

Downtown Madison Market Analysis

2007

Created in partnership with the Madison Central Business Improvement District, Downtown Madison, Inc., City of Madison, University of Wisconsin-Extension Dane County, and University of Wisconsin-Extension Center for Community and Economic Development

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Data Disclaimer

This market analysis of downtown Madison relies on data purchased from private sources, secondary sources, and public data sets. The University of Wisconsin-Extension cannot be held responsible for the accuracy of this data or for decisions made resulting from the use of the data in this report.

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Introduction

Downtown Madison is the geographic, cultural, government and knowledge center of the 90th largest metropolitan area in the nation. While downtown Madison has not experienced the economic decline faced by other city centers, downtown investment has continued to grow dramatically over the past decade. Recent large scale public improvement projects, construction on the UW-Madison Campus, a resurgence in downtown housing, and other private investment (Table i.1) has increased the economic vitality of downtown Madison. Between 2000 and 2005 alone, downtown Madison experienced \$522.2 million in new construction¹. The renewed public and private investment in downtown Madison has positioned it to maintain and expand its prominence in the regional, national, and international economy.



Monona Terrace Community and Convention Center and Downtown Madison viewed from Lake Monona
Photo Credit: Jeff Miller/UW-Madison

Despite the recent levels of investment, downtown Madison still faces a number of key economic restructuring challenges. Growing regional retail competition, a competitive suburban office market and varying public perceptions about downtown Madison are several on-going issues to be addressed through a strong partnership of business operators, property owners, downtown organizations, government entities and other downtown stakeholders. Recognizing the need to connect these various interests, Downtown Madison, Inc. in cooperation with the Madison Central Business Improvement District (BID) initiated the *Downtown Dynamic* business retention, expansion and recruitment program for Downtown Madison.

To support the Downtown Dynamic program, the following market analysis is conducted as an *educational program* in conjunction with the UW-Extension's Center for Community and Economic Development and UW-Extension Dane County. Financial support was also provided by the City of Madison's Department of Planning and Community and Economic Development.

¹ City of Madison, Office of Business Resources Downtown Construction Statistics

Table i.1 – Downtown Development 1996 to 2007*

Project	Primary Use
Monona Terrace	Conventions/Events
Fluno Center for Executive Education	Conventions/Meetings
Overture Center for the Arts	Cultural Events
Kohl Center	Sports/Events
Hilton Madison at Monona Terrace	Lodging
Block 89	Commercial
740 Regent Street	Commercial
22 E. Mifflin	Commercial
J.H. Findorff & Son Inc. Headquarters	Commercial
University Square	Residential/Commercial
Capitol West	Residential/Commercial
Metropolitan Place	Residential/Commercial
100 Wisconsin Ave./10 W. Mifflin	Residential/Commercial
4 th Ward Lofts	Residential
Lorraine	Residential
Tobacco Lofts at Findorff Yards	Residential
Capitol Point Condominiums	Residential
Nolen Shore Condominiums	Residential
Marina Condominiums	Residential
Union Transfer Condominiums	Residential
Meriter Main Gate	Residential
Bedford Court Condominiums	Residential
Ogg Hall (Dormitory)	Residential
Newell J. Smith Hall (Dormitory)	Residential
Embassy Apartments	Residential
Aberdeen Apartments	Residential
Palisade Apartments	Residential
Risser Justice Center	Government
Dane County Courthouse	Government

Compiled from Various Sources.

*Not intended to be all inclusive

Study Purposes

Economic restructuring is a continuous process involving a large number of downtown constituents. Downtown retention, expansion and recruitment efforts require addressing the needs of business operators, property owners and customers. However, downtown revitalization also involves educating and building the capacity of these stakeholders, as well as policy makers and economic development organizations. Given these objectives, the Downtown Madison Market Analysis is designed to provide market information needed for economic development efforts, while also developing the capacity and knowledge of individuals and organizations engaged in downtown revitalization. Accordingly, this market analysis may differ from other studies as it has an educational focus. Specific goals of the Downtown Madison Market Analysis include:

- *Create a clearinghouse of market data on downtown Madison* – The data assembled by the market analysis includes information on downtown customer segments, national downtown trends, and local market conditions relevant to business retention, expansion and recruitment efforts. The data clearinghouse is to be used by existing businesses seeking to better serve various consumer segments. Furthermore, this analysis can assist in recruiting new businesses and entrepreneurs by providing information that demonstrates the value of a downtown location. While the clearinghouse will allow the Madison Central BID and Downtown Madison, Inc. to become principal sources for downtown market information, the information in the market analysis can be used by commercial brokers and other private interests.
- *Develop the capacity of the Madison Central BID and Downtown Madison, Inc. to update and enhance market research on an ongoing basis* – The Downtown Madison Market Analysis is largely an effort to educate downtown stakeholders and build the capacity of the Central BID and Downtown Madison, Inc. While the market analysis examines current information on downtown consumer segments, the evolving nature of regional competition and changing customer preferences may require downtown Madison to make adjustments to its business mix and marketing strategies. The design of this study and data clearinghouse will allow for these organizations to update market information and perform additional research as necessary.
- *Explore specific business opportunities for downtown Madison* – The analysis provides a framework for examining expansion and recruitment opportunities by specific business category. Using the data assembled in the analysis, a systematic method is provided to help economic development organizations identify opportunities that could serve downtown consumer segments and/or enhance the downtown Madison business mix.
- *Examine downtown Madison's position in the regional economy* – Downtown Madison operates in a regional economy that impacts its economic vitality. In fact, many business location decisions are made on a regional basis before a specific site within a given region is determined. Consequently, the Capital Region's human capital, industry strengths, knowledge institutions, natural environment and quality of life provides aspects of competitive advantage that influence downtown Madison's position in the regional economy.
- *Assess the physical layout of downtown Madison and its corresponding impact on future development opportunities* – While the Downtown Madison Market Analysis is not a design study, the economic success of a downtown is inherently linked to its physical layout. Accordingly, the market analysis examines several opportunities and challenges to developing business clusters and creating linkages among downtown sub-districts and traffic generators.

As with many other central cities, downtown Madison faces a number of challenges regarding parking, public perceptions and commercial gentrification. While this market analysis recognizes that these factors impact downtown economic vitality, the scale of these issues suggests that they deserve separate, in-depth attention. Subsequently, the ad hoc Downtown Dynamic Study Advisory Committee recommended limiting the scope of this study to other market aspects related to business retention, expansion and recruitment.

Downtown Madison Study Area

The Downtown Madison Study Area is a one square mile region containing a diverse mix of commercial, residential, governmental and cultural uses (Map i.1). Specifically, the Downtown Study Area is bounded by Park Street, Lake Mendota, Blair Street, Lake Monona, Regent Street and Proudfit Street. While the Study Area encompasses the boundaries of the Madison Central Business Improvement District, the Study Area also recognizes that downtown Madison extends beyond the area served by the BID. Specifically, the Downtown Study Area boundaries are based on the input of the ad hoc Downtown Dynamic Study Advisory Committee, the presence of physical features and travel barriers, the location of Census Bureau enumeration units, and the geographic definition of downtown used by several community development organizations.

The following narrative provides a brief description of the Study Area and several of its key features. Specific features and uses found in downtown Madison are further detailed throughout the market analysis.

- *State Street Commercial Area* - The State Street Commercial Area is a six-block pedestrian shopping and entertainment district that links the University of Wisconsin to the Capitol Square. State Street includes approximately 250,000 square feet of commercial space occupied by a variety of independent and national retailers. State Street is also home to the recently opened Overture Center for the Arts; a 400,000 square foot cultural facility located on the east end of the commercial district. The State Street Commercial Area is currently undergoing a four-phase streetscape reconstruction project scheduled to be completed in summer 2008.
- *Capitol Square Area* - The Capitol Square Area encompasses the government centers for the State of Wisconsin, Dane County and the City of Madison. Specifically, the Capitol Square and its surrounding blocks are home to government facilities including the State Capital building, the Madison Municipal Building, the City-County Building, a variety of state office buildings, and numerous legal facilities. In addition to government functions, the Capitol Square Area encompasses a variety of class-A and class-B office space, cultural facilities (Madison Children's Museum and the Wisconsin Historical and Veteran's Museums), dining establishments, hotels, and retailers. The Capitol Square Area also includes the vibrant King Street Commercial District and is home to a variety of festivals and events such as the Dane County Farmers' Market, Concerts on the Square, Taste of Madison, and Art Fair on the Square.



Dane County Farmers' Market on the Capitol Square

Map i.1 – Downtown Madison Study Area



Sources: USDA, Madison Central BID, City of Madison, & UW-Extension
 Map Production: Matt Kures, October 2006
 UW-Extension Center for Community and Economic Development

- *Lake Monona Shore* – The Lake Monona Shore includes the area along Lake Monona between North Shore Drive and Blair Street. Home to the Monona Terrace Community and Convention Center, the Lake Monona Shore area is partially buffered by state office buildings, rental housing units, and a growing number of condominium developments. The Lake Monona Shore area is transected by John Nolen Drive, providing downtown gateways from the Williamson Street commercial area to the northeast and from the Beltline highway to the south.

- *Western Study Area* - The Western Study Area is bounded by Lake Mendota to the north, Frances Street to the east, Regent Street to the south and Park Street to the west. UW-Madison facilities are the dominant features of the Western Study Area including academic facilities, the Memorial Union, and various residence halls. The Western Study Area is also home to the 17,000 seat Kohl Center which hosts sporting events and concerts. Additional features of Western Study Area include the 12-story, mixed use University Square re-development project, office space in the Regent Street Rail Corridor, and a southern downtown gateway from Park Street.



The Memorial Union Terrace located on the UW-Madison Campus in the Western Study Area
Photo Credit: Jeff Miller/UW-Madison

- *Lake Mendota Shore* – The Lake Mendota Shore area comprises the northeastern portion of the Study Area. Primarily residential in character, the Lake Mendota Shore area encompasses Langdon Street, and the Mansion Hill Historic District. However, the Lake Mendota Shore includes commercial establishments such as National Guardian Life, the Edgewater Hotel, Mansion Hill Inn, and companies located in the Verex Plaza building on East Gilman Street. The Lake Mendota Shore area contains the Gorman Street gateway, one of the primary eastern entrances to the Study Area.
- *Southern Study Area* – Similar to the Lake Mendota Shore, land use in the Southern Study Area is largely residential. While the Southern Study Area is dominated by rental units, this area is home to a number of recently developed condominium projects such as the 4th Ward Lofts, Bedford Court, and the Tobacco Lofts at Findorff Yards. A variety of retail, health care, and other commercial uses are also found along West Washington Avenue, and South Bedford Street.

Study Components

To achieve the study's goals and purposes, the Downtown Madison Market Analysis is segmented into seven sections examining various characteristics of the Downtown Study Area, downtown consumers, and regional economic conditions:

- *Section 1: Descriptions of the Study Area's Primary Consumer Segments* – Section 1 focuses on four market segments identified as keys to downtown economic vitality: downtown employees, college students, downtown residents and visitors. While these are not the only consumer groups important to downtown Madison, they do provide an important cross-section of groups that value the importance of enhancing the downtown as a place to live, work, and recreate. Residents of the broader Madison region comprise an additional downtown consumer segment and are examined separately in Section 3.
- *Section 2: Size and Shape of Downtown Madison's Trade Areas* – Section 2 examines existing customer shopping patterns, regional competition, and other market factors that impact the consumer drawing power of the Downtown Madison Study Area. The trade areas defined in this section will serve as one basis for further study of market conditions.
- *Section 3: Trade Area Demographic and Lifestyle Characteristics* – Section 3 compares demographic and psychographic characteristics of the consumers living in the downtown Madison trade areas, Dane County and the United States.
- *Section 4: Regional Economic Position of Downtown Madison* – The analysis of downtown Madison's position in the regional economy provides background economic and industry data on the Madison Metropolitan Statistical Area (MSA), and a broader eight-county region identified by the newly formed Regional Economic Development Entity (REDE). Section 4 provides key economic trends on the region's income, population, wages, labor force, and entrepreneurial activity. Section 4 also examines the region's industry structure for opportunities to capitalize on key driver industries and clusters.
- *Section 5: Needs and Perspectives of Business Operators* – Section 5 summarizes the results of a downtown business operator's survey conducted in Spring 2007. The survey examined business operator needs, challenges and perspectives relative to downtown Madison as a location to operate a business
- *Section 6: Analysis of Comparable City Downtowns* – To gain insight from other communities, Section 5 examines five selected downtowns to determine their vitality, business mix, and economic restructuring activities. The goal of this analysis is to not to mimic these communities, but rather to determine potential best practices in downtown revitalization. These downtowns were selected on the basis of their market size, the presence of a large university, their role as a government center, and other unique market characteristics. The five downtowns include Boulder, Colorado; Austin, Texas; Lincoln, Nebraska; Boise, Idaho; and Ann Arbor, Michigan.
- *Section 7: Opportunities to Enhance Downtown Madison's Economic Vitality* – Using the foundation of information in the preceding sections, Section 7 examines a series of opportunities and activities for enhancing downtown Madison's commercial environment and improving its contributions to the local and regional quality of life. These opportunities are based on the needs and desires of different consumer segments, the presence of established challenges, and emerging opportunities presented by regional economic development efforts.

Acknowledgements

The Downtown Madison Market Analysis builds upon past studies such as the *1999 State Street Corridor Commercial Market Study* prepared by Gibbs Planning Group, the previous work performed by Bert Stitt & Associates for the Downtown Dynamic program, and Northstar Economics' analysis of *University of Wisconsin-Madison's Economic Contribution to the Region*. The market analysis was developed as a grassroots educational effort with the assistance and support of the following organizations and individuals:

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- Bill Rizzo, UW-Extension Dane County Community & Economic Development Educator
- City of Madison Department of Planning and Community and Economic Development
- Downtown Madison business operators who provided customer origin data and completed the business operators survey
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