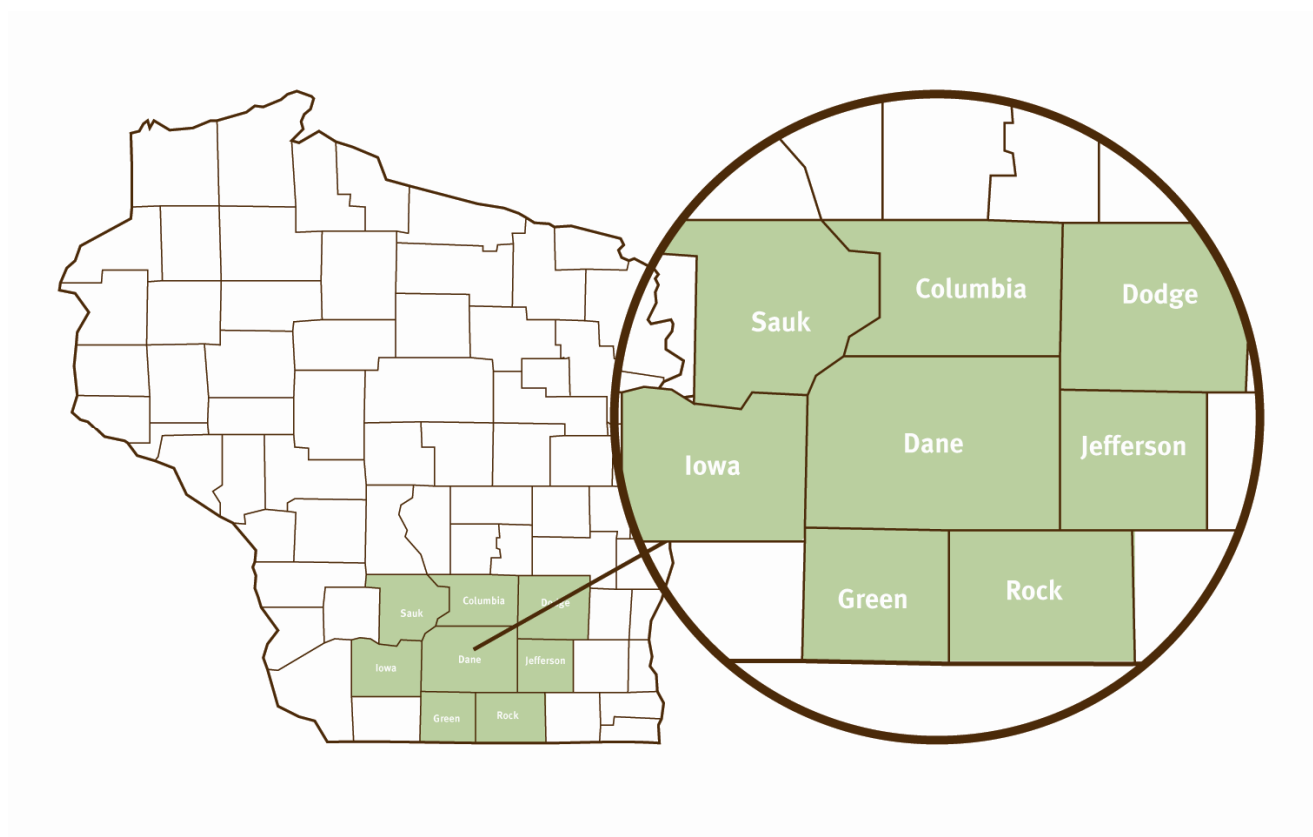


State of the Madison Region

2008-2009 Report



Issued in December 2008

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**GROWING THE MADISON REGION'S ECONOMY IN WAYS THAT
PRESERVE AND ENHANCE QUALITY OF LIFE.**

In order to begin a dialogue concerning our shared regional future in five, ten, twenty years and beyond, we need to understand the state of our eight-county Madison Region today. Thrive's first annual **STATE OF THE MADISON REGION** report is that tool, a report to foster a more complete and accurate view of our interdependencies as a region, so we can all move forward... together.

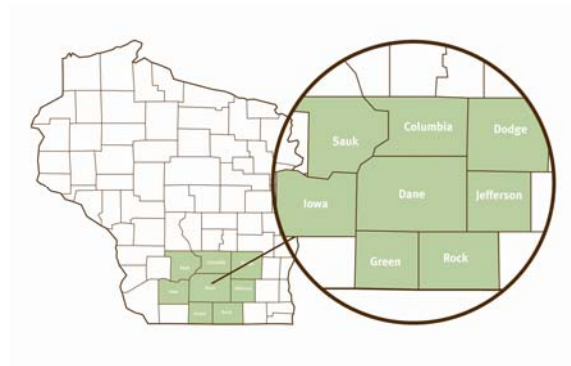
Planning for this report began in 2007 when the Thrive Quality of Life Committee launched a regional survey effort to find out what people cared about and how they thought the region was doing in key areas. Those findings served as the foundation for the development of this **STATE OF THE MADISON REGION** report. This new report brings traditional economic indicators together with quality of life indicators for a unique set of quantitative measures that will help guide our decisions as a region and over time, will help monitor the long-term impact of our region's collective efforts.

Thrive intends to issue a **STATE OF THE MADISON REGION** report on an annual basis, and will include updates and changes to the measures as we learn what is most useful for the region. The report here is just the start of a long-term process of monitoring and measuring performance and motivating action. As part of an ongoing process using the report, Thrive will focus on one key theme each month by engaging experts, delving into the nuances of the data, and providing insights into how we can use this data to celebrate our strengths and work together to better understand and tackle areas where there is room for improvement. Be sure to sign up for the Thrive Newsletter on any page of the www.thrivehere.org website to get the **Monthly Insights**. In addition, look for our **Sector Snapshots** in early 2009 and a **Regional Innovation** report mid-year.

We recognize that we are issuing this report at an unprecedented time in the world and in our nation's history and expect that the next few years will bring changes and impacts to the region that no one can foresee. Nevertheless, we are excited to offer this report to the Madison Region and on behalf of the Thrive Board and staff we look forward to joining with all of our regional leaders and stakeholders as we embark on a new chapter in defining the Madison Region, celebrating its strengths and working together to make it even better.

Jennifer Alexander, Thrive President

John Biondi, Thrive Board Chair



The Madison Region consists of the eight counties in south central Wisconsin that cluster around the State Capital and contain some of the most beautiful geography in the nation.

The region's rich agricultural heritage combined with a world renowned university in the center of the region, surrounded by a strong manufacturing network of small, medium, and large firms creates a region that feeds, educates and builds the world.

Table of Contents

Executive Summary	6-7
Choosing our Peer Regions	8-9
Choosing our Measures	9
State of the Region Themes	
Life at Work	10
1. Employment Growth	
2. Establishment Growth	
3. Productivity	
4. Employer Supplement to Wages	
5. Per Capita Personal Income	
6. Average Wage per Job	
Life at Home	14
7. Home Ownership	
8. Cost of Home Ownership per Income	
9. Poverty Rate	
10. Median Household Income	
Life at School	16
11. 3 rd Grade Reading and 5 th Grade Math Levels	
12. Eligibility for Subsidized Lunch	
13. K-12 Enrollment	
14. High School Degree in Adult Population	
15. Associates Degree in Adult Population	
16. Bachelor's Degrees and Higher in Adult Population	
Life in our Communities	18
17. Population Change	
18. Age Dependency	
19. Crime Rate	
20. Local Governments	
Life on the Move	20
21. Biking or Walking to Work	
22. Traveling Over 30 Minutes to Work	
23. Vehicle Miles Traveled	
24. Traffic Fatalities	
25. Alcohol Impaired Drivers in Fatal Crashes	
A Healthy Active Life	22
26. Low Birth Weight Births	
27. Health Insurance Coverage	
28. Fitness and Sports Centers	
29. Air Quality Index- Ozone Days	
30. Special Outdoor Places	
Regional Maps	24
Additional Reports Planned in 2009	26

Executive Summary

The first annual *State of the Madison Region* Report provides a unique set of regional economic and quality of life metrics. This annual report will inform us about where we are doing well, where we can improve, and will help regional decision-makers make focused decisions in a collaborative manner for the good of the overall region. To ensure a comprehensive look at the region, we selected measures that tell the full story about our region. To that end, there are thirty individual metrics grouped into six topic areas to cover all aspects of life.

In addition to reporting on the overall “health” of the Madison Region, metrics are included for five peer regions, and when appropriate, for the state and the nation. There might be some surprise at the five regions that were chosen as our representative peers as they are not the usual areas that are often compared Madison. But they are unique similar in many ways to our region as a whole and will serve us well as overall benchmark regions. They were chosen based on key similarities such as being a State Capital and having a major university important to the region. They are all key regions in their states but not the primary metro region. These are important features to benchmark against, but we recognize that a different set of regions might be chosen to look at related to specific aspects of the region. In fact we may compare ourselves to others for reports with a different focus such as the **Sector Snapshots** or **Regional Innovation** report. See page 8-9 on more about choosing these peer regions.

PEER REGIONS
Lincoln, Nebraska
Columbus, Ohio
Salem, Oregon
Columbia, South Carolina
Richmond, Virginia

Thrive’s objective with this report is to inform and to spur action for individuals and organizations in the region as we move toward a shared regional vision. The metrics used are objective, quantitative measures of specific aspects of our region, chosen for this inaugural report with guidance from the *Summary of the Madison Region Quality of Life Indicators*. We anticipate changes over the coming years as we fine-tune our metrics to best tell our story and help us grow together as a region. Still to come in 2009 are **Monthly Insights** to further explore these measures, **Sector Snapshots** on our targeted three sectors of agriculture, biotechnology and healthcare, and planning is underway for a mid-year **Regional Innovation** report.

Life at Work - Work is one of the activities in life that give us meaning, an opportunity to contribute, to create, and to provide for our families. The kinds of work we do help define our communities and our region.

- Per capita income, including all forms of income, was quite high in the Madison Region, estimated at \$36,071, 3rd among the peer regions with the weighted peer average at \$35,006.
- For wages per job, the Madison Region averaged \$36,348; lower than the peer average of \$38,001 but placing 3rd, behind the Columbus, OH and Richmond, VA regions.
- Employer contributions to pension and insurance funds, ranged from a low of 15.7% of wages/salaries to a high of 18.6% with the Madison Region at 16.7%.



- Productivity is an important measure of output per measured input. Every dollar paid for wages and salaries produced \$1.71 in the Madison Region and the highest was Columbus, OH at \$1.78, a seemingly small gap that translates to a difference of \$1.75 billion per year.
- In growth of business establishments, the Madison Region, at 8.5%, was slightly above the 8.1% average for the peer regions.
- Actual employment growth in most of the peer regions has been quite robust at 7.1% over the period from 2001 to 2006. The Madison Region was second at 8.4% with Salem, OR leading at 10%.

Life at Home – The shelter of a home has always been one of the most important components of quality of life along with having the means to care for one's family. Success at school and at work often starts at home.

- The Madison Region has the 3rd highest rate of ownership compared to the peer regions, but ranks 2nd in terms of the percent of household income that goes to mortgage costs.
- Our region boasts the lowest poverty rates among the peer regions but has seen the 3rd highest increase in the percent of the population in poverty from 2000 to 2005.

Life at School – Education has become widely recognized as a foundation of both quality of life and economic vitality. We must have an adequate and well-educated pipeline for the future.



- Looking at just the Madison Region since 2005, 5th graders have increased 2.2% in math skills, while 3rd graders dropped 1.7% in reading skills.
- From 2000 to 2005, the Madison Region declined in overall K-12 enrollment, rebounding slightly in 2007 but still lagging our peers.
- Again just for the Madison Region, the percentage of children that met poverty thresholds to be eligible for subsidized lunches increased from 17.8% in 2000 to 25.7% in 2007, now over a quarter of the children in our region's schools.
- Among our peer regions adult populations, we have a high percent of high school graduates, the 2nd highest in associate's degrees, and are 4th in bachelor's degrees or better.

Life in our Communities – Vital and safe communities contribute immensely to the quality of life in the Madison Region and are at the heart of what makes this region such a great place to live.

- The Madison Region has the lowest rate of violent and property crime combined of the peer regions.
- Our population growth lagged behind all but one of the other peer regions from 2000 to 2007.
- We have the 2nd highest number of local governmental units per 10,000 in population among the peers.

Life on the Move – How we get from one place to the other is more important than ever and will help define our region in the future.

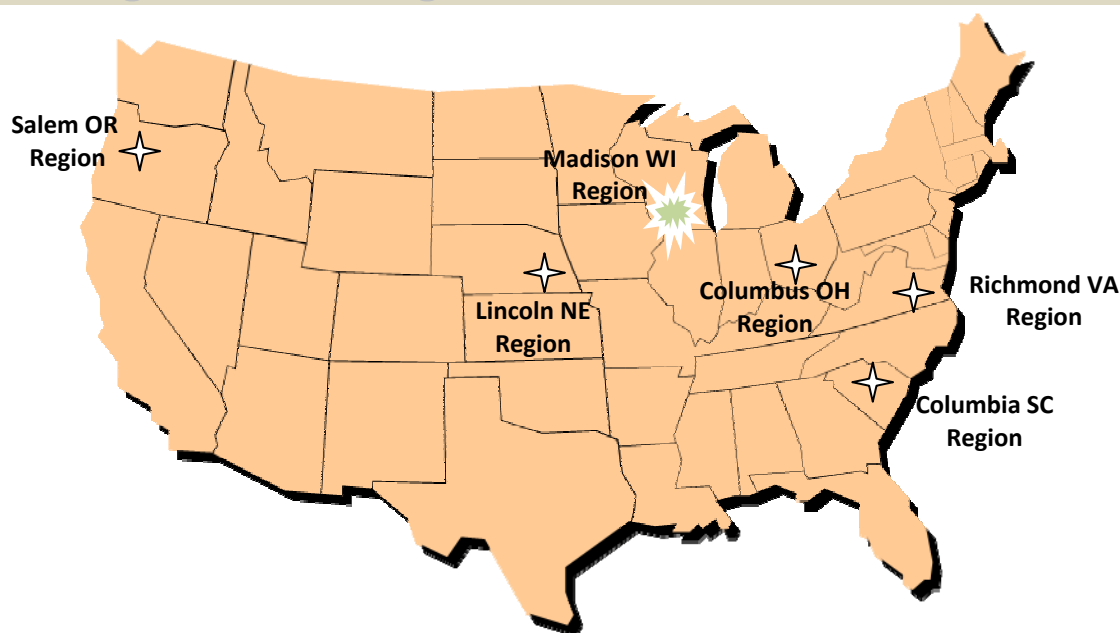
- The Madison Region is the highest among the peer regions in walking or biking to work and 2nd lowest in traveling over 30 minutes to work.
- Our traffic fatalities per capita have decreased since 2000 compared to the peer regions.
- Compared to our peer regions, we were #1 in 2000 and #2 in 2007 for alcohol impaired drivers involved in those fatal crashes.



Living a Healthy, Active Life – Health and activity go hand-in-hand and are important components of our regions' quality of life.

- Among the peers, the Madison Region was 1st for health insurance coverage in 2000 and 3rd in 2007.
- The Madison Region has the 2nd lowest percentage of low birth weight births of the peer regions.
- Somewhat surprisingly, the region has the lowest number of fitness centers per 1,000 of population.
- Related to air quality, the region had the 2nd highest increase in ozone days from 2000 to 2007.
- Our region is 2nd in the number of special places like national and state parks, and rails to trails.

Choosing our Peer Regions



LINCOLN, NEBRASKA AND A SIX-COUNTY SURROUNDING AREA

See pages 24-25 for detailed maps

Population	342,300, and 19 percent of Nebraska's total population
Growth	16 percent growth from 1990 to 2000, and 8 percent from 2000 to 2007
Features	State Capital; University of Nebraska; Lincoln is 40 miles from Omaha, the largest city

COLUMBUS, OHIO AND AN EIGHT-COUNTY SURROUNDING AREA

Population	1,754,300, and 15 percent of Ohio's total population
Growth	14.8 percent growth from 1990 to 2000 and 8.8 percent from 2000 to 2007
Features	State Capital; Ohio State University; Columbus is Ohio's largest city but slightly smaller than the metro areas of Cincinnati and Cleveland

COLUMBIA, SOUTH CAROLINA AND A SIX-COUNTY SURROUNDING AREA

Population	716,000, and 15 percent of South Carolina's total population
Growth	18 percent growth from 1990 to 2000 and 10.6 percent growth from 2000 to 2007
Features	State Capital; University of South Carolina; South Carolina's largest metro area, although the City of Charleston is a somewhat larger city than Columbia

SALEM, OREGON AND A FIVE -COUNTY SURROUNDING AREA

Population	925,000, and 25 percent of Oregon's total population
Growth	15.7 percent growth from 1990 to 2000, and 8.8 percent growth from 2000 to 2007
Features	State Capital; University of Oregon at Eugene and Oregon State University at Corvallis, region contains three mid-size cities; Salem, Corvallis and Eugene, and is 35 miles south of Portland, Oregon's largest city

RICHMOND, VIRGINIA AND A SIXTEEN-COUNTY AREA, PLUS FOUR CITIES

Population	1,220,000, and 15 percent of Virginia's total population
Growth	15.6 percent growth from 1990 to 2000, and 11.2 percent from 2000 to 2007
Features	State Capital; University of Richmond; and near two super metros, the Virginia Beach/Newport News, Norfolk metro and of course the Washington, D.C metro. Also nearby are several other well known colleges and universities

MADISON, WI AND AN EIGHT-COUNTY SURROUNDING AREA

Population	977,500, and 17 percent of Wisconsin's total population
Growth	11 percent growth from 1990 to 2000, and 8.3 percent growth from 2000 to 2007
Features	State Capital; University of Wisconsin-Madison; 2 nd largest metro area in WI, between Milwaukee, Chicago, and Twin Cities

Choosing our Peer Regions

These five regions were chosen because they possess many of the same advantages present in the Madison Region, including their respective State Capitals and therefore the seat of their state governments, and the presence or close proximity to a major University. They are not the largest area in their states, but they have enough of their respective state's population to be vital in their own right. They have research and innovation occurring at their universities, stable economies anchored by state government employment, and other employment opportunities in vibrant private sectors.

The metropolitan areas included have gross domestic product ranging from \$10 billion to \$75.4 billion. The Madison Region metro areas combined, Janesville/Beloit and Madison, are near the middle, with about \$35.1 billion. The 2005 gross domestic product ranges from \$23,362 per capita to \$41,776 per capita for all the peer regions. The combined Madison and Janesville metro area is about \$39,360 per capita, slightly over \$38,095 which the mean for all of the regions.

Each of these region's populations grew at a fast pace. In the period from 1990 to 2000, the average growth was 16.2 percent, led by Columbia, South Carolina at 18 percent. The Madison Region metros were actually the slowest growing metro areas with a 14.4 percent growth. Between 2000 and 2007, these areas have grown on average about 9.6 percent. Richmond, Virginia was the fastest growing at 11.2 percent, while Lincoln, Nebraska grew the slowest at 8.0 percent. The Madison Region grew from a population of 902,871 in 2000 to 977,470 in 2007, a growth of 8.3 percent, slightly below the average for these regions.

BUT WHY NOT _____?

Several capital regions were not chosen due to an overwhelming size compared to their respective states.

- *Minneapolis/St. Paul, Indianapolis, Phoenix, Oklahoma City, and Atlanta were not chosen for this reason.*

Other regions that were initially considered were ultimately not selected because they were not as dominant in their states as the Madison Region.

- *Austin, Texas is often compared to Madison, but the Austin region is only 6 percent of the population of Texas and doesn't have the same statewide political and economic clout in Texas that Madison does in Wisconsin.*
- *Lansing, Michigan and Montgomery, Alabama are also too small in their respective states to make the "short list".*

Choosing our Measures

A metric is an objective, quantitative measure that describes some aspect of our region—economic, social, cultural, and environmental—over time. Our goal was to select measures that address both quality of life and economic measures. Based on guidance from the recent *Madison Region Quality of Life Indicators Summary*, as well as research on other regional indicators/metrics reports, the measures are organized into eight themes: Life at Work, Life at Home, Life at School, Life in our Communities, Life on the Move, and Living a Healthy, Active Life. To ensure that the effort is doable, sustainable, and credible, we have established guidelines for choosing the metrics that will be used:

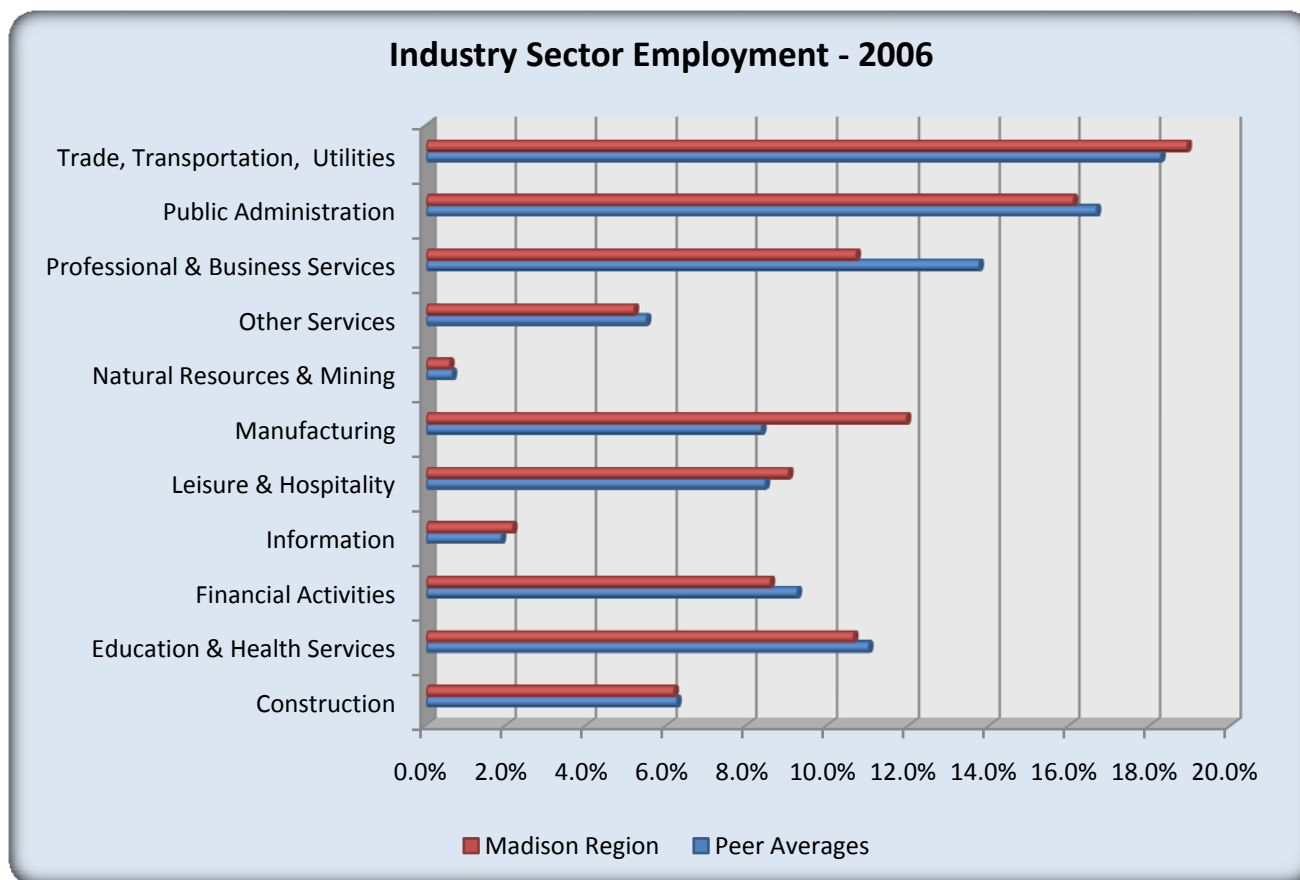
1. The data must be publicly available without charge.
2. The data should be available at the county level across the nation for comparisons to peer regions. However, locally collected data is used occasionally to augment or highlight more recent regional data.
3. The data must be the most current available.
4. The data selected must be available at least to 2000 to show trends.
5. The metrics should be actionable, suggesting an important issue for regional leaders to address.

Life at Work

Work is one of the things in life that gives us meaning, an opportunity to contribute, to create, and to provide for our families. The kinds of work and the income that we gain from that work help define our communities and our region. Our industry structure helps us understand the region further.

Income can mean several things to both economists as well as people in general. This report presents a variety of income measures. We will use wages per job, per capita personal income, value of benefits and a measure of gross product. As the regions are varied in population, each of these measures will be provided and discussed per capita, or, when appropriate, per job.

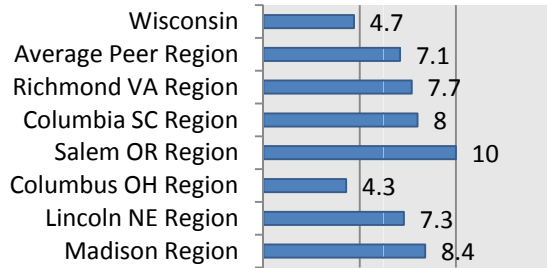
Industry Employment comparisons between the Madison Region and the peer regions finds the Madison Region is strongest in jobs in the manufacturing sector, with greater than average representation in the trade, transportation and utilities sector, and the leisure and hospitality sector. The Madison Region is less represented in jobs in the professional and business services sector, and in the financial services sector. As the professional and business services sector and the financial services sector tend to be high-paying jobs while the trade, transportation and utilities sector and the leisure and hospitality sector tend to be lower-paying industrial sectors, the wage structure for the Madison Region in comparison to some of the peer regions is also in the low- to middle range.



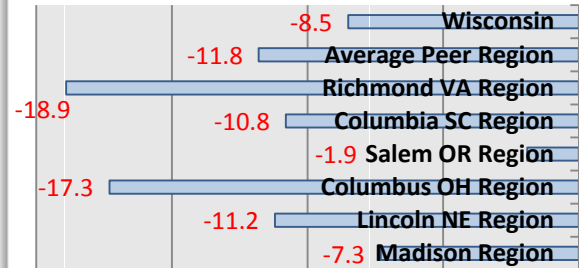
Source: US Commerce, Bureau of Economic Analysis, 2006

Employment Growth From 2001 to 2006, all peer regions experienced employment growth. The average was 7.1 percent. The Salem, Oregon region reported the fastest growth, at 10.0 percent, followed by the **Madison Region at 8.4 percent**. During that same period, population grew for the six peer regions, averaging 6.2 percent. In all peer regions except Columbus, Ohio, employment growth outpaced population growth.

1. Employment Growth 2000 to 2006



Manufacturing Change 2000 to 2006



Source: US Commerce, Bureau of Economic Analysis, 2000 to 2006

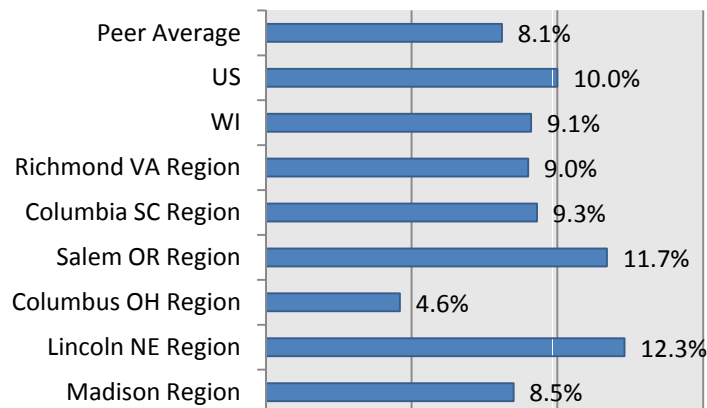
As employment in total was growing, there were structural employment changes. Manufacturing in each peer region lost employment, led by a loss of 18.9 percent in the Richmond, VA region. On average, the peer regions experienced an 11.8 percent decrease in manufacturing employment. The Madison Region, with perhaps the greatest exposure in employment in manufacturing based on its relatively stronger manufacturing base, experienced only a 7.3 percent decline.

Another interesting phenomenon is the increase in proprietor's employment as opposed to wage and salary employment. Although wage and salary employment on average for the peer regions increased 3.8 percent, proprietor's employment increased 25.6 percent. In the Madison Region, wage and salary employment increased by 4.9 percent, while proprietor's employment increased by 26.1 percent. In the Madison Region, proprietor's employment has become 18.9 percent, very nearly one-fifth of total employment. This includes self-employment as well as locally owned businesses paying wages to the owner.

Establishment or firm growth

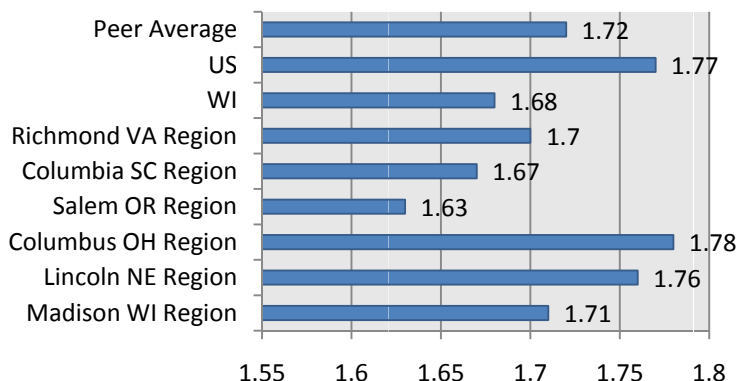
looks at the increase in the number of business establishments with some employment activity during the period of 2001 through 2006. The six peer regions saw an aggregate 8.1 percent increase. **The Madison Region was slightly above the average for the peer regions with an 8.5 percent increase.** The Lincoln Nebraska region had the fastest growth during the period with a 12.3 percent increase.

2. Growth in Establishments - 2000 to 2006



Source: US Commerce, Bureau of Economic Analysis, 2006

3. Productivity Measure Amount Produced per Dollar Paid in Wages/Salaries



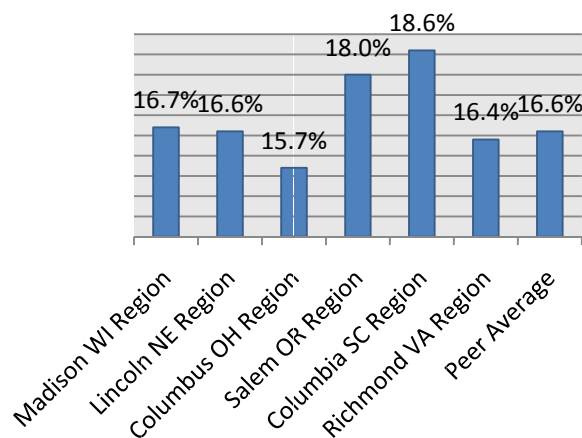
Source: US Commerce, Bureau of Economic Analysis, 2006

Productivity is an extremely important metric as it looks at the value of the products produced based output per input, usually a labor cost figure. The figure used here is the dollar value of Gross State Product per dollar input of total employer wage and salary input. The peer average for this figure was \$1.72. For the Madison Region it was \$1.71. The highest output was reported for the Columbus, OH region at \$1.78. The national figure is \$1.77, and for Wisconsin the figure was reported at \$1.68.

Although the difference between \$1.71 and \$1.78 as reported for Madison and Columbus, respectively, seems like a small differential, using the number of wage and salary jobs and the average disbursement puts the variance into perspective. The average peer region had 530,421 salary jobs at an average disbursement per job of \$47,155 equals a productivity difference between \$1.71 and \$1.78 of output of \$1,750,826,190.

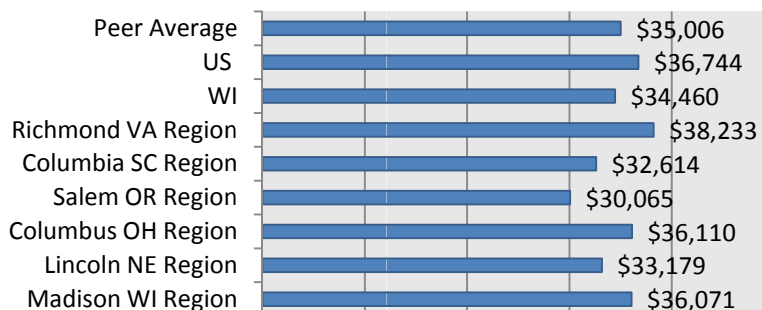
"Fringe Benefits" can be roughly estimated by looking at employer supplements to wages and salaries. Contributions for insurance and pensions ranged from 15.7 percent of wages and salaries to 18.6 percent in 2006. The peer regions averaged 16.6 percent in employer contributions for employee pensions and insurance funds not counting government social insurance. **The Madison Region was just above the peer region average, at 16.7 percent.** The peer average employer contribution for employee government social insurance was 7.4 percent of wages and salaries, and the Madison Region was at that figure as well. Although it would be expected that employer contributions for government insurance would be the same throughout the regions, this was not the case as the Salem, OR region had an 8.8 percent figure for a high, and the Columbus, OH region and the Richmond, VA region had a low of 7.2 percent.

4. Employer Supplements to Wage/Salary - 2006 or "Fringe Benefits"



Source: US Commerce, Bureau of Economic Analysis, 2006

5. Per Capita Personal Income - 2006



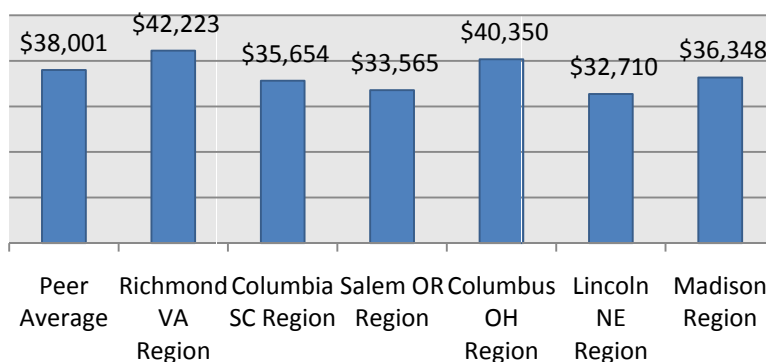
Source: US Commerce, Bureau of Economic Analysis, 2006

↑ Per capita income is a measure of all income for individuals and the Madison Region ranked 3rd among peers, ahead of the state and the nation.

Per Capita Personal Income Personal income is defined as all income from wages, business enterprise and investments. The PCPI for the Madison Region was quite high, at \$36,071 for 2006. This put the Madison Region in a strong third place among the peer regions, close to the Columbus, OH region. The weighted peer average was \$35,006, and the national figure was \$36,744. Richmond, VA, had the highest per capita income, approximately six percent higher than the Madison Region. The Salem, OR region had the lowest per capita income, at about 86 percent of the norm for the peer regions. Since 2001, the Richmond, VA area has seen the strongest growth of any of the other peer regions.

↑ In average wage per job, the Madison Region ranked 3rd.

6. Average Wage per Job - 2006



Source: US Commerce, Bureau of Economic Analysis, 2006

Wages per Job Wages per job is based on place of work data. It measures the wages and salary paid to workers and is normally compiled per industry. There is a great variation in wages per industry, with some industries having wages double the wages in other industries. The structure of industry employment depends on the area where the employment is measured. Areas with dense population often have heavier concentration of employment in high paying service sectors such as professional and technical services (i.e., lawyers, engineers), financial services, or information services. The Madison Region consists of a number of small communities and small urban areas. It therefore has lower wages than the peer average. The Madison Region has an average of \$36,348; the peer average was \$38,001.

The shelter of a home has always been one of the most important components of quality of life along with having the means to care for one's family.

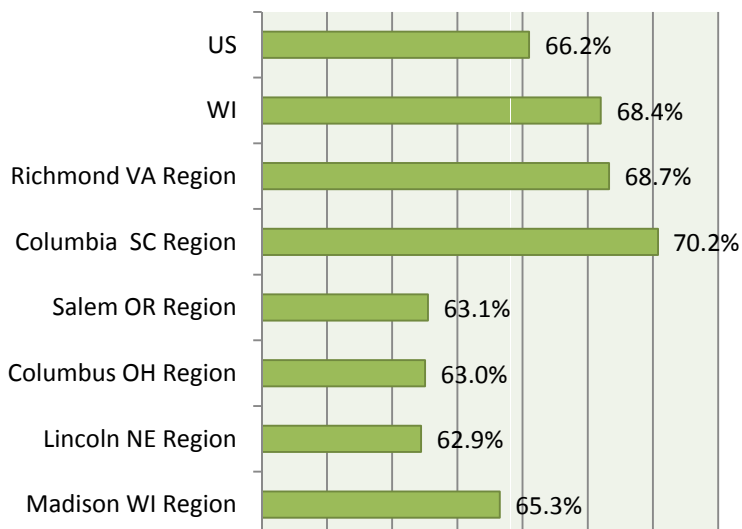
Success at school and at work often starts at home.

↑ The Madison Region ranks 3rd among the peer regions for home ownership.

↑ The Madison Region is at the national average for mortgage cost per income, slightly more than the peer average/

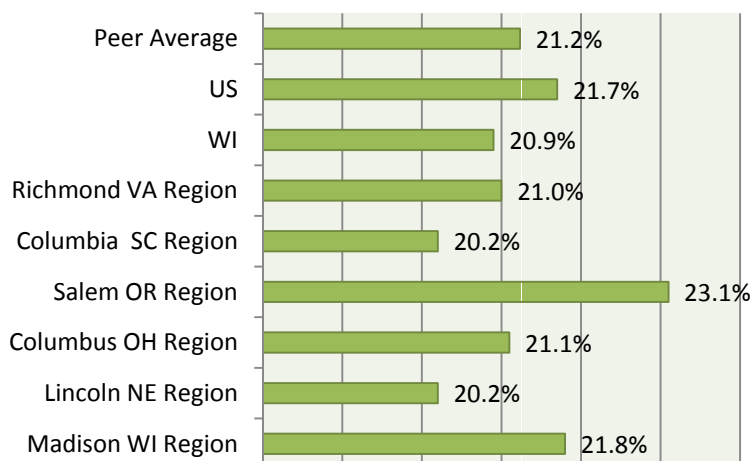
This is a difficult time to address home ownership and cost issues as the housing market has changed dramatically in the past two years. The next Census in 2010 will help us see how the Madison Region has fared in this area compared to our peers.

7. Home Ownership Rate - 2000



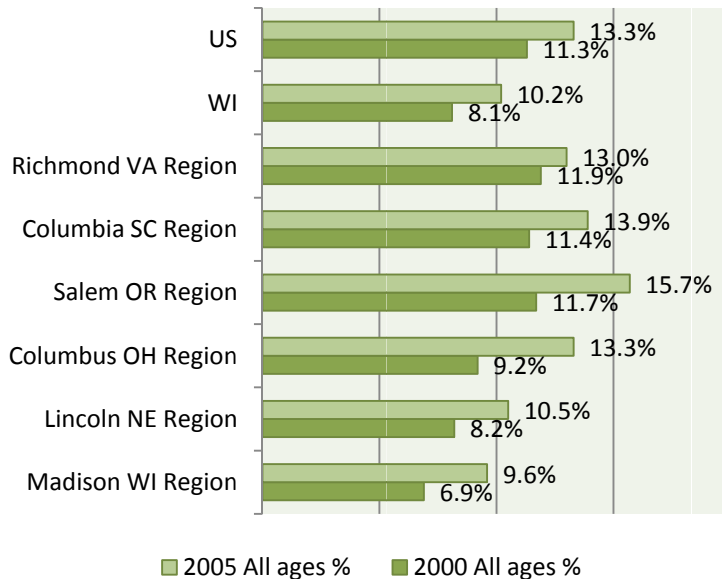
Source: US Census, 2000

8. Homeowner Cost as % of Income - 2000



Source: US Census, 2000

9. Poverty Rate - % Population - 2000 to 2005



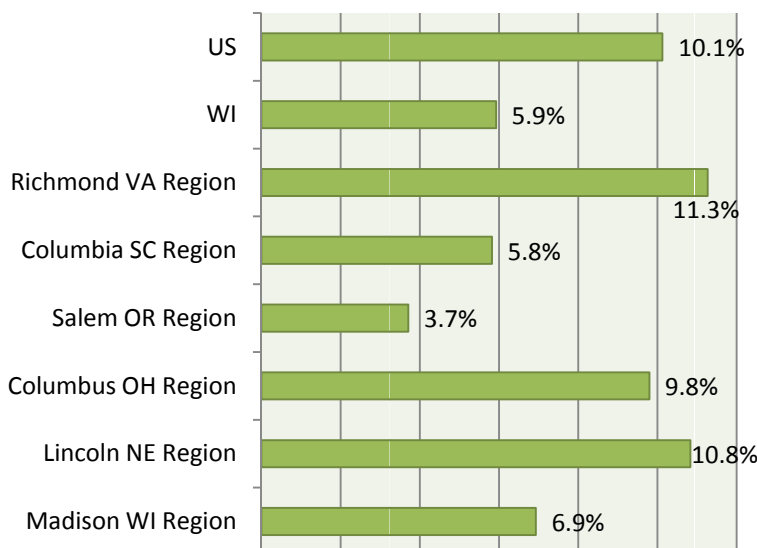
Source: US Census, Small Area Income and Poverty Estimates, 2000 and 2005

Adequate income is one of the most important determinants of economic success and quality of life.

↑ Lowest % poverty rate in 2005 compared to peers, the state and the nation, though 3rd highest % increase from 2000 to 2005 among peers and a higher increase in poverty rate than WI and the U.S.

→ Fourth in household income increase compared to peers, lagging the US, and ahead of WI.

10. Median Household Income - % increase from 2000 to 2005



Source: US Census, Small Area Income and Poverty Estimates, 2000 and 2005

Household income calculates income from all workers in the household.

During the same period of time, our poverty rate increased and our median household income did not keep pace with our peers, an indication of an increase in lower wage jobs for more of our region's workers.

Life at School

Education has become widely recognized as a foundation of both quality of life and economic vitality. We must have an adequate and well-educated pipeline for the future.

Preparation at the elementary level is crucial for future academic success. We look at 3rd grade reading, where “learning to read” shifts to “reading to learn,” and 5th grade math, where basic skills need to be achieved to build higher level math skills.

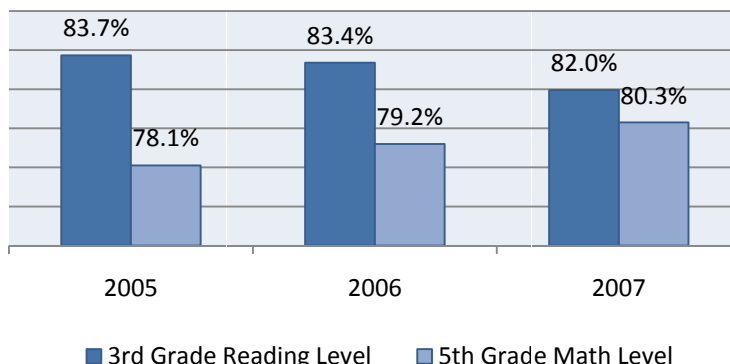
↓ In the past three years, the Madison Region has seen a decline in the % of 3rd grades reading at or above grade level.

↑ In the past three years, the Madison Region has seen an increase in the % of 5th graders with proficient or advanced math skills.

↓ Since 2000, the Madison Region has seen an 8 percent increase in low income children eligible for subsidized meals.

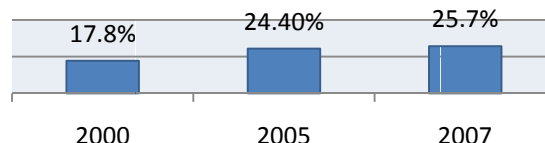
↓ Enrollment has declined in the Madison Region from 2000 to 2005. There was slight increase in 2007 for the Madison Region.

11. Madison Region Proficient or Advanced 3rd Grade Reading and 5th Grade Math



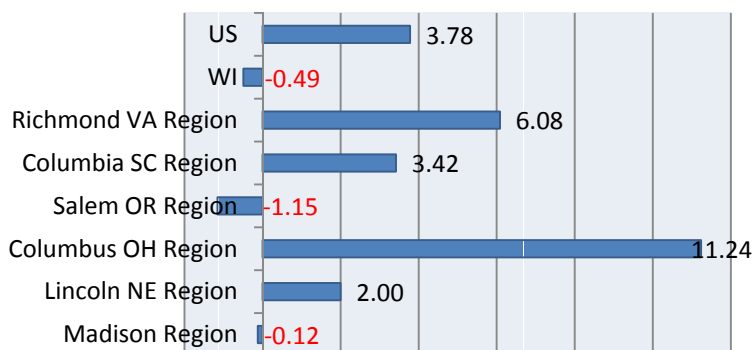
Source: Madison Region only – Wisconsin Department of Public Instruction WINSS

12. Madison Region Increase in K-12 Students Eligible for Subsidized Lunch due to Family Income



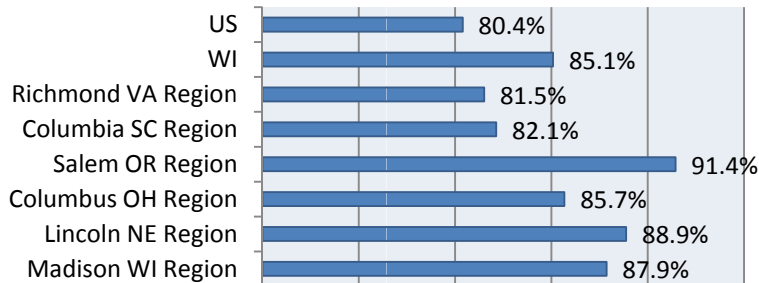
Source: Madison Region data only – Wisconsin Department of Public Instruction WINSS

13. K-12 Enrollment Change 2000 to 2005



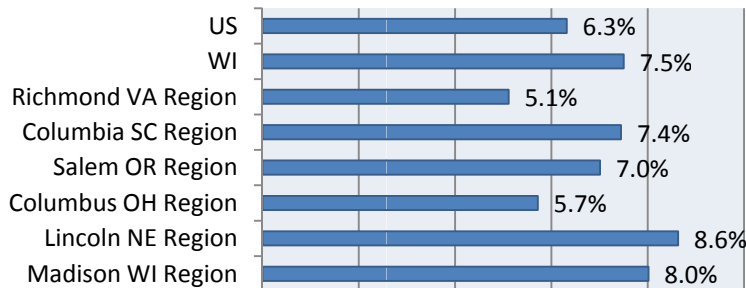
Source: Enrollment Data from Annie E. Casey Kids Count Community-Level Information on Kids based on data contributed from each state education department, 2000 to 2005

14. High School Degree or Higher in the Adult Population over 25 yrs - 2000



Source: US Census, Education Attainment, 2000

15. Associates Degrees in the Adult Population - 2000



Source: US Census, Education Attainment, 2000

16. Bachelor's Degree or Higher in the Adult Population - 2000



Source: US Census, Education Attainment, 2000

It is more important than ever to continue education beyond high school, both to achieve degrees in demand sectors and also to embrace life-long learning and skill upgrading for the 21st century global economy.

Regardless of where we rank against our peers, we must strive to improve on all of these measures as we cannot afford to have residents unable to prosper and contribute to the region due to a lack of education and skills.

↑ 2nd highest high school diploma or higher in adult population

↑ 2nd highest associate's degree

↓ 4th highest with bachelors' degree or higher

High school graduation rates are not included as these are not calculated uniformly in the Madison Region or across the nation.

Recently released information on high school non-completion from the UW Population Health Institute in the 2008 WI County Health Rankings indicates a range across the Madison Region from 5.7 to 13.9 percent, ranking between 23 and 65 among WI counties.

Vital and safe communities contribute immensely to the quality of life in the Madison Region and are at the heart of what makes this region such a great place to live.

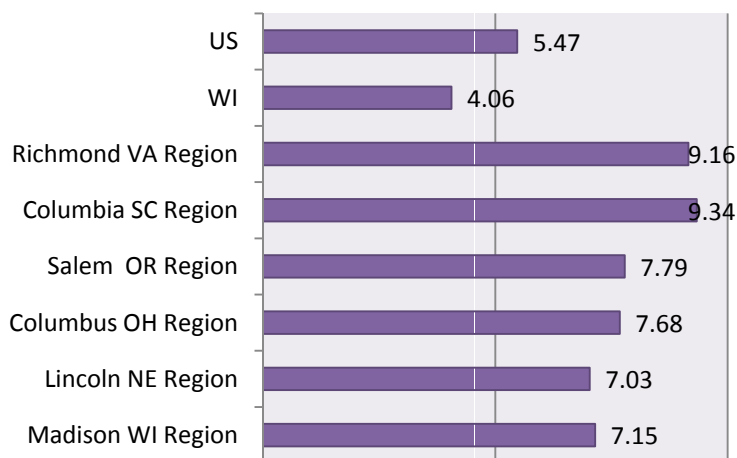
- ↑ Higher population growth than the state or the nation, but 2nd to last among peer regions
- ↑ The population dependency ratio for Madison Region was estimated at a total of 43.6, the lowest figure among the peer regions.

An interesting population measure is the dependency ratio which looks at the 0-14 and the 65+ age cohorts against the working age population. A low child dependency ratio indicates a low number of young people available for work in the near future.

For the 0-14 cohort the Madison Region registered a 27.1 percent ratio—good for now, but lowest of the peer regions and an indicative of a sagging birth total for the area and a potential shortage of entry level workers for the future.

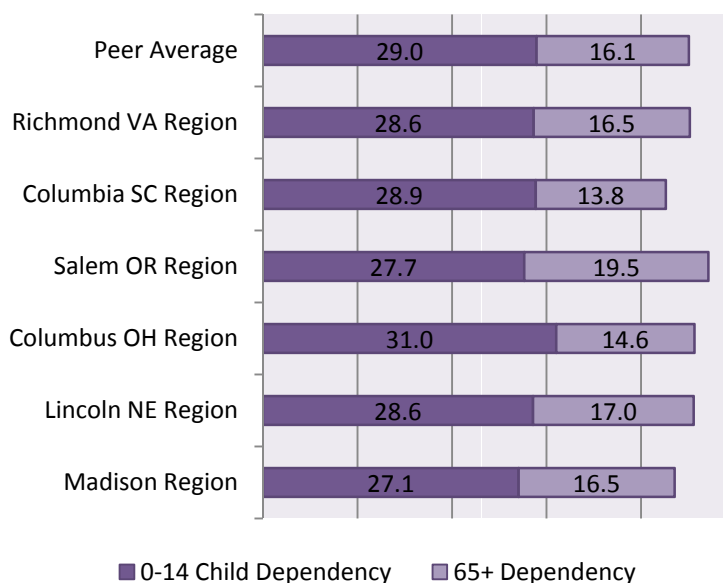
The average peer region dependency ratio for the 65+ population was 16.3 percent the Madison Region at 16.5 percent.

17. % Population Change - 2000 to 2007



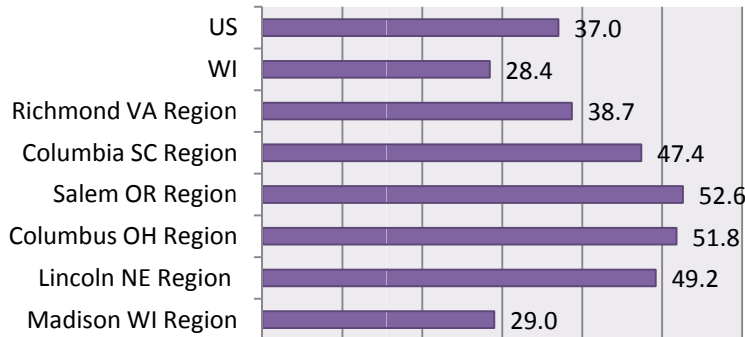
Source: US Census, Population Estimates, 2000 to 2007

18. Age Dependency Ratio - Ages 0-14 & 65+



Source: US Census, Population Estimates, 2006

19. Total Violent and Property Crime per 1000 Residents - 2005



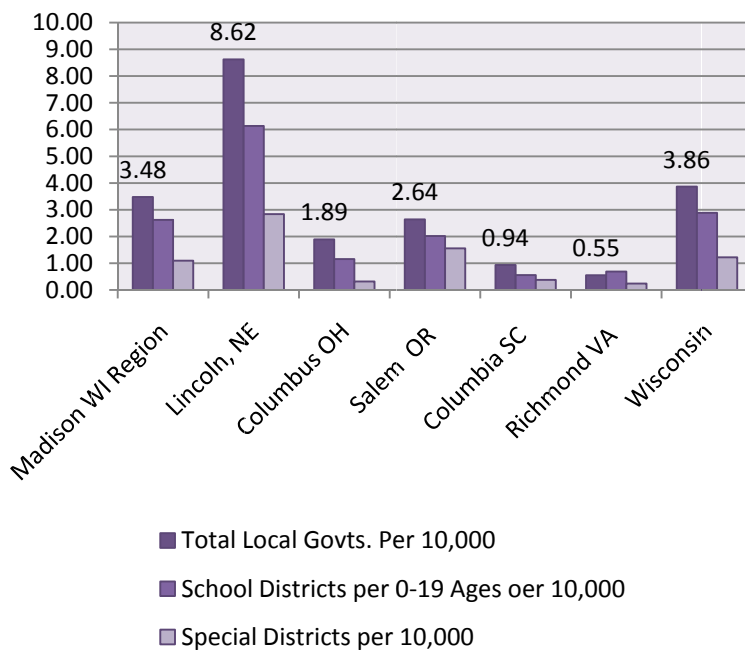
Source:

Our communities need to be safe places for both people and property and we need accessible and cost-effective local governments and schools.

↑ Lowest crime rate per capita

→ 2nd Highest number of total local government units

20. Local Governments per 10,000 - 2002



Source: US Census, Local Governments, 2002

Local governments per capita is an interesting measure of access and includes all cities, towns, villages, school districts, and special districts such as fire, sewer, and water.

The Madison Region's rank at 2nd reflects the long history of local government in Wisconsin and no doubt contributes to our quality of life.

The question can be asked whether the increased access comes at a price and as a result, whether we have seen recent efforts to share services and in some case consolidate where it makes sense for local governments.

How we get from one place to the other is more important than ever and will help define our region in the future.

While the Midwest may always be more of a car culture than more densely populated regions, we can celebrate our efforts to drive less and continue to look for ways to reduce our vehicle miles traveled (VMT).

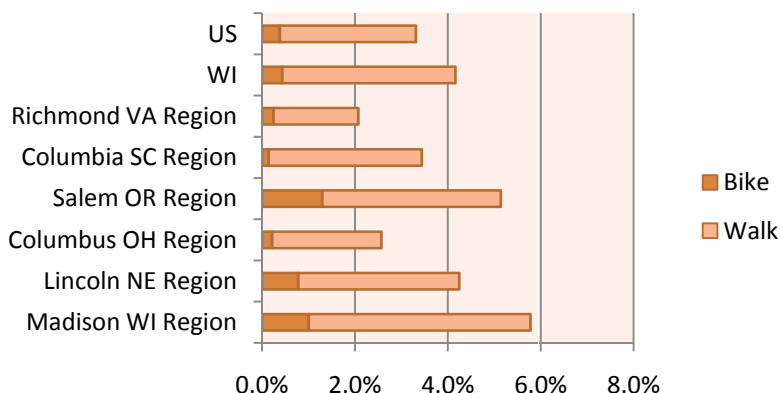
- ↑ Highest percent walking or biking to work
- ↑ 2nd lowest percent traveling 30 minutes or more to work
- ↑ Daily vehicle miles traveled has decreased slightly from 2000 to 2007

Most transportation data is found in the decennial census which is now eight years old and so is minimally useful to us. We look forward to the 2010 Census for new meaningful data.

Vehicle Miles Traveled (VMT) was not readily available for peer regions but is presented here for the Madison Region.

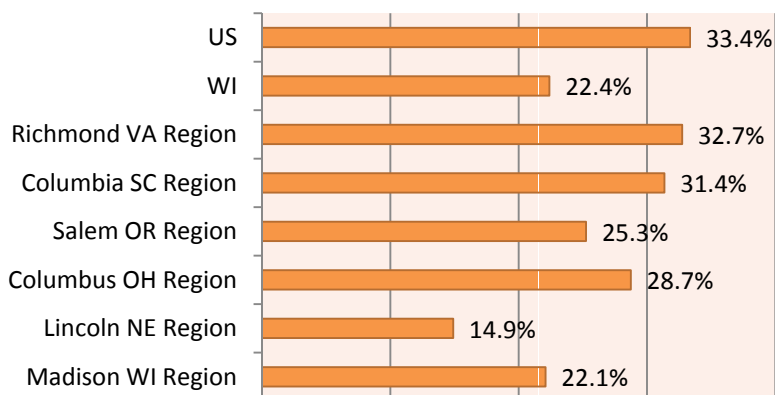
A positive trend is that the regional VMT is not increasing at the same pace as our population growth.

21. Population Bike/Walk to Work - 2000



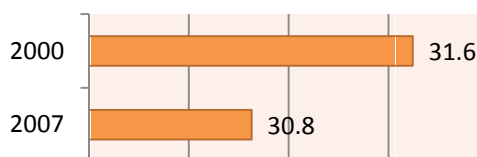
Source: US Census, Means of Transportation, 2000

22. Traveling Over 30 mins to Work - 2000



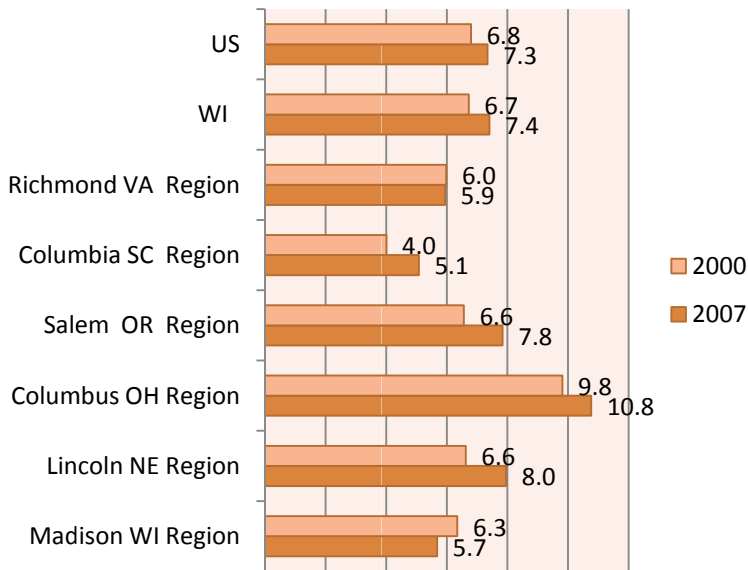
Source: US Census, Travel Time, 2000

23. Madison Region Daily Vehicle Miles Traveled per Capita -2000 and 2007



Source: Wisconsin Department of Transportation and US Census Population Estimates

24. Traffic Fatalities per 1000 - 2000 and 2007



Source: US Department of Transportation, Fatality Analysis Reporting System, 2000 and 2007

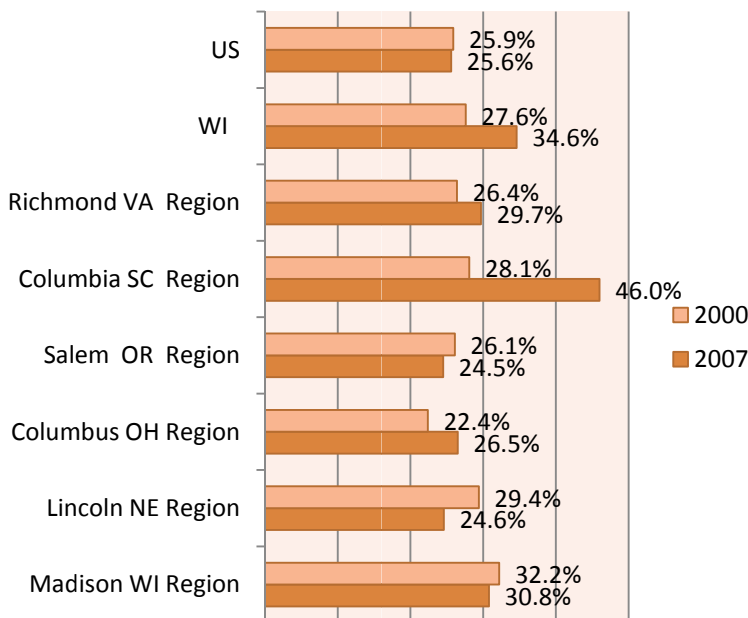
While we are on the move in our region, safety is a key indicator of quality of life.

A recent industry survey showed that 77 percent of accidents occur within 15 miles of home.

↑ 2nd lowest traffic fatalities per 1000 in 2007 though our population grew by 7.7% from 2000 to 2007

↓ 2nd highest percent of alcohol impaired drivers in fatal crashes among peers, slightly behind WI, and with slight reduction in 2007

25. Alcohol Impaired Drivers in Fatal Crashes - 2000 and 2007



Source: US Department of Transportation, Fatality Analysis Reporting System, 2000 and 2007

The majority of people in the Madison Region travel by car. While there is progress being made on more mass transit options, it is likely this will remain the major mode of transportation.

Safety on our roads is important, not only for drivers and passengers in cars but for cyclists and pedestrians as well.

Further research of these issues as well as tracking the potential increase in other transit options will be included in future reports.

A Healthy, Active Life

Health and activity go hand-in-hand and are important components of our regions' quality of life. We not only have access to top healthcare services, but can live an active life through indoor and outdoor activities in all four seasons.

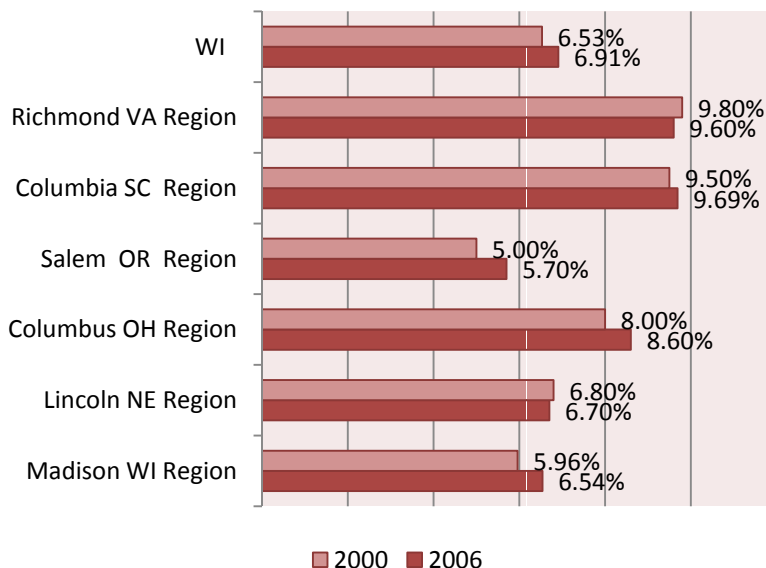
↑ 2nd lowest percent of low birth weight births for peer, WI and the US

→ 3rd highest health insurance coverage, down from 1st in 2000

The drop in health insurance coverage was universal in the US and is most likely due to a combination of factors that include: the decrease in jobs with employer-sponsored health insurance, the increase in low-wage and part-time jobs that often do not provide employer-sponsored insurance, a reduction in employers providing coverage due to the cost, and the increase in retirees who are now receiving Medicare.

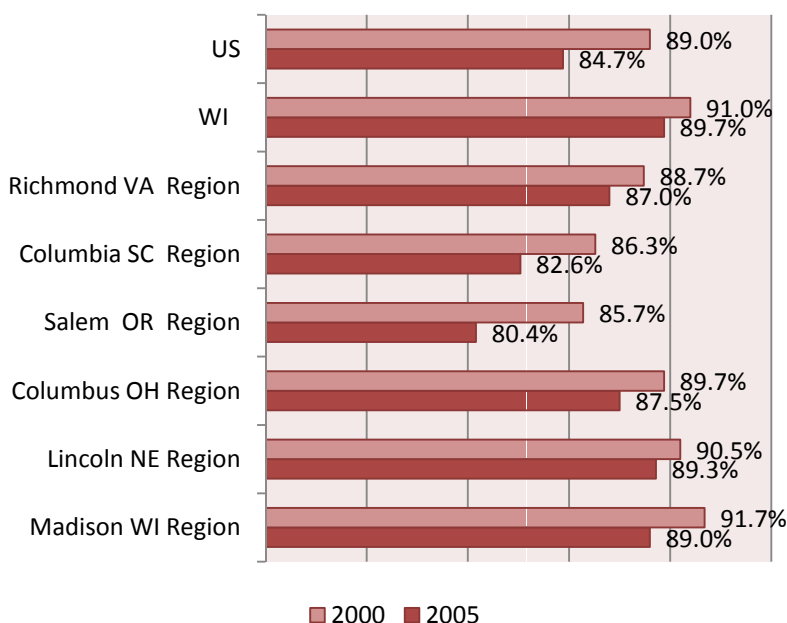
Regardless of the reasons, it is not the direction we want to be trending, as a region or as a nation.

26. Low Birth Weight Births of All Births for 2000 and 2006



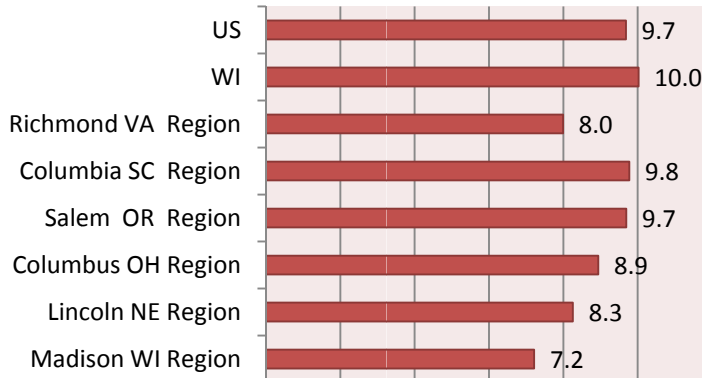
Source: Enrollment Data from Annie E. Casey Kids Count Community-Level Information on Kids or individual state departments

27. Health Insurance Coverage Change from 2000 to 2005



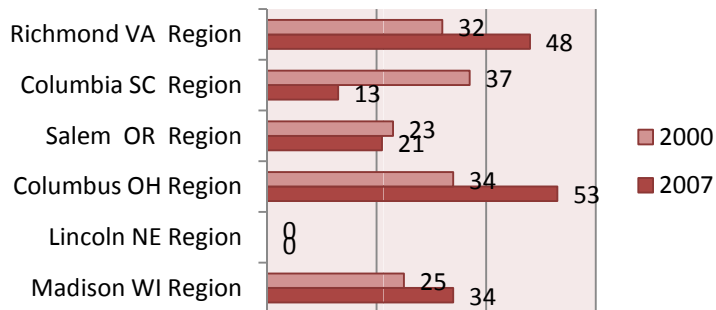
Source: US Census, Small Area Health Insurance Estimates, 2000 to 2005

28. Fitness/Sports Centers per 1000 - 2006



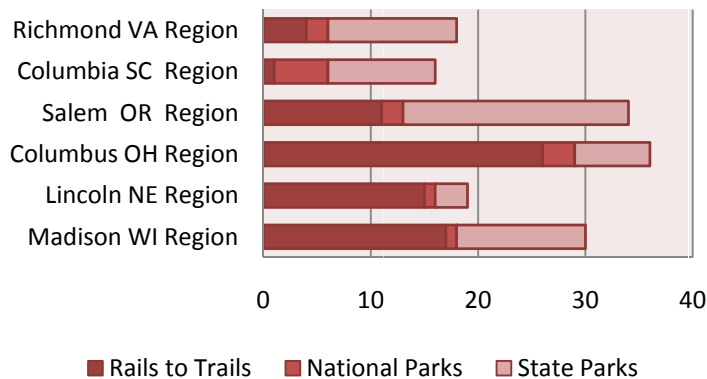
Source US Commerce, Bureau of Economic Analysis, 2006

29. Air Quality - # Unhealthy Days for Sensitive & All Groups - 2000 and 2007



Source: EPA Air Quality Index, 2000 and 2007

30. Special Outdoor Places



Source: National and State Park, and Rails to Trails websites

In addition to healthcare services, an active lifestyle enhances our overall health and quality of life.

The region abounds in natural resources and access to year-round indoor and outdoor activities.

→ Lowest number of fitness centers per capita, though this perhaps presents an entrepreneurial opportunity

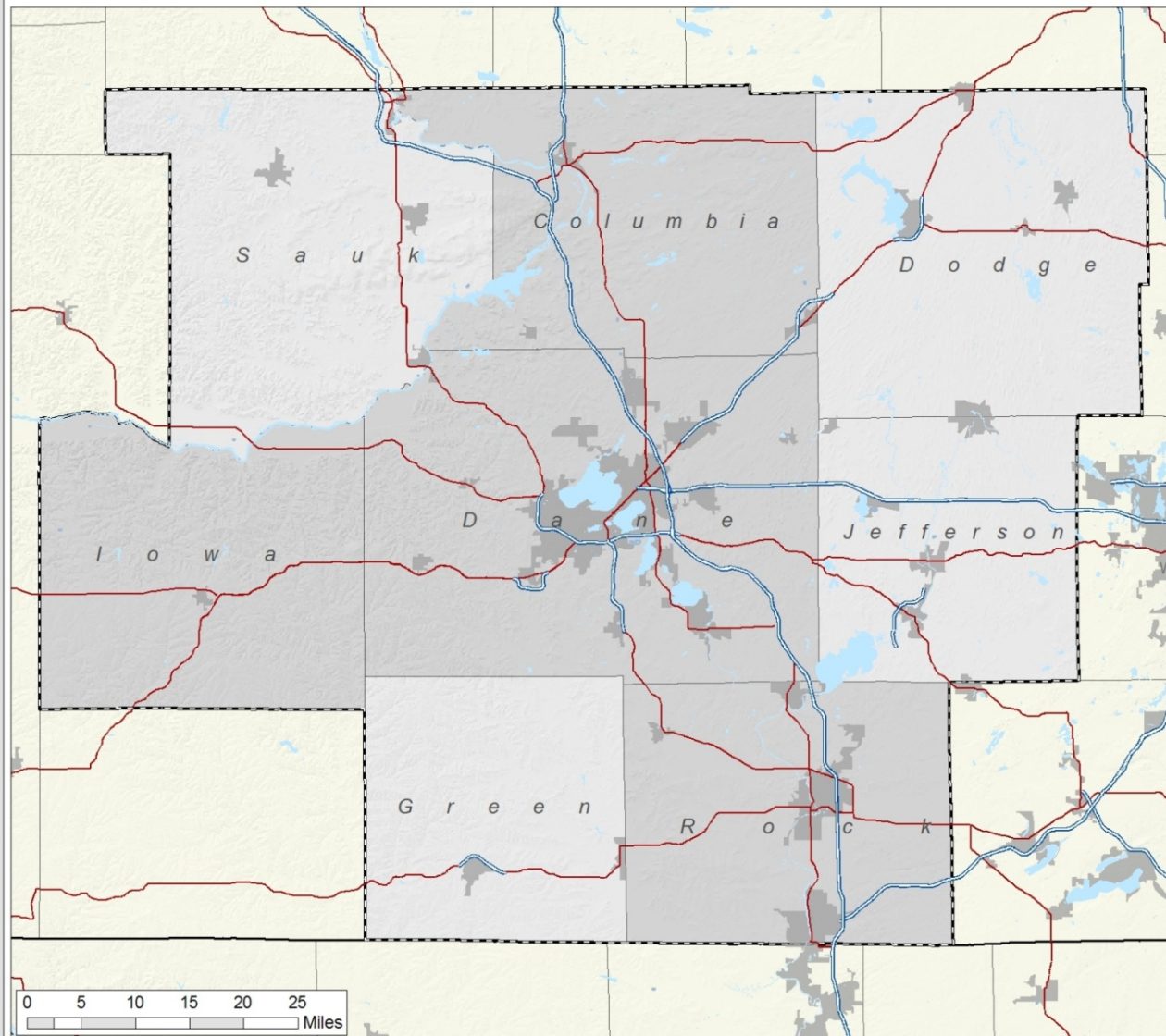
→ 3rd highest number and increase of unhealthy air quality days

↑ 3rd highest number of “special places” – trails, national and state parks within easy drive distance.

There are many ways to gauge our activity levels and options and we will continue to look for meaningful measures in this category.

Special outdoor places was chosen as a way to look at what is unique to the Madison Region but we will also work to catalogue additional spaces such as city and county parks in order to establish a park acres per capita picture of the region.

Madison Region



Madison Region

- County in a Metropolitan Area
- County in a Micropolitan Area
- Madison Region
- County Boundary
- State Border
- Urbanized Area
- Limited Access Highway
- Primary Highway

Metropolitan and Micropolitan Areas in the Madison Region (counties):

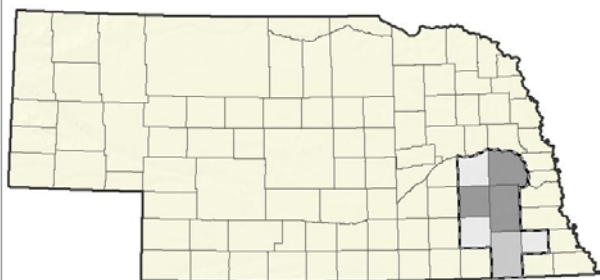
- Madison, WI Metropolitan Area (Dane, Rock and Iowa)
- Janesville, WI Metropolitan Area (Rock)
- Baraboo, WI Micropolitan Area (Sauk)
- Beaver Dam, WI Micropolitan Area (Dodge)
- Monroe, WI Micropolitan Area (Green)
- Watertown-Fort Atkinson, WI Micropolitan Area (Jefferson)

Area of Interest



Peer Regions

Lincoln, Nebraska Region



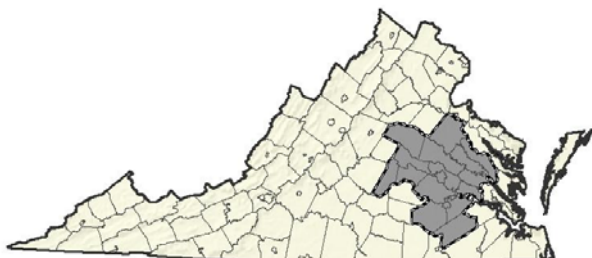
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Miles

Columbus, Ohio Region



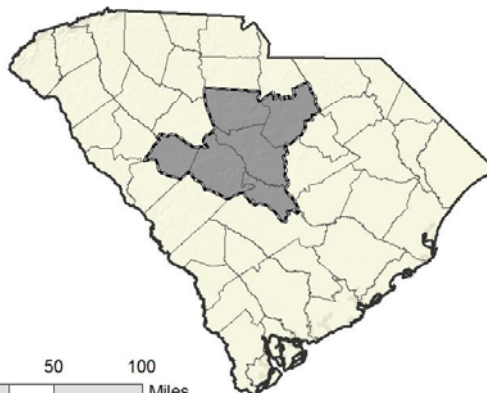
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Richmond, Virginia Region



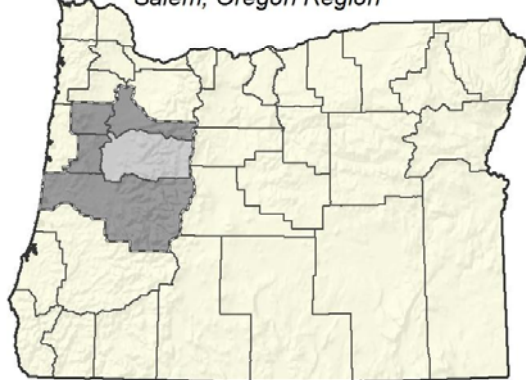
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Columbia, South Carolina

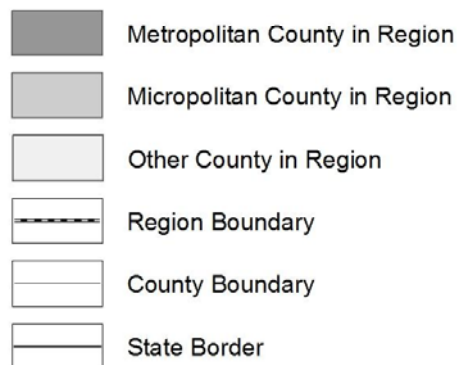


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Miles

Salem, Oregon Region



0 50 100
Miles



Additional Reports Planned for 2009

- *State of the Madison Region – **Monthly Insights*** focused on further exploring the individual metrics and what regional experts think they mean for the Madison Region
 - One of the early 2009 features will explore race and ethnicity in the region
- ***Sector Snapshots*** that will help us further understand the targeted sectors of Agriculture, Biotechnology and Healthcare and how they each compare against a unique set of peer regions
- Preliminary planning is underway for a mid-year ***Regional Innovations*** report that will explore how the Madison Region is doing on measures related to entrepreneurship, patents, research funding, etc.

Receive the monthly Thrive Newsletter to get the latest information about the above reports and other regional news.

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