



Economic feasibility of commercial rehabilitation: Williamson Street, Madison, Wisconsin. September, 1978

Landmark Research, Inc.
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COMMONWEALTH DEVELOPMENT
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Economic Feasibility
of Commercial Rehabilitation

Williamson Street
Madison, Wisconsin

PREPARED FOR:

Madison Development Corporation
Madison, Wisconsin

SEPTEMBER, 1978

CR

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Section I

Introduction

The purpose of this report is to present the results of the economic and market study of the Williamson Street area of Madison. The general objective of the study is to develop conclusions as to the economic feasibility of rehabilitation of commercial structures presently located on Williamson Street and to make planning recommendations consistent with the economic conditions found in the area.

This economic report is a portion of a joint study effort performed by Economic Research Corporation and Trkla, Pettigrew, Allen and Payne. The data and conclusions presented in this section of the report analyzes the economic feasibility of rehabilitation as it relates to the general economic conditions of the Williamson Street area and the specific Williamson Street businesses being considered for rehabilitation. This economic feasibility section of the Williamson Street study project is divided into five sections. These sections are:

- I. Introduction
- II. Williamson Street Basic Economic Analysis
- III. Business, Residential and Pedestrian Surveys
- IV. Williamson Street Market Potentials
- V. Findings and Recommendations

The report is prepared in accordance with a contract between the Madison Development Corporation, Economic Research Corporation and Trkla, Pettigrew, Allen and Payne. It is designed to provide the Madison Development Corporation and interested private business persons and citizens in the area with economic data and planning recommendations to utilize as a basis for formulating rehabilitation plans.

It was necessary, in preparing this report, to use data from a variety of sources since no one source had all the desired information. A basic source of material for a large amount of the data reported was the 1970 and 1974 census information published by the U.S. Department of Commerce. An additional source of data was a survey of existing businesses located on Williamson Street. The excellent cooperation of the businessmen enabled Economic Research Corporation to obtain accurate information regarding the most recent trends. A further source of data was a survey of residents of the Williamson Street neighborhood. This survey enabled Economic Research Corporation to make judgments regarding the market areas of existing businesses, potential for increased penetration of the residential neighborhood by the businesses and perceptions and desires of neighborhood residents regarding the goods and services wanted in the nearby stores. A final survey which provided information for the report was a survey of customers taken on Williamson Street. This effort enabled Economic Research Corporation to confirm perceived market areas of Williamson Street businesses and to obtain judgments and opinions of those persons that are visiting Williamson Street on a regular basis.

In the following sections of this report, Economic Research Corporation will present its findings and recommendations regarding the economic feasibility of rehabilitation of Williamson Street commercial properties.

Section II

Williamson Street Basic Economic Analysis

In order to place the Williamson Street market area in perspective, it is helpful to examine the basic economic factors in the area. In the following subsections, various economic and demographic characteristics for the area will be reported.

Historically, Williamson Street has served as a major traffic artery between the east side residential areas and the Madison central business district. Its location within the Madison area is shown on Figure 1. The west end of the street terminates a few blocks from the square and connects to John Nolen Drive which serves as a corridor to the Dane County Exposition Center and the south side residential areas. The east end of the street has its terminus in the Atwood-Shenks Corners area in the east side of Madison.

The study area to be treated in this analysis is the whole of Williamson Street beginning with the 600 block on the west and ending in the 1500 block on the east. Williamson Street is an older arterial which serves as a retail focus for a small residential area located between it and Lake Monona. The development of shopping facilities in other east side locations has limited the market area of those businesses located on Williamson Street. The neighborhood surrounding the primary study area is an older residential community which serves as a home for persons with a variety of income levels and lifestyles. In the following subsections, the Williamson Street area will be examined and analyzed. The factors which will be reported include:

1. Major facilities and land use patterns,
2. Population and housing characteristics,
3. Employment characteristics and trends,
4. Transportation patterns and
5. Existing commercial activity.

This portion of the report will develop an overview of the Williamson Street area and provide a basis for the recommendations and conclusions.

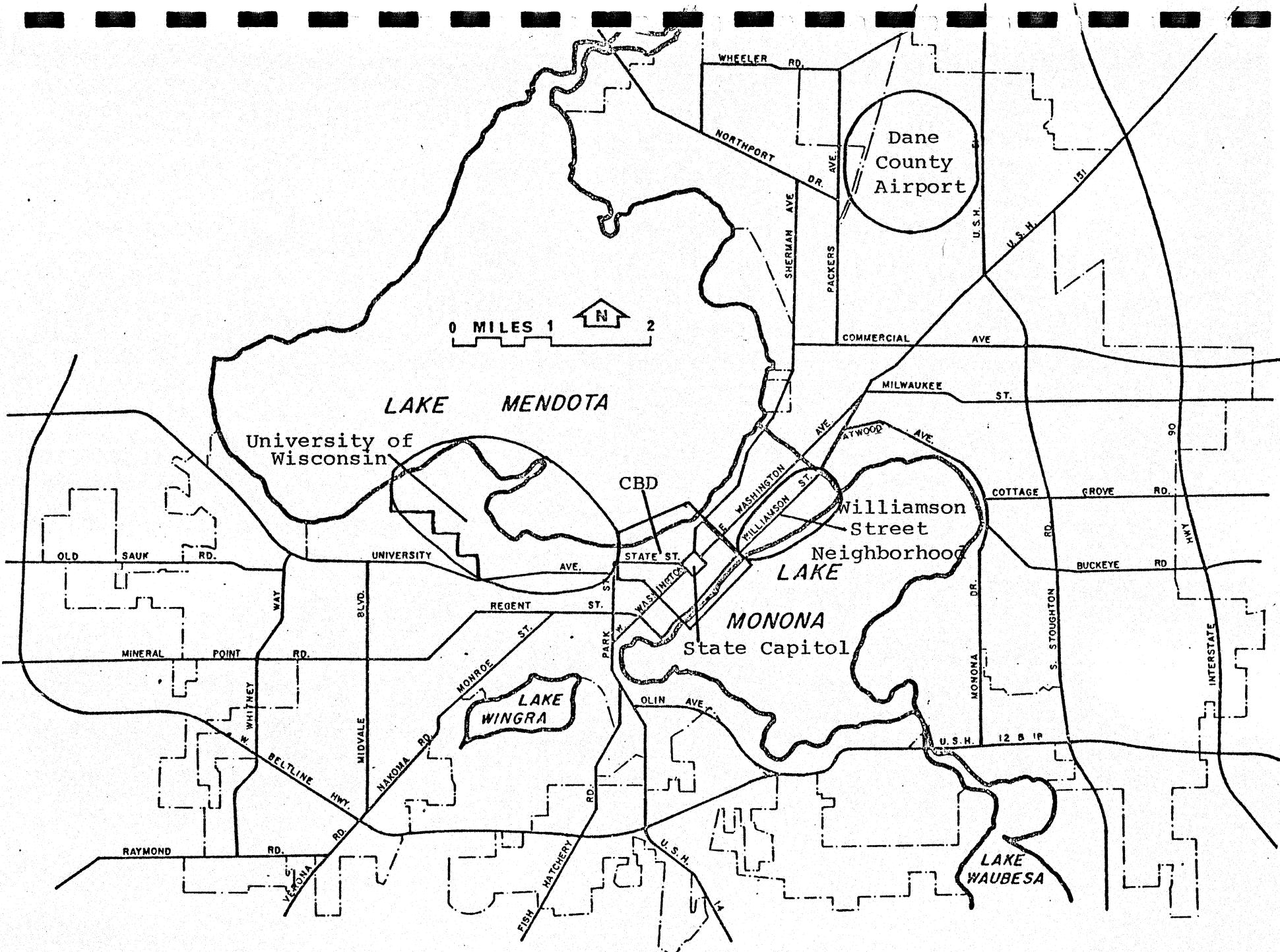


FIGURE 1

LOCATION OF WILLIAMSON STREET NEIGHBORHOOD

Major Facilities and Land Use Patterns

Land use patterns for the Williamson Street area are diverse and include residential, commercial, industrial and institutional. Major facilities in the area include:

1. The State Capitol Complex,
2. The Central Business District of Madison,
3. The East Washington Industrial Area,
4. The Oscar Mayer Meat Packing Facility, and
5. The Madison Municipal Airport.

The land use pattern along Williamson Street and in the primary study area is mixed but is primarily residential, commercial and light industrial. The inventory of structures by use on Williamson Street is reported on Table 1. As shown there, 57 percent of the structures on the street are residential with the remaining 43 percent divided into the following categories:

1. Neighborhood Retail - Services;
2. Eating and Drinking - Clubs;
3. Area-wide Specialty Retail;
4. Social Agencies and Institutions; and
5. Suppliers, Processors, Contracting, Fabrication and Wholesale.

The inventory of this commercial and institutional space by block is reported on Table 2. As shown, the greatest concentration of neighborhood retail and services is in the 1200 and 1300 blocks. On the other hand, the area-wide specialty retail and supplier-wholesaler functions are concentrated at the western end of Williamson in the 600 to 1100 blocks.

The influence of these varied land use patterns on possible rehabilitation activities will be analyzed and recommendations presented in later sections of this report.

Table 1
Inventory of Structures by Use

<u>Type of Structure</u>	<u>Number of Units</u>				
<u>Location by Block Area</u>	<u>600-800</u>	<u>900-1100</u>	<u>1200-1300</u>	<u>1400-1500</u>	<u>Division Total</u>
Neighborhood Retail-Services	1	2	7	1	11
Eating & Drinking Entertainment, Social and Fraternal Clubs	3	2	8	2	15
Area-wide Specialty Retail	6	7	6	3	22
Social Agencies and Institutions	4	2	4	0	10
Suppliers, Processors Contracting Fabrication, Wholesale, Others	13	7	7	0	27
Total	27	20	32	6	85
Vacant	6	0	7	0	13
Residential	13	63	18	38	132

Source: Economic Research Corporation

Table 2
Inventory of Commercial and Institutional Space

<u>Location by Block Area</u>	<u>Amount of Space in Square Feet</u>				<u>Division Totals</u>
	<u>600-800</u>	<u>900-1100</u>	<u>1200-1300</u>	<u>1400-1500</u>	
Neighborhood Retail-Services	400	2,850	13,850	2,700	19,800
Eating & Drinking Entertainment, Social and Fraternal Clubs	13,800	2,550	23,550	3,600	43,500
Area-wide Specialty Retail	15,600	12,250	7,350	7,850	43,050
Social Agencies and Institutions	76,800	3,900	18,600	0	99,300
Suppliers, Processors Contracting, Fabrication, Wholesale, Others	84,800	21,150	10,100	0	116,050
Vacant	<u>31,250</u>	<u>0</u>	<u>13,500</u>	<u>0</u>	<u>44,750</u>
Area Totals	222,650	42,700	86,950	14,150	
			<u>GRAND TOTAL</u>		<u>366,450</u>

Source: Economic Research Corporation

Population and Housing Characteristics

In this subsection, the population and housing characteristics of the Williamson Street area will be reported. First, population characteristics will be discussed and thereafter the housing patterns will be shown.

Table 3 reports the 1960, 1970 and 1974 population estimates for the Williamson Street area, the city of Madison and Dane County. As can be seen, the area has declined in total population substantially during this period, dropping from 8,240 persons in 1960 to an estimated 6,054 persons in 1974. This population loss for the Williamson Street area is consistent with trends in inner-city neighborhoods throughout the United States. However, the loss of nearly 2,200 persons, which represents 26.5 percent of the census tract population, during this period is a significant one. This trend must be stopped or reversed if the neighborhood is to provide a demand base for retail and service functions located on Williamson Street.

The age characteristics of the Williamson Street neighborhood population are reported on Table 4. As shown there, there have been significant drops in the number of children and the number of persons over 45 since 1970. An increasing percentage of the area population is in the 20 to 44 age brackets. When compared to the city of Madison, the area contains many less children and more elderly persons. It appears clear that families with school-age children are not selecting this area as a home as often as they are selecting other residential areas in the city of Madison.

Family income characteristics from the 1970 census are reported on Table 5. It is clear that the Williamson Street market area is not a high income residential community. Sixty-five percent of the population had family incomes of under \$10,000 and 88 percent of the family incomes were under \$15,000. This compares with 72 percent of the family incomes in the city of Madison that were under \$15,000 during the same period. Also shown on the table is the median family income for Census Tract 19 and the city of Madison with Madison reporting \$11,385 compared with \$8,243 for the families in Census Tract 19.

Table 3

Population Trends, 1960-1974

	<u>1960</u>	<u>1970</u>	<u>1974</u>	<u>Percent Change</u>	<u>1960-1970</u>	<u>1970-1974</u>
Census Tract 19	8,240	6,841	6,054		-17.0%	-11.5%
Madison	126,706	171,769	168,671		35.6%	-1.8%
Dane County	222,095	290,272	304,600		30.7%	4.9%

Sources: U.S., Department of Commerce, Bureau of the Census, 1970 Census of Population, Number of Inhabitants, Wisconsin, PC(1)-A51; U.S., Department of Commerce, Bureau of the Census, 1970 Census of Population and Housing, Census Tracts, Madison, Wisconsin, SMSA, PHC(1)-123; U.S., Department of Commerce, Bureau of the Census, Special Census of Madison, Wisconsin, Series P-28, No. 1515; U.S., Department of Commerce, Bureau of the Census, Estimates of the Population of Counties and Metropolitan Areas, Series P-25, No. 709; U.S., Dept. of Commerce, Bureau of the Census, 1960 Census of Population and Housing, Census Tracts, Madison, Wis. SMSA; Economic Research Corporation.

Table 4

Age of Residents
Census Tract 19

<u>Age</u>	<u>1970</u>	<u>1974</u>	<u>Percent Change</u> <u>1970-1974</u>
Under 19	1,737	1,139	-34.4%
20-24	1,075	1,342	24.8
25-44	1,478	1,674	13.3
45-64	1,440	1,036	-28.1
65 and over	1,111	863	-22.3
Total	6,841	6,054	-11.5%

<u>Percent Distribution</u>	<u>City of Madison</u> <u>1974</u>		
Under 19	25.4%	18.8%	33.3%
20-24	15.7	22.2	17.8
25-44	21.6	27.6	26.0
45-64	21.0	17.1	15.2
65 and over	16.3	14.3	7.7
Total	100.0%	100.0%	100.0%

Sources: U.S. Dept. of Commerce, Bureau of the Census, 1970 Census of Population and Housing, Census Tracts, Madison, Wis. SMSA, PHC (1)-123; U.S. Dept. of Commerce Bureau of Census, Special Census of Madison, Wis., Series P-28, No. 1515, August 1975; Economic Research Corporation.

Table 5
Family Income Characteristics, 1970

	<u>Percentage of Families by Income Level</u>	
	<u>Census Tract 19</u>	<u>Madison</u>
\$0 - \$4,999	25	13
\$5,000 - \$9,999	40	27
\$10,000 - \$14,999	23	32
\$15,000 - \$24,999	10	22
\$25,000 and Over	2	6
Median Family Income	\$8,243	\$11,385

Sources: U.S. Dept. of Commerce, Bureau of the Census, 1970 Census of Population and Housing, Census Tracts, Madison, Wisconsin SMSA, PHC(1)-123; Economic Research Corporation.

Housing trends and characteristics are reported on Tables 6 and 7. These tables and the information reported therein provide some insight into the general housing patterns and conditions of the area. Since 1960, the number of single-family units in Census Tract 19 declined nearly 18 percent from 1,087 to 895. During that same period, the number of multi-family units increased from 1,925 to 2,153. As might be expected from this data, the number of owner-occupied units declined during the period with renter-occupied units increasing. However, the Williamson Street area has shown almost no housing growth since 1960 while the city of Madison has added over 17,000 units.

As was indicated by the family income data reported earlier, the median value of owner-occupied units in Census Tract 19 is substantially lower than comparable values for the city of Madison. The residential units have also been increasing in value at a slower pace than the city-wide averages. As is reported on Table 7, 82 percent of the Census Tract 19 housing units were constructed in 1939 or earlier. Only 144 units or 4.7 percent of the structures in the census tract were constructed from 1960 to 1970. This compares with the city-wide averages indicating that 33.6 percent of Madison residential units were constructed between 1960 and 1970.

In summary, the Williamson Street neighborhood can be characterized as an older, residential area that has been experiencing a population decline and a significant change in the age mixture of its residents. Family incomes are lower than city-wide averages as are housing values and levels of housing construction. If this neighborhood residential area is to continue to provide support for retail and service facilities on Williamson Street, the trends noted must be halted or reversed. The image and perceived desirability of the area as a place of residence must be enhanced so that individuals and families will remain in the neighborhood and others looking for a residence will be attracted to the area.

Table 6

Housing Trends 1960-1970
Census Tract 19 & Madison

<u>Structural</u>	<u>Census</u> <u>Tract</u> <u>19</u>	<u>Madison</u>
Single Family Units		
1960	1,087	22,120
1970	895	29,340
Pct. Change	-17.7%	32.6%
Multi-Family Units		
1960	1,925	17,430
1970	2,153	27,444
Pct. Change	11.8%	57.5%
Occupancy		
Owner-Occupied Units		
1960	1,222	20,522
1970	1,021	27,094
Pct. Change	-16.4%	32.0%
Renter-Occupied Units		
1960	1,666	17,334
1970	1,899	28,004
Pct Change	14.0%	61.6%
Financial		
Median Value of Owner-Occupied Units		
1960	\$ 13,500	\$ 15,900
1970	16,400	22,100
Pct. Change	21.5%	39.0%
Median Contract Rent of Renter-Occupied Units		
1960	\$ 81	\$ 85
1970	105	128
Pct. Change	29.6%	50.6%

Sources: U.S., Dept. of Commerce, Bureau of the Census, 1970 Census of Population and Housing, Census Tracts Madison, Wis. SMSA, PHC(1)-123; U.S., Dept. of Commerce, Bureau of the Census, 1960 Census of Population and Housing, Census Tracts, Madison, Wis. SMSA, PHC(1)-87; Economic Research Corporation.

Table 7

Housing Characteristics, 1970
Census Tract 19 & Madison

	Number		Percentage	
	Census Tract 19	Madison	Census Tract 19	Madison
<u>Structural</u>				
Single-Family Units	895	29,340	29.4%	51.7%
Multi-Family Units	2,153	27,444	70.6%	48.3%
<u>Age of Structures</u>				
Units Built in 1939 or earlier	2,499	19,559	82.0%	34.5%
Units Built 1940-1949	307	6,021	10.1%	10.6%
Units Built 1950-1959	98	12,101	3.2%	21.3%
Units Built 1960-1970	144	19,103	4.7%	33.6%
<u>Occupancy</u>				
Owner-Occupied Units	1,021	27,094	35.0%	49.2%
Renter-Occupied Units	1,899	28,004	65.0%	50.8%
<u>Financial</u>				
Median Value of Owner Occupied Units	\$16,400	\$22,100		
Median Contract Rent of Renter Occupied Units ²	\$105	\$128		

1. Limited to one-family homes on less than 10 acres and no business on property.

2. Excludes one-family homes on 10 acres or more.

Sources: U.W., Dept of Commerce, Bureau of the Census, 1970 Census of Population and Housing, Census Tracts, Madison, Wis. SMSA, PHC (1)-123; Economic Research Corporation.

Employment Characteristics and Trends

This section of the report will analyze the employment opportunities in and near the Williamson Street area, and the occupation of residents of Madison and the neighborhood. There are some employment opportunities within the neighborhood. These include:

1. The retail and commercial establishments located along Williamson Street, and the nearby Atwood-Shenks Corner area, and along East Washington Avenue.
2. The small number of wholesale and industrial concerns located on Williamson Street.
3. The larger number of small industrial companies located between Williamson Street and East Washington Avenue.

In addition to the employment within and near the neighborhood, there are nearly unlimited opportunities within convenient time and distance. The area is immediately adjacent to downtown Madison which contains major office facilities as well as the State Capitol and its many agencies. The area is also convenient to the University of Wisconsin campus located to the west of the downtown square as well as all the industries located on the east side of Madison.

The occupation of residents of the neighborhood by various employment classifications, as reported in the 1970 Census, is shown on Table 8. Also reported on that table is the comparable data for the city of Madison. As can be seen, the neighborhood is fairly representative of Madison area employment except in the categories of professional and technical and managers and administrators where the percentage of employees in these categories is lower in the Williamson Street area than for the city of Madison. The Williamson Street area has higher numbers in the service worker and machine, equipment and truck operator categories.

Table 8

Employment by Classification, 1970
Williamson Street Area Compared to Madison

<u>Employment Classification</u>	<u>Census Tract 19</u>		<u>Madison</u>	
	<u>Number</u>	<u>Percent</u>	<u>Number</u>	<u>Percent</u>
Professional, technical and kindred workers	681	19.7	20,370	26.7
Managers and administrators	201	5.8	5,760	7.5
Sales Workers	289	8.4	5,740	7.5
Clerical Workers	727	21.0	17,118	22.4
Craftsmen, foremen	320	9.3	6,095	8.0
Machine, equipment and truck operators	487	14.0	6,587	8.6
Laborers	117	3.4	2,247	2.9
Service Workers	636	18.4	12,500	16.4
Total	3,458	100.0	76,417	100.0

Sources: U.S. Dept. of Commerce, Bureau of the Census, 1970 Census of Population and Housing,
Census Tracts, Madison, Wisconsin SMSA, PHC(1)-123; Economic Research Corporation.

Transportation Patterns

Ease of access to the Williamson Street area constitutes one of its greatest assets. As was seen on Figure 1, the Williamson Street area is centrally located between the east side residential areas and the Capitol complex in downtown Madison. It is also very convenient to south Madison by way of John Nolen Drive and thus to the west side by use of the Beltline Highway.

The confirmation of the area's convenience can be found in the Madison-wide service and wholesale functions that have selected Williamson Street as a location for their business. Furthermore, many of those businessmen interviewed as a part of the study process stated the well-known and easily accessible street was a definite advantage for them and their customers.

Traffic counts published by the City of Madison indicate that Williamson Street carries in excess of 18,000 cars per day. The majority of these vehicles represent through-traffic that is travelling from home to work and back. Williamson Street carries approximately half of the traffic volume of East Washington Avenue. However, due to the smaller street size and the somewhat residential character of many parts of the street, the impact of this volume of traffic is significant. Because of the bottleneck created by the two lakes, there are a limited number of streets available to carry traffic from east to west in the city of Madison. Therefore, it would appear likely that Williamson Street will continue to be impacted by large numbers of vehicles unless a new corridor or right-of-way is constructed between East Washington and Williamson Street.

As will be seen in the following section, many neighborhood residents, as well as Williamson Street business persons, are concerned about the impact of these heavy traffic volumes. There is a definite interest on the part of these people in exploring alternatives that would result in a lessening of the traffic volumes or softening the impact of the large number of automobiles passing through the area each day.

Existing Commercial Activity

In order to properly project future commercial demand and the feasibility of commercial rehabilitation for the study area, it is necessary to examine present commercial uses and the commercial activity in nearby competing areas. It was also felt that, to the extent possible, it would be desirable to measure existing trends for the various types of commercial establishments along Williamson Street. Therefore during the study, a personal interview program was designed and implemented. The survey program received wide support and cooperation from the business persons along the Williamson Street corridor. In the following section of this report, the pertinent results of that survey program will be reported. In this subsection the specific commercial land uses on Williamson Street and in the nearby competing neighborhood centers will be outlined and discussed.

As was reported earlier in Tables 1 and 2, the existing land use pattern on Williamson Street is very mixed with 57 percent of the structures being utilized as residential units and the remaining 43 percent divided into a number of commercial and institutional categories. These categories include:

1. Neighborhood Retail - Services;
2. Eating and Drinking - Clubs;
3. Area-wide Specialty Retail;
4. Social Agencies and Institutions; and
5. Suppliers, Processors, Contracting, Fabrication and Wholesale.

The market areas for these various commercial and institutional uses can be and are greatly different as is shown in detail in the following section. The market areas range from a very high percentage of customers coming from the immediate Williamson Street neighborhood to some businesses which sell a substantial volume beyond the boundaries of the city of Madison.

The major retail concentrations within the city of Madison are shown on Figure 2. The closest retail areas geographically to the Williamson Street corridor are:

1. The Madison CBD;
2. The Fiore Shopping Center on East Washington Avenue;
3. The Atwood-Shenks Corners Shopping Area; and
4. The Madison East Shopping Center on East Washington Avenue.

The greatest impact of these competitive retail areas is on the convenience-oriented facilities located primarily in the 1200 and 1300 block. These competing retail areas with comparable goods and services limit the geographic market area of similar businesses located on Williamson Street.

In summary, Williamson Street is a major traffic arterial which serves as a retail focus for a small residential area between it and Lake Monona. Since 1960, the residential community has experienced population declines, lower than average income levels and little new residential construction. These trends must be stopped or reversed if the neighborhood is to provide an effective demand base for the retail and service functions located on Williamson Street. In light of the nearby competitive retail and commercial facilities, the existing businesses on Williamson must attract a greater number of neighborhood residents on a more regular basis and take advantage of the large number of potential customers passing through the area on a daily basis.

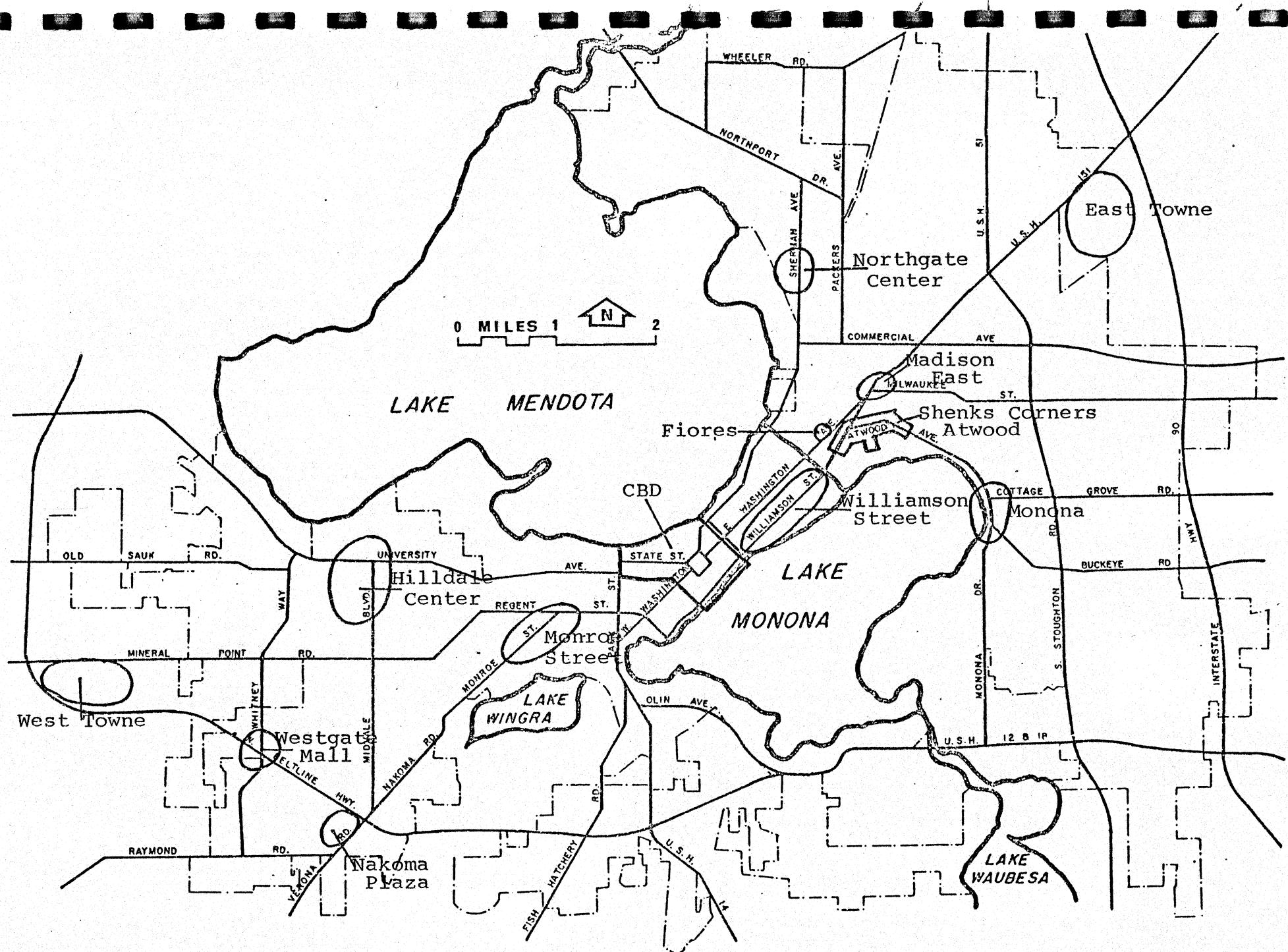


FIGURE 2
LOCATION OF MADISON RETAIL AREAS

Section III

Business, Residential and Pedestrian Surveys

The analysis of the potential for rehabilitation of commercial structures on Williamson Street involved conducting three separate surveys. First, a survey was conducted of businesses and agencies located on Williamson Street for the purpose of determining present occupancy terms, adequacy of present facilities, business trends, market areas served and interest in a rehabilitation program. A survey of residents of the Williamson Street area was conducted for the purpose of determining their present shopping habits and their attitude toward Williamson Street and its commercial facilities. In addition, a survey was conducted of pedestrians on Williamson Street primarily to verify the information provided by the businessmen regarding the market area which they serve. This section of the report will outline the procedures utilized in conducting each of these surveys and report their general results.

Survey of Businesses

The survey of businesses and agencies on Williamson Street was conducted during July, 1978, by representatives of Economic Research Corporation. The basic surveying was done on four separate days in early July with follow-up call backs on three later days. Calls were made at each business or agency on the street at least twice with additional call backs either by appointment or at times when the owner or manager was normally expected to be in. Survey forms were mailed to those businesses or agencies that the representatives of Economic Research Corporation were unable to interview during the survey. In most instances the interview was conducted with the owner or manager of the business or agency, although in a few instances, other persons knowledgeable regarding the operation of the business were interviewed.

In general, the cooperation of the businessmen on Williamson Street was excellent with only a few of those contacted declining to be interviewed or answering the questions in a non-serious manner. Personal interviews were conducted with representatives of 58 of the businesses and agencies on Williamson Street. This represents 68 percent of the 85 businesses or agencies located on Williamson Street.

A tabulation of the interview responses is reported on Table 9. This is followed by a special tabulation of selected responses of those interviewed who were interested in the remodeling or rehabilitation program. See Table 10. The responses to each question and their significance are summarized as follows:

1. Name of Establishment.

The names of the establishments are not reported to preserve the confidentiality of the various individual responses.

2. Address.

The number of responses per block ranged from two in the 700 and 1400 blocks to 12 in each of the 1200 and 1300 blocks where the largest number of customer-oriented retail and service facilities are located.

3. Type of Business.

The businesses and agencies interviewed reflected the diverse nature of the commercial activity upon Williamson Street. They included 32 which rely upon customers coming to the business facility and 26 which, in general, deliver their goods or services. Those which rely upon customers coming to their facilities were the most interested in improving the appearance and image of Williamson Street. In general, a higher percentage of the businesses located in the 600, 700 and 800 blocks deliver their goods or services. The customer-oriented facilities are concentrated primarily in the 1200 and 1300 blocks.

4. Contact Person.

The contact persons are not reported in order to preserve confidentiality. In general, they consisted primarily of owners or managers of the business or agency, although in some instances persons knowledgeable concerning the operation were interviewed.

5. Number of Employees.

The businesses interviewed employ a total of 357 full-time and 105 part-time employees, of which 34 percent live in the neighborhood. Most of the businesses interviewed had less than 10 workers with 31 employing two or less. There were only six businesses interviewed which employed more than 10 persons, although three of those employed more than 50 persons.

6. Is Space Leased or Owned?

Twenty-eight or 50 percent of those interviewed occupied leased space with the other 50 percent either owning or buying their facility. The percentage of ownership is substantially higher than normally would be anticipated on an older commercial street and is a positive factor in regard to the potential success of a rehabilitation and improvement program.

7. Lease Terms and Conditions.

This question was asked of those which leased space and involves a number of subquestions. Some of the main responses are summarized as follows:

- (a) Only 8 of those responding, that occupied leased space, were interested in purchasing their building.
- (b) Nearly 50 percent of the leases are on a month-to-month basis and only two businesses reported leases which ran for more than two years.
- (c) The monthly rents for the 20 businesses reporting ranged from \$50 to \$700 with an average of \$304. The overall average rent was \$1.51 per square foot. However, if two large space users, which rented space at less than \$1.00 per square foot were excluded, the average rent for the remaining businesses would be \$2.63 per square foot.

(d) Most of those responding indicated that they paid heat and utility costs in addition to the basic rent.

8. Amount of Space.
The amount of space utilized by the businesses interviewed varied considerably with three businesses utilizing less than 500 square feet and two businesses using over 10,000 square feet. The median size facility was 1800 square feet which is typical of many of the retail type businesses located on Williamson Street.

9. Sufficiency of Space.
A majority of those businesses and agencies interviewed indicated that their existing area was sufficient to meet their needs, although 22 indicated they needed more space or desired an upgrading of the building.

10A. Plans to Expand or Remodel.
Eighteen of the businesses interviewed indicated they wished or intended to expand or remodel their facility.

10B. Types of Remodeling Contemplated.
Those businesses intending or wishing to remodel reported quite a variety of needs. The largest single item, however, was the need for additional building space for their operations. This indicates that there is a need for a rehabilitation program that includes assistance for building expansion as well as rehabilitation of existing space.

10C. Type of Assistance Desired.
The type of assistance desired, by most of the businesses or agencies contemplating remodeling, was low interest loans. Many of those interested in remodeling indicated that they probably could not afford substantial remodeling at the current high interest rates for commercial loans.

11. Satisfaction with Present Location.

Most of the businesses and agencies interviewed indicated that they were well satisfied with their present location, with only six indicating a dissatisfaction.

12. Desire to Relocate.

A number of those interviewed indicated that they would be interested in relocating their business to a different area of the city if they had an opportunity to do so. However, a majority of those interviewed indicated a desire to remain on Williamson Street. Although a few of those interviewed appeared to be seriously pursuing possible relocation, most of those indicating a desire to relocate were simply expressing some dissatisfaction with current business trends and physical conditions on Williamson Street.

13. Age of Business.

The responses to the question of how long the businesses had been in the Williamson Street neighborhood indicate a fairly high turnover rate with over 50 percent having been in business less than 10 years and six having been in operation less than one year. In addition, there have been changes in ownership or location on Williamson Street of a number of the businesses which have been in operation for a long time.

14. Residence of Owner or Manager.

A majority of those interviewed did not live in the Williamson Street neighborhood. However, 17 of those persons interviewed indicated they did live in the neighborhood and this is a substantially higher proportion than would normally be found in older commercial streets.

15. Sales Trends.

There were substantial differences in the sales trends for the various businesses interviewed. Sixteen of the businesses indicated sales remaining the same or decreasing which, in view of the rate of inflation, represents a decreasing volume of business. However, 13 businesses reported normal increases of between one and 20 percent in sales and 11 reported substantial increases of more than 20 percent. In view of the decreasing population in the market area served by the Williamson Street retail and service facilities, future decreases can be anticipated unless steps are taken to attract new customers.

16. Operating Expenses.

Most of those interviewed did not indicate which of their operating expenses had risen the most during the past year. Of those responding to this question, however, a substantial majority indicated that fuel and utility costs were increasing most rapidly.

17. Number of Customers.

There is a substantial difference in the number of customers coming to the various businesses located on Williamson Street. Twenty of the businesses reported less than 10 customers a day and these included primarily those businesses which delivered their goods or services to their customers. Many of these reported that customers never came to their place of business. However, some businesses reported substantial customer traffic each day with the grocery stores, service stations and taverns experiencing the greatest activity. The large number of persons passing through the neighborhood and the large customer traffic at some of the existing businesses provides potential for increased volumes of business on Williamson Street.

18. Location of Customers.

The businesses reported a wide variety of market areas served by their particular businesses or agencies. However, in general they fall into three categories:

- a. Those serving primarily the Williamson Street neighborhood;
- b. Those attracting customers from throughout the east side and other parts of Madison; and
- c. Those that deliver their goods and services throughout Madison, the state, and in some cases, the nation.

Seventeen of the businesses interviewed indicated that over 50 percent of their customers resided in the Williamson Street neighborhood. These businesses, in general, offer convenience goods and services and were concentrated primarily around the 1200 and 1300 blocks of Williamson Street. There were, however, 27 businesses interviewed which did less than 10 percent of their business with Williamson Street neighborhood residents. These businesses tended to be concentrated toward the west end of the street and include all the businesses which deliver their goods and services. The other category of specialty retail which attracts customers from throughout the city of Madison is scattered along the street and are not concentrated in any one particular area.

19. Needed Improvements.

Most of those interviewed indicated that improvements on Williamson Street were necessary or desirable. Many respondents expressed the opinion that there was a need for rehabilitation of commercial buildings and physical improvements such as trees, new curbs, sidewalks and lighting. Many also indicated a need to reduce the traffic congestion and provide more on-street and off-street parking. It was recognized by most of

the respondents that the image of Williamson Street as perceived by persons living outside the area is poor. Some felt this image was justified and that substantial improvements were necessary to attract new customers and to provide a safe environment for their employees and property. Many, however, felt that this poor image was not justified, but recognized the need for visible physical improvements to modify the perceptions of those persons going to or through the Williamson Street area.

In summary, the business survey indicates the great diversity of types of businesses and agencies located on Williamson Street. There are large differences in the amount and quality of space they occupy, the market areas they serve, the types of goods and services provided and the extent to which rehabilitation and improvement activities will benefit their businesses. In general, the businesses most concerned and interested in rehabilitation and improvements are the customer-oriented businesses concentrated in the 1200 and 1300 blocks of Williamson Street.

In the following subsection, the results of the residential survey will be reported and analyzed.

Table 9
Williamson Street Business Survey

A survey of businesses and social agencies on Williamson Street was conducted during July, 1978 by representatives of Economic Research Corporation. Each business or agency was visited at least twice. Survey forms were mailed to the businesses or agencies if an owner or manager were not available during the survey periods. In general the cooperation was excellent with only a few of those contacted declining to be interviewed.

SURVEY QUESTIONS AND TABULATION OF RESPONSES

1. Name of Establishment

2. Address

<u>Block</u>	<u>Number of responses</u>
600	3
700	2
800	10
900	6
1000	3
1100	4
1200	12
1300	12
1400	2
1500	4
	<u>58</u>

3. Type of Business or Nature of Goods or Services Offered.

Neighborhood oriented retail	7
Neighborhood oriented services	3
Eating and drinking	7
Automotive related	6
Area wide retail	9
Area wide services	
Social	3
Contracting related	6
Fabrication-processers	4
Wholesalers	4
Others	9
Services Total	<u>26</u>
TOTAL	58

4. Contact Person: Name _____
 Position _____

Table 9 (continued)

Page 2

5. Number of employees:

Totals: Full time employees 357 Part time employees 105
 Number living in neighborhood 157
 Percent in neighborhood 34%

<u>Full time</u>	<u>Number of Businesses</u>	<u>Part time</u>	<u>Number of Businesses</u>	<u>Living in Neighborhood</u>	<u>Number of Businesses</u>
0-2	31	0-4	47	0-3	48
3-5	13	5-9	9	4-9	6
6-9	7	10 and up	-	10-29	0
10-29	2	No response	2	30 and up	2
30-49	1			No response	2
50 and up	3				
No response	1				

6. Is space leased or owned?

Leased	28
Owned	27
Buying	1
No response	2

7. If leased -

A. Would you purchase the building if you could?

Yes 8 No 18 No response 4

B. If you are interested in purchasing, which of the following purchase alternatives would you prefer:

1. Outright, with bank financing 0
2. Land Contract 3
3. Other 1-MDC

C. Landlord's name and address or telephone number

D. Length of lease: Monthly 10; 1 year 6; 2 year 3; 5 years 2; No response 9

E. Monthly rent: \$ 50-175 4 Average rent: \$304

176-250	<u>5</u>
251-350	<u>5</u>
351-450	<u>3</u>
451-700	<u>3</u>

F. Does the landlord pay heat or other utility costs?

Yes 3 Heat only 3 No 12 No response 12

Table 9 (continued)

Page 3

8. How much space do you have? (square feet or dimensions)

0- 499	3
500-1,999	26
2,000-4,999	12
5,000-9,999	4
10,000 and up	2
 No response	11
Total square feet	129,275
Average square feet	2,750
Median square feet	1,800

9. Is your present space sufficient for your needs?

Yes	32
No	22
No response	4

10. If not sufficient -

A. Do you intend or wish to expand or remodel?

Yes	18	No response	24
No	16		

B. What specific types of remodeling do you have in mind?

1. new siding	4
2. new front	5
3. electrical	3
4. plumbing	1
5. heating plant	2
6. additional building space	11
7. floors	2
8. roof	1
9. other	10

Maintenance items: interior remodeling-6
 bathroom: new canopy: tear down workshop:
 new fixtures: back bar redone.

C. What assistance do you need to accomplish this remodeling?

1. Bank loan	1
2. Low interest government loan	14
3. Architectural assistance	4
4. Planning assistance	5
5. No help needed	3
6. No response	21

Table 9 (continued)

Page 4

11. Are you satisfied with your present location?

Yes	46
No	6
No response	6

12. If you had an opportunity to relocate your business to a different area of the city, would you?

Yes	14
No	32
No response	12

A. Why?

Reputation of Williamson Street-2: If business would be better: Westside customers and I live there and rent is too high: Building not adequate: Area not too good for parking-2: Not unless build own building: get a larger market: Stay near the central city: office space.

B. To which other city area would you relocate?

Other eastside area: On the Beltline: Don't know: Westside: Suburban near good highway: Hard to say.

13. How long has your business been in the Williamson Street neighborhood?

less than 1 year	6
1- 4	11
5- 9	12
10-29	16
30-49	5
50 and up	2
No response	5

14. Do you live in the neighborhood?

Yes	17
No	31
No response	10

15. During the past year, have your annual sales for your business. . .

Decreased	4
Stayed the same	12
Increased 1-20%	13
Increased over 20%	11
No response	18

Table 9 (continued)

Page 5

16. Which of your operating expenses have risen the most in the past year?

fuel	13
maintenance	4
electricity and	12
other utilities	
property taxes	2
rent	3
other	11
no response	31

17. What is the approximate number of customers that come into your establishment each day?

0- 9	20
10- 50	10
51- 99	0
100-299	8
300-499	6
500 and up	2
No response	12

18. Where do your present customers reside? (percentage)

<u>Number of business</u>	<u>Average percentage</u>
Williamson Street area	29%
(0- 9 27)	
(10- 24 9)	
(25- 49 0)	
(50-100 17)	
East Side	24%
Throughout Madison	30%
Beyond Madison	14%
Beyond Wisconsin	3%
No response	<u>5</u>

Table 9 (continued)

Page 6

19. In your opinion, what improvements should be made on Williamson Street?

A. more parking off-street	20	→	80	→	Med
B. more parking on-street	15	→	60	→	Low
C. less vehicular traffic not including public transportation	21	→	84	→	Med
D. more vehicular traffic not including public transportation	2	→	8		
E. rehabilitation of commercial buildings	32	→	128	→	H.
F. removal of buildings	13	→	52	→	Low
G. less retail and service facilities	2	→	8		
H. more retail and service facilities, What kind?	15	→	60	→	Low

Cafes-3: good businesses & buildings: better class of customers: library branch: bookstore: newsstand: more community service for elderly: need laundromat-2: clothing store: auto: type to serve people living there.

I. physical improvements such as trees, new curbs and sidewalks and lighting 26 → 104 → H

J. others

Traffic light on corner of Dickerson-4: Don't need traffic light on Rogers: no rehabilitation: reset stoplight: mini shopping center-2: take down telephone poles-2: most don't make much difference.

K. no response 7 → 28

20. Additional Comments or Suggestions.

Clean up and paint residences and other structures-9: Just planting trees won't do it: Residential on Williamson street needs repair and improvement: Williamson Street has a bad image which needs changing-4: Traffic is good for business: Street is important: No rehabilitation money for helping landlords: No uniform design for street: More low income housing: Room for improvement: Don't want new curb or gutter: Too much traffic-9: No T.V. cable wire: Foot patrol: Bike racks-3: Better law enforcement: unloading areas-1: less taverns: more railroads: loans for rehabilitation: community trust aid: real estate tax relief: People who fix property should not be penalized: Not CETA doing labor: No strict enforcement on building code-2: Pedestrians safety-4: Why bus line on Jennifer: Eliminate fast foods there: Vandalisms and stealings: No condominiums: Money won't solve problems: need to tax inside city: cops don't come: Nobody cares: do something about drunks-4: Very interested in program-1.

Table 10

Business Survey
Selected Responses of Those Interested in Remodeling

Location of those interested

<u>Block</u>	<u>Number Interested</u>	<u>Total Responses</u>	<u>% Interested</u>
600	1	3	33%
700	0	2	0
800	2	10	20
900	1	6	17
1000	2	3	66
1100	2	4	50
1200	6	12	50
1300	5	12	42
1400	0	2	0
1500	1	4	25
	20	58	34.5%

Ownership of spaceLeased 7 Owned 13Specific types of remodeling desired.

<u>Type</u>	<u>Number Interested</u>
a. new siding	4
b. new front	5
c. electrical	3
d. plumbing	1
e. heating plant	2
f. additional building space	11
g. floors	2
h. roof	1
i. other	10

Assistance needed to accomplish this remodeling

<u>Type</u>	<u>Number Interested</u>
a. bank loan	1
b. low interest government loan	14
c. architectural assistance	4
d. planning assistance	5
e. no response	4
f. no help needed	3

Table 10 (continued)

Page 2

Annual sales for the business, in the past year. . .

Decreased	1
Stayed the same	5
Increased 1-20%	7
Increased over 20%	5
No response	2

Location of present customers (Average percent)

Williamson Street Area	37%
East Side	19
Throughout Madison	28
Beyond Madison City Limits	14
Beyond Wisconsin Borders	2%

Source: Business Survey; Economic Research Corporation

Survey of Williamson Neighborhood Residents

A personal interview survey of residents of the Williamson neighborhood was undertaken during June and July of 1978. The interviews were conducted by four individuals employed by the Madison Development Corporation under the Comprehensive Education and Training Act. They were trained in interview techniques by representatives of Economic Research Corporation. The interview procedure involved a door-to-door canvassing of the neighborhood during the day, early evening and on Saturdays. The initial interview format was pre-tested and thereafter modifications were made which are included in the final format reported herein.

The interviewers covered the entire Williamson neighborhood. This area is defined, for purposes of this report, as the residential properties between the railroad corridor and the lake from the central business district to the Yahara River. The interviewers made arrangements for calling back and, in most cases, tried a second time to reach those residents not at home during the initial call. The individual interviews averaged about 30 minutes each and ranged from 15 minutes to one hour in length.

A total of 388 interviews were conducted which represents approximately 22 percent of the 1,745 households that were in the neighborhood in 1970. For purposes of tabulation, the neighborhood was divided into sub-areas. The sub-areas are graphically portrayed on Figure 3. The percentage of the households interviewed in each sub-area ranged from 18 percent in the north-central portion of the neighborhood along Williamson Street to 29 percent in the southeast along the lake.

The number of interviews conducted in each of the sub-areas and the tabulation of the responses to each of the survey questions are reported on Table 11. In addition, special tabulations were made of specific questions. These included how often the residents shopped on Williamson Street and the improvements the residents felt were important for the upgrading of Williamson Street. See Tables 12 and 13. A separate tabulation is also included relating to which improvements were considered important to those neighborhood residents who presently do not shop regularly on Williamson Street. See Table 14. The responses to each question and their significance are summarized as follows:

1. Goods or Services Regularly Purchased.
The responses to the question regarding which goods or services the residents regularly purchase on Williamson Street indicate that over 70 percent of the residents regularly buy groceries and hardware. However, less than 50 percent stated that they bought other types of goods or services on a regular basis. In the special tabulation by sub-area, substantial differences in shopping habits were indicated. See Table 15. The percentage of residents regularly buying groceries on Williamson Street ranged from 58 percent in the southeast sub-area to over 75 percent in the three sub-areas along Williamson Street. The percentage regularly buying drugs and sundries ranged from 28 percent in the westend sub-area to over 50 percent in the southcentral and northeast sub-areas. In general, the residents of the northcentral sub-area along Williamson Street had the highest percentage of residents that regularly purchased the various categories of goods and services available on Williamson Street. The southeast sub-area along the lake had the lowest percentage of residents shopping on Williamson Street.
2. Which Store Shopped at Most Often.
The stores that residents shopped at most often included the Co-op Grocery (73), Ace Hardware (47), Sunshine Market (38), and Miller Horne (37). This is consistent with the responses to question 1 which indicated the highest percentage of residents regularly purchased groceries and hardware on Williamson Street.
3. Williamson Street Shopping Habits.
This question related to the shopping habits of the residents of the Williamson Street neighborhood and how often they shopped on Williamson Street and at other commercial centers.

Responses indicate that over 80 percent of the residents of the neighborhood shop once a week or more often on Williamson Street. The next most popular commercial areas in terms of frequency of shopping included 51 percent on East Washington Avenue, which included the Fiore and Madison East Shopping Centers and Kohl's Grocery, and 32 percent at the Uptown-State Street commercial area. Less than 16 percent of the neighborhood residents shopped regularly in the Shenks Corners-Atwood commercial area even though that commercial area is located only about three blocks northeast of the neighborhood. The special tabulation by sub-area indicates that the residents of the sub-areas along Williamson Street shop the local firms with greater frequency than do the residents of the two sub-areas along the lake. However, even in those sub-areas, over 60 percent of the residents shop once a week or more often on Williamson Street.

4. Dollar Volume of Shopping.

The responses to this question indicate that a substantial majority of the residents spend less than \$50 a week on groceries and less than \$50 a month on such purchases as drugstore items, clothes, hardware and home furnishings. The responses to questions of this nature are generally not entirely reliable since many individuals are unaware of how much they are actually spending in a week or month for various types of goods or services. The relatively low amounts reported, however, tend to indicate the small size of the families and the lower income levels which typify the northern portion of the neighborhood.

5. Shopping Areas Attracting the Largest Dollar Volume of Shopping.

Although over 300 persons or 80 percent indicated that they shopped regularly on Williamson Street, only 100 indicated that they did their largest dollar volume of shopping there. This compares to 132 that stated their largest dollar volume of shopping was at the East Washington shopping centers. This tends to indicate that there is some potential for increased business activity by local merchants, providing they can attract a larger share of the purchases by those neighborhood residents that already shop regularly on Williamson Street.

6. Percentage of Shopping Dollar Spent on Williamson Street.

The question requested the respondents to indicate the percentage of dollar volume that they spent with Williamson Street merchants. A total of 157 respondents indicated they did less than 25 percent of their shopping on Williamson Street. This compares to 72 that estimated between 26 and 50 percent; 45 who did between 51 and 75 percent and 35 who indicated they did over 75 percent. These answers again indicate the potential for increasing the dollar volume of sales to residents of the Williamson Street neighborhood, by increased market penetration.

7. Are Changes Needed on Williamson Street?

A large percentage of the respondents indicated that they thought changes were needed in the Williamson Street commercial area to better meet their needs. A total of 246 respondents indicated that changes were needed compared to 126 who felt that the commercial area presently meets their needs.

8. Nature of Improvements Needed.

The residents were requested to indicate which of various suggested changes or improvements they thought were very important, important or not important. The responses indicated that a large majority of the residents thought it was important to rehabilitate substandard buildings and to improve the physical appearance of Williamson Street. The residents also indicated that they were very concerned with traffic congestions and that they desired improvements to make the street easier and safer for pedestrians. A majority of those responding, however, felt that more convenient parking, greater concentration of retail and services, and increased police protection or other activities to increase personal safety were not important. Although more convenient parking and greater concentration of retail and service facilities are relatively unimportant for the residents of the Williamson neighborhood, they are important factors for the Williamson Street businesses. If they are to obtain a larger volume of the business from the neighborhood and attract residents of other areas who are passing through the neighborhood, such improvements are essential. A special tabulation was made of improvements desired by those persons not shopping regularly on Williamson Street. Their responses followed a similar pattern, stressing the need for rehabilitation of substandard buildings, improved physical appearance and reduction of traffic congestion.

9. Types of Retail and Service Facilities Desired.

The majority of the respondents stated they would like to see more and different retail and service facilities on Williamson Street. The types of new businesses mentioned included restaurants, apparel stores, grocery stores, and a book store. However, less than 15 percent of the respondents indicated the desire for any particular type of store. This indicates there is no general concensus in the neighborhood regarding what new facilities are necessary or desirable. The only existing businesses not desired were taverns (62) and fast food restaurants (51). 41

10. Potential for Increased Purchases.

Over 85 percent of those responding to this question indicated that they would substantially increase the volume of goods and services purchased on Williamson Street if the improvements they thought important were made. In addition, 77 percent of those persons not regularly shopping on Williamson Street also indicated that they would substantially increase their purchases if the improvements were completed. This indicates a potential for increased business volumes which could be attracted to Williamson Street as a result of a rehabilitation program and other activities for improving the street.

11. Persons per Household.

A high percentage of the respondents lived in one- or two-person households and less than 20 percent of the households responding contained four or more persons.

12. Occupancy Characteristics.

A total of 236 of the respondents indicated that they rented their housing unit compared to 145 owner-occupied units. The 39 percent of the respondents living in owner-occupied units compares to 35 percent in 1970 in Census Tract 19.

13. Income.

The responses to the income question indicated that a majority of the residents are in the lower income categories. The responses, however, do indicate a fairly wide range of income levels and do reflect the diversity of this neighborhood.

14. Age of Respondent.

Over 50 percent of the respondents were in the 25 to 45 year age category. The age characteristic of the respondents is consistent with the age characteristics of the residents of Census Tract 19 as reported in the special census of 1974.

15. Reasons for Living in the Neighborhood.

The respondents were requested to indicate the primary reasons why they were living in the Williamson neighborhood. The most frequently mentioned reasons were:

- a. Convenience of location (220);
- b. Prefer older neighborhoods (189);
- c. Good transportation services (183);
- d. Diversity of life style (170); and
- e. Cost of housing (160).

In summary, the responses to the demographic questions indicate that the survey sample reasonably represents the Williamson Street neighborhood. The residents of the neighborhood strongly feel that improvements are needed to upgrade the Williamson Street commercial area and that if such improvements were made they would substantially increase the volume of goods and services purchased there. A high percentage of the residents of the neighborhood regularly shop on Williamson Street although many do their greatest volume of shopping at other commercial areas. The responses indicate there is a good potential for an increased volume of business activity on Williamson Street if the commercial area were upgraded. This potential arises primarily from increasing the dollar volume of purchases by residents who presently regularly shop on Williamson Street but also includes the potential for attracting residents who presently do most of their shopping at other locations.

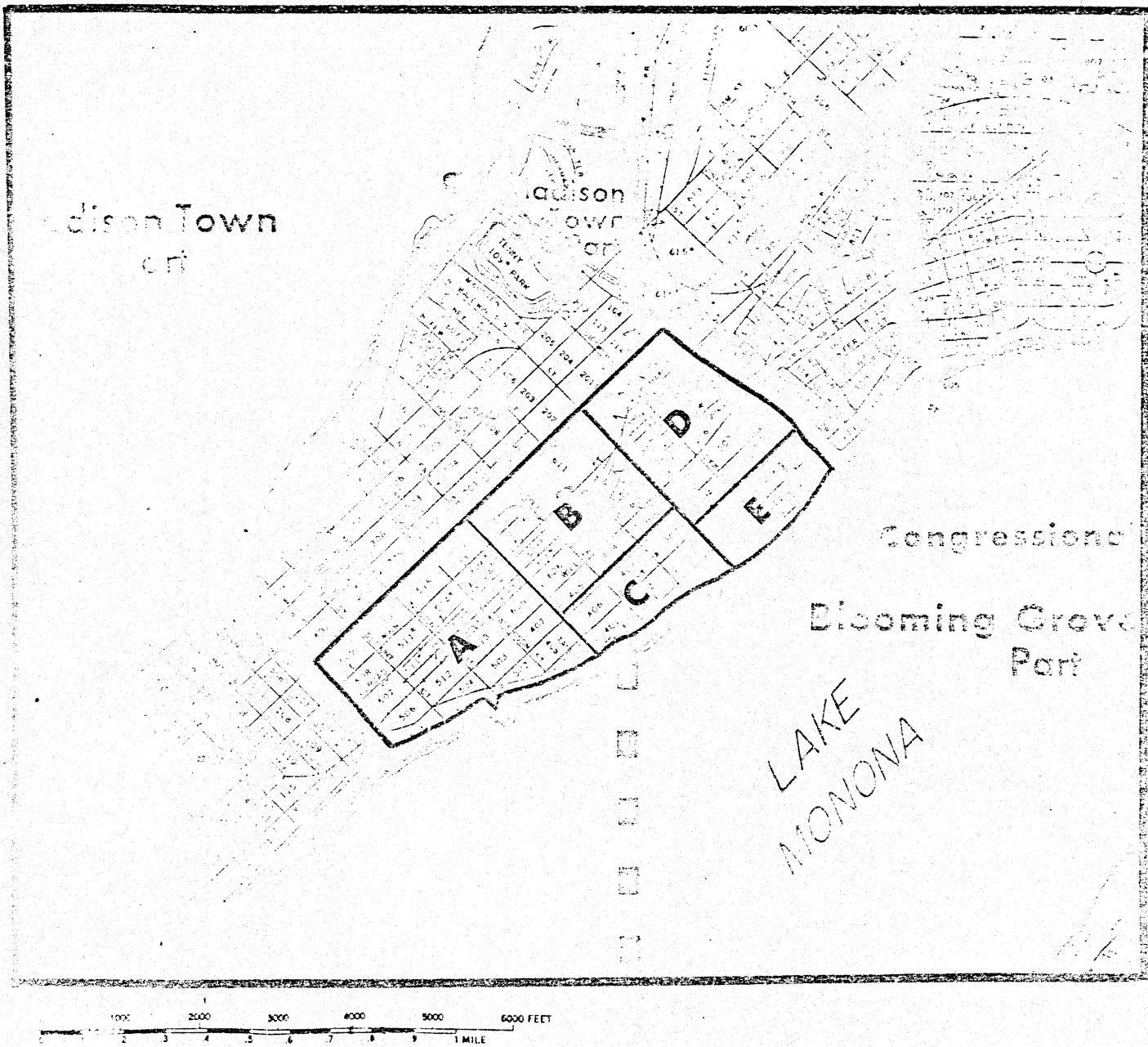


FIGURE 3

Survey Sub-areas

Table 11
Survey of Williamson Neighborhood Residents

A personal interview survey of Williamson neighborhood residents was conducted during June and July 1978. Four interviewers went door to door during the day, early evening and on Saturdays. The interviewers covered the entire neighborhood with call backs to those not home in much of the neighborhood.

The number of responses by sub-area of the neighborhood are as follows:

Sub-areas	<u>Number of Households 1970</u>	<u>Number of Interviews</u>	<u>Percent of 1970 Households</u>
A (Westend)	374	83	22.2%
B (Northcentral)	248	45	18.1
C (Southcentral)	441	83	18.8
D (Northeast)	385	91	23.6
E (Southeast)	297	86	29.0
 Neighborhood Total	 1,745	 388	 22.2%

SURVEY RESULTS

1. What goods and services do you regularly purchase on Williamson Street?

	<u>Yes</u>	<u>Occasionally</u>	<u>No</u>	<u>Percent Yes</u>
a. groceries	273	30	85	70.3%
b. drugs & sundries	169	18	200	43.6
c. hardware	274	21	92	70.6
d. restaurants	124	7	254	32.0
e. taverns	132	9	236	34.0
f. dry cleaning-laundry	152	3	225	39.2
g. gasoline	64	-	-	16.5
h. Other (Star Photo, Liquor, St. Vincents, Bakery)	79	-	-	20.4%

2. Which store on Williamson Street do you shop at most often?

Coop Grocery	73	Wm. Market	22
Ace Hardware	47	Shafers Drug	17
Sunshine Mkt.	38	Others	10
Miller Horne	37	No response	144

Table 11 (continued)

Page 2

3. How regularly do you shop or patronize the following shopping areas?

	<u>More</u> <u>than</u> <u>once</u> <u>a week</u>	<u>Once</u> <u>a</u> <u>week</u>	<u>Once or</u> <u>twice a</u> <u>month</u>	<u>Less</u> <u>often</u>	<u>Percentage</u> <u>once a</u> <u>week or</u> <u>more</u>
a. Williamson Street	234	77	33	38	80.2%
b. Shanks Corners-Atwood	18	42	60	225	15.5
c. East Washington Ave. (Fiore-Eagle, Kohl's, East Madison)	66	131	102	79	50.8
d. Uptown-State Street	51	74	100	139	32.2
e. Downtown Square	31	51	103	176	21.1
f. East towne	14	17	136	197	8.0
g. Monona Shopping Centers	3	-	20	274	0.8
h. Other	8	15	23	16	5.9%

4. (a) How much do you spend each week for groceries?

\$25 or less	162
\$26 to \$50	153
\$51 to \$75	32
greater than \$75	16

4. (b) How much each month for such items as drugstore items, clothes, hardware, home furnishings?

\$25 or less	102
\$26 to \$50	94
\$51 to \$75	27
greater than \$75	56
no response	109

5. Which shopping area do you do the most dollar volume of shopping in?

East Washington	132	Uptown-State Street	10
Williamson St.	100	Monona	2
East towne	11	University	2
Downtown Square	10	No response	121

Table 11 (continued)

Page 3

6. (a) What percentage of your shopping dollar do you spend on Williamson Street?

0-25%	157	Over 75%	35
26-50%	72	No response	79
51-75%	45		

6. (b) (Ask only if majority of shopping NOT on Williamson Street) What percentage of your shopping dollar is spent at _____?

	26-50%	51-75%	Over 75%
East Washington	6	2	2
State Street	1		
Monona	1		

7. Do you think the Williamson St. commercial area meets your needs or do you think changes should be encouraged?

Meets needs	126
Changes needed	246
No response	16

8. A number of suggestions or comments have been made regarding changes or improvements which some people would like to see which are listed on this card. (Hand respondent card.) Please tell me which of those listed or others you think are very important, important or not important to you to make Williamson St. more attractive to you in meeting your shopping needs.

	2 pts.	1 pts.	0 pts.	Total
	Very Impor- tant	Impor- tant	Not Impor- tant	
a. More convenient parking.	.70	97	212	237
b. Reduced traffic congestion.	182	114	76	472
c. Make it easier or safer for pedestrians.	156	143	68	455
d. Improved physical appearance.	174	157	47	378
e. Availability of greater variety of goods and services.	96	152	109	354
f. Needs greater concentration of retail and services for "one stop shopping".	42	90	225	357
g. Rehabilitation of substandard buildings.	203	142	14	348
h. Removal of substandard buildings which cannot be rehabilitated.	118	169	67	354
i. Increased police protection or other activities to increase personal safety.	50	109	199	358
j. More locally owned businesses.	90	157	102	349
k. More competitive pricing.	60	122	162	344
l. Needs entertainment or recreational facilities.	46	98	113	257
m. Other	13	3	2	18

543
505
478
455
405
300 - 400
242
237
210

9. Would you like to see more or less or different retail or service facilities on Williamson Street.

More	143	As is	21
Different	128	Less	13

A. Types and quality of new businesses you would like.

Restaurants	47	Coffee Shop	8
Clothing	41	Movie Theater	7
Grocery	36	Meat Mkt	6
Bookstore	22	Bakery	6
Laundromat	16	Variety Store	5
Drug Store	11		

B. Types of businesses or facilities whether existing or not that you do not want on the street.

Taverns	62	Wrecking Co.	7
Fast food	51	Gas	6
Shopping Center	8	Industrial Business	6

Motorcycle Shop 5

10. (Ask only if 75% or less of shopping is presently being done on Williamson Street.) If those things you consider very important were done, would you substantially increase the amount of goods and services purchased on Williamson Street?

Yes	247
No	42
Other or no response	99

Demographic Information

To assist the neighborhood groups and the Madison Development Corporation determine what is desired and possible, we would appreciate some information regarding your household.

11. The number of persons in household.

Number in household

1	105
2	144
3	64
4	47
5	15
6	5
7	5

12. Do rent or own?

Rent	236
Own	145

13. From the card, tell me which letter of the categories most closely represents the total take home income of all members of the household.

a. under \$5,000	75
b. \$5,000-\$10,000	111
c. \$10,000-\$15,000	76
d. \$15,000-\$20,000	53
e. \$20,000-\$30,000	28
f. \$30,000 or over	12

14. Age of respondent.

Under 25	71
25-45	208
45-65	55
Over 65	64

Sex of respondent

Male	194
Female	227

15. Which of the following are most important as reasons you are living in this neighborhood?

a. Convenience of location.	220
b. Cost of housing.	160
c. Quality of schools.	55
d. Good transportation services.	183
e. Opportunity for non-traditional life style.	107
f. Diversity of life style	170
g. Prefer older established neighborhoods.	189
h. Near friends or relatives.	83
i. Lake	36
j. Other	34

Source: Residential Survey; Economic Research Corporation

Table 12

Percent of Neighborhood Residents Shopping on Williamson

	<u>More than once a week</u>	<u>Once a week</u>	<u>Once or twice a month</u>	<u>Less often</u>	<u>No Response</u>
Neighborhood Sub-areas					
A (Westend) 225 ← 374 × 60.3%		30.1%	2.4%	3.6%	3.6%
B (Northcentral) 173 ← 248 × 77.8		15.6	2.2	4.4	-
C (Southcentral) 51.8 × 441 → 228 24.1			12.1	9.6	2.4
D (Northeast) 272 ← 385 × 70.6		15.2	2.2	12.0	-
E (Southeast) 47.7 > 177 → 142 12.8			20.9	16.3	2.3
Neighborhood Total 670 1007	60.1%	738 370 19.8%	8.5%	9.8%	1.8%
	~ 69%	50%			

Source: Residential Survey; Economic Research Corporation

Table 13

Percent of Residents Feeling Specified Changes
are Very Important or Important

	Neighborhood Sub-areas					Neighborhood Total
	A	B	C	D	E	
More convenient parking	40.0%	53.3%	45.8%	40.7%	40.7%	43.0%
Reduced traffic congestion	79.5	88.9	68.7	85.7	64.0	76.3
Easier/Safer for pedestrians	78.3	82.2	72.3	82.4	72.1	77.1
Improved physical appearance	86.7	86.7	86.7	81.3	86.0	85.3
Greater variety of goods & services	68.7	66.7	67.5	57.1	61.6	63.9
Greater concentration of retail & services	30.1	28.9	36.1	24.2	48.8	34.0
Rehab of substd bldgs.	89.2	91.1	91.6	85.7	88.4	88.9
Removal of substd. bldgs. which can't be rehabilitated	74.7	66.7	68.7	80.2	75.6	74.0
Increase police protection or other safety protection	48.2	46.7	41.0	40.0	32.6	41.0
More locally owned businesses	67.5	71.1	60.2	62.6	60.5	63.7
More competitive pricing	42.2	53.3	56.6	45.1	40.7	46.9
Entertainment or recreational facilities	48.2	44.4	31.3	40.7	24.4	37.1

Sources: Residential Survey; Economic Research Corp.

Table 14

Survey of Williamson Street Residents
Responses of Those Not Shopping Regularly on Williamson Street

A number of suggestions or comments have been made regarding changes or improvements which some people would like to see which are listed on this card. (Hand respondent card.) Please tell me which of those listed or others you think are very important, important or not important to you to make Williamson Street more attractive to you in meeting your shopping and service needs.

	4 pts. Very Impor- tant	2 pts. Impor- tant	0 pts. Not Impor- tant	Total
a. More convenient parking.	21	18	35	74
b. Reduced traffic congestion.	31	21	18	66
c. Make it easier or safer for pedestrians.	22	33	15	65
d. Improved physical appearance.	34	29	9	62
e. Availability of greater variety of goods and services.	11	29	24	54
f. Needs greater concentration of retail and services for "one stop shopping".	8	34	23	65
g. Rehabilitation of substandard bldgs.	39	31	3	73
h. Removal of substandard bldgs. which cannot be rehabilitated.	32	33	9	74
i. Increased police protection or other activities to increase personal safety.	16	18	36	60
j. More locally owned businesses.	15	30	19	64
k. More competitive pricing.	12	29	23	64
l. Needs entertainment or recreational facilities.	7	13	33	53
m. Other	0	0	0	

If those things you consider very important were done, would you substantially increase the amount of goods and services purchased on Williamson Street?

Yes 46 No 9 Some 3 Not Sure 1

Source: Residential Survey; Economic Research Corporation

Table 15

Percent of Residents Regularly Purchasing
Various Goods & Services on Williamson Street

	<u>Groceries</u>	<u>Drugs & Sundries</u>	<u>Hardware</u>	<u>Restaurants</u>	<u>Taverns</u>	<u>Dry Cleaning & Laundry</u>
Neighborhood Sub-areas						
A (Westend)	78.3%	27.7%	62.7%	32.5%	37.3%	34.9%
B (Northcentral)	75.6	42.2	80.0	40.0	46.7	53.3
C (Southcentral)	63.9	51.8	66.3	27.7	25.3	45.8
D (Northeast)	78.0	53.8	70.3	40.7	44.0	41.8
E (Southeast)	58.1	40.7	77.9	22.1	22.1	26.7
Neighborhood Total	70.4%	43.6%	70.6%	32.0%	34.0%	39.2%

Source: Residential Survey; Economic Research Corporation.

Williamson Street Pedestrian Survey

A survey of pedestrians on Williamson Street was undertaken August 4 through 7, 1978, which included a Friday, Saturday and Monday. The interviewing was done at various intersections and, depending on the number and location of pedestrians, was conducted on all four corners of each intersection. A count of the pedestrians at or near each intersection was done at the same time. The surveys were conducted for a greater number of hours at those intersections where it was anticipated there would be the greatest amount of pedestrian and shopper traffic. The greatest number of pedestrians per hour was observed at the Baldwin, Dickinson and Few intersections and the greatest number of the interviews was conducted at these locations. A total of 311 interviews was completed. The responses to the survey are tabulated on Table 16. A separate tabulation was also made of the responses of persons that did not live in the Williamson neighborhood. See Table 17. The responses and their significance are summarized as follows:

1. Purpose of Visit.

Shopping was the purpose of the visit to Williamson Street of 46 percent of those interviewed. Other reasons for visiting Williamson Street included: obtaining services (14%); live on the street (13%); employment (9%); and passing through (8%). The responses of the persons living outside the Williamson neighborhood indicated a similar breakdown as to the purpose of their visit to Williamson Street.

2. Businesses Shopped at or Visited.

The respondents to the pedestrian survey indicated a wide variety of businesses were being visited. The highest percentages of the respondents indicated they were going to shop at the Co-op Grocery (29%), Sunshine Market (18%) and Shafers Pharmacy (9%). The number of persons that said they were going to visit businesses in the 1200 and 1300 blocks of Williamson Street was substantially higher than for other locations.

2. (continued)

This was expected because more interviews were conducted at those intersections. However, particularly in the case of the Co-op Grocery Store, a number of pedestrians at each intersection indicated that they were going to visit that store. The Co-op Grocery Store was also the most frequently listed of those businesses visited by persons living outside the Williamson neighborhood, indicating that it does have a larger market area.

3. How Often They Visit Williamson Street.

Over 75 percent of the pedestrians interviewed indicated that they visited Williamson Street more than once a week and 12 percent estimated the frequency at once a week. Nearly 50 percent of those interviewed, who live outside the Williamson Street neighborhood, indicated that they came to Williamson Street more than once a week.

4. Residence of Respondents.

Over 61 percent of the persons responding to the pedestrian survey lived in the Williamson Street neighborhood. There were an additional 10 percent from the Marquette (Atwood) neighborhood across the Yahara River, 7 percent from the Downtown-University area and 5 percent from the Tenny Park neighborhood. The other respondents were from various locations throughout Madison and Dane County.

In summary, the pedestrian survey indicates that the Williamson Street commercial area serves primarily the immediately adjacent neighborhood. Some customers, however, are attracted from the nearby Marquette (Atwood) and Tenny Park neighborhood as well as from the Downtown-University area. The survey tends to indicate that the Williamson Street commercial area is presently not very successful in attracting business from persons passing through on Williamson Street. This indicates another untapped potential source of increased business activity.

Table 16

Williamson Street Pedestrian Survey

A survey of pedestrians on Williamson Street was conducted on Friday, Saturday and Monday, August 4-7, 1978. The interviewing was done at the various intersections and, depending on number and location of pedestrians, interviewing was conducted on all four corners of each intersection. A pedestrian count was conducted at the same time.

The number of hours spent at each intersection, the number of interviews and number of pedestrians are as follows:

<u>Intersection</u>	<u>Number of hours</u>	<u>Interviews</u>		<u>Pedestrians</u>	
		<u>Number</u>	<u>Number per hour</u>	<u>Number</u>	<u>Number per hour</u>
Livingston	3	19	6.3	50	16.7
Paterson	1	23	23	35	35
Ingersoll	1	15	15	40	40
Few	4.5	85	18.9	288	64
Baldwin	3.75	82	21.9	465	124
Dickinson	5.25	82	15.6	412	78.5
Thornton	1	5	5	30	30
TOTAL	19.5	311	15.9	1,320	68

SURVEY RESPONSES

1. What is the purpose of your visit to Williamson Street today?

	<u>Number</u>	<u>Percent</u>
Shopping	142	45.7%
Services	42	13.5
Work	29	9.3
Clubs or Associations	5	1.6
Live on Street	39	12.5
Visiting Residents	15	4.8
Passing Through	26	8.4
Other	13	4.2%
	311	100.0%

Table 16 (continued)

Page 2

2. What businesses have you or will you shop at or visit today?

	<u>Number</u>	<u>Percent</u>		<u>Number</u>	<u>Percent</u>
Coop Grocery	91	29.3%	Dolly's Cafe	11	3.5%
Sunshine Market	56	18.0	Miller-Horne	8	2.6
Shafer Pharmacy	29	9.3	U-Pump	6	1.9
Ace Hardware	25	8.0	Fasten All	4	1.3
St. Vincents	24	7.7	Greig Club	4	1.3
Clara's Cafe	17	5.5	Howe Bros.	3	0.9
Crystal Corner	15	4.8	Eagles	3	0.9
Star Liquor	15	4.8	Bakery	3	0.9
Wm. Market	14	4.5	Speedway Gas	3	0.9
Laundromat	14	4.5	Hans' Sewing	3	0.9
Star Photo	11	3.5%	Others (24)	35	11.3
			None	31	10.0%

3. How often do you come to Williamson Street?

	<u>Number</u>	<u>Percent</u>
More than once a week	238	76.5%
Once a week	36	11.6
Once or twice a month	13	4.2
Less often	16	5.1
No answer	8	2.6
	<u>311</u>	<u>100.0%</u>

4. Where do you live?

Williamson Neighborhood	190	61.1%
Marquette (Atwood)	32	10.3
Tenny Park	16	5.1
Downtown-University	23	7.4
Northeast Madison (Maple Bluff)	4	1.3
Southeast Madison (Monona)	5	1.6
South Madison	9	2.9
West Madison	6	1.9
Other Dane County	14	4.5
Other	5	1.6
No Answer	7	2.3
	<u>311</u>	<u>100.0%</u>

Source: Residential Survey; Economic Research Corporation.

Table 17

Williamson Street Pedestrian Survey
Responses of persons living outside the Williamson neighborhood

	Marquette (Atwood)	Tenny Park	Other	Total
Number of responses	32	16	73	121

1. Purpose of Visit.

Shopping	20	9	31	60
Services	1	1	14	16
Work	1	3	10	14
Visiting Residents	1	2	8	11
Passing through	5	1	7	13
Other	4	0	3	7

2. Businesses Visited

Coop Grocery	10	9	9	28
Shafer Pharmaceuy	7	2	2	11
St. Vincents	3	1	7	11
Ace Hardware	0	1	10	11
Star Photo	0	0	8	8
Sunshine Market	3	0	8	11
Wm. Market	1	1	5	7
Cafes	0	1	12	13
Taverns or Clubs	3	1	3	7
Other	6	5	16	27
None	6	1	9	16

3. How often to Williamson Street?

More than once a week	22	11	36	59
Once a week	8	3	11	22
Once or twice a month	1	2	8	11
Less often	1	0	15	16

Source: Pedestrian Survey, Economic Research Corporation

Section IV

Williamson Street Market Potentials

The market potentials for existing or new businesses on Williamson depend on the characteristics and trends within the different market areas served by the various kinds of businesses on the street. For the purpose of this analysis, the businesses have been categorized into three basic types:

1. Neighborhood-oriented retail and service facilities;
2. Area-wide specialty retail stores; and
3. Suppliers, fabricators, wholesalers and agencies which basically deliver their goods and services.

Because of the diversity of business activity on Williamson Street, a number of businesses do not fit easily into any of these categories and other businesses have characteristics of more than one of the categories. However, an analysis of the market potentials for businesses in each of these categories, will assist in determining the likelihood of increased business activity that might result from a rehabilitation and improvement program.

Neighborhood-oriented Retail and Service Facilities

The market area for neighborhood-oriented retail and service facilities is shown on Figure 4. This market area was delineated based on:

1. The perceived geographic market of existing businesses as indicated in the business survey;
2. The place of residence of customers as indicated in the pedestrian survey;

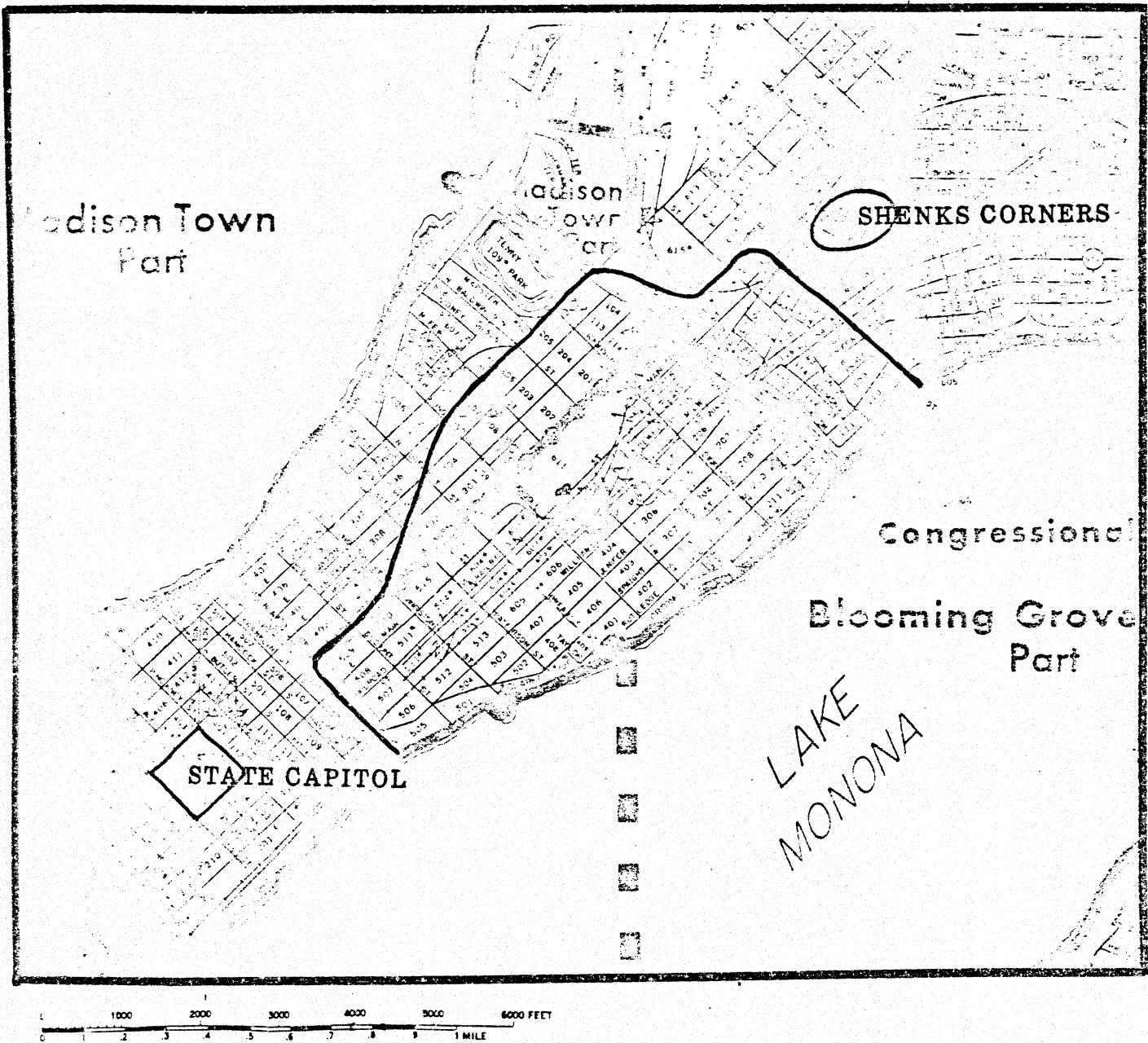


FIGURE 4

Market Area

Williamson Street Neighborhood Retail Facilities

3. Physical barriers including Lake Monona, the central business district, and the East Washington Avenue industrial area;
4. Normal transportation patterns;
5. The location of competitive retail and service facilities;
6. General marketing patterns of similar facilities, whether located in Madison or other urban areas.

The delineated market area is primarily the Williamson Street neighborhood but does include small portions of Marquette (Atwood) across the Yahara River and a portion of the Tenny Park neighborhood. See Table 18. The portion of the Tenny Park neighborhood included in the market area is intended to be a representative sample of the entire neighborhood. It is anticipated that customers from that neighborhood include persons living throughout that area. The purpose of a market area delineation is to identify the geographic area from which at least 75 percent of the anticipated volume of business will come. Thus, it is assumed that 15 to 25 percent of the business of Williamson Street neighborhood-oriented retail and service facilities will come from outside the outlined market area.

The number and type of "convenience" and "shoppers goods" facilities on Williamson is substantially less than in other neighborhood shopping districts such as Monroe Street or the Shanks Corners-Atwood commercial area. There are, however, significant differences in the market areas served by these three older commercial areas. Monroe Street, which appears to be a strong and healthy business street, serves an estimated market area population of over 17,000 compared to 11,000 for Shanks Corners-Atwood and 6,700 for Williamson Street as shown on Table 19. The median family incomes and median housing values in the Monroe Street market area are also higher than for either Williamson Street or Shanks Corners-Atwood. In addition, both Williamson Street and Shanks Corners-Atwood have substantial nearby competition on East Washington Avenue, the central business district, and to a lesser extent, the Monona Shopping Centers.

Table 18

Williamson Street Neighborhood
Retail Market Area Population 1970

	<u>1970 Population</u>	<u>1970 Occupied Housing Units</u>	
Williamson Neighborhood			
Sub-areas ¹			
A. (Westend)	828	374	
B. (Northcentral)	554	248	
C. (Southcentral)	986	441	
D. (Northeast)	1019	385	
E. (Southeast)	686	297	
Williamson Subtotal	<u>4073</u>	<u>1745</u>	64%
Marquette (Atwood)			
F. (Yahara to Russell)	1240	398	15%
Tenny Park			
G. (Southeast of Johnson)	1430	582	21%
Market Area Total	6743	2725	

¹ See Figure 3 for sub-area boundaries.

Sources: U.S. Dept. of Commerce, Bureau of Census, 1970 Census of Population and Housing, Block Statistics Madison, Wisc. Urbanized Area, HC (3)-270; Economic Research Corporation.

Table 19

Commercial District Market Area Comparison

	<u>Market Area Population</u>	<u>Median Income</u>	<u>Median Housing Values</u>	<u>Percent Owner Occupied</u>
Williamson Street				
Tract 19	5,313	\$ 8,243	\$16,400	35%
Tract 18	1,430	8,975	17,500	27
Market Area Total	6,743	8,398	16,633	33
Atwood-Shenks Corner				
Tract 19	4,473	\$ 8,243	\$16,400	35%
Tract 20	6,435	9,293	15,500	54
Market Area Total	10,908	8,862	15,869	46
Monroe Street				
Tract 9	6,204	\$13,788	\$23,600	51%
Tract 10	2,615	11,966	19,700	72
Tract 11	1,793	6,808	18,500	4
Tract 12	5,665	9,155	20,100	40
Tract 4.01	580	15,575	26,100	91
Tract 8	384	13,500	22,200	66
Market Area Total	17,241	11,317	21,381	47
Summary				
Williamson	6,743	\$ 8,398	\$16,633	33%
Atwood	10,908	8,862	15,869	46
Monroe	17,241	11,317	21,381	47

Sources: U.S Department of Commerce Bureau of Census 1970 Census of Population and Housing, Census Tract, Madison, Wisc SMSA, PHC (1)-123; Block Statistics Madison, Wisc. Urbanized Area, HC (3)-270; Economic Research Corporation.

Alternative competitive facilities are much less convenient for the residents of the Monroe Street market area in terms of both time and distance. The Williamson Street market area does not have sufficient population and income to support the number and type of retail facilities found on Monroe Street. Therefore, its retail potential must be measured within its proper market area scale.

As was previously reported, the market area is characterized by declining population, older residences, a high percentage of renter-occupied units and a diversity of income levels. Unless new customers can be attracted to the street or a greater penetration of the existing market base can be achieved, it is likely that there will be a decline in business for neighborhood-oriented retail and service facilities.

New customer markets can be obtained only by attracting people from greater distances or by capturing those persons going near or through the area for other purposes. There is little potential for attracting persons from greater distances for ordinary retail-type items. The market for these goods and services is presently limited by physical barriers and the existence of competitive establishments. Convenience goods and services are generally obtained at locations nearest the purchaser's home or in an area which he visits on a regular basis. The goods and services are usually purchased on a regular (daily or weekly) schedule and are similar to those carried by many merchants in various locations. Therefore, convenience for the customer is generally the controlling factor in selection of the purchase location.

The relatively high percentage of the pedestrians from outside the neighborhood planning to visit the Co-op Grocery Store indicates, however, that persons will travel greater distances for goods and services of a type and quality not available at a more convenient location. Most convenience goods and services, however, are relatively standard and either are or could be made available at other competitive locations.

A second method of expanding the market area is to offer a concentration of retail and service facilities so that potential customers could do most of their shopping at one location. The development of more and larger shopping centers in the Madison area is a reflection of the business potentials resulting from such a retail concentration. As indicated previously, Williamson Street does not presently have a number of the types of facilities normally found in community shopping areas. It does not have a full-size super market, department store, variety store, apparel stores, financial institutions or business services. In view of the market area population and characteristics, it is doubtful whether these businesses could be attracted to Williamson Street. This is particularly true since "shoppers goods" retailers prefer to be located near other stores of the same type to attract persons doing comparison shopping. It is anticipated that the future business activity on Williamson Street will be similar in nature and scope to the existing facilities and that the area will not be transformed into a major retail center, regardless of the improvements made or assistance provided.

The third method of effectively expanding the market area is to attract a larger volume of business from persons going near or through the Williamson Street area. As indicated previously, there is substantial employment nearby in the railroad corridor industrial area and the central business district in addition to the employment on Williamson Street. Furthermore, there are approximately 18,000 vehicles travelling daily on Williamson Street, a large percentage of which are passing through the neighborhood to or from various locations in East Madison and Monona. There is a good potential to increase the volume of business from this source by making shopping more attractive and convenient. Activities or conditions which would tend to increase the volume of business attracted from this source include:

1. Improved physical appearance of the street;
2. Rehabilitation or removal of substandard or deteriorating commercial and residential structures;

3. More convenient parking, particularly during rush hours;
4. Improved traffic patterns in order to permit persons to easily and conveniently stop, make purchases, and continue on their way;
5. A greater concentration of retail and service facilities to permit those passing through to conveniently purchase a variety of goods and services with only one stop.

The anticipated potential volume of increased business from this source, however, is not sufficient to alone make these improvements or changes economically feasible. Substantial costs are involved in the rehabilitation or demolition of all substandard or deteriorating structures, to provide sufficient convenient parking, or to restructure the businesses to provide greater concentration of retail and service facilities. However, there are a number of activities which, because of their reasonable cost and their other potential benefits to the neighborhood, would be feasible and desirable. A rehabilitation program, concentrated on the portion of the street with the greatest customer-oriented businesses, coupled with removal of structures and activities which most greatly detract from the image of the street, would assist in attracting more business from persons passing through. A large concentration of retail activity, surrounded by convenient parking, implies a shopping center which would be neither economically feasible nor desired by the neighborhood. However, the development of smaller off-street parking areas and the encouragement of retail concentration through rehabilitation and improvement program priorities will permit existing and potential new businesses to attract greater volumes of business from automobile-oriented customers. The volume of business which may possibly be attracted from persons passing through is considerable. For example, suppose an additional three percent of those persons in the 18,000 vehicles daily passing along Williamson Street could be encouraged to stop and make purchases averaging \$5.00 each. This would result in increased business volume of \$2,700 a day, \$13,500 a week and over \$700,000 annually, excluding weekends.

A rehabilitation and improvement program, particularly if it includes provision for more convenient parking during rush hours, will result in increased business for area retail and service facilities from persons passing through the neighborhood. The increased sales volume, which will assist in paying the cost of rehabilitation and expansion, will accrue primarily to those businesses offering convenience items such as groceries, drugs, hardware, dry cleaning, liquor and the like.

Another potential source of additional business for the Williamson Street neighborhood-oriented retail and service facilities is an increased sales volume to persons who regularly shop on Williamson Street. As indicated in the residential survey, a high percentage of neighborhood residents shop regularly on Williamson Street. Only a small percentage, however, indicated that they made the greatest volume of their purchases on Williamson Street. A rehabilitation program and improvement activities will encourage these market area residents to purchase a higher percentage of their goods and services on Williamson Street. The amount of potential increase is limited by the lack of availability of various types of goods and services. Although, as indicated previously, the market area will not support large new convenience or "shoppers goods" retail facilities, a limited expansion to offer a greater variety of items will assist in attracting a larger share of purchases by neighborhood residents. Therefore, a rehabilitation program should include assistance to retailers desiring to expand as well as rehabilitation of existing space.

Another potential source of increasing business involves attracting those residents of the market area who presently do not shop regularly on Williamson Street, even though it is the most convenient location for them to purchase convenience goods and services. Since these residents go out of their way to purchase goods and services at other locations, it can be assumed that they are dissatisfied with present conditions on Williamson Street. This assumption is confirmed by the residential survey, in which a majority of persons presently not shopping regularly on Williamson Street indicated they would be persuaded to if improvements they thought were important were to be accomplished.

Improvements desired included the rehabilitation or removal of substandard or deteriorating structures and the improvement of the physical appearance of the street. Other factors that were considered as needing attention were traffic congestion and the lack of pedestrian safety. A rehabilitation program combined with other activities to improve the appearance and convenience of Williamson Street will encourage a higher percentage of the market area residents to shop regularly on Williamson Street.

The volume of business which may possibly be attracted from these residents is substantial. Twenty percent of the persons responding to the survey indicated that they did not presently shop regularly on Williamson Street. Applying this percentage to the market area population, it amounts to nearly 1,300 residents and over 500 households. If 75 percent of these household heads could be encouraged to spend an average of \$20 to \$40 a week on Williamson Street it would result in increased sales of \$7,500 to \$15,000 a week or \$390,000 to \$780,000 annually.

In summary, there is good potential for increased business as a result of a rehabilitation and improvement program. This potential will accrue primarily to those consumer-oriented businesses offering convenience goods and services. Since the facilities offering convenience goods and services are concentrated in the 1200 and 1300 blocks of Williamson Street, a rehabilitation and improvement program would have the greatest impact if concentrated in that area. To maximize the potential for new business the rehabilitation and improvement program should include assistance for business expansion and provide needed parking during rush hours.

Area-wide Specialty Retail Stores

The second category of businesses on Williamson Street are the area-wide specialty retail stores. These include a very diverse group including appliance dealers, sewing center, rod and reel shop, mattress shop, antiques and many others. These businesses tend to attract customers from throughout the city of Madison and are not concentrated in any particular portion of the street. These businesses do contribute substantially to the amount of commercial activity on the street, although in general, they do not attract large volumes of customers nor do they attract customers that are likely to make many purchases at other nearby establishments. These stores offer a diverse type of merchandise but have several characteristics in common including:

1. Goods which are only purchased on an irregular basis, and
2. Products or services for which people are willing to make a special trip because of their unique nature or limited availability.

Williamson Street is an attractive area to many specialty retail stores since it is centrally located and is easy to find. However, it is not particularly advantageous for those specialty retail facilities which appeal primarily to higher income persons, need large numbers of customers, or market principally to younger persons. Specialty retailers appealing primarily to higher income shoppers would prefer a west side location which would be nearer the residences of a greater number of those persons. Specialty retailers needing high volumes would prefer locations in or near large retail centers, such as the central business district or the major shopping malls. Specialty retailers appealing primarily to youth or young adults would tend to locate on State Street or near the university.

A rehabilitation and improvement program would, to a limited extent, tend to increase the volume of business for the specialty retailers and attract new ones to Williamson Street. However, a number of the specialty retailers need and desire low overhead locations. Some of these retailers expressed a refusal to participate or a disinterest in a formal rehabilitation program.

In general, a rehabilitation program and improvement activities will increase the volume of business for some specialty retailers. The Williamson Street area has a poor perceived image by many residents of the Madison area. A majority of the businessmen felt that this was unjustified but recognized that it was the image held by many persons. The area's reputation does not greatly affect the existing customers of the area-wide specialty stores since they are familiar with Williamson Street and the stores they visit. The perceived image, however, adversely affects the ability of the area-wide specialty retailers to attract new customers to their stores. If a potential customer has any concerns regarding the safety of their person or property, they are likely to seek the desired goods or services at other locations where they feel more comfortable.

In summary, a rehabilitation program and improvement activities are likely to increase the volume of business at most of the area-wide specialty retail stores on Williamson Street. Some of the retailers, however, are not interested in a rehabilitation program for their individual structures which would increase their overhead. In order to enlist their interest and active participation, it will be necessary to prove that such a program will result in a profitable increase in business. A rehabilitation and improvement program might encourage some new specialty retailers to locate on Williamson Street. It might also tend to discourage those retailers who insist on low overhead locations to the extent that the improvement programs increase the values of area land and buildings and thus rents.

Businesses which Deliver their Goods and Services

There are a number of businesses on Williamson Street which, in most cases, deliver goods and services to their customers. Since the customers do not come to Williamson Street or to the business facility, a rehabilitation and improvement program will not appreciably affect their volumes of business. Businesses in this category include suppliers, contractors, fabricators, wholesalers and other related operations. In general, most of these companies are not interested in a formal rehabilitation program for their business structure. However, many have engaged in significant remodeling and improvements on a private basis. Most improvements and rehabilitation efforts are related to increasing the efficiency of their internal business operation or for purposes of employee comfort and safety.

As became clear in the business survey, these persons are interested in seeing general improvements initiated in the area even though they do not desire or require assistance with their particular properties. The improvements or changes suggested included the rehabilitation of adjacent structures, clean-up of trash, and a change in the type of person frequenting the street. Since conditions on the street do not directly affect their volume of business, they are primarily concerned with the efficiency of their operation and the safety and morale of their employees.

Since Williamson Street is a convenient location for persons delivering goods and services throughout the Madison area, it is an attractive location for many of these types of businesses. Furthermore, the transportation facilities in and out of Madison make it an attractive location for delivering goods and services throughout Wisconsin and, in some instances, the nation. It can be assumed, based on the availability of suitable space, that additional businesses of this type will probably be attracted to Williamson Street. However, because location is not a critical factor to these firms, they would not hesitate to relocate to other locations in Madison which offered more suitable facilities in terms of size, condition, price or neighborhood surroundings.

In summary, a rehabilitation improvement program is unlikely to substantially increase the volume of business for these firms which mainly deliver their goods and services. These businesses are a benefit to the neighborhood because they provide substantially greater employment than most of the customer-oriented retail businesses. This situation provides employment opportunities for residents of the Williamson Street neighborhood and a potential source of customers for the area retail stores including the eating and drinking establishments.

Feasibility of Rehabilitation

The feasibility of rehabilitation of individual structures, that were included in the Trkla, Pettigrew, Allen and Payne Study, varies substantially. As indicated on Table 20, the total and per square foot costs of rehabilitation of the various structures had wide ranges. The cost per structure to reach design objective standards varied from \$6,000 to \$48,000 per structure. The square foot cost varies from \$3.81 to approximately \$28.00 per square foot. As noted earlier, the cost-benefit ratio for various businesses will also vary substantially as will the financial capability of individual owners.

The financial feasibility of rehabilitating specific structures will need to be determined on an individual basis as the buildings and businesses are selected for remodeling. Each particular business and owner will have to be analyzed and feasibility determined based on certain factors. Some of the key factors include:

1. The extent of the general rehabilitation and improvement program that will be undertaken on Williamson Street;
2. The increased volumes of business for a particular participant which can be anticipated from the actual rehabilitation and improvement program selected for Williamson Street;
3. Current volumes of business and profit margins;
4. Financial capability of the owners; and
5. Terms and conditions of loans or grants or other assistance that are to be made available to participants.

The proprietary information regarding current business volumes and financial condition can only be obtained at such time as the particular business has decided to participate in the program and thus has an incentive to provide such information. Without such accurate data, individual rehabilitation feasibility is not determinable. The actual program participants will have to

Table 20

<u>Address</u>	<u>Description</u>			<u>Total Estimated Costs of Rehabilitation by Level</u>			<u>Estimated Costs Per. Square Foot for Rehabilitation by Level</u>		
	<u>Use</u>	<u>Owned or Rented</u>	<u>Square feet of Commercial Space</u>	<u>Enforceable Codes</u>	<u>New Construction*</u>	<u>Design Objectives**</u>	<u>Enforceable Codes</u>	<u>New Construction*</u>	<u>Design Objectives**</u>
1207	Liquor Store	rented	1,800	2,495	4,630	6,850	1.39	2.57	3.81
1101	Antiques	owned	1,080	5,345	12,760	18,455	4.95	11.81	17.09
951	Primitive Musical Instruments	rented	388	3,660	5,550	5,825	9.43	14.30	15.01
1146***	Friends Cafe	buying	918	4,120	7,095	8,795	4.49	7.73	9.58
906	Red Caboose Day Care	rented	1,985	26,200	30,925	39,675	13.20	15.58	19.99
940	Appliances Unlimited	owned	2,976	6,230	17,050	23,125	2.09	5.73	7.77
1012	Smiths Cycle	owned	3,420	10,131	23,678	28,618	2.96	6.92	8.37
1394	Ace Hardware	owned	3,992	4,650	45,720	46,270	1.16	11.45	11.59
853***	Yopack	owned	1,765	7,365	26,550	48,410	4.17	15.04	27.43
1251***	Shafers	owned	2,684	2,380	16,150	21,530	.89	6.02	8.02
<u>TOTAL</u>			21,008	72,576	190,108	247,553	3.47	9.05	11.78
<u>AVERAGE</u>			2,100	7,258	19,011	24,755	3.47	9.05	11.78

* Includes Enforceable Codes Costs

** Includes Enforceable Code & New Construction Costs.

***Excludes costs specifically related to rehabilitation of residential portions of the property.

be selected on a preliminary basis after which each will be the subject of an individual feasibility analysis. This analysis would be similar to that performed by any good lending institution in judging whether to make a business improvement loan. The key difference in this case is the potential for Madison Development Corporation to make grants, loans or other forms of assistance that could tip the scales in favor of feasibility in an otherwise marginal case.

The understandings and desires of the individual businessmen will greatly affect their willingness to participate in a general rehabilitation program. It can be anticipated that some businesses will participate in a rehabilitation and improvement program out of a sense of "community pride" irrespective of the direct economic impact on their particular firm. Others, who are likely to benefit economically, will not participate for a variety of reasons including varying views as to the potential benefit, future business plans, view of general economic conditions, and personal likes and dislikes.

Assuming reasonable costs, rehabilitation would be feasible for a substantial number of the businesses on Williamson Street. Rehabilitation would likely be most feasible for those businesses providing convenience goods and services. As indicated, for these firms there is potential for an increased volume of business as a result of a rehabilitation and improvement program. The increased business and profits will assist in repaying the costs of rehabilitation. However, there is a much less direct connection between rehabilitation and increased business volumes for the area-wide specialty retailers and those businesses which deliver their goods and services. Therefore, there is substantially less interest in a rehabilitation program among these categories of businesses. The economic feasibility in terms of increased business or more efficient operations tends to be more speculative.

In summary, a rehabilitation program, if combined with other activities to improve conditions on Williamson Street, would have definite positive results, even though not all businesses will or should participate. Nearly one-third of the businessmen interviewed indicated their willingness to participate in a rehabilitation program. Furthermore, the cost estimates for the rehabilitation of typical structures indicate that many can be improved at a reasonable cost.

Section V

Findings and Recommendations

This section of the study will report the findings and recommendations of Economic Research Corporation regarding the feasibility of rehabilitation of commercial structures on Williamson Street. These findings and recommendations will be supplemented in a separate report by the firm of Trkla, Pettigrew, Allen and Payne setting forth its findings and conclusions.

Finding

The Williamson Street neighborhood is one of the older neighborhoods in Madison and contains a relatively high proportion of renter-occupied units. There is a higher percentage of young adults and elderly in the area than the city and a lower and decreasing percentage of families with children.

Discussion

The housing along and near Williamson Street consists primarily of renter-occupied units and many of the structures are deteriorating. The portion of the Williamson neighborhood near the lake contains a higher proportion of owner-occupied units and appears to be in better physical condition. The 1970 median family income in the Williamson neighborhood census tract was \$8,243 compared to \$11,385 for the city of Madison. In 1974, nineteen percent of the residents were 19 years old or under compared to thirty-three percent for the city. Similarly, over fourteen percent of the Williamson area census tract population was 65 or over compared to less than eight percent for the city of Madison.

Finding

There is a wide variety of uses on Williamson Street including residential, neighborhood oriented retail and services, and a number of retail, service, supply, contracting and wholesaling businesses or agencies serving the entire city or state.

Discussion

Although Williamson is generally considered a commercial street, over 50 percent of the structures and nearly 50 percent of the frontage is devoted exclusively to residential uses. There are, however, over 80 businesses or agencies located on Williamson Street. These include those providing convenience goods and services to the neighborhood residents, retailers and service businesses attracting customers from throughout the Madison area, and a diverse group of suppliers, fabricators, processors, wholesalers, contractors and other businesses and agencies which deliver goods and services throughout Madison or the state. Since this latter group delivers most of their goods and services, they do not attract or rely upon customers coming to the Williamson Street area.

Finding

In general, the commercial buildings on Williamson Street are older and have not been rehabilitated or remodeled. However, there are some significant exceptions to this general situation.

Discussion

Most of the commercial structures along Williamson Street are older buildings that have only been maintained sufficiently to allow the continued utilization of the properties. However, there are a number of significant exceptions which include extensive remodeling and new construction. These exceptions include, among others:

1. Star Photo Service
2. Hans' Sewing Center
3. Gilman Press
4. Elks Club
5. Dolly's Cafe
6. Madison Appliance Parts, Inc.

These investments are evidence that some business owners along Williamson are growing and sufficiently confident in the area's future to risk equity dollars.

Finding

The economic strength of the different businesses in this diverse commercial area varies considerably, although the general trend is towards less affluent business activity and increasing numbers of marginal or low overhead operations.

Discussion

There are a number of strong and growing businesses located on Williamson Street. However, there has been a continual turnover with 30 percent of the businesses interviewed having been in operation less than 5 years. There is a substantial amount of vacant commercial space on the street. The available space has tended to attract a number of marginal businesses, that can operate profitably only from older low-cost space, and some large space users which prefer low overhead facilities. On the west end of the street, in particular, there is a substantial amount of space in older multi-story buildings which is vacant or under-utilized.

Finding

The market area served by the neighborhood oriented retail and service facilities is limited in physical size and has been experiencing a decline in population.

Discussion

The market area for neighborhood related retail and service facilities is limited physically by a number of barriers which include the lake to the south, the central business district to the west and the industrial-railroad area to the north. The eastern limits of the market area are constrained competitively by the Shanks Corners-Atwood commercial area and the Fiore and Madison East shopping centers. The Williamson Street market area includes the immediate neighborhood plus a portion of the Marquette-Atwood residential area across the Yahara River and a portion of the Tenny Park neighborhood north of the industrial area. The market area had an estimated 1970 population of 6,743 persons. The census tract in which the Williamson Street area is located decreased in population 17 percent between 1960 and 1970 and an additional 11.5 percent between 1970 and 1974.

Finding

The volume of sales of convenience goods and services is likely to decrease as the market area population declines unless new customers can be attracted to the street and existing customers can be persuaded to shop more often.

Discussion

The Williamson Street market area population is decreasing and will thus require lesser amounts of convenience goods and services. Improved physical appearance, rehabilitation of buildings, reduced traffic congestion, increased pedestrian safety and more convenient parking are all important to maintaining existing volumes of business and to attract new customers.

Finding

The Williamson Street commercial area offers most of the convenience goods and services usually found in a "neighborhood" shopping area. Even though it does have a wide variety of business establishments, Williamson Street does not have the range of goods and services normally available in a "community" shopping area.

Discussion

Williamson Street has most of its goods and services available which are normally found in a "neighborhood" shopping area, although the one missing ingredient is a full-size supermarket. It does not, however, have a number of businesses normally found in a "community" shopping area such as a variety store, junior department store, apparel shops, shoe stores, financial institutions and business services. Because of the limited size of the market area and the nearby location of existing merchants of these types it is unlikely that many of these kinds of businesses could be attracted to Williamson Street.

Finding

There is a potential for increased sales of convenience goods and services on Williamson Street. The three likely sources of potential sales increase include:

1. Additional purchases by market area residents who presently shop regularly on Williamson Street;
2. New sales to market area residents not presently shopping there regularly; and
3. Sales to potential customers passing through the neighborhood on a regular basis.

Discussion

Because of the physical and competitive limitations upon the convenience goods market area, rehabilitation and physical improvements alone will not increase the geographic market area. However, there is a potential opportunity to increase sales to those market area residents who presently shop regularly on Williamson Street. Over 80 percent of the neighborhood residents indicated that they shopped Williamson Street once a week or more often, yet only about 25 percent indicated that they did their greatest dollar volume of shopping there.

The second new business source is the 20 percent of market area residents who do not now shop regularly on Williamson Street. Nearly 80 percent of these persons interviewed indicated that if improvements were made to make Williamson Street more attractive, they would substantially increase the amount of goods and services purchased there. The third potential source of increased sales is from those persons driving through the area on a regular basis. Approximately 18,000 vehicles a day travel on Williamson Street. A combination of rehabilitated structures, an improved physical appearance of the street and convenient parking might encourage a higher percentage of these commuters to stop and shop.

Finding

Most of the neighborhood oriented retail-service facilities are located in the 1100, 1200 and 1300 blocks of Williamson Street, and this area attracts the greatest volume of customers and pedestrians.

Discussion

This concentration of convenience goods gives the various businesses the advantage of mutual support and drawing power. Therefore, in order to have the greatest opportunity to retain existing customers and attract new ones, this area should be given priority in regard to physical improvements, rehabilitation of structures, improved pedestrian safety and additional convenient parking. Such activities are likely to have the greatest impact on the largest number of existing and potential customers.

Finding

There are over 20 specialty retail facilities on Williamson Street which attract customers from throughout the general Madison area. These businesses are not concentrated in any particular portion of the street, but overall they contribute substantially to the amount of the commercial activity on the street.

Discussion

There are a number of specialty retail stores on Williamson Street which draw customers from throughout the general Madison area. These stores offer a very diverse type of goods that have several characteristics in common. These common characteristics include:

1. Goods which are only purchased on an irregular basis and
2. Products or services for which people are willing to make a special trip because of their unique nature or limited availability.

Williamson Street is an attractive location for many types of specialty retail since it is centrally located within the general Madison area, easy to find and has an ample amount of relatively inexpensive retail space available. On the other hand, Williamson Street is not a particularly good location for those specialty retail functions which require high volume, appeal primarily to higher income people, or are oriented to youth or young adults. Specialty retailers needing high volumes would prefer locations in or near large retail centers such as the central business district or the major shopping malls. Specialty retailers appealing primarily to higher income persons would prefer a west side location which would be nearer the residences of a greater number of those persons. Specialty retailers appealing primarily to youth or young adults would tend to locate on State Street or near the University in order to take advantage of the large number of nearby potential customers.

Finding

There is a good potential for an increased number of specialty retail and an increased volume of specialty sales on Williamson Street.

Discussion

Improved physical appearance of the street, reduced traffic congestion and more convenient parking, particularly at rush hour, will help increase the volume of specialty sales and attract new retailers into the area. The rehabilitation of the individual business structures will help some specialty retailers increase their volume of business and may attract some new ones to the area. However, rehabilitation could adversely affect those existing or potential specialty retail businesses which require or desire low cost space. For this reason, a number of specialty retailers indicated a lack of interest in a rehabilitation program.

Finding

There are a large number of commercial and institutional businesses, particularly on the west end of the study area, which deliver goods or services to their customers. Since existing or potential customers do not come to their place of business, the physical appearance of Williamson Street or the appearance of their facility does not appreciably affect their volume of business.

Discussion

There are a large number of businesses and institutional users, particularly in the 600 through 900 blocks of Williamson Street, that deliver goods and services to their customers. These include suppliers, processors, contractors, fabricators, wholesalers and other service industries. Since customers do not come to their place of business, the location of their business, the quality of the structure, and general conditions of Williamson Street have little impact on their volume of business. Williamson Street is attractive to some of these businesses since it is centrally located with reasonably good access to most portions of the Madison area and has low cost building space available. These types of businesses are concerned about conditions on the street and in the area only to the extent that it affects the perceived safety of their employees and property. Furthermore, their concern with the appearance and conditions of their buildings relates primarily to the efficient operation of their business including employee morale. Few of these businesses were interested in participating in an organized rehabilitation program, although, a number indicated they had and will continue to make changes or improvements on their own.

Finding

These area-wide commercial and industrial business types are important to Williamson Street and Madison and should be encouraged since they provide employment and bring money into the Madison area economy.

Discussion

Those businesses which provide goods and services throughout Madison, the state, and, in some cases, the nation contribute to the economic strength of Williamson Street and Madison. They should be encouraged even though they do not help generate business for the consumer oriented businesses because they do not draw many customers to Williamson Street. They do bring employees to the area on a daily basis, which persons represent potential customers for many Williamson Street business and service facilities.

Finding

The feasibility of rehabilitation for individual businessmen on Williamson Street varies substantially. The costs per structure and per square foot for rehabilitation is greatly different among the various buildings. Furthermore, there is great diversity in types of businesses, volumes of sales, profit margins and the extent to which more attractive or efficient space will increase sales.

Discussion

The likelihood of success of a rehabilitation program depends on the economic feasibility of rehabilitation and the active participation of interested business persons. The responses to the business survey indicated substantial interest with 35 percent of the businesses indicating an interest in rehabilitation. Many of those interested are located in the 1200 and 1300 blocks which presents an opportunity for a sufficient concentration so as to have a substantial impact upon the appearance of that portion of the street. Furthermore, it can be anticipated that other businessmen will become interested, as the program develops. The economic feasibility of rehabilitation for a particular business will vary substantially depending upon the costs of rehabilitating the specific building, present profit margins, and the extent to which the rehabilitation may increase or improve the business. The estimated rehabilitation costs to obtain designed objectives range from \$6,850 to \$48,410 per structure and from \$3.81 to \$27.43 per square foot. The economic strength and profit margins of the various businesses on Williamson Street also vary substantially as does the likelihood that rehabilitation will increase their business substantially. There are, however, a sufficient number of businesses on Williamson Street, particularly in the 1100, 1200 and 1300 blocks that would benefit in terms of increased sales by the improvement of the physical appearance of the street and their facility. Many of these can, particularly with the assistance of low interest loans, afford the average rehabilitation cost of \$24,755 per structure or \$11.78 per square foot. Rehabilitation, however, will not be feasible for some structures due to the high costs or to the inability of individual businesses to afford the costs even with interest subsidies. It will be necessary to prepare a detailed financial pro forma for each project undertaken by MDC or a Neighborhood Development Corporation. It is believed that the participating business would benefit sufficiently so that its cooperation in providing accurate and useful financial information is likely.

Finding

A program for the rehabilitation of commercial structures on Williamson Street is feasible and would benefit the business community and the neighborhood. This is particularly true if it is combined with other activities to improve the physical appearance of Williamson Street, reduce traffic congestion and noise, increase pedestrian safety and provide needed parking, particularly during rush hours.

Discussion

A program for the rehabilitation of commercial structures, if combined with other activities to improve Williamson Street's attractiveness and convenience, should result in an increased volume of business for existing businesses, attract new business and provide a more attractive and convenient commercial area for neighborhood residents. There is, however, a limited potential for attracting a large number of new businesses or ones which differ greatly in type or scope from existing establishments. A rehabilitation program and other improvement activities will not greatly alter the character or scope of commercial enterprises on Williamson Street. It will continue to be a diverse area consisting primarily of small businesses with larger more regionally oriented concerns located on the west end. Rehabilitation and other programs will increase the amount of business activities, but will not transform Williamson Street into a major retail center.

