio"/>	<input type="radio"/>
February.....	<input type="radio"/>	<input type="radio"/>
March.....	<input type="radio"/>	<input type="radio"/>
April.....	<input type="radio"/>	<input type="radio"/>
May.....	<input type="radio"/>	<input type="radio"/>
June.....	<input type="radio"/>	<input type="radio"/>
July.....	<input type="radio"/>	<input type="radio"/>
August.....	<input type="radio"/>	<input type="radio"/>
September	<input type="radio"/>	<input type="radio"/>
October.....	<input type="radio"/>	<input type="radio"/>
November....	<input type="radio"/>	<input type="radio"/>
December....	<input type="radio"/>	<input type="radio"/>

What are the hours of operation of your business for both your busiest and slowest months?

	13. Busiest Months		14. Slowest Months	
	Open	Close	Open	Close
Monday....	_____	_____	_____	_____
Tuesday ..	_____	_____	_____	_____
Wednesday	_____	_____	_____	_____
Thursday..	_____	_____	_____	_____
Friday.....	_____	_____	_____	_____
Saturday...	_____	_____	_____	_____
Sunday....	_____	_____	_____	_____

15. What is your average sale per transaction? (if known)

In store \$ \_\_\_\_\_  don't know  
 Online \$ \_\_\_\_\_  don't know

16. How many people, including owners, does your business employ in each of the following categories?

Full-time (\$2 or more hours/week) year-round \_\_\_\_\_  
 Part-time year-round \_\_\_\_\_  
 Seasonal \_\_\_\_\_

17. During a typical week, what are the seven busiest times for your business? (● mark up to SEVEN times total for the week)

	Before 11:00 am	11:00 am - 2:00 pm	2:00 pm - 5:00 pm	5:00 pm - 7:00 pm	7:00 pm - 9:00 pm	After 9:00 pm
Monday.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tuesday.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wednesday.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Thursday.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friday.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Saturday.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sunday.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. What are your thoughts on store hours? (● mark ALL that apply)

- I am open all the hours I need to be
- I can't be open more hours for personal reasons
- I would like to be open more hours, but can't afford the staff
- I would like to be open more hours, but can't find good staff
- I would be open more hours if I were sure of sales
- I would be open more hours if everyone else were

19. Rate the impact on your sales from the following events, either during or following the event? (● mark ONE for each)

	High Impact	Medium Impact	Low Impact	No Impact	Negative Impact
Conventions .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Football games (Camp Randall).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kohl Center events .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
WIAA High School Championship Tournaments.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overture Center events .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Capitol Sprints (January).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Summer Farmers Market.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Crazy Legs Classic Race (April).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
UW Spring Commencement, Kohl Center (May).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
UW Parents weekend.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Concerts on the Square (summer).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Art Fair On the Square, Off the Square (July).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maxwell Street Days (July).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Paddle and Portage (July).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dane Dances, Monona Terrace Rooftop (August).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jazz at Five (August-September).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taste of Madison (Labor Day Weekend).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ironman Wisconsin (September).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
World Dairy Expo (October).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Halloween.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

20. What three conventions had the most noticeable and positive impact on your foot traffic or sales? (list in order of significance with "1" having the most impact).

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

21. How important are the following consumer segments to your business? (● mark ONE on each row)

	Very Important	Important	Not Important	Not Sure
Males.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Females.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Age under 18.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Age 18-24.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Age 25-44.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Age 45-54.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Age 55-64.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Age Over 64.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Downtown Residents.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Area/Regional Residents (outside of downtown).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Downtown Office Workers.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Students.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourists and Visitors.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

22. What percentage of your annual marketing budget is spent with each of the following media? (Total = 100%)

- \_\_\_% Newspapers
  - \_\_\_% Magazines
  - \_\_\_% Radio
  - \_\_\_% Television
  - \_\_\_% Direct Mail/Catalogs
  - \_\_\_% Window Displays
  - \_\_\_% Billboards
  - \_\_\_% Internet
  - \_\_\_% Give-aways and donations
  - \_\_\_% Referral Programs
  - \_\_\_% Yellow Pages
  - \_\_\_% Other \_\_\_\_\_ (specify)
  - \_\_\_% I Don't Advertise
- 100%

23. What media has produced the best results for you?

\_\_\_\_\_

24. What percent of your sales is spent on marketing and media? \_\_\_\_\_%

25. Which publications are included in your annual advertising budget? (● mark ALL that apply)

- Wisconsin State Journal
- The Capital Times
- Madison Magazine
- Isthmus
- The Onion
- The Daily Cardinal
- The Badger Herald
- BID Downtown Map & Guide
- Capital Region Business Journal
- In Business
- Greater Madison Convention & Visitor Bureau Guide
- Greater Madison Convention & Visitor Bureau Map
- Madison Originals
- Madison Magazine Hotel Book
- Hotel Guides (please list \_\_\_\_\_)
- MadGuide
- Wisconsin Woman
- ANEW/Brava
- Wisconsin Trails Magazine
- Business Directory (please list \_\_\_\_\_)
- Neighborhood and suburban publications
- Others \_\_\_\_\_

26. Which radio stations are included in your annual advertising budget? (● mark ALL that apply)

- WERN 88.7 FM Wisconsin Public Radio
- WORT 89.9 FM Community Radio Station
- WSUM 91.7 FM University of Wisconsin Madison
- WXXM 92.1, "The Mic," Progressive Talk
- WHIT 93.1 FM The Lake
- WJJO 94.1 FM Solid Rock
- WOLX 94.9 FM WOLX - Madison's Oldies Station
- WMAD 96.3 FM Star Country
- WMGN 98.1 FM Magic 98 - Adult Contemporary
- WIBA 101.5 FM WIBA FM 101.5 Classic Rock
- WZEE 104.1 FM Z104 FM
- WCHY 105.1 FM, Charlie
- WMMM 105.5 FM 105.5 Triple M
- WWQM 106.3 FM Q106 FM - Madison's Country
- WTSO 1070 AM Madison's ESPN Sports Radio
- WIBA 1310 AM NewsRadio 1310
- WTUX 1550 AM AM 1550
- WTDY 1670 AM Talk Radio 1670 Madison
- Other \_\_\_\_\_

27. Which local or network television stations are included in your advertising budget? (● mark ALL that apply)

- WISC-TV (CBS 3)
- WKOW-TV (ABC 27)
- WMSN-TV (Fox 47)
- WMTV (NBC15)
- The CW (WB 57)
- Wisconsin Public Television/WHA Ch. 21
- My Madison TV (14)
- Charter Communications/Cable
- Other \_\_\_\_\_

28. Which websites are included in the annual advertising budget for your business? (● mark ALL that apply)

- Madison.com
- Thedailypage (Isthmus.com)
- Channel3000.com
- Other \_\_\_\_\_

29. Do you offer? (● mark ALL that apply)

- Gift cards
- Gift certificates
- Loyalty programs

30. Do you have a website?  Yes  No
31. If yes, what is your average monthly web traffic measured in "unique visitors"? \_\_\_\_\_
32. If no, do you plan on launching one?  Yes  No
33. Do you sell products or services online?  Yes  No
34. If yes, what percent of your sales are online? \_\_\_\_\_
35. If no, do you plan to sell products or services online?  Yes  No
36. Do you communicate with your customers via email?  Yes  No
37. Relative to the other retailers in the central downtown area, are you? (● mark ONE)
- Discount/highly promotional
  - Average-priced/Similar in number of sales events
  - Quality focused with fewer/seasonal discounts
38. Relative to your direct competition in the broader Madison area, are you:
- Discount/highly promotional
  - Average-priced/Similar number of sales events
  - Quality focused with fewer/seasonal discounts
39. What three existing downtown businesses complement your business the most? (specify up to THREE businesses by name)
- a. \_\_\_\_\_ b. \_\_\_\_\_ c. \_\_\_\_\_
40. Thinking regionally, how much do you compete with the following shopping destinations? (● mark ONE for each)
- |                          | A Lot                 | A Little              | Not at All            | Don't Know            |
|--------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| East Towne.....          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Greenway Station.....    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Hilldale.....            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Monroe Street.....       | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| West Towne.....          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Westgate/Odana Road..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Williamson/Atwood.....   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other.....               | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
41. To what degree do the following traits help make downtown Madison more competitive versus the competitors listed above? (● mark ONE for each)
- |                               | A Lot                 | A Little              | Not at All            | Don't Know            |
|-------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Location.....                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Parking.....                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Hours.....                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Service.....                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Name Brands.....              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Quality.....                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Selection.....                | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Price.....                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Character/Sense of Place..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

42. What percentage business mix (retail, services and restaurants) would you like to see in downtown Madison? (total = 100%)

- \_\_\_\_ National Chains
  - \_\_\_\_ Regional Chains
  - \_\_\_\_ Locally Owned Franchises
  - \_\_\_\_ Locally Owned Independents
- 100%

43. With your business in mind, what specific retail stores would you like to see locate in downtown Madison. Please list up to four retail store categories. (If helpful, include the names of local or national chains, franchises, or independent local businesses)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_

44. With your business in mind, what specific service businesses would you like to see locate in downtown Madison. Please list up to four business categories. (If helpful, include the names of local or national chains, franchises, or independent local businesses)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_

45. Please rate the degree you are experiencing the following business challenges? (● mark ONE answer for each item)

	Major Challenge	Minor Challenge	No Challenge	Don't know
Conflict with building owner or tenant.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty recruiting/retaining employees.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expensive employee wages or benefits.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expensive rent.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product delivery or loading challenges.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insufficient financing.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insufficient parking.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Suburban competition.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Internet competition.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Language barriers.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Poor building condition.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restrictive business regulations.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shoplifting or theft.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unskilled workers.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vandalism/Graffiti.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perception of safety.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Construction.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of pedestrian traffic.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Street closure for events.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smoking ban.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Street-peoplepanhandling.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

46. How strongly do you agree or disagree with the following statements? (● mark ONE answer for each statement)

	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree
Local police protection is outstanding.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local fire protection is outstanding.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local waste management service is outstanding.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sidewalk/street maintenance on State St/Capitol Sq is outstanding.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local municipal services are worth the level of local taxation.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel safe downtown, even at night.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I try to buy products and services downtown.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I try to direct customers to other downtown businesses.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I seek ways to cooperate with complementary Dtn. businesses.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The existing downtown business mix helps my business.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My customers frequently complain about parking.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Downtown Madison is an excellent place to have a business.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

47. Which of the following business incentive or assistance programs have you used for your downtown Madison business? (● mark ONE answer for each item)

	Used in Past Year	Will Use in Next Year	Don't Know About	Won't Use
Entrepreneurial Training Program offered through the UW Small Business Development Center (SBDC).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Free business counseling from the SBDC.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Free telephone assistance from the SBDC Wisconsin Business Answer Line.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other programs or seminars by the SBDC.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wisconsin Entrepreneurs' Network (WEN) Early Planning Grant from the Wisconsin Department of Commerce for start up or expansion studies.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Capital Ideas Technology Zone High Tech Company Tax Credits.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dept of Commerce (DOCOMM) Minority Business Development Loan Program.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
WI Housing and Econ Devel Auth (WHEDA) Small Business Loan Guarantee.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Madison Area Tech. College Business Procurement Assist. Center (BPAC).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Free business counseling from SCORE (Service Corp. of Retired Executives).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wisconsin Women Business Initiative Corp (WWBIC) Loan Program.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
WWBIC business assistance programs and seminars.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Free assistance from City of Madison Office of Business Resources (OBR).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
City of Madison Facade Improvement Grant Program.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
City of Madison Capital Revolving Loan Fund (RLF).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Madison Development Corp (MDC) financing programs.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
US Small Business Administration (SBA) loan program.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Free assistance from Downtown Madison Inc. (DMI).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other: .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

48. With your business in mind, how important are the following possible downtown improvements? (● mark one on each row)

	Very Important	Important	Not Important	Not Sure
Exterior landscaping/flowers .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public art.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water features.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performing arts stage.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pedestrian wayfinding signage.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parking ramp/stall availability signage.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Credit card parking meters.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

49. How useful have each of the following resources been for you? (● mark ONE answer for each item)

	Very Useful	Useful	Not Useful	Don't Know Existed
Business Improvement District (BID) Promotions (gift bags, etc).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
BID Cooperative Advertising.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
BID Downtown Map and Guide.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
BID weekly email updates.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
BID Seminars (e.g., window display seminar).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
BID Ambassador program.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
DMI Networking Events (e.g., New Faces, New Places).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dane County Buy Local cooperative advertising.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Greater State St Business Assoc. (GSSBA) Meetings and Events.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

50. Could you use information to assist you with the following topics? (● mark ONE answer for each item)

	A Lot	Some	A Little	None	Don't Know
Business planning.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial management.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inventory management.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing/Branding/Advertising.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employee hiring or training.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer service or hospitality.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building improvements.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Window displays or interior store design.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business market analysis.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Internet or E-Commerce.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transfer of ownership or selling a business.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gift cards/loyalty programs.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

51. What additional market information should we collect in our study to help your business become more profitable? (For more space, please attach as separate sheet of paper)

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Please return your completed survey to Bill Ryan, UW-Extension-CCED, 610 Langdon St, Lowell Hall #329, Madison WI 53703