



*Photo: Palermo's Pizza facility was one of the first businesses to purchase land in the newly built Menomonee Valley Industrial Center, moving its operations there in 2006



*Photo: A Milwaukee landmark once home to Milwaukee's Pfister and Vogel Leather Company, the Tannery Urban Business & Living Center's seven refurbished buildings are some of the most unique in the Valley



*Photo: Ingeteam, a Spain-based supplier to the wind and solar energy industries, moved to the Menomonee Valley Industrial Center in 2011

*Sources (All): Greg Latsch Photography & Menomonee Valley Benchmarking Initiative Photography

SECTION THREE THE VALLEY ECONOMY

19 INDICATORS

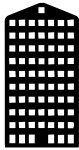
THE MEMONONEE VALLEY ECONOMY

The following section presents analyses of data and trends related to four issues of Economy - **Employment, Commercial Property, Business, and Infrastructure & Access**. These issues have been confirmed by work groups and other stakeholders as important measurements to gauge changes in the Valley economy during its redevelopment.



EMPLOYMENT INDICATORS:

Workers by Business Type (Page 39) **Where Workers Live** (Page 43)
Total Employees (Page 40) **Where People Work** (Page 44)
Employee Demographics (Page 41) **Worker Health Insurance**
Average Worker Salary (Page 42) (Page 45)



COMMERCIAL PROPERTY INDICATORS:

Building Occupancy (Page 46)
Land Utilization (Page 47)
Average Lease Rates (Page 48)



BUSINESS INDICATORS:

Type of Business (Page 49) **Local Ownership** (Page 53)
Annual Sales (Page 50) **Perceptions of Valley** (Page 54)
Sales & Expenditures (Page 51)
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ECONOMY SECTION CONTENTS

The content below details the information under the **Economy Section**. *To the left*, each indicator analyzed for this section is under its representative issue. *To the right*, key findings are highlighted for each specific issue. *At the bottom*, a timeline graphic depicts relevant Valley economic events that have occurred since the previous MVBI State of the Valley Report in 2005. Lastly, data sources and additional information on economic indicators can be found at the end of this section.

25.1%
workers 29
years or younger

YOUNG WORKERS INCREASING IN VALLEY

In 2011, about 1/4 of all Valley jobs were held by individuals 29 or younger - the highest rate from 2002-2011. This rate was lowest in 2006 (20.1%).

7.2%
vacant industrial
square footage

VACANT INDUSTRIAL SQUARE FOOTAGE DOWN

In 2012, about 7.2% of industrial property square footage was vacant in zip codes 53208, 53204, 53215 & 53233 combined (best rate in six years).

33%
of businesses
surveyed in 2011

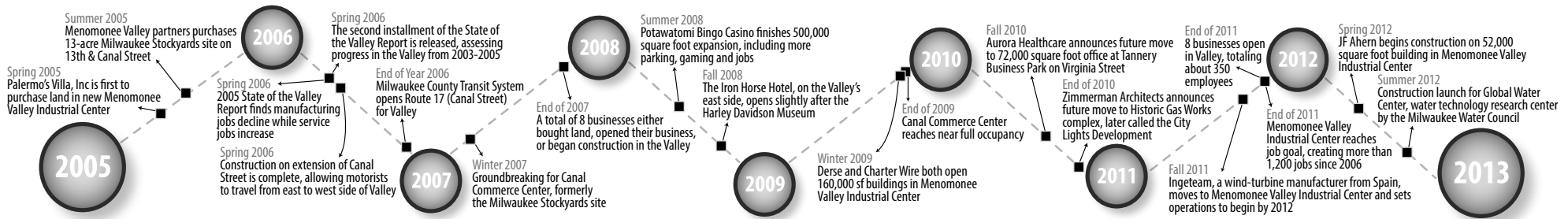
LOCATION STILL TOP ADVANTAGE FOR VALLEY

In 2011, 33% of Valley businesses said central location was the Valley's best advantage. The top disadvantages were none (23%), unpleasant conditions (21%) and local government (19%).

23/4
minutes & miles
by bike

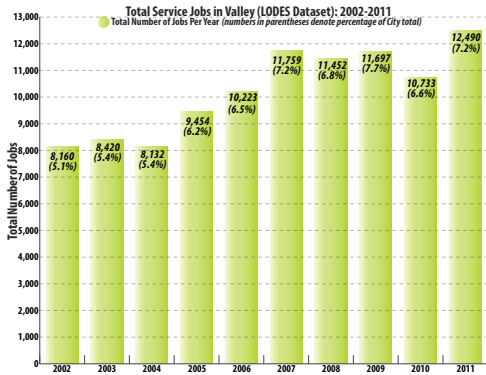
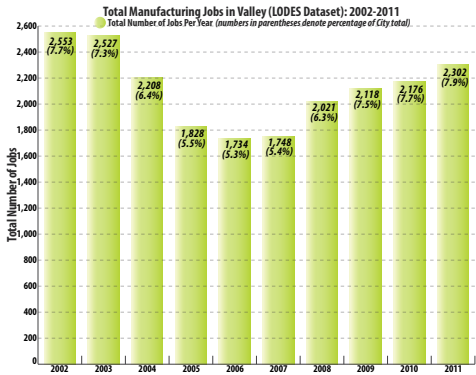
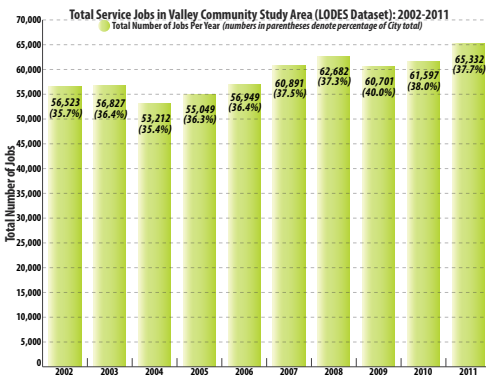
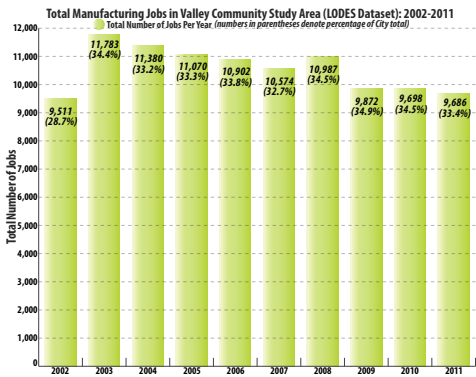
VALLEY ACCESSIBILITY INCREASES FOR BIKES

The Hank Aaron State Trail now provides bicyclists a route from the Valley Passage to Summerfest. It takes 23 mins and includes off/on-street sections.



ECONOMIC EVENT TIMELINE 2005-2013

SECTION 3 HIGHLIGHTS



Measurement

The total number of jobs by business in the Valley and Valley community study area were determined from Origin-Destination Employment Statistics (LODES) for years 2002-2011. The 'OntheMap' mapping application from the US Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) program was used to extract this data. For all years, a job is counted if the worker has been employed with positive earnings during the 2nd (April-June) and 1st (January-March) quarters. To assist in graphical representation, all eight service business types were grouped into one category. Of note - the LODES dataset may have incorrect geo-coding methods for certain Valley business addresses, potentially altering job totals.

Importance

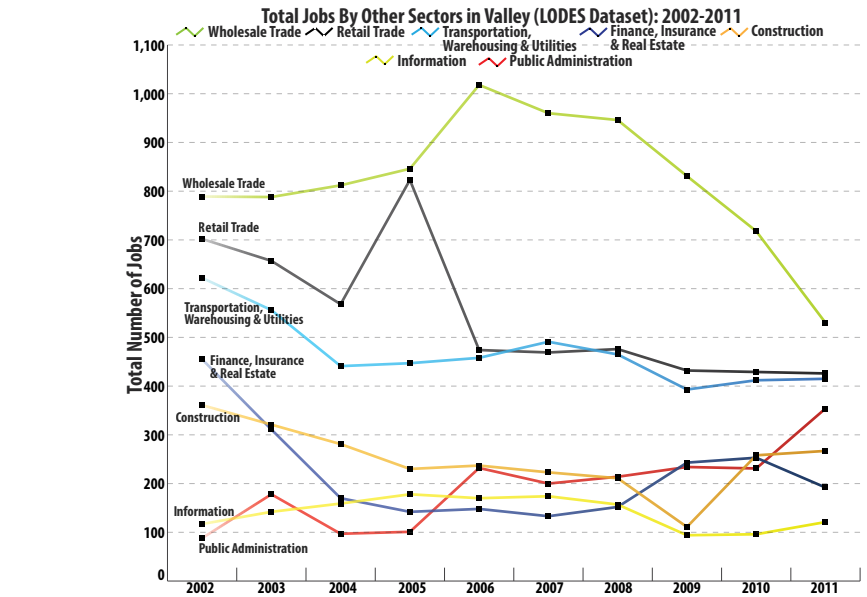
Tracking employment by industry allows for a better understanding of which employment areas are growing and declining. Also, this information helps gauge how balanced the Valley's business activities have become in recent years. A balance in business activity helps strengthen the local economy and absorb potential economic issues in specific industry types. As stipulated in the Valley Land Use Plan, employment in the manufacturing industry is given higher focus because of its importance to the local and greater economies historically.

Analysis

According to the LODES dataset, service type businesses continue to employ the most Valley workers. In 2011, some 12,490 workers (7.2% of the City service industry total) were employed in the services industry - the highest total observed from 2002-2011. Large annual increases raised service job totals from 8,132 in 2004 to 11,759 in 2007. The Valley community study area had nearly identical trends, ending 2011 with 65,332 workers (about 37% of City service industry total). For manufacturing jobs, the Valley has experienced healthy growth since 2006 and makes up nearly 8% of all manufacturing jobs in the City. In 2011, the Valley had 2,302 manufacturing jobs, a 32.7% (568 jobs) increase since 2006 (1,734 jobs). An obvious catalyst for this growth is the Menomonee Valley Industrial Center (MVIC), whose tenants are mostly of this type. Despite these changes, recent numbers still fall short of 2003 (2,527 jobs) and 2002 (2,533 jobs) totals. Interestingly, the Valley community study area did not reveal similar trends in years after 2009.

The remaining work sectors had various changes in total jobs from 2002-2011, with the most jobs being in wholesale trade (even after annual declines since 2006). Retail trade and transportation jobs had modest changes since 2006 while construction jobs showed recent increases amid prior years of job losses. Finance, insurance and real estate had 192 jobs in 2011, a sharp decline since 2002 (455 jobs). Lastly, public administration was at its highest count in 2011 (354 jobs).

*Source (all charts): 2002-2011 US Census LODES data



EMPLOYMENT WORKERS BY BUSINESS



Measurement

The employment status of Valley workers was taken from Valley business surveys for years 2002, 2004 & 2011. The number of businesses by firm size in the Valley was calculated from Wisconsin State Unemployment data for years 2001, 2007 & 2010. Lastly, the total number of jobs in the Valley, Valley community study area and City were determined from Origin-Destination Employment Statistics (LODES) for years 2002-2011. The 'OntheMap' mapping application from the US Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) program was used to extract this data. Of note - the LODES dataset may have incorrect geo-coding methods for certain Valley business addresses, potentially altering job totals.

Importance

A healthy job market is essential to a successful economy at all geographies. Jobs provide individuals, households and families the income to satisfy basic needs and allow more disposable income that can benefit the local economy in many ways. Tracking changes in job totals for the Valley over time can reveal how strong the job market in the Valley has been, especially during recent economic woes.

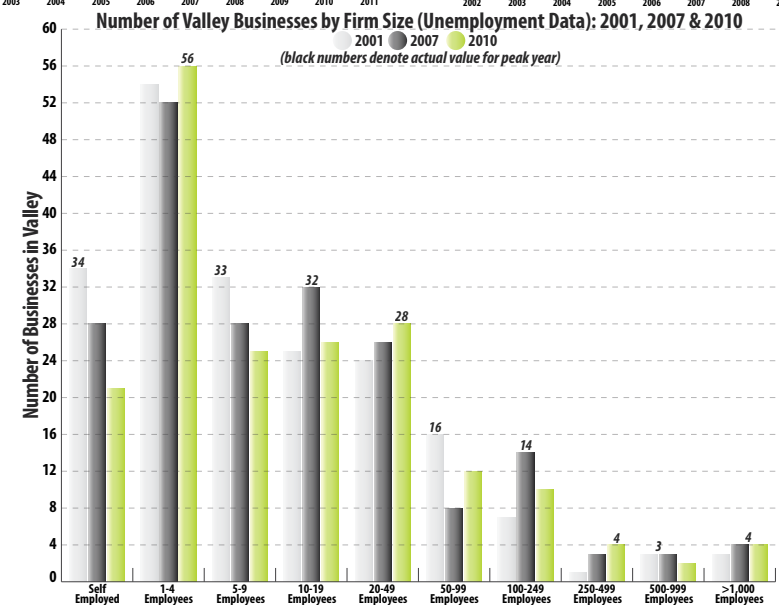
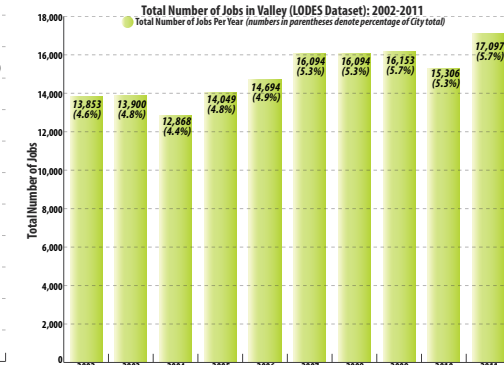
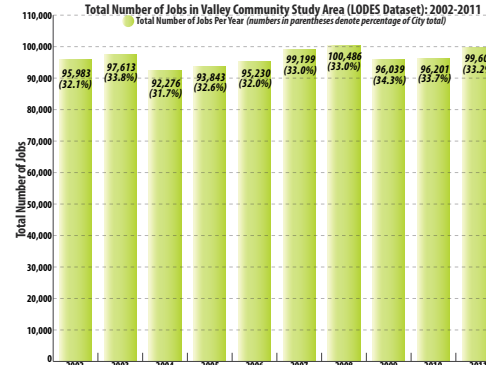
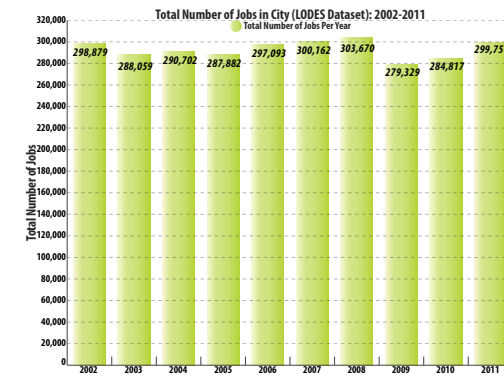
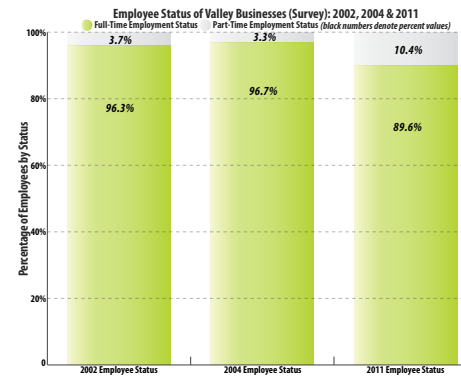
Analysis

State unemployment data for 2011 showed little change in the number of businesses having over 500 employees since either 2001 or 2007. The Valley saw one more employer have over 1,000 workers since 2001, but also had one less employer with 500-999 workers. Firms with 250-499 workers increased each data year, while firms with the largest gains since 2007 were 100-249 (increase of 3 firms since 2007) and 50-99 (increase of 4 firms since 2007) workers. Despite more firms of 1-4 and 20-49 employees, the remaining three firm sizes (self employed, 5-9, and 10-19) had fewer counts in 2010 than 2007.

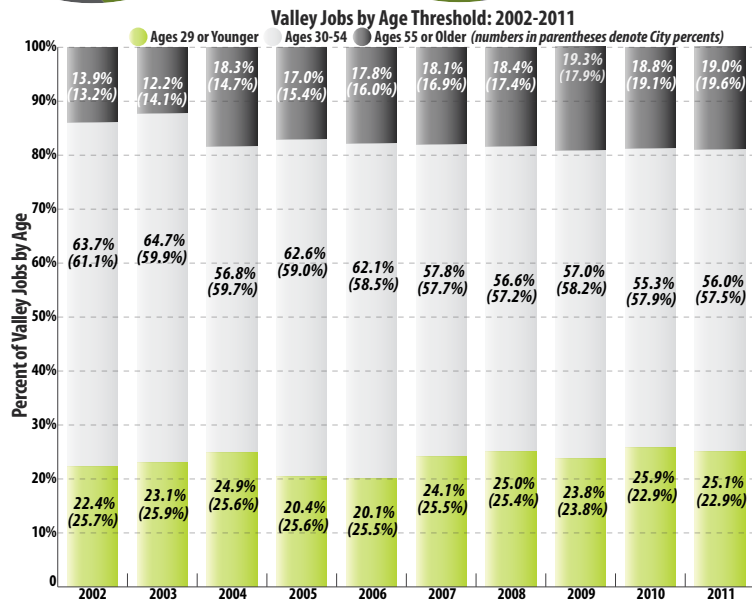
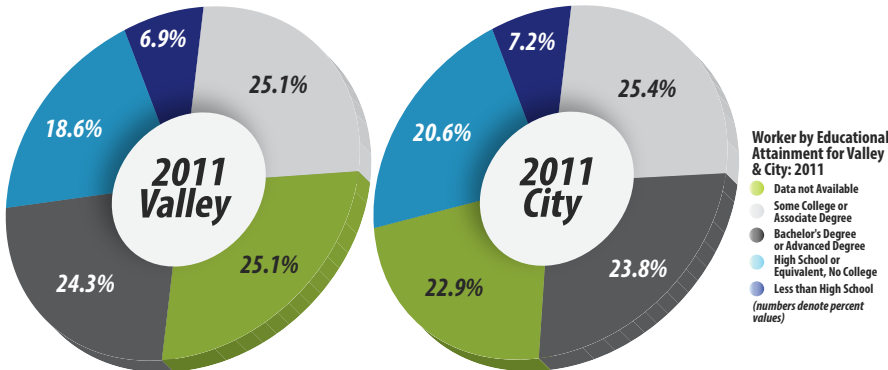
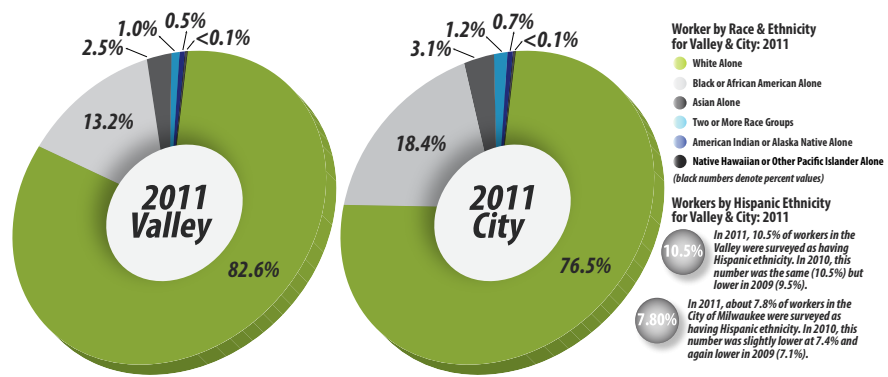
The LODES dataset revealed 17,097 jobs existed in the Valley in 2011, the highest total from 2002-2011 and 5.7% of the City total. The number of Valley jobs grew 32.8% (4,229 jobs) from 2004-2011 despite a -5.2% decrease from 2009-2010. Alternatively, the number of Valley jobs grew an average annual rate of 4.3% during this time. To compare, City totals declined -8% from 2008-2009, with increases in each following year. Prior to 2008, totals were around 290,000 to 300,000 jobs. For the Valley community study area, most years had about 95,000 jobs (nearly 33% of the City total), with annual increases in eight of the past 10 years.

Finally, Valley businesses said 89.6% of their staff was full-time in 2011, with the remaining 10.4% being part-time. This is different than previous survey years as more employees were considered full-time in 2004 (96.7%) and 2002 (96.3%). A plausible reason for this decrease is the hardship many businesses experienced following the economic recession, with companies forced to reduce full-time workers to maintain their financial obligations.

*Source (all charts): 2002, 2004 & 2011 Valley Business Surveys; 2001, 2007 & 2011 State Unemployment data; and 2002-2011 US Census LODES data



EMPLOYMENT TOTAL EMPLOYEES



Measurement

Demographic information on Valley workers were taken from Origin-Destination Employment Statistics (LODES) for years 2002-2011. The 'OntheMap' mapping application from the US Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) program was used to determine the respective age, race and educational attainment of Valley workers. All information shown below, except age detail (2002-2011), were only available from 2009-2011. Of note - the LODES dataset may have incorrect geo-coding methods for certain business addresses within the Valley, potentially altering this demographic information.

Importance

Analyzing the demographic characteristics of workers in the Valley helps better understand who Valley businesses are hiring. Trends on worker age can determine how adequately these businesses are hiring young professionals, college or non-college educated - both important considerations for the future. Lastly, information on the race of these workers is essential for considering how diverse the Valley workforce has been over the years.

Analysis

According to the LODES dataset, in 2011 over half (56.0%) of Valley jobs were held by individuals between the ages of 30-54. This represents a large decrease since 2002 (63.7%) and 2003 (64.7%). Comparatively, this age group had a slightly higher rate (57.5%) in the City during 2011, but overall both areas had similar data patterns since 2002. The other groups, ages 55 or older and ages 29 or younger, held less percent shares of all Valley jobs in 2011. However, older workers (ages 55 and above) were 19.0% of the workforce in 2011 - a large increase since 2002 (13.9%) and 2003 (12.2%).

The remaining age group (29 or younger) had steady increases in holding Valley jobs since 2006 (20.1%), with 2011 (25.1%) being the highest share of jobs seen from 2002-2011. For 2011, close to 6% of all City jobs held by those 29 or younger were in the Valley, with the other two age groups both close to 5%. Finally, about 20% of all jobs in the Valley community study area held by those 29 or younger were in the Valley itself. The other two age groups were near 16%.

For 2011, the educational attainment of Valley workers was similar to City trends with 25.1% having some college education or an associate degree, and 24.3% having a bachelor's or advanced degree. Only subtle differences exist from 2009-2011 for both the Valley and City. For race and ethnicity of workers, the Valley had a slightly higher rate of Whites (82.6%) and those with Hispanic ethnicity (10.5%)

than the City. However, the Valley had a lower rate of Black workers (13.2%).

*Source (charts and graphs): 2002-2011 US Census LODES data

EMPLOYMENT EMPLOYEE DEMOGRAPHICS



Measurement

Average salary information for Valley workers was made available through Valley business surveys in 2002, 2004 & 2011. Supplemental information on Valley wages was taken from Origin-Destination Employment Statistics (LODES) for years 2002-2011. The 'OntheMap' mapping application from the US Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) program was used to determine the percent shares for each wage threshold. Of note - the LODES dataset may have incorrect geo-coding methods for certain business addresses within the Valley, potentially altering wage information.

Importance

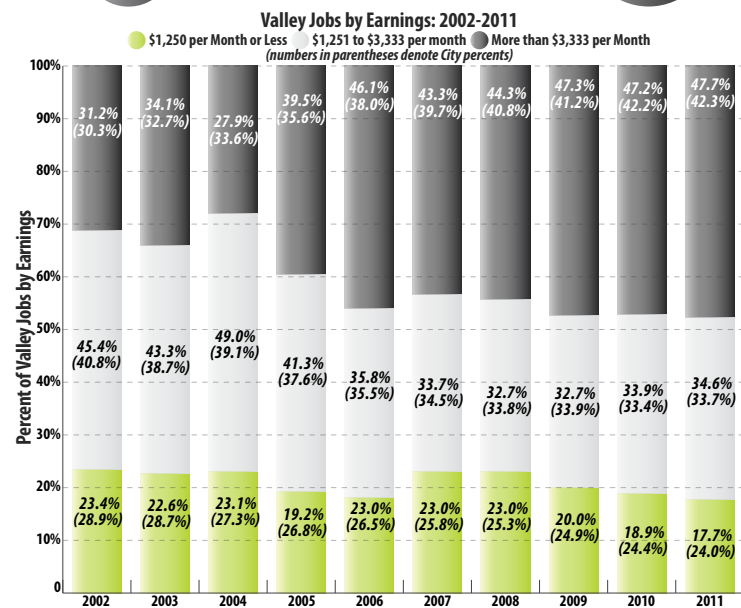
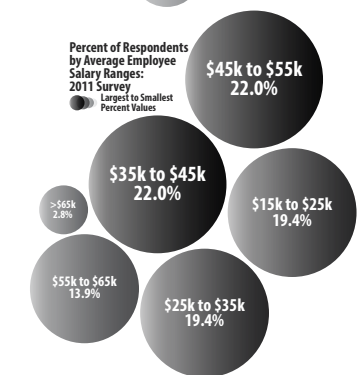
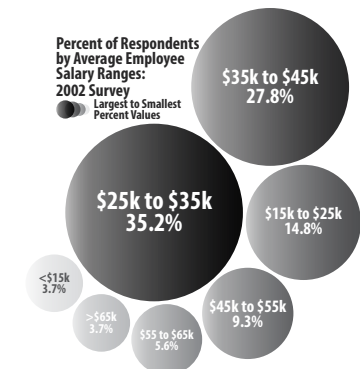
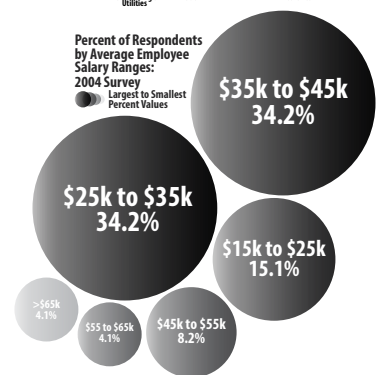
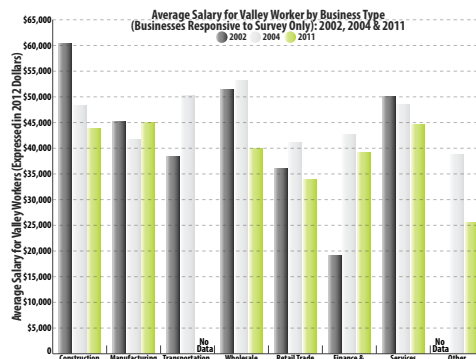
Salary is a good indicator on the quality of employment and the ability for employees to afford a good quality of life. One objective of the City's Land Use Plan for the Valley is to attract living-wage and family-supporting jobs to the area. An increase in these incomes creates the possibility for a healthier regional economy. As more businesses continue to relocate to the Valley, opportunities for more living-wage positions should also become available.

Analysis

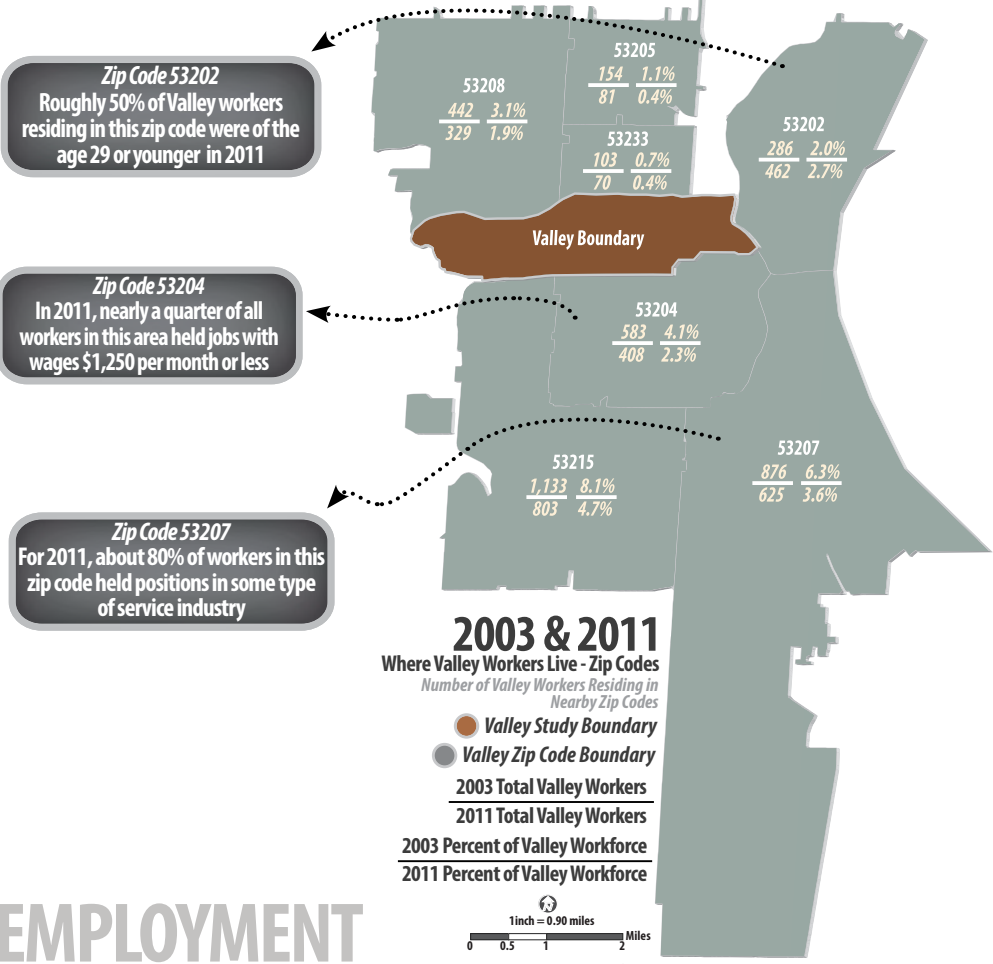
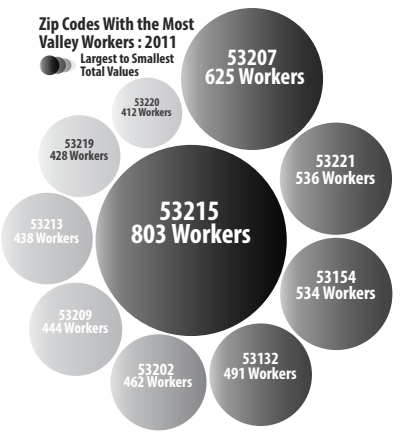
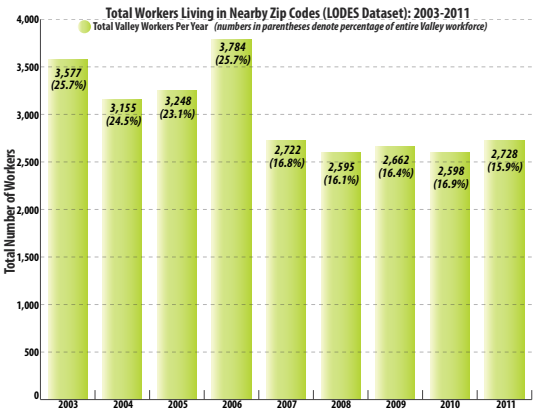
According to the US Census Bureau's LODES dataset, a higher proportion of Valley workers are making more than \$3,333 per month in 2011 (47.7%) than in previous years - a rate similar to the City (42.2%). Overall, this is the highest ratio of Valley workers making over \$3,333 per month from 2002-2011. Interestingly, jobs earning between \$1,251 to \$3,333 per month once represented nearly half (49.0%) of all Valley jobs in 2004 but have since declined to 34.6% in 2011. The number of Valley jobs providing earnings of \$1,250 per month or less have fallen since 2007 (23.0%) and were at 17.7% in 2011 - one of its lowest rates from 2002-2011. This is slightly different than the City as this earnings group had consecutive years of losses in percent shares of all City jobs from since 2002, with 2011 (24.0%) being the lowest year on record from 2002-2011.

Another data source used to measure worker salaries were Valley business surveys given in 2002, 2004 & 2011. The 2011 survey results showed no salary range being significantly greater than any other. The salary ranges of \$35k-\$45k (22%) and \$45k-\$55k (22%) were the most common responses, with \$15k-\$25k and \$25k-\$35k both at 19.4% respectively. Preceding survey years had similar trends as \$25k-\$35k was the most common response in both 2004 (34.2%) and 2002 (35.2%). However, respondents who chose worker salaries of \$45k-\$55k were more prevalent in 2011 than in 2004 (8.2%) and 2002 (9.3%). Finally, businesses who participated in the Valley business survey also disclosed an exact number for their worker's salaries. For 2011, many business types reported either no gain or a decline in salary since the 2002 and 2004 surveys. Manufacturing was one of the few types who expressed an increase in worker salary since 2004 (\$45,088).

*Source (charts and graphs): 2002, 2004 & 2011 Valley Business Surveys; and 2002-2011 US Census LODES data



EMPLOYMENT AVERAGE SALARY



Zip Code 53202
Roughly 50% of Valley workers residing in this zip code were of the age 29 or younger in 2011

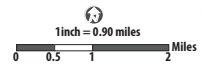
Zip Code 53204
In 2011, nearly a quarter of all workers in this area held jobs with wages \$1,250 per month or less

Zip Code 53207
For 2011, about 80% of workers in this zip code held positions in some type of service industry

2003 & 2011
Where Valley Workers Live - Zip Codes
Number of Valley Workers Residing in Nearby Zip Codes

- Valley Study Boundary
- Valley Zip Code Boundary

2003 Total Valley Workers
2011 Total Valley Workers
2003 Percent of Valley Workforce
2011 Percent of Valley Workforce



Measurement

The number of Valley workers who live in nearby zip codes was determined by data from Origin-Destination Employment Statistics (LODES) for years 2003-2011. The 'OntheMap' mapping application from the US Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) program was used to match Valley workers to the zip code in which they live. A job is counted if the worker has been employed with positive earnings during the 2nd (April-June) and 1st (January-March) quarters. Further analysis was done to filter Valley workers and their zip code of residence by their corresponding demographics. Of note - the LODES dataset may have incorrect geo-coding methods for certain Valley business addresses, potentially altering job totals.

Importance

Historically, neighborhoods south of the Valley were home to many Valley workers because of their proximity to the industrial factories. An important objective of the Valley's redevelopment was making it possible for people to work, live, and play in their communities without the need for extensive travel to work. This creates a sense of community for those employees living closer to their place of work and allows them more time to enjoy other activities other than commuting to work.

Analysis

In 2011, some 15.9% (2,728 workers) of Valley workers lived in one of the seven zip codes bordering the Valley - a decrease from 25.7% (3,577 workers) shown for 2003. Comparatively, these nearby zip codes had 799 (-22.3%) fewer Valley workers reside in them for 2011 than in 2003. The year with the largest count of Valley workers in nearby zip codes was 2006 (3,784 workers) - about 25.7% of the entire Valley workforce. Prior to 2007, the percentage of Valley workers living in these nearby zip codes was above 23%. However, these percentages were lower following 2006 (mostly in the high teens), with little change in total workers living in nearby zip codes.

The zip code 53215 consistently had the highest number of Valley workers throughout all years with 803 workers (4.6% of all Valley workers) in 2011 and 1,133 workers (8.1% of all Valley workers) in 2003. Zip code 53204, having one of the City's largest population densities per block, had 722 workers (4.1% of all Valley workers) in 2011 and 408 workers (2.3% of all Valley workers) in 2003. Interestingly, for zip code 53202, a good proportion of Valley workers were ages 29 or younger (50%). The recipient of several condominium developments, this zip code was the only one to have more Valley employees reside there in 2011 (286 workers) than in 2003 (462 workers). Lastly, the following zip codes were further away but had large Valley worker totals in 2011 - 53132 (16.5 miles), 53154 (15.4 miles), 53220 (10.3 miles), 53209 (8.5 miles) and 53221 (8.3 miles).

*Source (graphs, charts & maps): 2002-2011 US Census LODES data

EMPLOYMENT WHERE WORKERS LIVE

Measurement

Information on where residents in the Valley community study area work was retrieved from Origin-Destination Employment Statistics (LODES) for years 2002-2011. The 'OntheMap' mapping application from the US Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) program was used to match these residents to the zip code in which they work. Further analysis on the labor market size, inflow/outflow of workers, and distance to work of residents was also done. Of note - the LODES dataset may have incorrect geo-coding methods for certain Valley business addresses, potentially altering job totals.

Importance

An important objective for the redevelopment of the Valley is to create opportunities for people to live, work and play in their communities without the need to travel extensively by automobile. This reduces the need for an automobile, flexibility for urgent needs, and gives local residents more time to enjoy other activities they otherwise would not be able to enjoy because of a far work commute.

Analysis

The Valley study area had 99,602 individuals working in it for 2011, which represents an increase of 3.8% (3,619 workers) since 2002 and 4.6% (4,372 workers) since 2006. The labor force size for the Valley study area was 21,632 workers in 2011 - this indicates the available labor force of workers living in the Valley study area but not necessarily working in it. This was a minimal decrease of <-1% since 2002 (21,835 workers) and 2006 (21,796 workers). In 2011, only 4.6% (4,627 workers) of the 99,602 workers in the Valley study area live and work there, while 95.4% (94,975 workers) commute from outside. The number of those working and living in the Valley study area has fallen -1.7% annually from 2002-2011, with 2002 (5,472 workers) being the peak year. Lastly, about 79% of those living in the Valley study area but work outside of it, a growing trend since 2002 (75%).

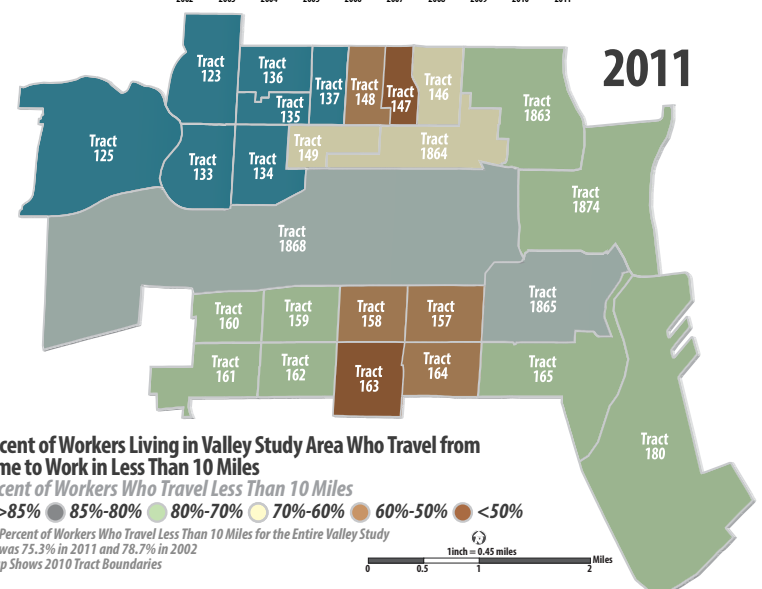
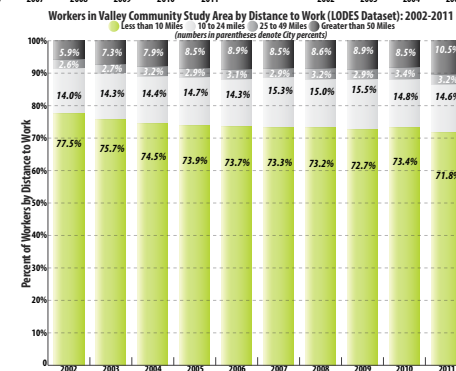
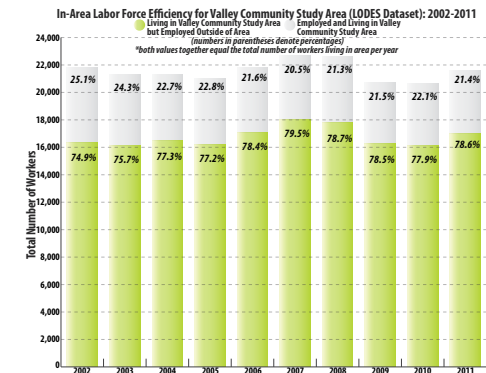
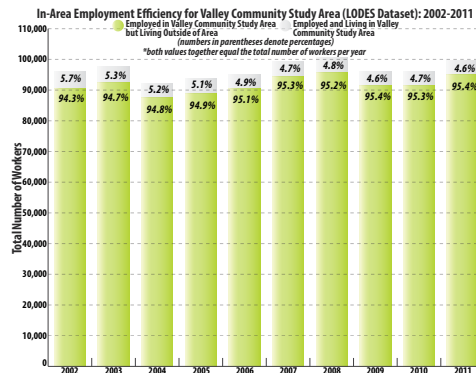
For 2011, the majority (71.8%) of the 21,796 workers who live in the Valley study area travel fewer than 10 miles. This is the lowest rate for all years, including 2009 (72.7%), 2006 (73.7%) and 2002 (77.5%). Those with commutes greater than 10 miles were 28.2% (6,108 workers) of all workers living in the Valley study area, higher than 2009 (27.3%), 2006 (26.3%) and 2002 (22.4%). Of the 6,108 workers who commute greater than 10 miles to work, nearly 35% travel west.

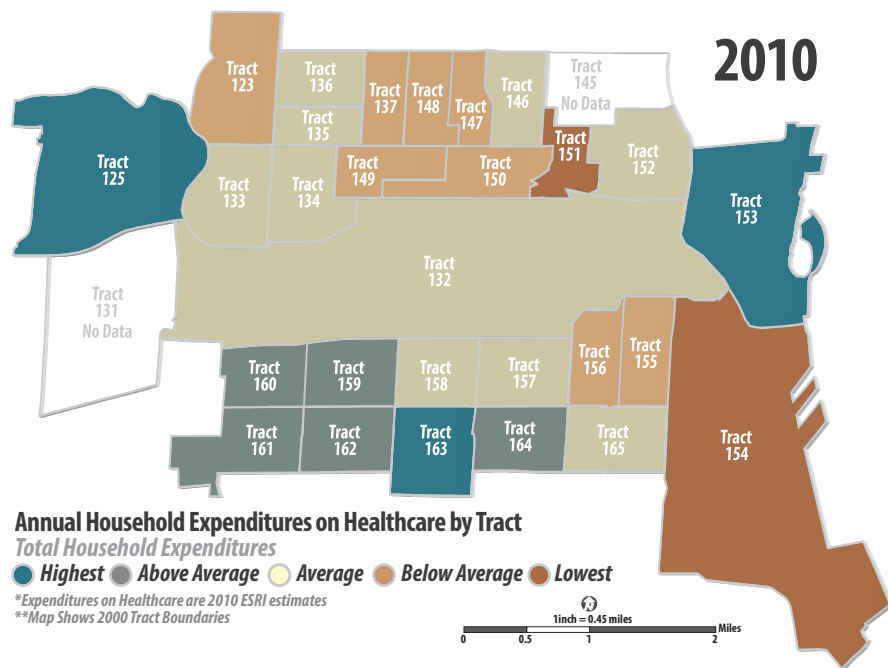
The majority of census tracts north of the Valley had, on average, 9% of their available workforce (number of workers in respective tract) commute to the Downtown zip code 53202 in 2011. Conversely, nearly all tracts south of the Valley had, on average, 11% of their workforce commute to the 53204 zip code - just south of Downtown. Not much was different from years 2002-2011.

*Source (graphs, charts & maps): 2002-2011 US Census LODES data



WHERE PEOPLE WORK





Measurement

Information regarding the provision of health insurance by employers in the Valley to either full or part-time employees was gathered from “Yes” and “No” answers on Valley employer surveys for years 2002, 2004 & 2011. Health insurance comparisons to the nation and state were made using information from the US Department of Health and Human Services Medical Expenditure Panel Survey (MEPS).

Importance

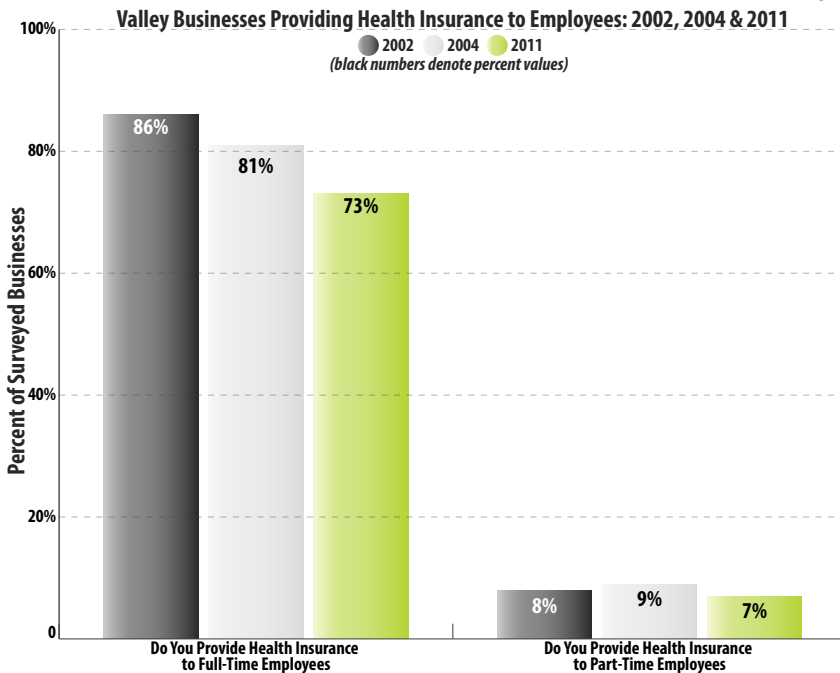
Recently, access to affordable health insurance has become a growing concern. The provision of health insurance for employees is said to reveal a company’s willingness to support the quality of life of its workforce. Without adequate health services, families and individuals increase the potential for health risks that may otherwise be avoidable. The absence of health insurance can also lead to large medical debts if accidental injuries occur.

Analysis

The results of the 2011 survey reveal that 77% of Valley businesses supply health insurance to their full-time workers. This rate is lower than 2004 (81%) and 2002 (86%), which has been declining since the 2002 survey. Approximately 9% of employers provide health insurance to part-time workers, a decline from the 2004 rate but matching the rate expressed in 2002. And as the map to the right shows, strong demand for health insurance exists south of the Valley where household expenditures for healthcare are above-average.

While the Valley rate for providing health insurance to full-time employees is higher than the Wisconsin average of 49% in 2010, both witnessed a similar decline since 2002. The average for Wisconsin businesses in 2002 was 60% while the Valley was 88%. One explanation for this decline is that statewide and nationally, health insurance premiums for individuals and families have increased considerably since 2002. The average individual premiums cost for employees in Wisconsin rose by 26.9% between 2002 and 2010, while family premiums rose by 37.7% during the same period.

Because of the recent economic recession, businesses experienced smaller revenue gains and higher costs when the survey was sent out. This has forced many employers to reduce health insurance coverage, raise costs for health insurance plans or completely eliminate health insurance for employees. Many employers will continue to experience challenges for health insurance as the average population age rises and government programs to provide health care to all US citizens are implemented.



EMPLOYMENT HEALTH INSURANCE



*Source (map and graph): 2010 ESRI Business Analyst/Infogroup demographic estimates; and 2002, 2004 & 2011 Valley business survey

Measurement

Data on total, available and vacant square feet of commercial properties for the Valley, County & Metro areas is from the Xceligent® database for years 2006-2012. Graphs are separated by type of commercial space - office, retail, industrial and all commercial. Also, data is shown by total square footage (in millions), with vacancy rates expressed by percentages in the lower-portion of the bars. Total, available and vacant square footage for the Valley represents a combination of four zip codes which intersect the boundary - 53208, 53204, 53215 & 53233.

Importance

Monitoring vacancy rates of commercial property over time helps gauge the demand for business space near or within the Valley. Occupying vacant or underutilized commercial space is critical to the economic renewal of the Valley because it returns these spaces to productive uses. High vacancy rates in commercial property can trigger less investment and undesirable uses of property.

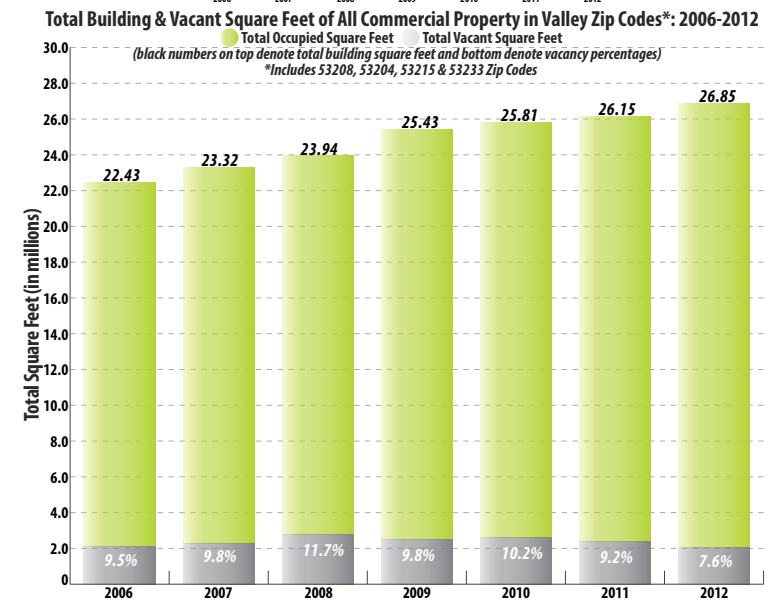
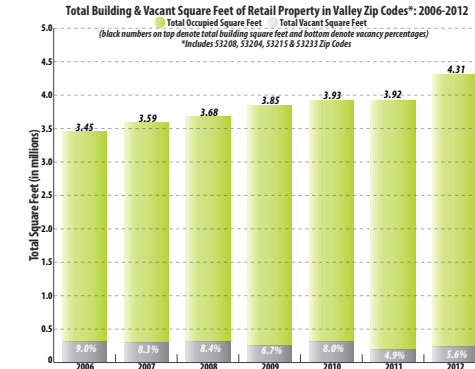
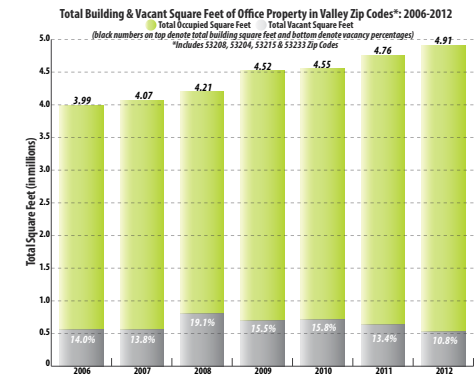
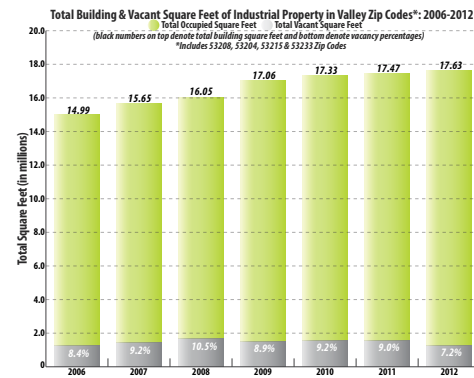
Analysis

In 2012, about 7.6% of the 27 million square feet of commercial property in Valley zip codes were vacant - its lowest percentage from 2006-2012. Since 2006, total building square feet rose an average annual percent rate of 3.1% with 2008-2009 being the peak year (6.2%). Commercial property in the County (2.6%) and Metro (2.8%) areas had a slightly lower average annual percent rate, with the peak year for both being 2008-2009 as well. Finally, total square footage in these Valley zip codes represent about 12% of all commercial property in the County and roughly 6% of the Metro.

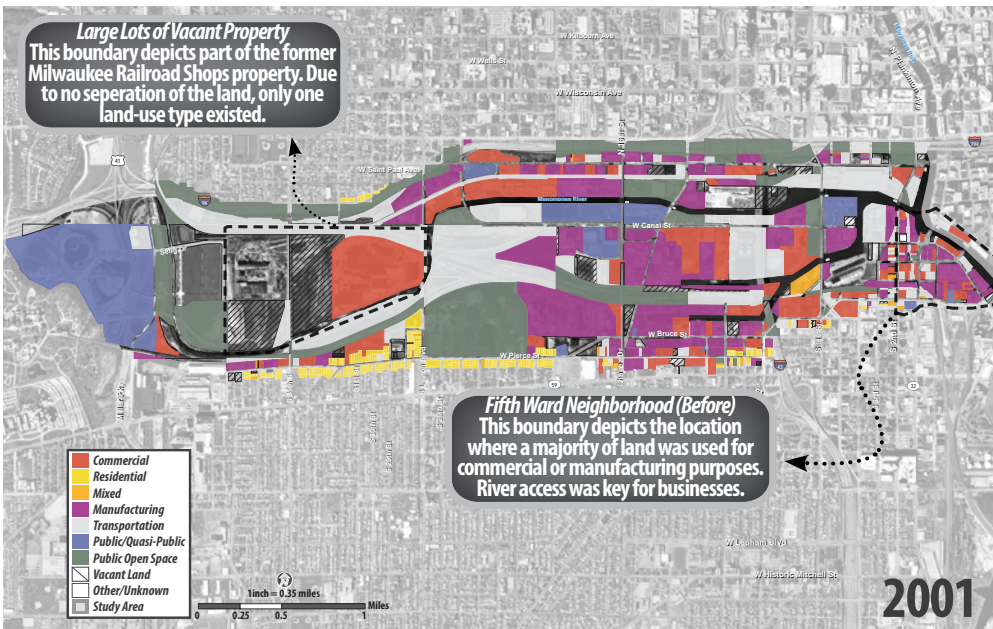
For 2012, retail vacancy was lower in Valley zip codes (5.6%) than the County (9.1%) and Metro (9.0%). The only year retail vacancy in Valley zip codes was higher than the other geographies was 2006. From 2006-2012, retail inventory in Valley zip codes increased at an average annual percent rate of 3.8%, lower than the County (4.4%) and Metro (4.7%). As of 2012, approximately 27 million square feet of retail exist in Valley zip codes - about 10% of all retail in the County and 5% in the Metro. Lastly, vacancy rates for office property in the Valley zip codes fell to 10.8% in 2012, its lowest percentage for all years. From 2006-2012, office square footage increased an average annual percent rate of 3.5% in Valley zip codes - higher than the County (2.3%) and Metro (2.4%).

Approximately 18 million square feet of industrial property exist in Valley zip codes for 2012 - 14.9% of all industrial property in the County and 7% in the Metro. From 2006-2012, vacancy rates were lower in Metro industrial properties (8.5%) than the County (10.1%) and Valley zip codes (9.0%). Despite this, the average annual percent rate for Valley zip codes was 2.8% - higher than the other geographies.

*Source (graphs): 2006-2011 Xceligent® records, Nathan Winkel, Xceligent®
Special thanks to Nathan Winkel, Xceligent® for his contributions to this indicator



COMMERCIAL PROPERTY
BUILDING OCCUPANCY

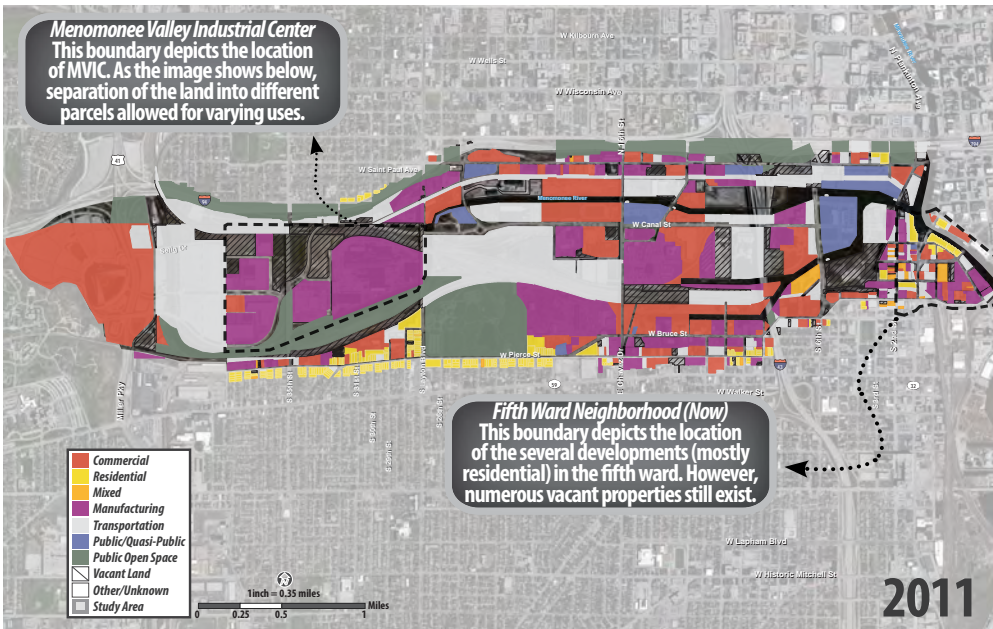


Measurement

Data on land utilization for the Valley were taken from Milwaukee's Master Property File (MPROP) for years 2003-2012. The following land-use groups for all parcels in the Valley were used - residential (single-family, duplex and multi-family), commercial (wholesale & retail trade, services, finances, insurance & real estate and mixed-commercial), mixed (residential and commercial), manufacturing/construction/warehousing, transportation, public/quasi-public (public schools, churches, cemeteries, and other buildings), open space, vacant land and other/unknown. Of note - due to limitations with the MPROP dataset, additional data sources should be used for the future monitoring of land-use types in the Valley.

Importance

Tracking how well utilization of the Valley land has been since 2003 is important in assessing the fulfillment of the overall land-use plan. Because the Valley had historically been used for industrial purposes, changes in its land-use were critical in satisfying the overall goal of the Valley's redevelopment. As future goals begin to surface from the Valley 2.0 plan, understanding the impacts from these land-use changes is important to future success in other parts of the Valley.



Analysis

Since 2001, the most notable difference in land-use is the former Milwaukee Railroads Shops property, which was 70 acres of vacant land in 2001. Now, the area is home to the Menomonee Valley Industrial Center (MVIC) and contains a mixture of manufacturing (12 parcels), commercial (1 parcel), open space (about 35 acres) and transportation land-uses. As of 2013, only three vacant parcels remain in the MVIC, with the City currently in discussions with prospective businesses to occupy these by sometime in 2014.

Properties east of the Valley also experienced significant changes in land-use types. In 2001, the majority of these properties were dedicated to manufacturing or commercial uses to utilize access to the river. In fact, no land in this area was residential. As the Third Ward neighborhood became increasingly popular, demand for vacant or under-utilized property nearby grew. By 2011, approximately 5 acres (8 parcels) were residential - 347 single-family condominiums and 153 apartment units. Mixed-use types also became more common, increasing from less than an acre (2 parcels) in 2001 to nearly 3 acres (5 parcels) in 2011. Finally, despite manufacturing still existing in the neighborhood, this use took up considerably less land in 2011 (11.6 acres) than in 2001 (16.5 acres). Overall, the Valley had more parcels of land in 2011 (464 parcels) than in 2001 (450 parcels).

*Source (Map): City of Milwaukee Master Property File (MPROP) and GIS parcel boundaries, 2001 & 2011

COMMERCIAL PROPERTY LAND UTILIZATION

Measurement

Data on the average direct lease rates for the Valley, County & Metro areas is from the Xceligent® database for years 2006-2012. Graphs are separated by type of commercial space - office, retail and industrial. Average direct lease rates for the Valley are represented as a combination of the four zip codes intersecting its boundary - 53208, 53204, 53215 & 53233. Data is shown by average leasing price in dollars per square foot, a common measurement in real estate rental pricing.

Importance

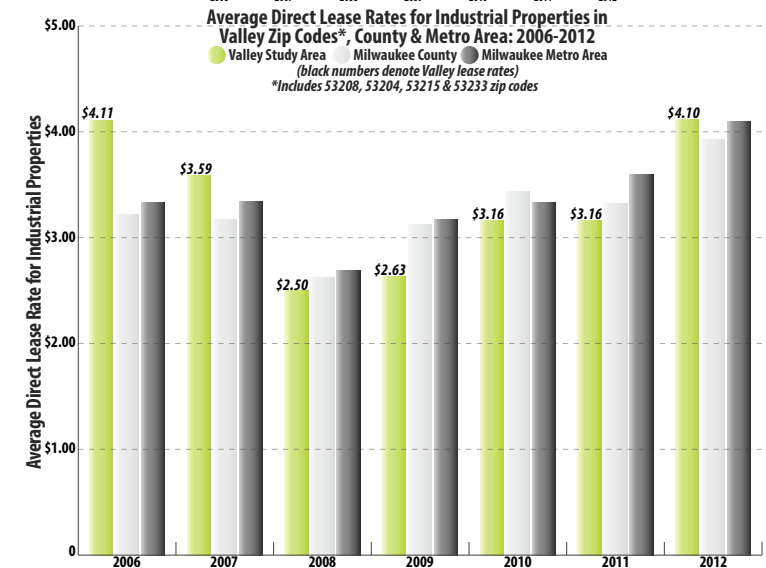
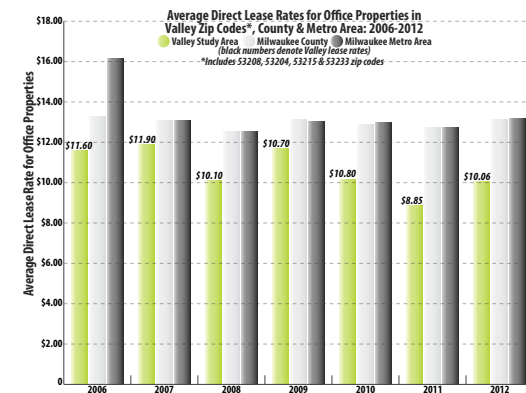
Determining the average rent paid by square foot for commercial space by tenants reflects what demand exists for industrial, office and retail space within the Metro, County and Valley zip codes. Available commercial space showcasing a higher rent is a result of that space having more demand. Commercial space garnering high interest for potential tenants is important for local markets to increase the appeal of constructing new commercial properties.

Analysis

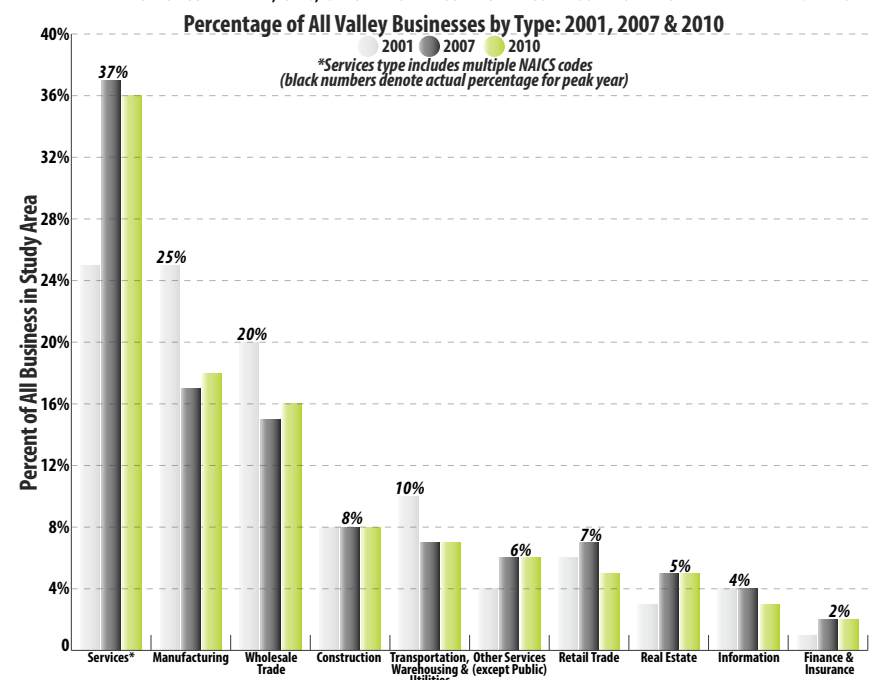
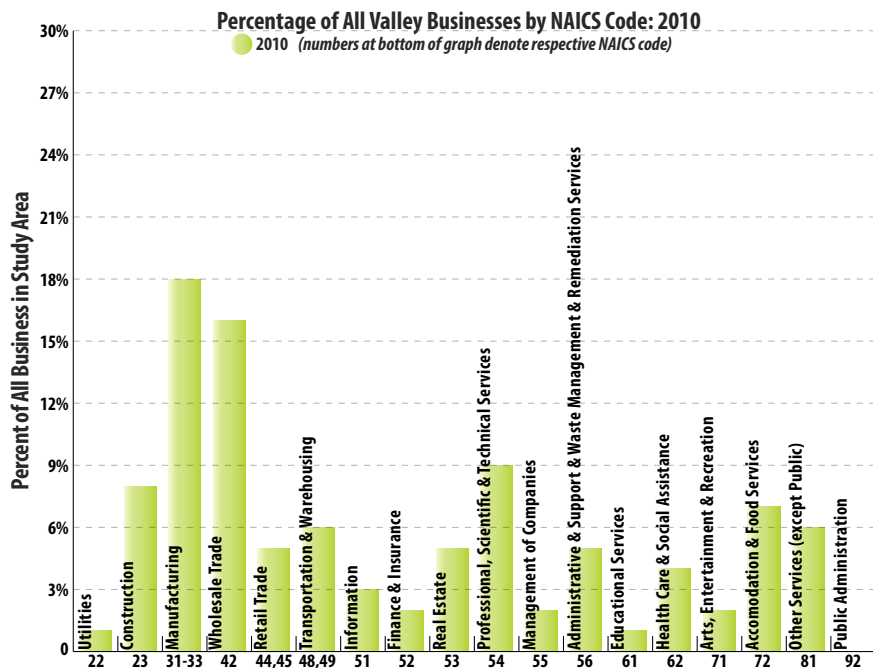
For 2012, the average direct lease rate for industrial property in the Valley zip codes (\$4.12) was about the same as the County (\$3.93) and Metro (\$4.10). This marked the first year since 2007 that these zip codes had an average direct lease rate for industrial property higher than both geographies. Additionally, this marks the first time since prior to the economic recession (2006) that industrial lease rates were above \$4.00 in the Valley zip codes. County and Metro lease rates were relatively consistent around \$3.00 from 2006-2012, with 2008 being the exception (below \$3.00).

Direct lease rates for retail properties in the Valley zip codes (\$12.57) remained below the County (\$13.63) and Metro (\$12.63) in 2011. Since 2006 (\$12.10), no significant gains were shown in the Valley zip codes, with 2007 being an outlier as lease rates rose to \$15.85. However, the proceeding year it was back down to \$12.60. For the majority of years, County lease rates were higher than the Metro, with the exception of 2008. Other factors including the decline of Grand Avenue Mall, lack of big-box national retailers Downtown and continued popularity of Milwaukee-suburban malls (Bayshore, Southridge, & Mayfair) are continuing to push the demand for retail in the Milwaukee-area. However, the Miller Park Way corridor near the Valley is experiencing growth in retail development, including several national chains. Finally, office direct lease rates in Valley zip codes still pale in comparison to County and Metro rates. For 2012, the Valley (\$10.06) rate was considerably lower than the County (\$13.15) and Metro (\$13.17). Valley lease rates did not rise above \$12.00 for all years, whereas the others were never below \$12.00.

*Source (graphs): 2006-2011 Exceligent® records, Nathan Winkel, Exceligent®
Special thanks to Nathan Winkel, Exceligent® for his contributions to this indicator



COMMERCIAL PROPERTY
AVERAGE LEASE RATES



Measurement

Information on the number of businesses by type in the Valley was found through Wisconsin State Unemployment data for years 2001, 2007 & 2010. This data was extracted for businesses only within the Valley economic study area (tract 132). Unfortunately, other data years were inaccessible. To protect privacy, percentages for business types were used to express these values (exact values were not used).

Importance

As redevelopment of the Valley continues, monitoring business types moving or expanding to the Valley helps better understand the changes in its economic diversity. Having a healthy mixture of different business types has proven effective in weathering issues related to economic uncertainties (i.e., recent economic recession). Furthermore, the original Valley Land Use Plan recommends a diverse economy for the Valley, including non-traditional land uses alongside each other.

Analysis

For 2010, some 188 businesses exist in the Valley, slightly less than 2007 (198) and 2001 (199). Of those businesses in 2011, more were of the services type than any other. About 36% of all businesses in the Valley were services, a slight decline since 2007 (37%) but dramatic increase since 2001 (25%). As service-type businesses increased since 2001, manufacturing businesses declined. In 2001, nearly 25% of businesses were manufacturing, about the same percentage as services. However, by 2007 manufacturing accounted for only 17% of all businesses and slightly higher in 2010 (18%). Many factors led this to decline (not just in the Valley), including less-expensive land outside the City, need for more business capital investments, and a growing skilled labor force residing in the suburbs. Despite these losses, a strong emphasis remains on continuing to bring manufacturing companies and their family supporting jobs to the Valley - as stated in the 1998 Land Use Valley Plan.

Wholesale trade, another important business type, declined to 16% in 2011 from 20% in 2001. This is likely due to less manufacturing firms existing in the Valley because wholesale trade companies sell goods created by these manufacturing firms. Transportation and warehousing is another business type that relies on manufacturing firms, thus a plausible explanation of its decline from 10% in 2001 to 7% in 2011. Finally, with the exception of finance and insurance business types increasing, the remaining business types had no change or declines since 2001.

Unfortunately, many of the vacant industrial and warehousing facilities that exist in the Valley today are outdated and require some capital investment. Vacant properties along Saint Paul Avenue, Canal Street and Greves Street, once home to successful industrial companies, are becoming increasingly more difficult to match with potential suitors.

*Source (graphs): 2001, 2007 & 2010 State unemployment data
Special thanks to Catherine Madison, UW-Milwaukee Center for Economic Development, for her contributions to this indicator

Measurement

The collection of data regarding total annual sales for Valley businesses was conducted using a multiple choice question format on Valley employer surveys in 2002, 2004 & 2011. Participating businesses were asked to circle which range of total annual sales best represented their own. Some businesses felt uncomfortable answering this question, prompting some responses to be incomplete.

Importance

The amount of sales revenue a business generates provides an indication of their success. Evaluating past sales revenue totals of Valley businesses creates an opportunity to monitor their growth, compare to others, and assess their consistency through various economic conditions.

Analysis

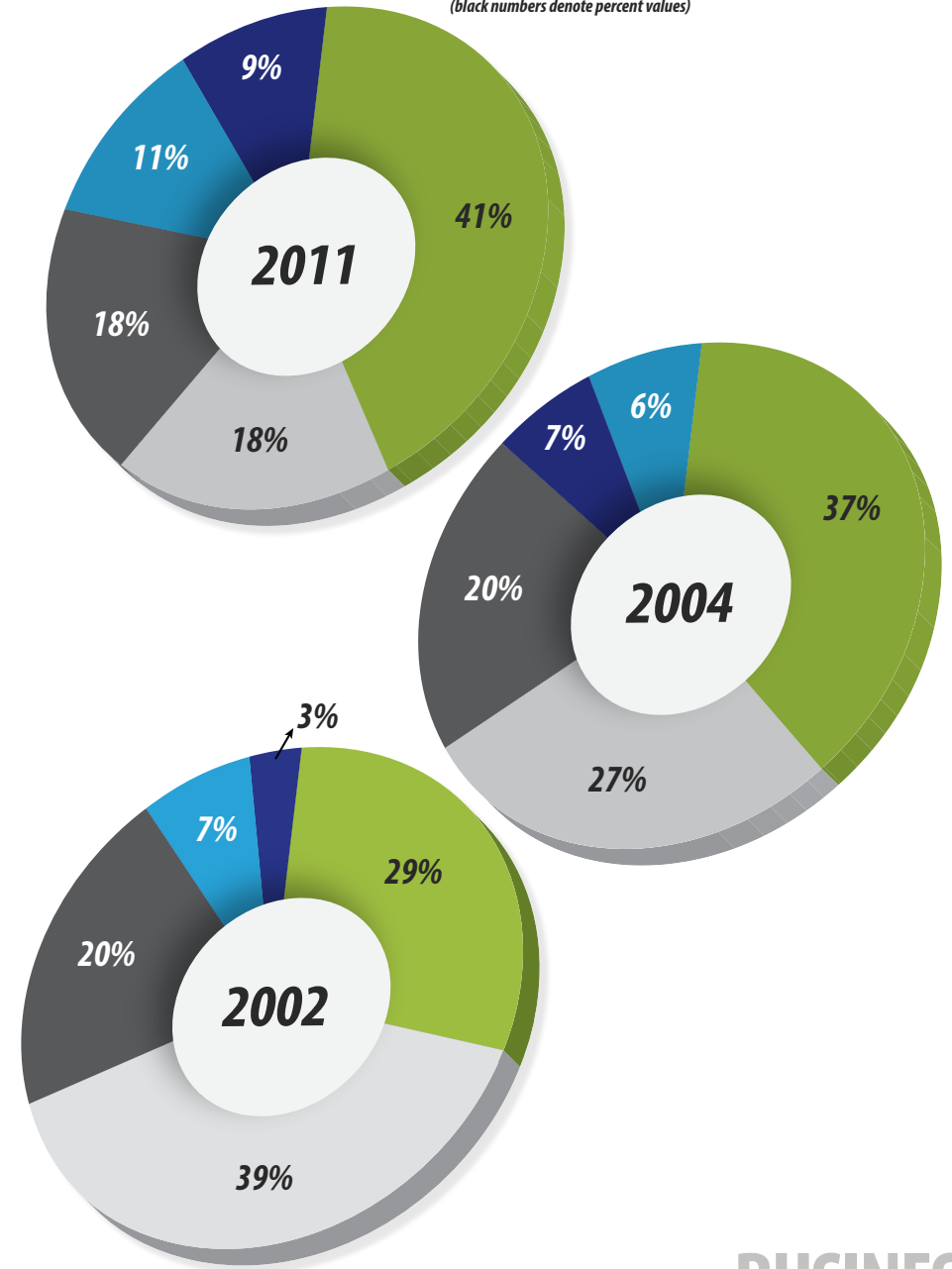
The 2011 survey revealed little change in the total sales reported by businesses in the Valley. A greater proportion of companies report generating sales of less than one million dollars in 2011 (40.9%) as opposed to 36.6% in 2004 and 28.8% in 2002. This is most likely in response to the recent economic recession as declines in sales were seen in businesses across the U.S. in sales resulting from the less spending by businesses and consumers. As the national and regional economies continue to recover, these numbers will gain lost ground and improve.

Interestingly, the share of companies reporting sales between one to fewer than twenty-five million declined, while the share reporting twenty-five million to one billion increased. One company reported topping the \$1 billion mark in sales. Of the 14 businesses answering this question on previous surveys in 2002 and 2004, 6 reported sales greater than \$25 million. There are 3 more business earning sales greater than \$25 million since 2002. And 11 of those 14 businesses either increased or retained their sales figures according to their responses in 2002. The future growth of not only the Menomonee Valley Industrial Center (MVIC), but other sections of the Valley, will contribute greatly to the upward trend of sales for Valley businesses.

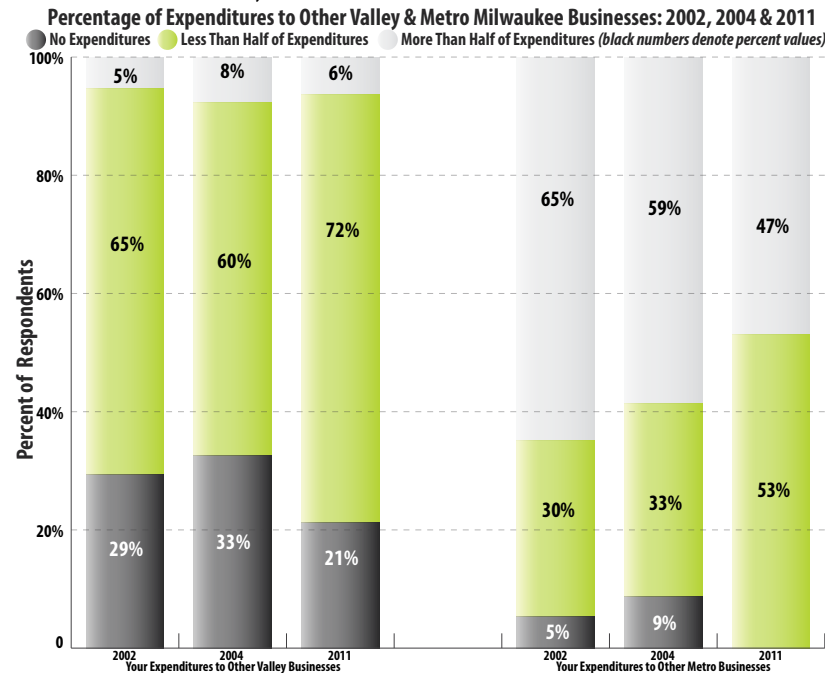
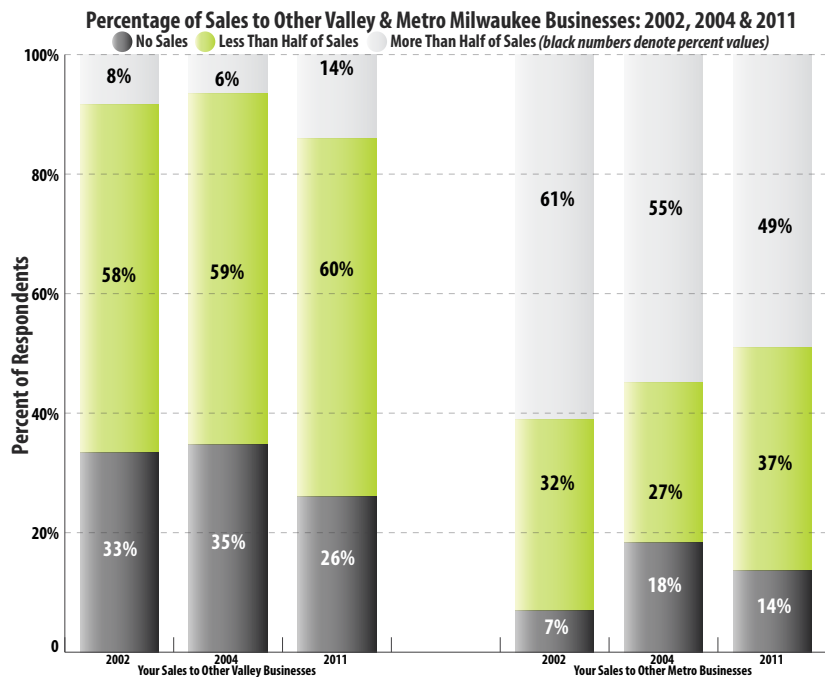
*Source (charts): 2002, 2004 & 2011 Valley business surveys

Total Annual Sales for Valley Businesses: 2002, 2004 & 2011

● Less than \$1 million ● \$1 million - \$4.9 million ● \$5 million - \$24.9 million
● \$25 million - \$99.9 million ● Greater than \$100 million
(black numbers denote percent values)



BUSINESS TOTAL ANNUAL SALES



Measurement

Data on the proportion of sales and expenditures that business in the Valley make to other businesses in the Valley and within Metro Milwaukee were gathered from multiple choice questions on Valley employer surveys in 2002, 2004 & 2011. Respondents answered one or more of the four questions that covered this topic.

Importance

This indicator helps measure how integrated businesses in the Valley are to each other and to the Greater Milwaukee economy. Creating a rapport in local and regional markets is an important step towards economic sustainability and security. Strong relationships help grow local businesses and retain funds within the region, benefiting employers, workers, and the local economy.

Analysis

Information gathered from the 2011 survey reveal little change in the character of sales reported by businesses in the Valley. The majority of respondents (60%) noted that less than half of their sales are generated from within the Valley. This is nearly the same as 2004 (58%) and 2002 (59%) rates. Approximately 14% of companies reported that in 2011 over half of their sales were to Valley businesses, which is higher than in 2004 (6.5%) and 2002 (8%). Lastly, 26% of businesses had no sales or sales less than 1% to businesses in the Valley, which is less than in 2004 (35%) and 2002 (33%).

About 50% of Valley businesses reported generating over half their sales from within the Metro area - a lower rate than in 2004 (55%) and 2002 (61%). About 37% of Valley businesses reported generating less than half of their sales from the Metro in 2011, more than 2004 (27%) and 2002 (32%). Close to 14% reported no sales or less than 1% of sales from the Metro, a decline from 2004 (18%) but higher than 2002 (7%).

Regarding Valley business expenditures, little has changed since 2004 as the majority are borne outside the Valley. Only 6% of businesses reported that over half of their expenditures were local in 2011, similar to 2004 (8%) and 2002 (5%). Valley businesses making over half of their expenditures in the Metro was 47% in 2011, lower than in 2004 (59%) and 2002 (65%). Results for sales and expenditures suggest that Valley businesses selling to each other has increased, although not as much as anticipated. As the Menomonee Valley Industrial Center (MVIC) nears full occupancy, and business efforts focus on other parts of the Valley (particularly Saint Paul Avenue and Canal Street), local sales and expenditures should increase in time.

*Source (graphs): 2002, 2004 & 2011 Valley business surveys

BUSINESS SALES & EXPENDITURES

Measurement

The collection of information regarding the primary advantages and disadvantages of doing business in the Valley was conducted using open-ended questions on Valley employer surveys in 2002, 2004 & 2011. Participating businesses were asked to list three advantages and disadvantages pertinent to their Valley operations.

Importance

Understanding the Valley's significant advantages provides information on the amenities, activities, and other factors considered important to employers. Identifying key disadvantages also helps in directing improvements where appropriate. Sustaining a healthy business climate helps retain existing businesses and recruit new businesses.

Analysis

For the 2011 survey year, the majority of respondents felt the Valley's central location (33%), good access to freeways (19%), quality of life (e.g., low crime, improving area, quality of life, etc.) (9%), and proximity to downtown (8%) were its primary advantages. The proportion of businesses highlighting access to workforce as a key advantage declined from 12% in 2002 to 4% in 2011, while those highlighting quality of life factors increased from 2% in 2002 to 8% in 2011. Employers responding in all survey years mention "good freeway access" as their top advantage in 2002, and note "central location" as their top advantage for 2011. While participating employers detailed a higher number of advantages in 2011 than any other survey year, this can be argued as the result of more projects being completed since 2004.

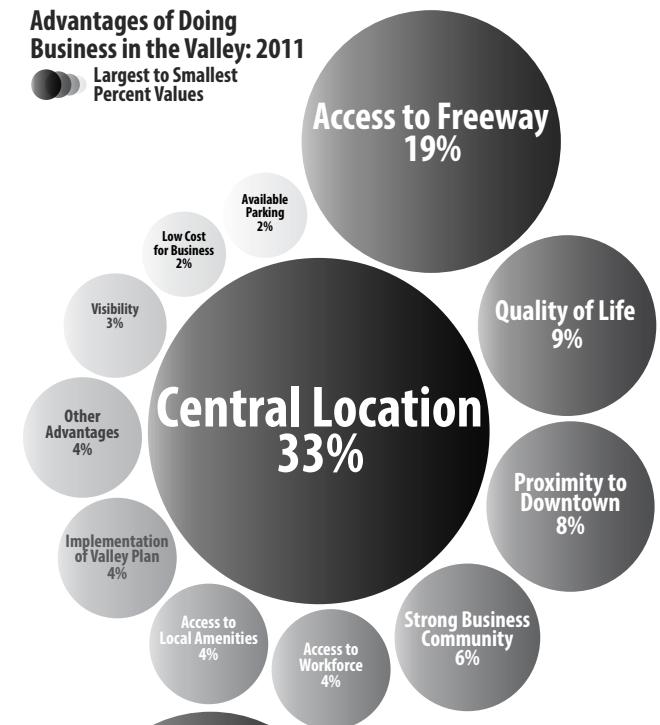
In 2011, businesses provided a range of disadvantages. No disadvantages (23%), unpleasant conditions (21%), local government (19%) and traffic/accessibility (11%) were the top answers given from responsive businesses. While there is some consensus on "cleanliness and limited city improvements" being problematic, most responses are dissimilar. Employers responding in all years consistently rate the top disadvantages for the Valley as being "none", "crime", or "high taxes".

Prior to its redevelopment, the Valley's accessibility was considerably worse for all motorists. While Valley businesses seem to still indicate that accessibility is still somewhat of a disadvantage (a common response in all surveys), improvements made to improve accessibility should not go unnoticed. The Hank Aaron State Trail extensions, west-ward opening of Canal Street and new pedestrian bridges are examples of how accessibility has improved in the Valley in the past decade.

*Source (charts): 2002, 2004 & 2011 Valley business surveys

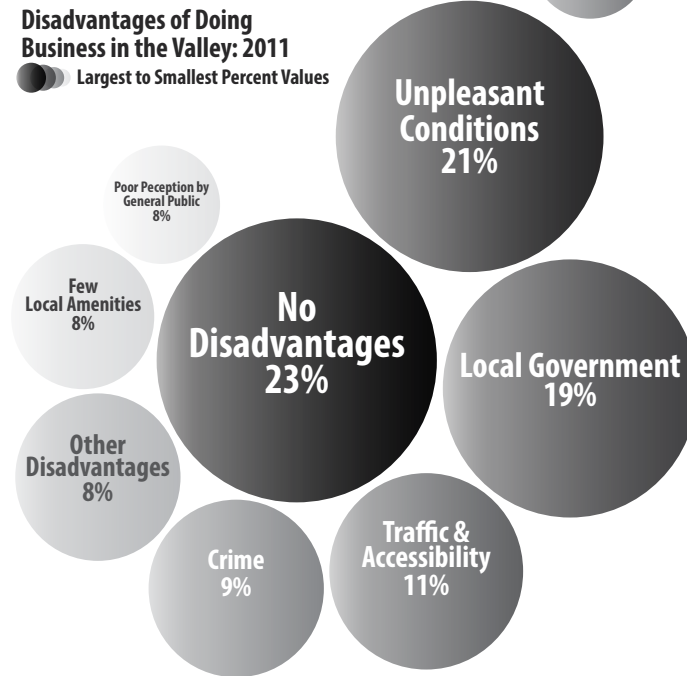
Advantages of Doing Business in the Valley: 2011

Largest to Smallest Percent Values

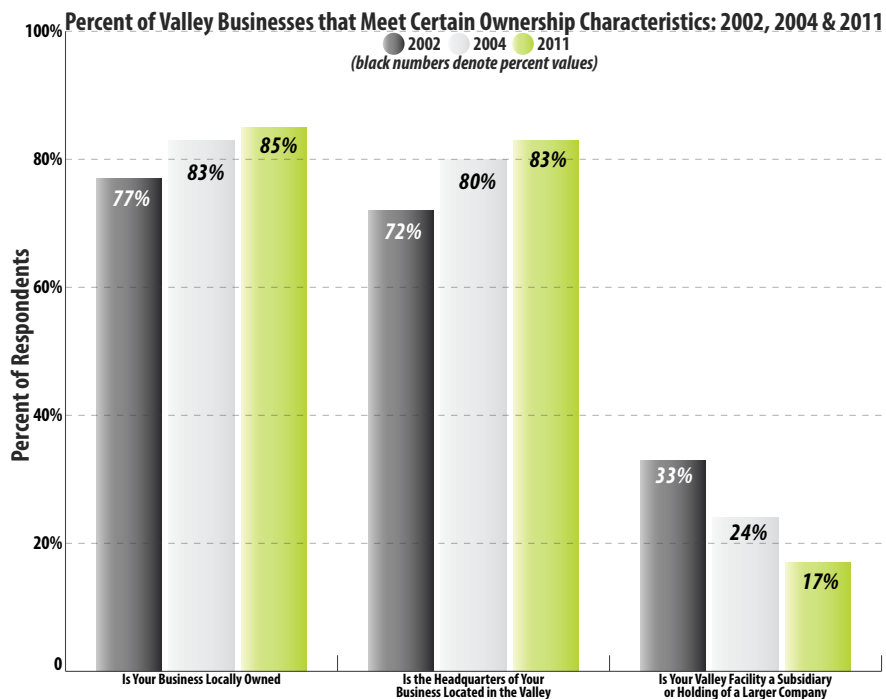


Disadvantages of Doing Business in the Valley: 2011

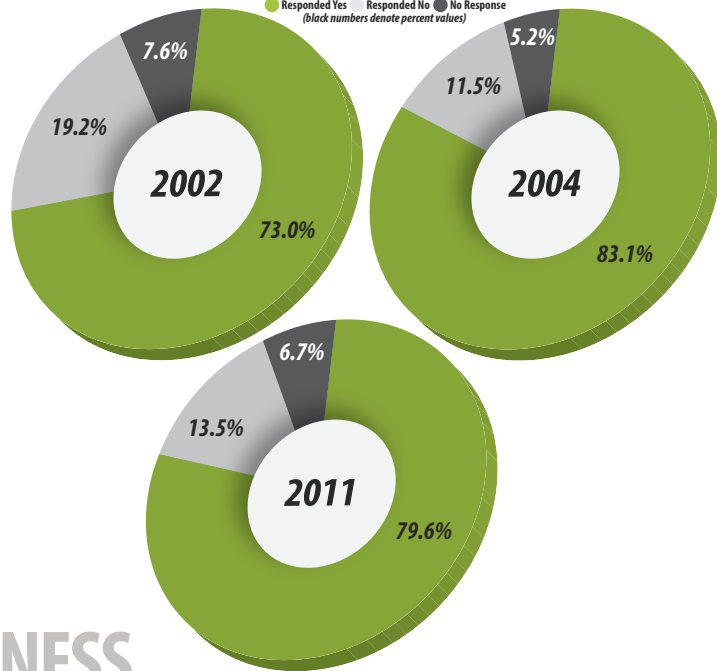
Largest to Smallest Percent Values



PROS & CONS FOR BUSINESS



If Enlarging Your Business, Would Your Business Consider the Valley: 2002, 2004 & 2011
 Responded Yes Responded No No Response
 (black numbers denote percent values)



Measurement

Information on the ownership status of businesses in the Valley was gathered from three questions on Valley employer surveys in 2002, 2004 & 2011. Participating businesses answered these questions with a “Yes” or “No” response. All employers who participated in the survey responded to all three ownership status questions detailed below.

Importance

Local ownership provides a good indication of whether metro area businesses consider the Valley as a potential location to conduct their operations. Companies under local ownership have a tendency to spend and invest more in nearby communities, providing a greater sense of loyalty to their community. A higher percentage of local firms indicates greater economic independence for the region.

Analysis

For 2011, 85% of businesses stated they were locally owned. This is a slight increase since the 2004 (83%) and 2002 (77%) surveys. Of the 13 businesses who responded to this question in all survey years, 10 defined themselves as being locally owned in 2011. As of 2013, some local businesses have made confirmations they will move to the Menomonee Valley Industrial Center (MVIC) in some time, which will add to this total.

In the 2011 survey, about 83% of businesses stated they were headquartered in the Valley. This represents a 3% increase since 2004 and an even larger increase since 2002 (72%). Roughly three-quarters of businesses from the 2011 survey were both locally owned and headquartered in the Valley. This represents a -5% decrease since 2004. Of the 13 businesses who responded to this question in all survey years, 11 defined their location in the Valley as being their company’s headquarters for 2011.

Finally, businesses that were subsidiaries of a larger company represented only 17% as indicated by the 2011 survey results. This represents a decrease from survey results in 2004 (24%) and 2002 (33%). Respondents stated that 8% are a subsidiary of a local company, which is down slightly from 9% in 2004. Of the 18 businesses who responded to this question in all survey years, only one defined themselves as being a subsidiary of a larger company in 2002, while 3 defined themselves as being the same in 2011.

*Source (graphs): 2002, 2004 & 2011 Valley business surveys

BUSINESS LOCAL OWNERSHIP

Measurement

Information regarding employer's perceptions of the Valley's future was taken from two questions on Valley employer surveys in 2002, 2004 & 2011. One question asks about future expansion plans of the respective company while the other about general perceptions the company has on the Valley's future.

Importance

Examining employer opinions about the future of the area provides a general sense of how businesses feel about the Valley's redevelopment moving forward. Reviewing the interests of businesses wanting to expand in the Valley offers insight on this topic as well.

Analysis

Nearly all businesses expressed positive opinions about the Valley's future in both 2004 and 2011 surveys. Employers overwhelmingly offered positive responses such as "bright", "great", "good", "positive" and "getting better and better" to describe their outlook on the Valley's future. To compare, in 2004 about 89% of responses were positive while in 2011 that number rose to 94%. Overall, these perceptions were given from employers who were located in the Valley before its redevelopment and after.

According to survey responses, employer interest in considering the Valley as a place for future expansion remains strong since 2002. Manufacturing businesses, which are of particular importance addressing the goals of the 1998 Menomonee Valley Land Use Plan, increasingly consider the Valley for their expansion or relocation now more than in 2002. Indeed, all but one of the responsive businesses in all survey years pointed out that they would consider the Valley for expansion.

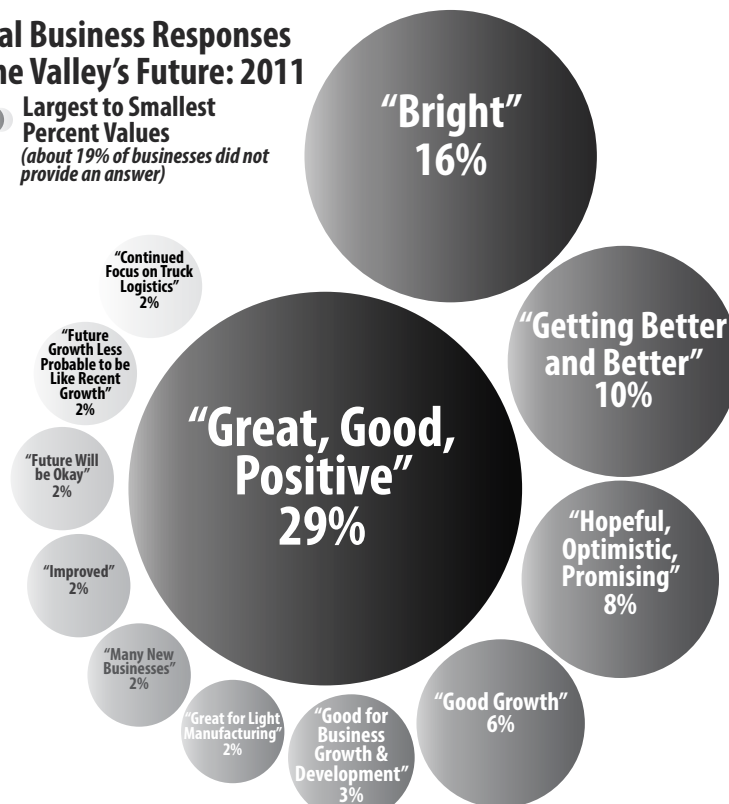
These survey results indicate the business climate in the Valley has seen steady improvements since 2002 amid dozens of new businesses moving into the Valley. It should be worth noting that several programs/organizations have contributed to the Valley's success in attracting reputable employers and developing relationships between Valley businesses. One such organization is the Menomonee Valley Business Association (MVBA), which coordinates efforts to provide promotional events, seminars and networking opportunities for businesses inside and outside the Valley and Business Improvement District (BID) 26.

Another is the Friends of the Hank Aaron State Trail, an organization responsible for the annual Hank Aaron State Trail 5k run/walk and maintaining the trail. Other opportunities include being a volunteer for numerous Valley Events and donating time to the 'Valley Stew Crew' team, a group of volunteers who pick up debris and other polluting agents.

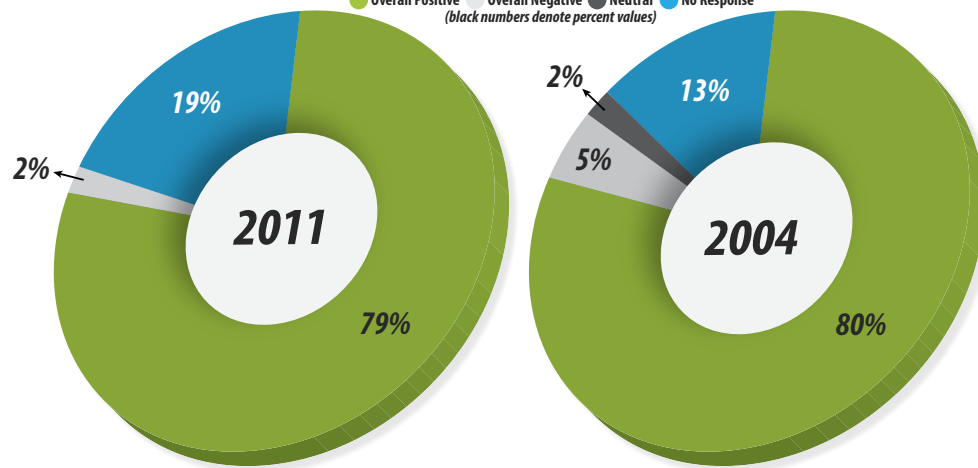
*Source (charts): 2002, 2004 & 2011 Valley business surveys

Actual Business Responses on the Valley's Future: 2011

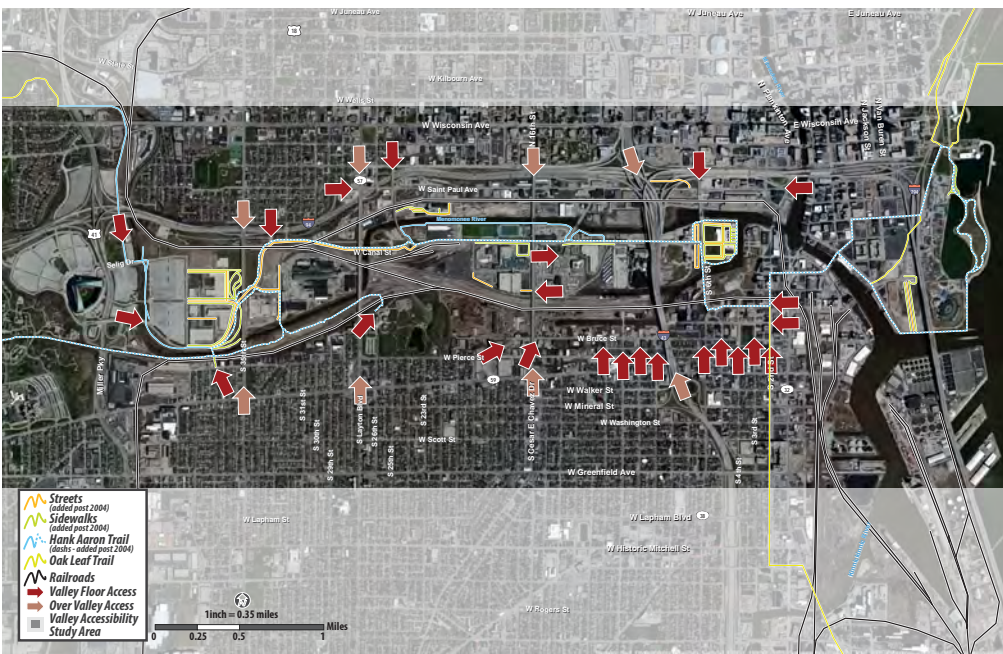
Largest to Smallest Percent Values
(about 19% of businesses did not provide an answer)



Business Perception of the Valley's Future (Business Surveys): 2004 & 2011
 ● Overall Positive ● Overall Negative ● Neutral ● No Response
 (black numbers denote percent values)



BUSINESS PERCEPTIONS OF VALLEY



Measurement

The number of roads, rail lines, sidewalks and trails within the Valley were reviewed from 2000 to 2012. Major and secondary roads, rail lines and sidewalks were identified through maps and historical aerial photography. Other supporting documents from the Friends of the Hank Aaron State Trail, Menomonee Valley Partners, and the city of Milwaukee were utilized.

Importance

Measuring various transportation options for the Valley helps understand how the Valley improves accessibility with regard to people and goods. While rail lines, roads and waterways have been important to the Valley's historical success as the industrial hub of Milwaukee, prior to its redevelopment, the Valley had little accessibility for all transportation modes (except the railroad). As traffic congestion and automobile ownership costs rise, more commuters are considering transportation alternatives such as the bus, bicycle and even walking.

Analysis

Accessibility to and within the Valley for all transportation modes has greatly improved in the past 10+ years. In 2012, some 34 streets provided access to the Valley. The 1.3 mile extension of Canal Street in 2006 gave the Valley an important east-west connection. Prior to this, motorists going westbound on Canal Street had to merge on 25th Street and access either I-94 or Wisconsin Avenue to reach the west-side. Now by traveling on Canal Street, motorists encounter 3 fewer signaled intersections, no right/left turns, and travel 0.5 miles less. The Menomonee Valley Industrial Center (MVIC) built 4 streets (South 33rd Court, Roundhouse Road, Wheelhouse Road & Milwaukee Road) totaling about 1 mile in length.

The Hank Aaron State Trail opened in 2000 and was roughly 4 miles. Since then, four extensions stretching 8.2 miles, and three bicycle loops totaling about 2 miles, have been added. These extensions now connect trail-goers to the Oak Leaf Trail from the east and west. Two additional extensions are slated for completion in 2013 - roughly 1 mile from Three Bridges Park to Mitchell Park and 0.35 miles from the 6th Street Viaduct to 2nd & Pittsburgh Avenue. With the trail expanding, the rail lines, which once populated the Valley, now have a smaller footprint.

Earlier reports noted about 23 miles of sidewalks were measured in the Valley in 2002. Since then, 10.8 miles (56,979 feet) of sidewalk have been built (including trail sidewalk). A majority (36%) occurred near the MVIC, where 3.9 miles (20,636 feet) of sidewalk was constructed. Finally, various Potawatomi Bingo & Casino renovations added 1.2 miles (6,457 feet) while the Harley Davidson Museum built about 2.5 miles (18,000 feet) both on and near its location.

*Source (map and bullets): 2002-2012 Microsoft Bing & Google aerial imagery

6 The total number of pedestrian-accessible structures (i.e., staircases, bridges) that provide access to the Valley floor, two of which have been added within the past 3 years.

14 The estimated number of minutes it takes to travel from the west-end of the Valley (near Selig Drive & West Canal Street) to the east-end (The Harley Davidson Museum).

24 The number of roads that provide accessibility to the Menomonee Valley floor from outside the Valley, four more than 2004. This is only for motor vehicle accessible roads.

100 Total mileage of the Oak Leaf Trail accessible by the Hank Aaron State Trail from its connections to the west (Underwood Creek Parkway), north (Doyme Park), and east (Lakeshore State Park).

INFRASTRUCTURE & ACCESS
ACCESSIBILITY TO VALLEY

Measurement

Data for bus routes, stops, and daily ridership in the Valley study area were given by the Milwaukee County Transit System (MCTS) for years 2001, 2004, 2007 and 2011. Supplemental data regarding individuals using public transit for work commuting were collected from the 2007-2011 US Census Bureau's 5-Year American Community Survey (ACS).

Importance

The bus offers a reliable and affordable transportation service to those without an automobile and others seeking refuge from the increasing cost of vehicular travel. The bus service provides individuals with access to employment, medical care, shopping, and entertainment. Public transit is particularly attractive to employers because it provides a simple and inexpensive alternative for their employees to get to work.

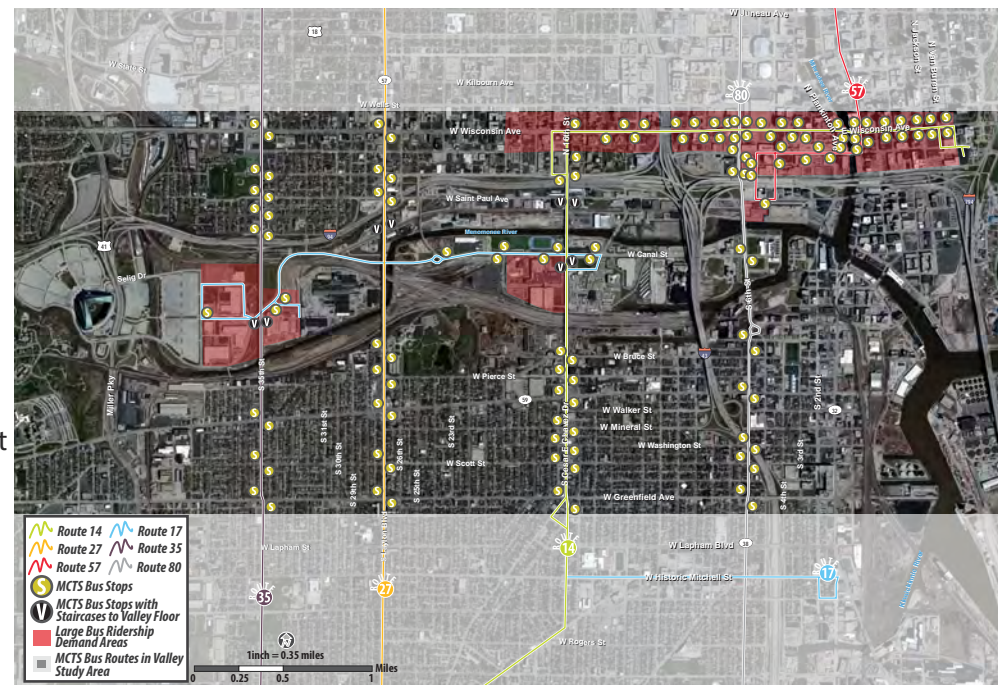
Analysis

For 2011, the Valley had 32 bus stops serviced by six routes - 14 (formerly route 20), 17, 27, 35, 57 (Intermodal Station) and 80. Pedestrian access is available for the 35th Street (route 35), 27th Street (route 27), and 16th Street (route 14) bus stops passing over the Valley. Direct bus access to the Valley is found only along the 6th Street Viaduct (route 80) and Canal St (route 17). Route 17 was modified in 2008 to provide local residents and employees bus service from Mitchell Street to the Menomonee Valley Industrial Center on Canal Street. According to results from the 2011 Valley business survey, usage of Route 17 received mixed reviews with most companies having few to no employees using the bus and the remaining respondents failing to provide an answer.

In 2011, daily ridership averages were the highest for boarding (626 riders) and exiting (772 riders) passengers. This is a 146 (30%) and 141 (22%) passenger increase since 2001. For all years, bus stops adjacent to Potawatomi Bingo & Casino had the most riders, followed by the 27th & Pierce Street stop. Passenger counts for 16th & Canal Street rose each year, with a dramatic increase after 2007. This is likely due to the expansion of Potawatomi in 2008.

The 2012 MCTS budget report reveals a need to reduce services -12% (or 158,000 service hours) to accommodate rising costs and declining revenue. MCTS will adjust only one Valley bus route (route 57) per the budget. On a separate note, according to the 2011 US Census Bureau's ACS, about 4,208 (8.5%) of working-age individuals (ages 16 or older) within one-mile of the Valley rely on public transit for their work commute, identical to the city average.

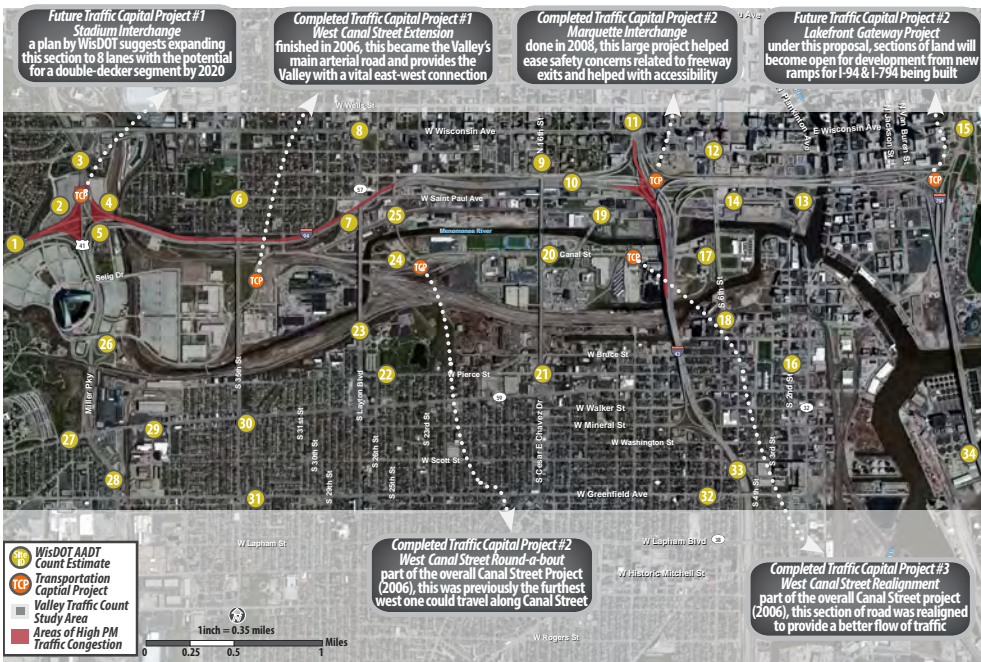
*Source (map and table): 2001, 2004, 2007 & 2011 MCTS ridership data, Stephen Hudak, MCTS
Special thanks to Stephen Hudak, MCTS for his contributions to this indicator



Milwaukee County Transit System (MCTS) Menomonee Valley Study Area Bus Route Ridership Analysis		2001 Bus Ridership (Average)		2004 Bus Ridership (Average)		2007 Bus Ridership (Average)		2011 Bus Ridership (Average)		2011 Peak Times for Ridership			
Route	Stop Location	Direction	On	Off	On	Off	On	Off	On	Off	On	Off	
Route 14	South 27th Street & West Greves Street Viaduct Stairs	North	1.0	1.0	1.0	1.0	1.1	6.1	0.8	1.3	PM	Mid-day	
	South 27th Street & West Greves Street Viaduct Stairs	South	0.0	1.0	0.0	1.0	2.2	2.3	2.3	1.3	Mid-day	Late Evening	
	South Layton Boulevard & West Evergreen Lane	North	N/A	N/A	29.0	18.0	37.7	26.4	42.9	23.8	Mid-day	Mid-day	
	South Layton Boulevard & West Evergreen Lane	South	N/A	N/A	54.0	18.0	26.8	3.0	24.6	19.8	Mid-day	Mid-day	
	South Layton Boulevard & West Pierce Street	North	N/A	N/A	63.0	18.0	80.6	25.1	69.6	27.5	Mid-day	Mid-day	
	South Layton Boulevard & West Pierce Street	South	N/A	N/A	17.0	93.0	19.9	72.1	22.2	76.4	Mid-day	Mid-day	
Route 27	South 16th Street & West Bruce Street	North	N/A	N/A	35.0	34.0	1.6	0.4	6.6	1.8	Mid-day	Mid-day	
	South 16th Street & West Bruce Street	South	N/A	N/A	16.0	39.0	0.8	0.2	37.4	62.8	PM	Mid-day	
	North 16th Street & West Canal Street Viaduct Stairs	North	78.0	77.0	78.0	77.0	90.8	96.3	132.3	81.9	Mid-day	Mid-day	
	North 16th Street & West Canal Street Viaduct Stairs	South	59.0	153.0	59.0	153.0	72.7	135.9	201.1	363.4	Mid-day	Mid-day	
	North 16th Street & West St Paul Avenue Viaduct Stairs	North	7.0	12.0	7.0	12.0	3.9	5.8	8.7	15.8	PM	Mid-day	
	North 16th Street & West St Paul Avenue Viaduct Stairs	South	22.0	11.0	22.0	11.0	8.2	7.6	8.0	11.3	Evening	PM	
Route 80	South 6th Street & West Canal Street	North	1.0	3.0	0.0	1.0	2.8	1.9	4.4	5.6	PM	Mid-day	
	South 6th Street & West Canal Street	South	1.0	1.0	0.0	3.0	0.0	0.2	5.9	8.5	Mid-day	Mid-day	
	South 6th Street & West Virginia Street	South	N/A	N/A	2.0	53.0	0.0	0.0	11.0	29.7	Mid-day	Mid-day	
	South 6th Street & West Bruce Street	South	N/A	N/A	84.0	19.0	52.1	25.6	41.3	28.7	Mid-day	Mid-day	
	South 6th Street & West Bruce Street	North	N/A	N/A	13.0	80.0	0.0	0.1	7.0	12.4	Mid-day	Mid-day	
Route 17	How beneficial is the Canal Street Bus Route (Route 17) to your Business and Employees? (MVBI Business Survey - 2004 & 2011)												
	Response Type	Percent of Valley Businesses - 2004				Percent of Valley Businesses - 2011							
	Very Beneficial	10%				12%							
	Somewhat Beneficial	37%				23%							
	Not Beneficial	53%				60%							
No Response	3%				18%								

INFRASTRUCTURE & ACCESS

BUS ROUTES & RIDERSHIP



Measurement

Annual average daily traffic counts (AADT) and ramp counts within the Valley study area were collected by the Wisconsin Department of Transportation (WisDOT) traffic reports from 2001-2012. AADT counts are collected during a short period, usually 48 hours, and interpolated for the entire year. Supplemental data on the Valley's past and current transportation projects are also from WisDOT.

Importance

According to past Valley business surveys (2002 & 2004), accessibility was consistently listed as a top disadvantage for the Valley. This includes on-going issues with Valley businesses trying to explain their location to customers. However, recent improvements to vehicular accessibility (most notably the Canal Street extension) now allows for easier commutes and better visibility.

Analysis

Many transportation projects have been completed in the Valley since 2001. The reconfigured Marquette Interchange, the largest project (completed in 2008), had AADT counts over 300,000 in 2010. This represents a modest increase since 2001 (294,300). The Stadium Interchange near Miller Park had 260,000 AADT counts in 2010, which is higher than in 2001 (224,100). The majority of Stadium Interchange traffic comes from the west and east, with traffic peaking from morning and evening rush-hour commutes to and from downtown. Interestingly, a proposal to expand this interchange, including a potential double-decker freeway, is ongoing.

Other projects completed since 2001 include the 6th Street Viaduct bridge, 6th Street round-a-bout, Canal Street reconstruction and 25th Street round-a-bout. Both 6th Street projects were completed in 2002 with the round-a-bout being Milwaukee's first. The 6th Street round-a-bout AADT counts were 12,800 in 2010, slightly higher than in 2001 (12,200) and 2005 (9,400). Renovations to Canal Street helped increase AADT counts along this corridor to 6,200 in 2010. These counts are far higher now than in 2001 (3,000). The 25th & Canal round-a-bout, built in 2005, experienced 18,500 vehicles daily in 2010, an large increase since 2001 (12,200).

Along the Valley's north-end lies St. Paul Avenue, connecting the Valley to the Third Ward and Downtown. AADT counts in 2010 (3,800) on St. Paul Avenue have declined since 2001 (4,400). Similarly, AADT counts on Emmer Lane, adjacent to St. Paul Avenue, were 3,300 in 2010. This is a decrease since 2001 (6,000) and 2006 (4,600). Finally, traffic counts at 16th & Emmer Lane, which connects the Valley to 27th Street, in 2010 (4,000) were far below those in 2001 (7,000) and 2005 (6,200). This is likely due to Potawatomi's vehicular bridge from 16th Street to its parking lot being completed in 2008.

*Source (map and table): 2001-2012 Wisconsin Department of Transportation (WisDOT) traffic count database

Wisconsin Department of Transportation (WisDOT) Annual Average Daily Traffic (AADT) Counts					
	Station Number (Map)	Most Recent AADT Count	Historic AADT Count (1)	Historic AADT Count (2)	Historic AADT Count (3)
Traffic Counts Near Stadium Interchange and North of the Valley					
I-94 (West of Stadium Interchange)	1	150,000 (2012)	148,000 (2008)	165,200 (2004)	158,100 (2001)
Hwy 41 (Heading West from I-94 West On-ramp)	2	8,800 (2012)	9,000 (2008)	7,600 (2004)	8,300 (2001)
Hwy 41	3	62,500 (2012)	63,800 (2008)	63,200 (2004)	58,600 (2001)
Hwy 41 (Heading North from I-94 West Off-ramp)	4	12,100 (2012)	7,900 (2008)	13,200 (2004)	14,000 (2001)
Hwy 41 (Heading East from I-94 East On-ramp)	5	8,800 (2012)	6,000 (2008)	6,800 (2004)	6,100 (2001)
North 35th St (North of I-94)	6	17,900 (2012)	17,900 (2008)	21,000 (2004)	17,500 (2001)
I-94 (Near North 26th Street/St. Paul Exit)	7	146,000 (2012)	133,000 (2009)	155,100 (2004)	152,200 (2001)
North 27th St (North of I-94)	8	18,000 (2009)	22,100 (2008)	24,900 (2004)	20,100 (2001)
Traffic Counts North of the Valley and Near Marquette Interchange					
North 16th St (North of I-94)	9	100,000 (2008)	101,000 (2008)	82,600 (2001)	N/A
I-94 (West of Marquette Interchange)	10	8,800 (2012)	9,000 (2008)	7,600 (2004)	8,300 (2001)
I-43 (North of Marquette Interchange)	11	153,000 (2012)	144,000 (2008)	144,100 (2004)	149,100 (2001)
North 6th St (North of I-94)	12	12,800 (2012)	12,900 (2008)	15,000 (2004)	21,000 (2001)
North Plankinton Avenue	13	9,400 (2012)	8,500 (2009)	9,100 (2007)	N/A
West St. Paul Avenue	14	7,200 (2012)	6,300 (2010)	6,400 (2004)	6,600 (2001)
North Lincoln Memorial Drive	15	28,700 (2009)	31,800 (2006)	N/A	N/A
Traffic Counts Within the Valley (East)					
South 2nd Street	16	6,700 (2012)	5,700 (2011)	7,300 (2008)	N/A
West Canal Street (Near North 6th Street)	17	6,200 (2010)	8,400 (2008)	9,100 (2006)	3,000 (2001)
South 6th Street Round-a-bout	18	16,500 (2012)	9,400 (2008)	12,300 (2004)	12,200 (2001)
West Emmer Lane	19	9,300 (2012)	4,600 (2008)	6,300 (2004)	6,000 (2001)
West Canal Street (Near North 16th Street)	20	13,300 (2012)	13,500 (2008)	10,500 (2004)	9,500 (2001)
South Cesar E Chavez Dr	21	14,500 (2011)	16,000 (2008)	21,600 (2004)	24,100 (2001)
Traffic Counts Within the Valley (West)					
West Pierce Street	22	4,900 (2011)	6,00 (2008)	6,700 (2004)	7,500 (2001)
South Layton Boulevard	23	22,500 (2012)	24,500 (2008)	22,700 (2004)	20,500 (2001)
West Canal Street Round-a-bout	24	9,800 (2012)	6,300 (2010)	N/A	N/A
North 25th Street	25	10,500 (2012)	11,500 (2007)	13,600 (2004)	12,400 (2001)
West Canal Street (Miller Parkway Exit)	26	3,100 (2012)	2,600 (2010)	2,600 (2008)	2,200 (2006)
West National Avenue (West of Miller Parkway)	27	31,600 (2011)	13,600 (2008)	N/A	N/A
Miller Parkway	28	60,600 (2011)	59,100 (2008)	35,900 (2005)	N/A
West National Avenue (East of Miller Parkway)	29	18,900 (2011)	15,600 (2008)	16,200 (2005)	N/A
Traffic Counts Near I-794 and South of the Valley					
South 35th Street	30	17,100 (2011)	15,400 (2008)	19,400 (2004)	23,400 (2001)
West Greenfield Avenue (Near Miller Parkway)	31	13,100 (2011)	13,600 (2008)	N/A	N/A
West Greenfield Avenue (Near I-43)	32	8,900 (2011)	8,700 (2008)	7,200 (2005)	N/A
I-43 (South of Marquette Interchange)	33	118,000 (2010)	103,000 (2008)	127,200 (2004)	132,800 (2001)
I-794 (Near Milwaukee Harbor)	34	42,900 (2010)	38,600 (2008)	39,500 (2004)	28,200 (2001)

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EMPLOYMENT DATA

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Website: www.wisconsinbikefed.org | Phone (Valley Office): 414.431.1798

ECONOMIC INDICATORS



SOURCES & INFORMATION