Brillion

Business District

Community Market Analysis

October 2002

Prepared by the Brillion Market Analysis Committee:
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Prepared in cooperation with the University of Wisconsin – Extension
UWEX Calumet County
UWEX Center for Community Economic Development

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Contents

Glossary

A number of terms and acronyms are used in this Community Market Analysis report that may not be common jargon. While they are generally defined within the body of the report, they are also highlighted here.

Big Box Retailer – Any one of a growing number of large (regional or national) retail chain stores, including Home Depot, Super Wal-Mart, K-Mart, etc.

CACI ACORN – CACI is an international information technology products and services corporation which provides a number of services, including ACORN -- **A** classification **o**f **r**esidential **n**eighborhoods. The original name of the company was California Analysis Center, Inc. The company name was officially changed to CACI, Inc. in 1973. CACI's ACORN system enables marketing professionals to perform site selection, customer profiling, sales territory analysis, and more.

Clustering – A concept in which new stores are strategically placed, existing stores are moved to more desirable locations, and poorly performing stores are replaced. Due to differing building ownership, most downtowns, especially those in small communities cannot manage their businesses exactly in this manner. Nonetheless, downtowns can still implement clustering practices by working cooperatively with their business and building owners.

NAICS – the North American Industry Classification System, which provides a categorized three and five digit system of standardized store categories.

Niche - a specialization that allows a downtown to gain dominance in certain categories of the retail market. Niche strategies can help a downtown compete in the competitive retail environment. Market analysis recommendations should include possible niche opportunities based on the data collected and analyzed throughout this study.

Primary Trade Area - the geographic area that generates the majority of the customers for a community, business district or downtown. Knowing the boundaries of the trade area defines the number of potential customers that may patronize your community. Furthermore, knowing the trade area allows for demographic and lifestyle information to be gathered from a variety of public and private sources. This information provides insight into the people in the trade area and eventually will allow consumer demand for products and services to be calculated.

Section 1

Current Situation

This section summarizes issues facing Brillion's business district and the broader community, and also sets the stage for more detailed data analysis in subsequent sections of this report.

The City of Brillion and the Brillion Chamber of Commerce have a long history of working on community development studies, projects, and plans to promote and support Brillion's business district and the community. The following text briefly describes the activities that have taken place during the past 50 years.

Historical Perspective

1962 - In a Master Plan prepared for Brillion by Mead & Hunt, Inc., Madison, WI, the consultant noted the following findings regarding Brillion. *"In 1962 we find in Brillion economic activity that is preponderantly industrial manufacturing. The major firms though few in number create a substantial demand for employment. They have exhibited evidence of stability and growth for the past 30 years (1930-1960) Their prospects for the future in Brillion are favorable for they possess the factors necessary to growth; a good competent labor supply, proximity to the necessary raw materials, a competitively adequate location relative to markets, and expectation of continued product demand…"*

1979 – Brillion's Citizen Advisory Committee and the East Central Wisconsin Regional Planning Commission prepared the City of Brillion Community Development Plan. This document identified community development goals, objectives, and policies, described existing conditions, projected future growth and offered recommendations to guide future development. It recommended a growth policy that encouraged staged development in areas adjacent to and compatible with existing development, to avoid unnecessary expenditures for public utility extensions and prevent the wasteful use of land resources.

1992 - The Community Development Committee was formed in 1992 by the direction of Mayor Robert Mathiebe. Since then it has met monthly, discussing development initiatives and providing guidance to the Community Development Director. It is comprised of local business representatives from service to industrial. Meetings are open to the public. In 1993, the Committee determined its mission: *To serve at the pleasure and by appointment of the City Council to promote and preserve the Brillion Community.*

1995 – Two projects were undertaken in 1995. First, a Business Retention and Expansion Study was completed by the Calumet County Univ. of WI – Extension, which recommended, among other things, the development of a business recognition program, and increased involvement by government officials with the Brillion business community. The second project was a preliminary Comprehensive Plan for the city prepared by Mid-America Planning Services, Madison, which made a number of recommendations, including development of business assistance programs like a revolving loan fund, building façade improvements, and updating the existing zoning ordinance to maximize cohesive development.

1998 – The Brillion Strategic Community Development Project was prepared by Calumet County Univ. of WI – Extension to identify important community amenities and learn about community satisfaction. As a result of the project, the City developed a web page and quarterly newsletter, among other outcomes.

1999 – A Brillion Business Retention and Expansion Program was prepared by Calumet County Univ. of WI - Extension and the City of Brillion. This study identified needs and problems of local business owners and gathered information on plans for business expansion and relocation. The City subsequently was able to address every improvement need identified.

Current Situation

The City of Brillion and the Brillion Chamber of Commerce decided to embark upon a detailed Community Market Analysis. A market analysis is a comprehensive study that provides details about a business district's current condition, explores changes occurring in the marketplace, verifies consumer wants, needs, and spending habits from that district, discovers what the market will support, and provides the foundation for business development strategy creation. The Market Analysis Committee, composed of three city representatives and seven business representatives, defined Brillion's Business District as Brillion's Downtown commercial strip extending out to the city limits on the north side, and along the US Highway 10 corridor.

Questions a market analysis can answer include:

- What are the business expansion and recruitment opportunities?
- Who are Brillion's customers?
- Who is our competition?
- What niche could we develop for Brillion's Downtown Business District?
- How can we promote the ENTIRE Brillion Business District?
- What markets are underserved?

In addition to this Market Analysis, the City is also working to complete a Business Park Feasibility Study and a Smart Growth-Comprehensive Plan.

At the initial meeting of the Brillion Market Analysis Committee, the following issues of concern related to Brillion's downtown area were discussed.

- Downtown vacancies:
  - Hardees,
  - Richard's Building,
  - Spindler Furniture Store Building,
  - Bumper to Bumper Auto Parts,
  - Brick's Shoe Store (store front).

- Historic preservation: Brillion is at a crossroads. There is significant interest in preservation of historical buildings. ADA requirements may be a significant limiting cost factor in further utilization of downtown historic buildings.

- Façade improvements. Some buildings exteriors may not appeal to the average passerby, and may deter potential customers from frequenting neighboring businesses as well. Grant and low interest loan options were mentioned.

- The loss of commercial/retail/service dollars to other areas: new retail stores in the Darboy area are siphoning money away from Brillion trade area. Advantages that Brillion has to counter this trend are a strong local workforce and a focus on service by smaller, locally owned businesses.

- Commuter workforce: manufacturing executives and numerous employees from local firms commute to Brillion rather than reside in the city. As a result, retail/commercial/service spending from those people may likely occur outside of Brillion.

- Strength of the community's economy closely impacts residents' spending ability. With a downturn in the economy, many young families do not have as much discretionary income to spend on housing, retail, and/or services.

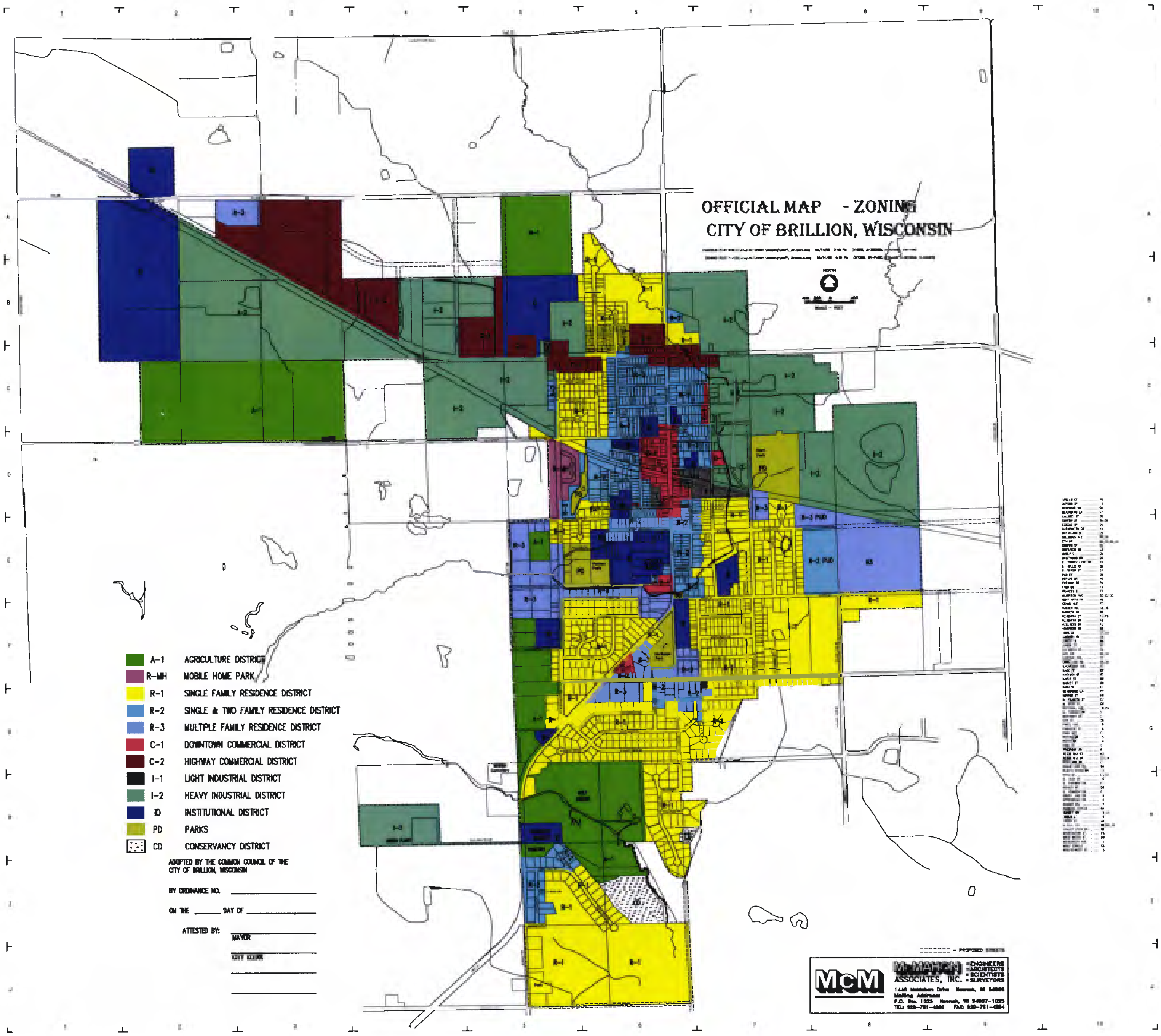
- Lack of ability to purchase certain goods and services in Brillion (for example, can't buy a pair of socks).

- Lack of a light manufacturing tax base. Strength of local industry has a direct impact on retail/commercial/service spending. Increasing light manufacturing/complementary industry in Brillion could improve the tax base for the city.

- Demonstrating the market potential as a catalyst for building rehabilitation (storefront improvements, etc.).

Brillion Business Districts and Business Inventory

The zoning map of Brillion on the following page illustrates the location of Brillion's downtown districts. In addition, several pages showing an inventory of Brillion businesses are included on subsequent pages.



OFFICIAL MAP - ZONING
CITY OF BRILLION, WISCONSIN
A-1 AGRICULTURE DISTRICT
R-MH MOBILE HOME PARK
R-1 SINGLE FAMILY RESIDENCE DISTRICT
R-2 SINGLE & TWO FAMILY RESIDENCE DISTRICT
R-3 MULTIPLE FAMILY RESIDENCE DISTRICT
C-1 DOWNTOWN COMMERCIAL DISTRICT
C-2 HIGHWAY COMMERCIAL DISTRICT
I-1 LIGHT INDUSTRIAL DISTRICT
I-2 HEAVY INDUSTRIAL DISTRICT
ID INSTITUTIONAL DISTRICT
PD PARKS
CD CONSERVANCY DISTRICT
ADOPTED BY THE COMMON COUNCIL OF THE CITY OF BRILLION, WISCONSIN
BY ORDINANCE NO. ______
ON THE ______ DAY OF ______
ATTESTED BY: ______ MAYOR
______ CITY CLERK
- PROPOSED STREETS
McM
ASSOCIATES, INC.
ENGINEERS
ARCHITECTS
SCIENTISTS
SURVEYORS

Brillion Market Analysis

Business Inventory

Ryan Street—North Side
628—820 W. Ryan Street

1 - V

H&R Block—Vacant by 2003
820 Main Street

2 - S

Best Wash—Service
810 W. Ryan Street

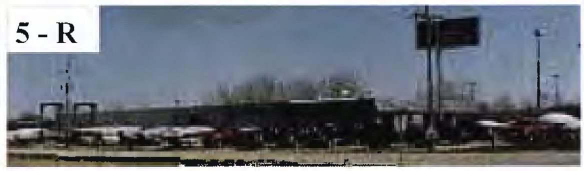
3 - S

Michiels Brillion Inn—Service
740 W. Ryan Street

4 - I

Endries International—Industry
714 W. Ryan Street

5 - R

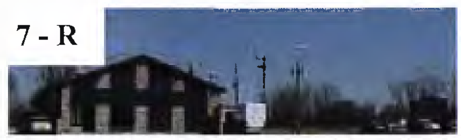


Horn Ford Mercury Marine—Retail
666 W. Ryan

6 - V

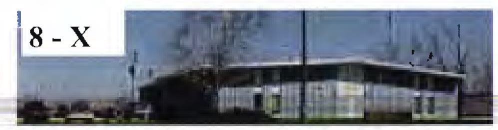
Hardees—Vacant
658 W. Ryan Street

7 - R

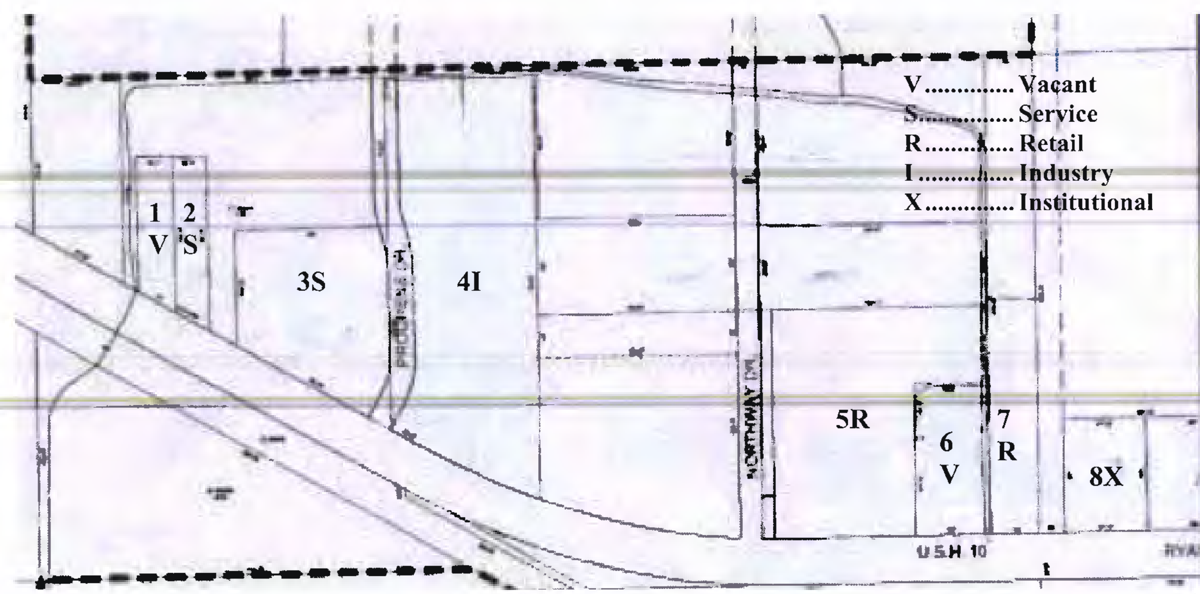


Roehrborns Meats—Retail
640 W. Ryan

8 - X



Brillion Vocational School—School
628 W. Ryan



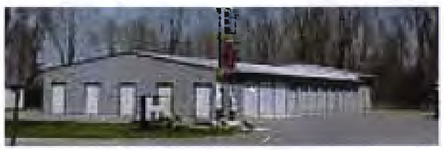
Brillion Market Analysis

Business Inventory

417 - 550 W. Ryan Street

1 S Sandman Motel—Service
550 W. Ryan Street

2 S Richard's Hairstylists—Service
516 W. Ryan Street



3 S Storage—Service

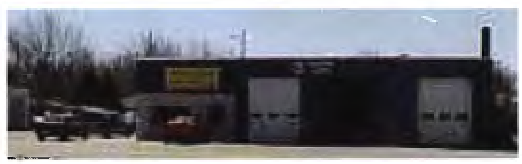
4 R S Brillion Mobil Mart—Retail, Service
452 W. Ryan Street

5 S I Primary Business Park—Service, Industry
420 W. Ryan Street

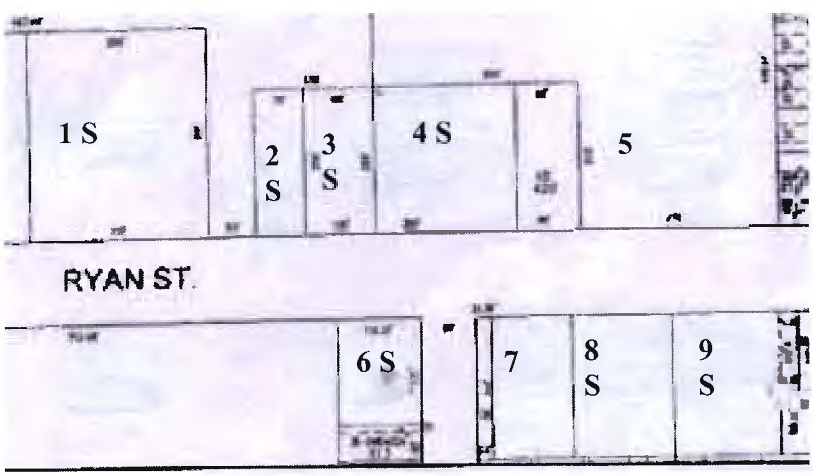
6 S Dairy Queen—Service
521 W. Ryan Street

7 WPS—Power Generator

8 S Zander Press Inc. - Service
425 W. Ryan Street



9 S Enneper's Garage and Body Shop
Service
417 W. Ryan Street



V .... Vacant
S............... Service
R .... Retail
I................ Industry
X .... Institutional

Brillion Market Analysis

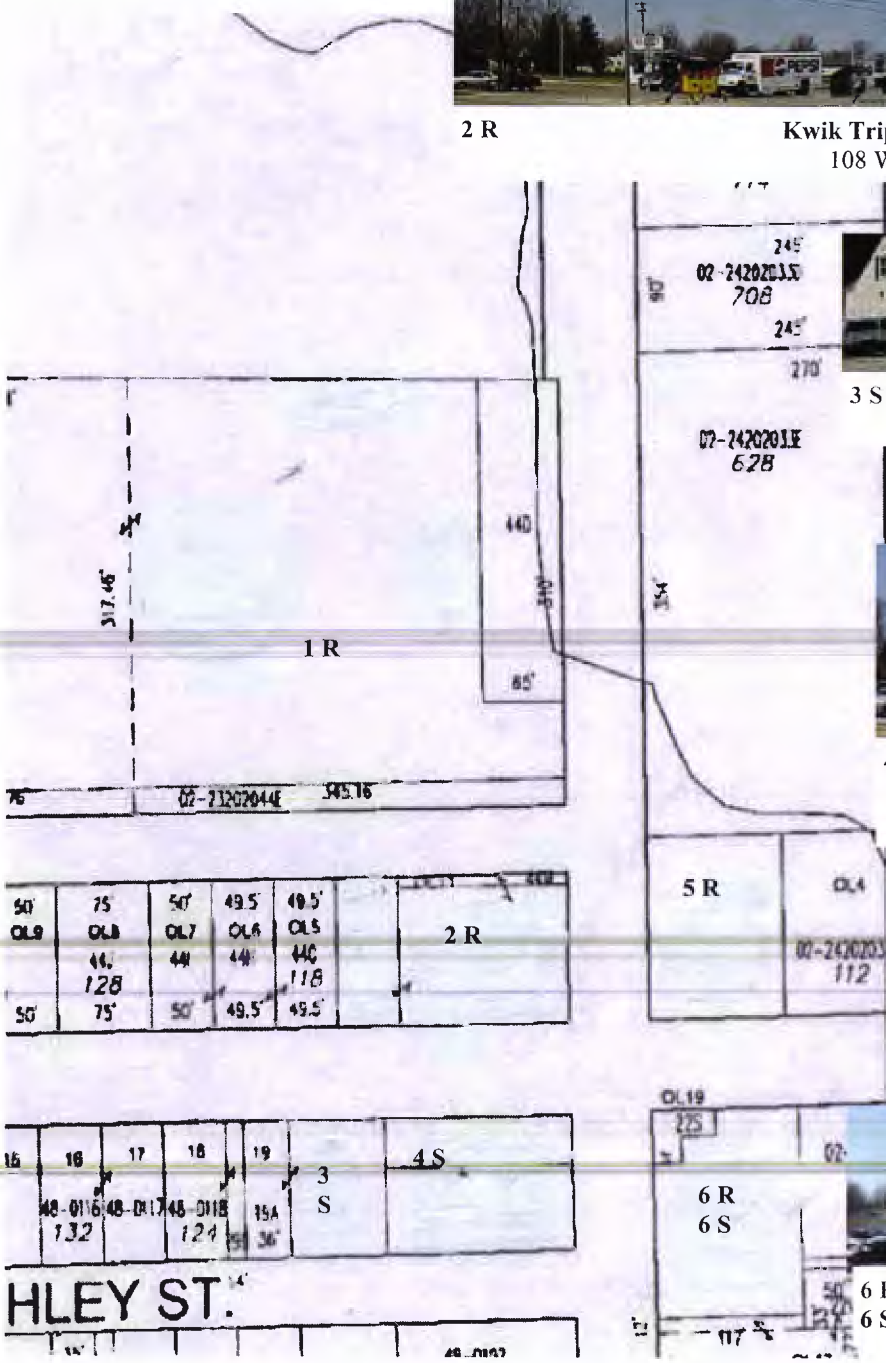
Business Inventory

PP and Ryan Street Intersection

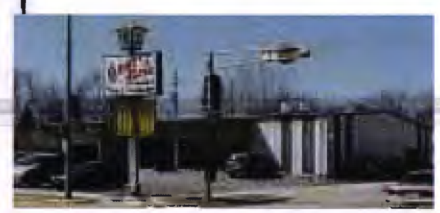
530 N. Ryan—707 N. Main Street

1 R Sentry Foods - Retail
707 N. Main Street

2 R **Kwik Trip - Retail, Service**
108 W. Ryan Street

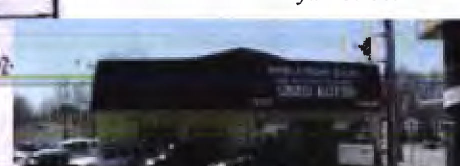


3 S Rudy's Diner - Service
116 W. Ryan Street



4 S Mom's Place - Service
Corner Laundromat - Service
527 N. Main Street

5 R BP/Amoco - Service/Retail
600 E. Ryan Street

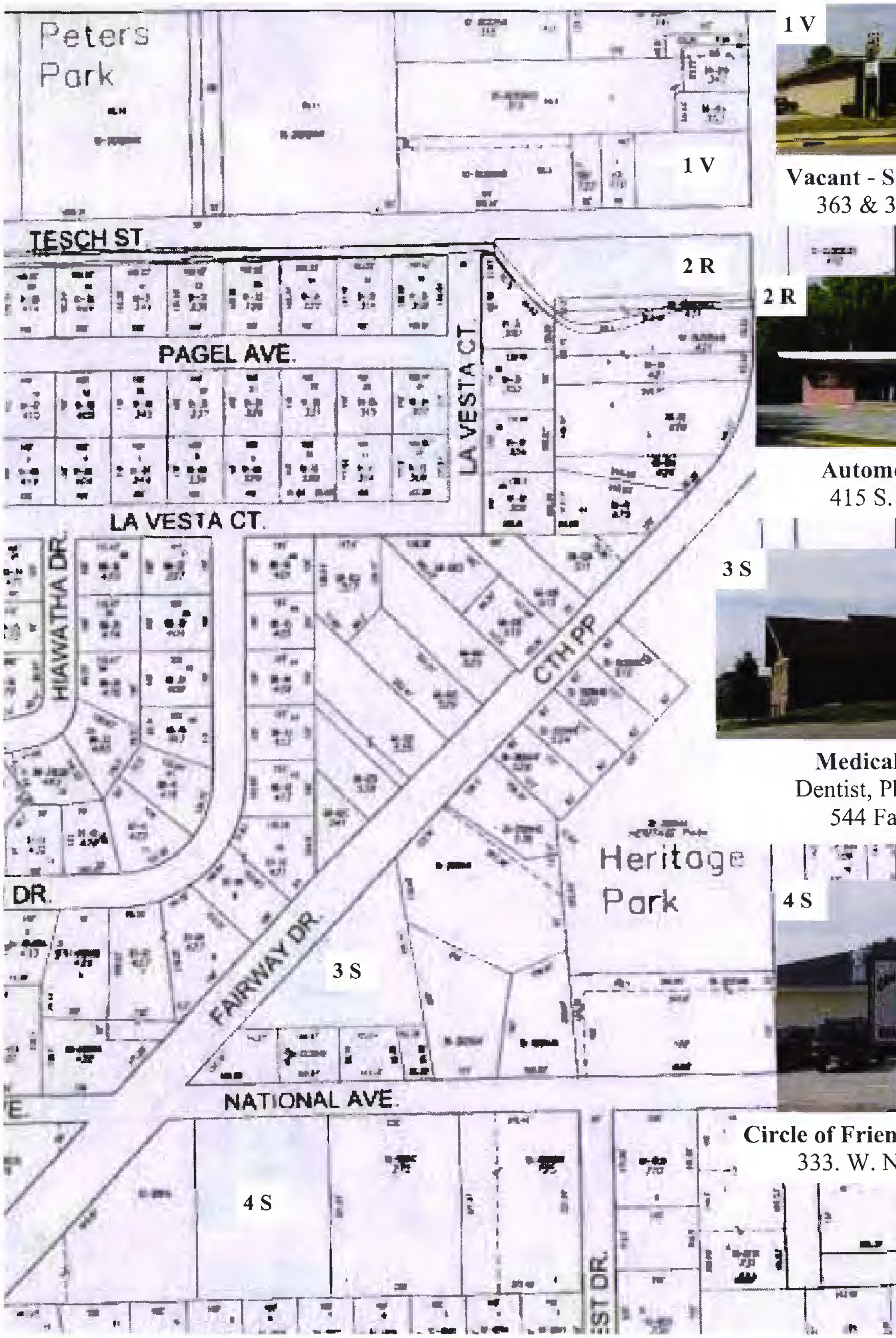


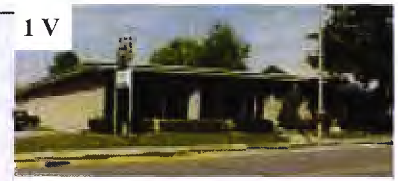
6 R Mobile Equipment Sales - Retail
6 S **Day Auto Repair - Service**
530 N. Ryan Street

Brillion Market Analysis

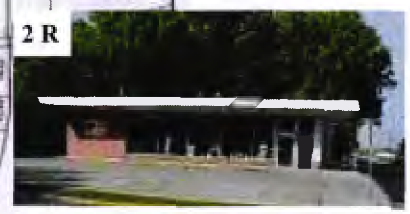
Business Inventory

363 S. Main - 333 W. National





Vacant - Spindler's Furniture
363 & 365 S. Main Street



Automotive Supply
415 S. Main Street

Medical Arts Center
Dentist, Physical Therapy
544 Fairway Drive

Circle of Friends Learning Center
333. W. National Avenue

National Trends

According to information provided at the 2002 National Town Meeting on Main Street, held in Fort Worth, Texas, there are several trends affecting retail shopping and Main Street/downtown, including communities like Brillion.

- Retailing is returning to downtown.
- Older shopping malls and strip centers are declining.
- Demand for main street housing and business sites is increasing especially in larger cities and suburban downtowns.
- The intensified focus on sprawl is positioning main streets as attractive, appealing alternatives.
- The internet is creating new opportunities for main street businesses. "Location-neutral" businesses are seeking out main streets.
- Shopping malls and power centers continue being developed when overall consumer spending is down and no increase in population and buying power.
- Consumer loyalty has disappeared as there are many retailing venues and information.
- Shoppers are spending less time in malls but many consumers use only the mall's destination businesses. 20 percent of malls today will be something different in twenty years.
- Super stores or category killers are generating one-third of sales today.
- Super store backlash: Are they convenient as they say?
- Convenience. Shoppers have less time to shop.
- Entertainment & entertainment districts. Shopping as live theater. Example: Nike Town, Discovery Channel Store.
- Urban, suburban, rural locations. More and more chain stores are considering downtown or neighborhood commercial district locations; for example: the Gap.
- Negative impacts, especially in suburban locations where brand name stores are forcing out mom and pop businesses.
- Rural population growth may spur new retail development.

Internet and E-Commerce will also have an affect on the Brillion business district. Consider the following:

- E-Commerce generated over $18.6 billion in total sales in 1999. By 2001, e-commerce sales will reach $65 billion.
- "Main Street" businesses are using the internet to sell more to current customers while providing them with better service.
- Internet has the potential to help downtown retailers generate more jobs, more business-to-business sales and higher occupancy both on first and upper stories.
- 74 percent of <u>1999 Trend Survey</u> respondents indicated that the number of downtown businesses going on-line had increased.

Section
2

Business Mix Comparison

This section analyzes the mix of retail and service businesses in Brillion and provides a comparison with fourteen other similar communities in Wisconsin, Indiana, Virginia, and Iowa. The analysis will be used later in this study in the analysis of business expansion and recruitment opportunities.

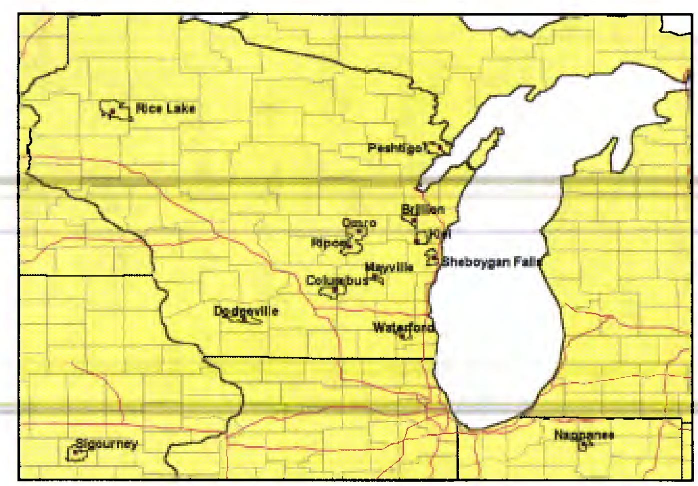
Examining the business mix of a downtown or business district provides a useful snapshot of the types and amounts of establishments located in the area. While the mix is useful on its own, comparing it to the business mix in other comparable communities provides a means of determining possible retail and service opportunities and answer questions such as:

- Does our downtown have fewer or more retail businesses than other similar communities?
- Is our community under-served or over-served in specific business categories?
- How does our retail/service mix compare to similar communities?

Answers to these types of questions are useful in identifying opportunities for future business expansion or recruitment.

Comparable Communities

For purposes of this analysis, Brillion, population 2,900, was compared with fourteen other communities that have a similar population (city/village of 3,000 to 8,000 people), similar distance from a metropolitan area (15 to 30 miles), and a manufacturing base. In each case but one, all the comparison communities are larger than Brillion. Communities selected in Wisconsin include Columbus, Dodgeville, Kiel, Mayville, Omro, Peshtigo, Rice Lake, Ripon, Sheboygan Falls, and Waterford. Franklin, VA; Nappanee, IN; and Sigourney, IA were also chosen for comparison. The following map illustrates the locations of these communities relative to Brillion (Franklin not shown).

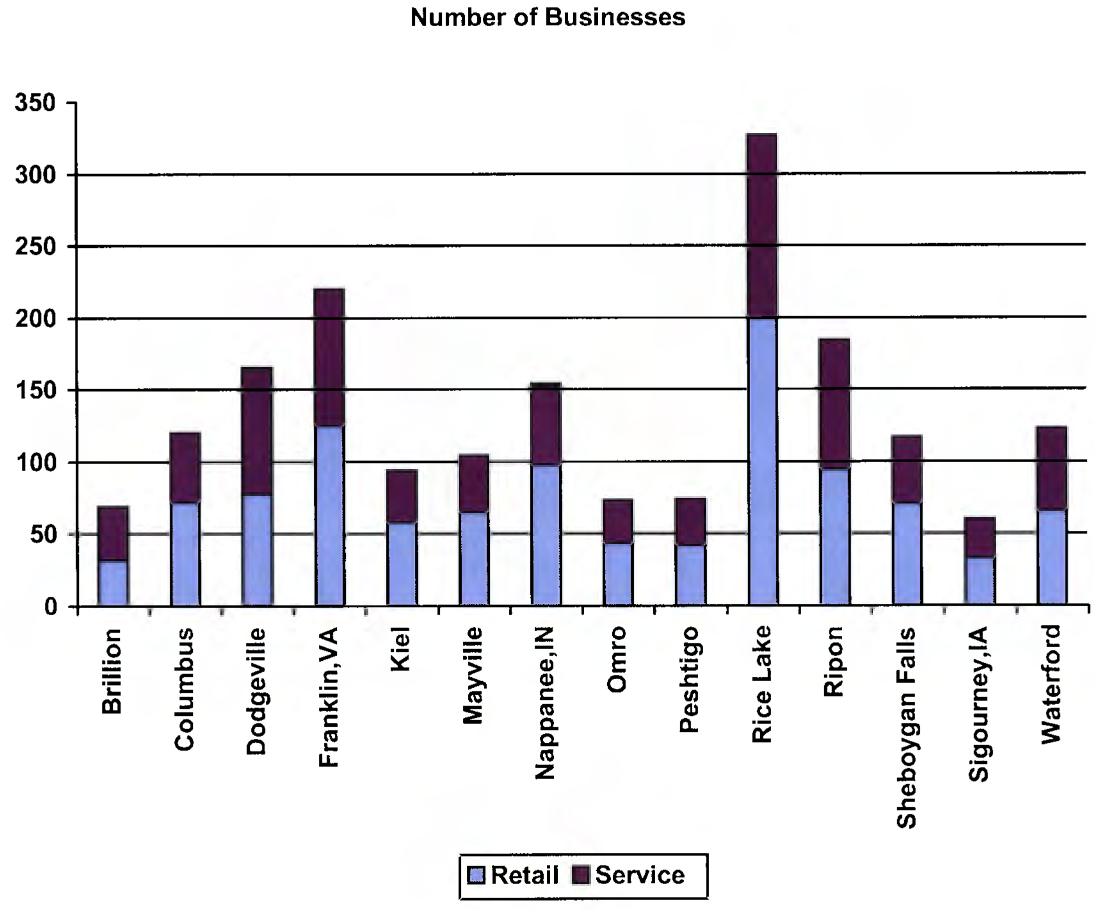


Data Collection

Data was collected on the types of businesses in each community through an American Business Information® database, according to the respective communities' zip codes. It is important to note that each business was placed into only one category. The category used was based on the primary type of goods or services provided by the business (SIC codes). For instance, a hardware store may sell some auto parts, but should be categorized as a hardware store if that is its primary line of business.

Data was collected for selected retail and service businesses that exist within the local zip code areas. Only those businesses selected from the American Business Information® database were included. Certain businesses, including home-based businesses, may not be included in the tallies. Businesses were selected to allow broad comparisons among Brillion and its comparison communities.

A total of 70 businesses were tallied in Brillion (33 retail/37 service) compared to an average of 146 in the comparison communities (80 retail/66 service). The comparison communities had significantly more businesses, as illustrated by the graphs below. Detailed data describing the mix of businesses in the comparison communities is presented in the table on page 2-3. A detailed listing of Brillion businesses follows on page 2-4.



Number of Businesses by Zip Code Area in Brillion and Comparison Communities	**Brillion (Pop. 2,900)**	Columbus (Pop. 4,500)	Dodgeville (Pop. 4,200)	Franklin,VA (Pop 8,300)	Kiel (Pop. 3,500)	Mayville (Pop. 4,900)	Nappanee,IN (Pop. 6,700)	Omro (Pop. 3,200)	Peshtigo (Pop. 3,400)	Rice Lake (Pop. 8,300)	Ripon (Pop. 6,800)	Sheboygan Falls (Pop. 6,800)	Sigourney,IA (Pop. 2,200)	Waterford (Pop. 4,000)
Retail Store Type														
Antiques/ Used Merchandise	**-**	7	2	7	2	4	10	1	1	9	3	-	-	5
Apparel	-	1	3	10	-	2	1	-	-	10	2	3	-	-
Auto Supply	**1**	3	2	7	1	5	3	2	-	8	4	2	3	1
Auto/ Truck	**2**	3	3	5	2	3	8	4	5	12	5	5	3	1
Boat/ RV/ Snowmobile	-	-	-	-	-	-	-	2	1	5	1	-	1	3
Book Stores	**-**	-	1	1	-	-	2	1	-	3	1	-	-	1
Building Materials	**1**	2	6	6	1	2	3	1	2	10	3	6	2	1
Department/ General Merchandise	**-**	-	2	3	1	1	3	-	1	9	2	1	1	-
Drinking Places	**4**	7	3	-	7	10	-	4	7	15	6	8	1	6
Drug	**1**	2	3	3	2	1	2	1	2	4	2	-	2	2
Eating Places	**6**	13	14	25	11	10	21	10	8	28	26	15	7	17
Flower	**1**	1	4	3	1	1	4	1	1	3	2	1	2	2
Food-Convenience	**1**	4	3	14	1	2	2	4	1	4	5	2	3	3
Food-Grocery	**2**	1	2	3	2	1	1	1	1	4	2	1	1	2
Food-Specialty	**2**	1	5	3	2	2	5	3	1	10	3	8	-	1
Furniture	**1**	2	1	2	2	3	6	-	2	8	1	4	-	2
Gas Stations	**3**	2	2	4	3	3	4	-	2	7	1	1	-	3
Gift	**-**	4	3	2	1	3	2	1	1	6	7	4	-	3
Hardware	**2**	1	1	2	1	1	2	-	-	1	1	1	2	1
Hobby/ Toy/ Game	**1**	2	-	-	-	1	-	-	-	2	-	-	-	3
Home Furnishings	**1**	3	2	-	3	3	2	-	2	5	3	1	1	1
Household Appliances	-	2	1	1	-	1	2	-	-	2	1	1	2	1
Jewelry	**-**	1	1	5	1	1	1	-	-	1	2	1	-	-
Lawn/ Garden	**1**	2	2	2	4	-	2	1	-	2	3	-	1	2
Liquor	**1**	1	1	1	1	2	2	-	-	4	1	2	-	2
Misc. Retail	**1**	3	4	5	4	2	2	4	-	10	3	3	1	2
Office Supply	**-**	1	-	1	-	-	1	-	-	1	-	-	-	-
Radio/ TV/ Computer/ Music	**1**	1	3	6	2	-	3	1	-	8	4	-	-	-
Sewing	**-**	-	-	-	1	-	1	1	-	2	-	-	-	1
Shoes	**-**	-	-	2	-	-	1	-	-	3	1	1	-	-
Sporting Goods/ Bicycles	**-**	2	4	2	2	1	2	1	4	4	-	-	-	-
Total Retail	**33**	**72**	**78**	**125**	**58**	**65**	**98**	**44**	**42**	**200**	**95**	**71**	**33**	**66**
Service Business Type														
Auto Repair	**5**	12	12	18	12	7	7	10	8	27	14	8	6	8
Banks/ Credit Unions	**3**	4	6	8	3	4	5	1	3	7	6	4	2	4
Beauty/ Barber Shops	**5**	8	13	21	4	8	11	6	7	22	11	11	6	10
Bowling Centers	**1**	1	1	1	1	2	1	1	1	1	1	1	1	1
Dance Studios/ Schools/ Halls	**-**	1	-	1	-	-	1	-	-	-	2	-	-	-
Health Clubs/ Fitness Centers	**2**	-	-	-	-	-	-	-	-	1	1	-	-	-
Insurance Agents/ Brokers	**8**	5	20	17	5	6	8	2	5	25	29	5	7	11
Laundry/ Dry Cleaners	**2**	-	1	3	2	1	2	1	1	3	3	2	1	1
Lodging Accommodations	**1**	4	7	4	-	3	8	2	1	11	4	1	2	2
Misc. Personal Services	**-**	2	-	2	1	2	1	1	1	2	3	2	-	2
Motion Picture Theatres	**-**	-	1	1	-	-	3	-	-	1	1	-	-	-
Museums/ Art Galleries		-	2	-	-	-	-	2	1	-	-	-	-	-
Photo Studios	**1**	2	3	1	2	-	1	-	-	3	2	1	-	1
Radio/ TV Repair	**-**	-	1	1	1	-	-	-	1	4	1	2	-	-
Real Estate Agents	**3**	3	14	6	5	2	3	1	2	7	6	4	1	8
Security/ Commodity Brokers	**1**	1	3	3	-	1	2	-	-	3	2	2	-	2
Shoe Repair	**-**	-	-	-	-	-	-	-	-	1	-	-	-	-
Tax Return	**3**	3	2	5	-	1	3	-	1	6	2	-	1	2
Travel Agencies	**1**	-	1	3	-	1	-	1	-	3	1	2	-	3
Video Tape Rental	**1**	2	-	-	-	1	-	1	-	-	-	1	-	2
Total Service	**37**	**48**	**87**	**95**	**36**	**39**	**56**	**29**	**32**	**127**	**89**	**46**	**27**	**57**

Listing of Brillion Businesses	# bus.	
Retail Store Type		**Stores Located in Brillion**
Antiques/ Used Merchandise	-	
Apparel	-	
Auto Supply	1	Automotive Supply
Auto/ Truck	2	Horn Ford, Mobile Equipment Sales
Boat/ RV/ Snowmobile	-	
Book Stores	-	
Building Materials	1	DJ Custom Windows
Department/ General Merchandise	-	
Drinking Places	4	Bullwinkles, Giese's, Shakers, KJ Inn
Drug	1	O'Connor's
Eating Places	6	Mom's, Randy's, Michiels, Dairy Queen, Rudy's, Subway
Flower	1	Schroth's Floral and Gifts
Food-Convenience	1	Kwik Trip
Food-Grocery	2	Sentry, T&C
Food-Specialty	2	Roehrborn's Meat Market, Brillion Bakery
Furniture	1	Mike's Custom Cabinetry
Gas Stations	3	Brillion Mobile Mart, Kwik Trip, Weber's Amoco
Gift	-	
Hardware	2	Brillion True Value, Henry Carsten's Ace
Hobby/ Toy/ Game	1	Sparkin' Chip Chop Shop
Home Furnishings	1	Furniture Plus
Household Appliances	-	
Jewelry	-	
Lawn/ Garden	1	Schroth's Garden Center Nursery
Liquor	1	Brillion Mobile Mart
Misc. Retail	1	Bullseye Screen Printing
Office Supply	-	
Radio/ TV/ Computer/ Music	1	NSC Inc.
Sewing	-	
Shoes	-	
Sporting Goods/ Bicycles	-	
Service Business Type		
Accountants	2	DiRenzo, Simonis & Miller; Endries, Otto and Calmes LLC
Attorneys	4	DiRenzo & Bomier; Keith Ondrasek, S.C.; Twohig Law Offices; William Hertel Law Office
Auto Repair		Enneper's, Day Auto Care, Progressive, Best Car Wash
Banks/ Credit Unions	3	First Northern, BACU, Calumet County Bank
Beauty/ Barber Shops	5	Richards, Main Street Styles, Shear Design, Pete's, Hot Heads
Bowling Centers	1	Juice's Bar and Bowl
Childcare	1	Circle of Friends Learning Center
Dance Studios/ Schools/ Halls	-	
Health Clubs/ Fitness Centers	2	Curves for Women, Self Image
Insurance Agents/ Brokers	8	Lutheran Brotherhood, State Farm, American Family, Hometown, Don Wittman, Allen Wittman, Key, Dietrich
Laundry/ Dry Cleaners	2	Corner Laundromat, Wascomat
Lodging Accommodations	1	Sandman
Misc. Personal Services	-	
Motion Picture Theatres	-	
Museums/ Art Galleries	-	
Photo Studios	1	Studio 205
Printing	1	Zander Press
Radio/ TV Repair	-	
Real Estate Agents	3	Jeanquart, Garrow, Levash
Security/ Commodity Brokers	1	Navigator Planning Group
Shoe Repair	-	
Tax Return	3	H&R Block; Endries, Otto & Calmes; Direnzo, Simonis & Miller
Title Services	1	Bay Title and Abstract
Travel Agencies	1	Total Travel
Video Tape Rental	1	Express Video

Case Studies Summary Report

The Brillion Market Analysis Committee researched and prepared case study summaries of a number of comparison communities. This was done to provide a sense of success in other communities.

- Conrad, Iowa:

Importance in revitalization efforts, new businesses opened, tax base increased 30%
Initiated a volunteer retention program, which includes both educating, and rewarding volunteers.
Downtown stakeholders are residents of the community
Main Street projects specifically aimed at families and children
"Whole Town" image emphasized in the business district

- Peabody, Kansas: Private investors spearheaded efforts

Strong emphasis on city's historical buildings and preservation of them: Fix-up program for upstairs windows
Planted trees
Transformed former maternity hospital into apartments, which now has a waiting list of renters
Active Chamber, get other community organizations involved in the process.
Professional market study done
Marketing town through press releases, TV, and flyers placed in tourist centers
Upper floors converted into apartments

- Corning, Iowa

Drive times to larger shopping centers similar to that in Brillion
Worked on industrial park first, efforts spread to retail establishments/downtown
Business visitation program to head off possible vacancies, business recruitment and retention program
Collaborative loan pool from local banks for improvements

- Sigourney, Iowa

Volunteer recruitment campaign
County cooperation, especially in the development of several local celebrations
Mixed-use zoning (apartments on upper floor)
Downtown group sponsored a scholarship program for high school volunteers
Provides business resources to the business district. Business committee conducts surveys, training seminars, and building inventories, and compiles a variety of resource materials

- Dodgeville, Wisconsin

Business development program
Business visitation program
Low interest loan program
Constant volunteer recruitment campaign to avoid burn-out
Historic walk guide

- Nappanee, Indiana

Low interest loan program
City purchased buildings, fixed up, and sold for a profit
Student and special needs student volunteers

- Sheboygan Falls, Wisconsin

Relied heavily on private investment to restore old buildings.
Restorations showed economic benefits through increased sales and exposure.
Low interest loan program
Business development, training and seminars
Promotional efforts, and niche marketing

Partnership with community organizations

- Lexington, Virginia

Business education seminars for merchants
Welcoming services to new visitors
24 festivals or promotions per year!

- Quincy, Florida

Merchants showed commitment to downtown effort by renovating their buildings
Student Advisory Committee from local high school conducted surveys and other projects
Self-promotion through festivals
Be sure you have willing participants before promoting their services
Understand the needs of the community
Mixed-use strategy and downtown sign ordinance.
Yearly planning strategy

- Rice Lake, Wisconsin

Devised an image building campaign that included advertisements in newspapers and on radio.
Low interest loan program for façade rehabilitations and matching sign grants sponsored by the Main Street organization.
Developed marketing niche for underserved segment of local market – home furnishings.
Events to promote the niche – annual spring home improvement event.
Challenges: funding, business recruitment, and maintenance of buildings

- Franklin, Virginia

Created special tax district for funding
Received financial support from the city – it is a city-sponsored organization
Provides special services to businesses:
Assists new businesses with grand openings and ribbon cuttings
Provides publicity for newsworthy business changes
Coordinates cooperative advertising campaigns
Low-interest loan programs and grant programs for interior and exterior improvements
Information and resources
Focuses on retention and expansion of existing businesses

- Beaufort, South Carolina

Provides services to businesses for an annual stipend
Design committee established
Downtown walking tour to help spur interest

- Pontiac, Illinois

Funding sources: City allotment, TIF, membership dues
City-funded 50% façade improvement grant
Volunteer recruitment efforts
Longevity of the program communicated to community
Incubator building: space for up to 27new specialty shops be nurtured into full business-hood. (Getting cottage/basement industry more visibility to increase their volume and profits, and fill up commercial district as well.)
Uptown business directory
Seasonal celebrations

- South Side, Pittsburgh, Pennsylvania

Providing technical assistance, funding, and access to foundations
Signage ordinance
City-funded façade improvement grant program
Low interest loan programs
Business plan review services

Main Street Group and Chamber joined to form a new organization called the South Side Business Alliance. No duplication and competition of efforts. One organization instead of two. Notes: without a strong residential neighborhood, the business district could only achieve limited success.

Common Themes:
Volunteer Retention and Recruitment Program
Preservation of historic buildings and streetscaping
Low-interest loan program
Mixed-use zoning – upper floor apartments
Design committees
Signage ordinances
Improvement grants City-funded all or in part
Promotions through events, historic walks, and business directories
Niche marketing
Business development/recruitment/retention/resource efforts
Involve citizens, schools, and other organizations

Common Challenges:
Recruiting and retaining volunteers
Business recruitment
Funding
Establishing the need for long-term commitment
Willing participants for promotions and merchant buy-in

Unique Perspectives and Initiatives:
Incubator building for new businesses
Welcoming services to new visitors
Special tax district for funding
Student advisory committee to conduct surveys and assist in other projects
Providing business support services with membership dues
Combining organizations to eliminate duplicated efforts
Main Street group is a city/government run organization, not grass roots

Food for Thought:
Avoid volunteer burnout
Understand the needs of the community
Yearly planning strategy
You don't have to give up just because Wal-Mart's coming.

Conclusion

As previously mentioned, the business mix comparison allows retail and service businesses to be compared among communities. The following conclusions can be drawn from this analysis:

Brillion has fewer retail businesses than all of the fourteen comparison communities.
Brillion also has fewer service businesses than most of the fourteen comparable communities, exceeding only Kiel, Omro, Peshtigo, and Sigourney, IA.
The retail-to-service ratio for Brillion's business community (33:37 or .89) is relatively lower than the average of the fourteen communities' retail-to-service ratio (80:66 or 1.22).
Retail categories under-served in Brillion that exist (or are more abundant) in the comparison communities include:
Antique stores
Specialty Foods (bakery, meat market, cheese shop, etc.)

Gift Shops
Eating Places (including fast food or family restaurants)
Auto/Truck Lots
Building Materials Stores (electric, lumber, glass, etc.)
Convenience Stores
Sporting Goods (wide range of small businesses from bike shops to fishing tackle)
Service categories under-served in Brillion that exist (or more abundant) in the comparison communities include:
Auto Repair
Beauty and Barber shops
Lodging Accommodations

These and other categories will be evaluated in more detail later in the report. Certain categories including physicians were not evaluated due to the complexity of their market analysis.

Section 3

Size and Shape of Trade Area

This section describes the size and shape of the trade area for Brillion businesses. It defines the boundaries that will serve as the basis for further analysis in this report.

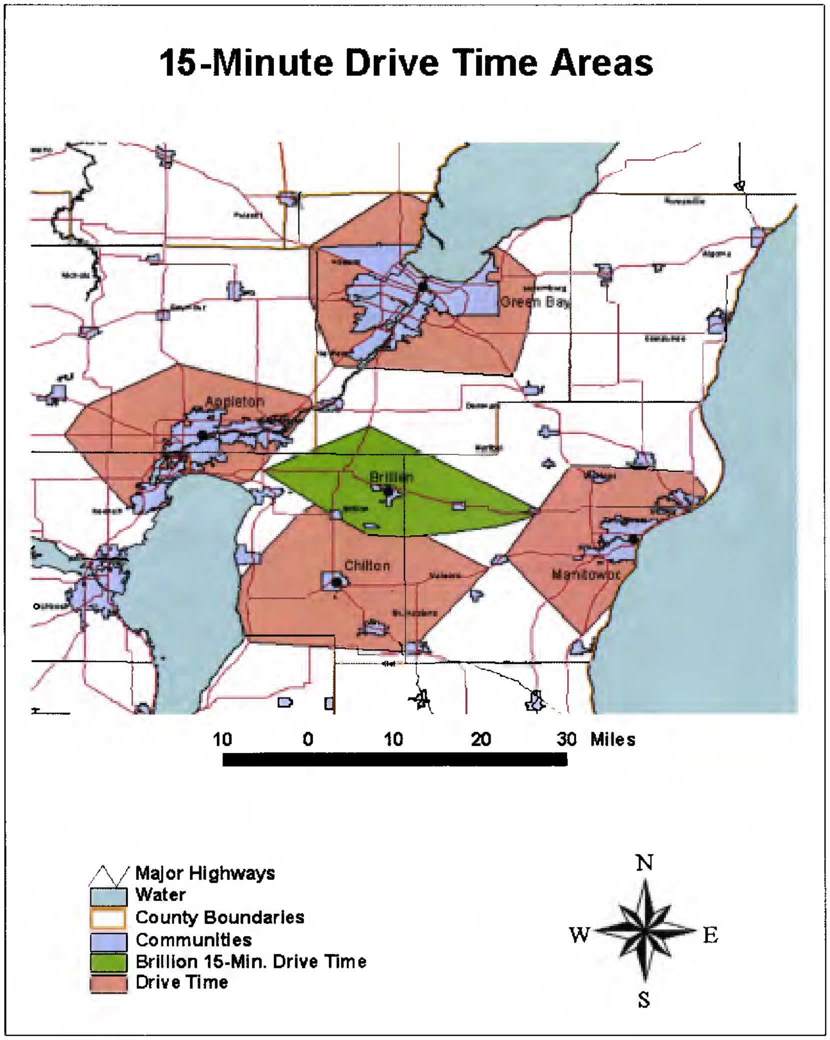
The Brillion trade area is the geographic area from which the majority of the retail and service business customers (and potential customers) reside. Different business types will have different trade areas. That is, some businesses will draw customers from a greater distance than others. Nevertheless, one geographic area needs to be defined that reflects the overall market area for the community (i.e. the primary trade area).

Local residents, who reside year-round, provide the majority of spending potential for most communities. For some convenience businesses, the primary trade area may represent 90% of the customers. For comparison shopping businesses, the primary trade area may represent less than 50% of the customers. For purposes of market analysis, an overall average of 75% of all customers is used to establish a community's primary trade area.

Commuter employees who work at local manufacturing businesses represent a sizable market segment for communities like Brillion. While many of these employees live outside of the primary trade area, they need to be recognized as an important market segment as they provide the potential to stay and make purchases.

Drive Time Analysis

In analyzing both the local resident and commuter employee market segments, an understanding of drive times around Brillion (and other regional commercial centers) is helpful. Drive time is simply the number of minutes it takes to drive to a point (in this case, downtown Brillion) based on the road network in the region. The following map illustrates a 15-minute drive time around Brillion, Appleton, Green Bay, Manitowoc and Chilton.



The map indicates that Brillion's 15-minute drive time area does not overlap that of surrounding cities (except for a portion of Chilton's 15-minute area). Brillion is separated far enough from the competing regional commercial centers for the purpose of convenience purchases. However, for purposes of comparison shopping, Brillion is 30 - 45 minutes from the surrounding major commercial centers.

Customer Origin

In this study, actual customer addresses were used to define the trade area of Brillion. Customer addresses were obtained from a variety of representative attractions and businesses including:

- Business 1 - Brillion Community Center
- Business 2 - Brillion Library
- Business 3 - Grocery Store
- Business 4 - Insurance Agency
- Business 5 - Grocery Store
- Business 6 - Bank

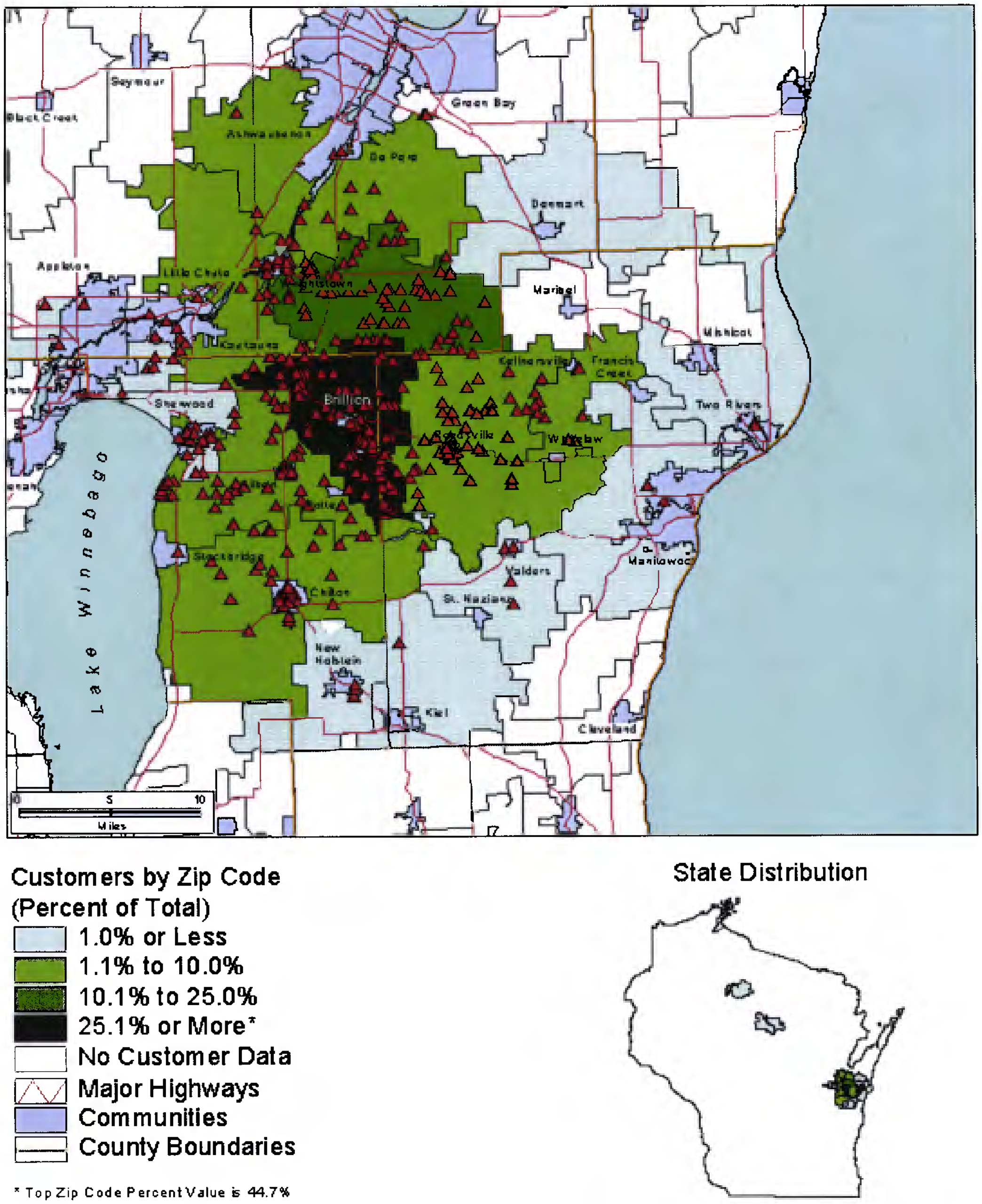
Actual customer addresses for each of these businesses were input and analyzed using Geographic Information Systems (GIS) software. Other people who do business in Brillion -- people visiting friends/relatives; traveling businessmen/women; tourists and some distant employees represent other important consumer markets that may not be not shown on these maps.

This method provides an estimate of the "community" trade area. We must recognize that each business has a unique trade area. Also, there are goods and services that will attract customers from larger or smaller trade areas. Often, people residing in the trade area purchase certain goods and services outside the area. Similarly, there are outsiders who purchase goods and services in Brillion. However, this method does have distinct advantages as it is based on actual customer data.

A summary of the results is presented on the following representative maps and tables. The triangles on some of the maps represent points where customers for each sample business reside (in some neighborhoods where there are many customers, the triangles may be stacked on top of each other, making it difficult to see the significance of that neighborhood).

The maps and tables demonstrate that the 54110 (Brillion), 54126 (Greenleaf), 54230 (Reedsville) and 54129 (Hilbert) comprise approximately 75% or more of the customers for each of the six sites analyzed.

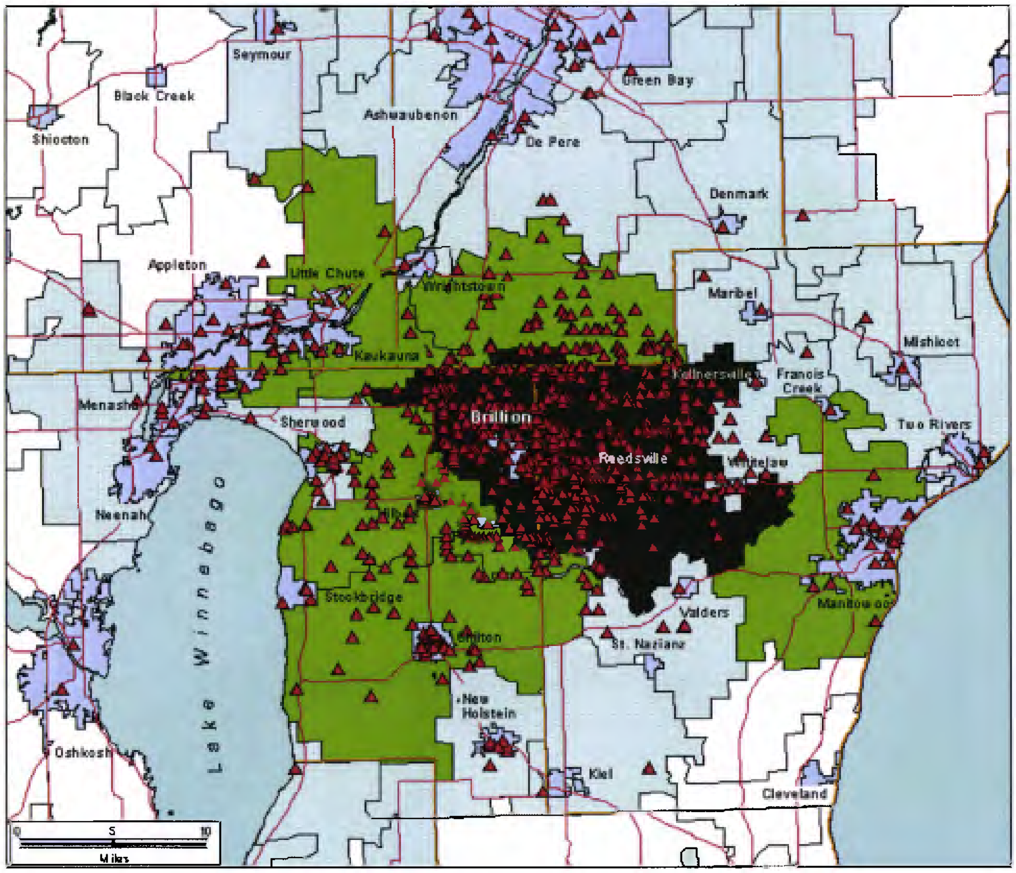
Business #1 Customers by Zip Code



Business #1 Customers

Zip Code	Community	Customer Count	Customer Percent
54110	Brillion	384	44.7%
54126	Greenleaf	100	11.6%
54230	Reedsville	81	9.4%
54129	Hilbert	72	8.4%
	Subtotal	**637**	**74.1%**
53014	Chilton	51	5.9%
54180	Wrightstown	30	3.5%
54130	Kaukauna	25	2.9%
54115	De Pere	23	2.7%
	Subtotal	**766**	**89.1%**

Business #2 Customers by Zip Code



Customers by Zip Code
(Percent of Total)

- 1.0% or Less
- 1.1% to 10.0%
- 10.1% to 25.0%
- 25.1% or More*
- No Customer Data
- Major Highways
- Communities
- County Boundaries

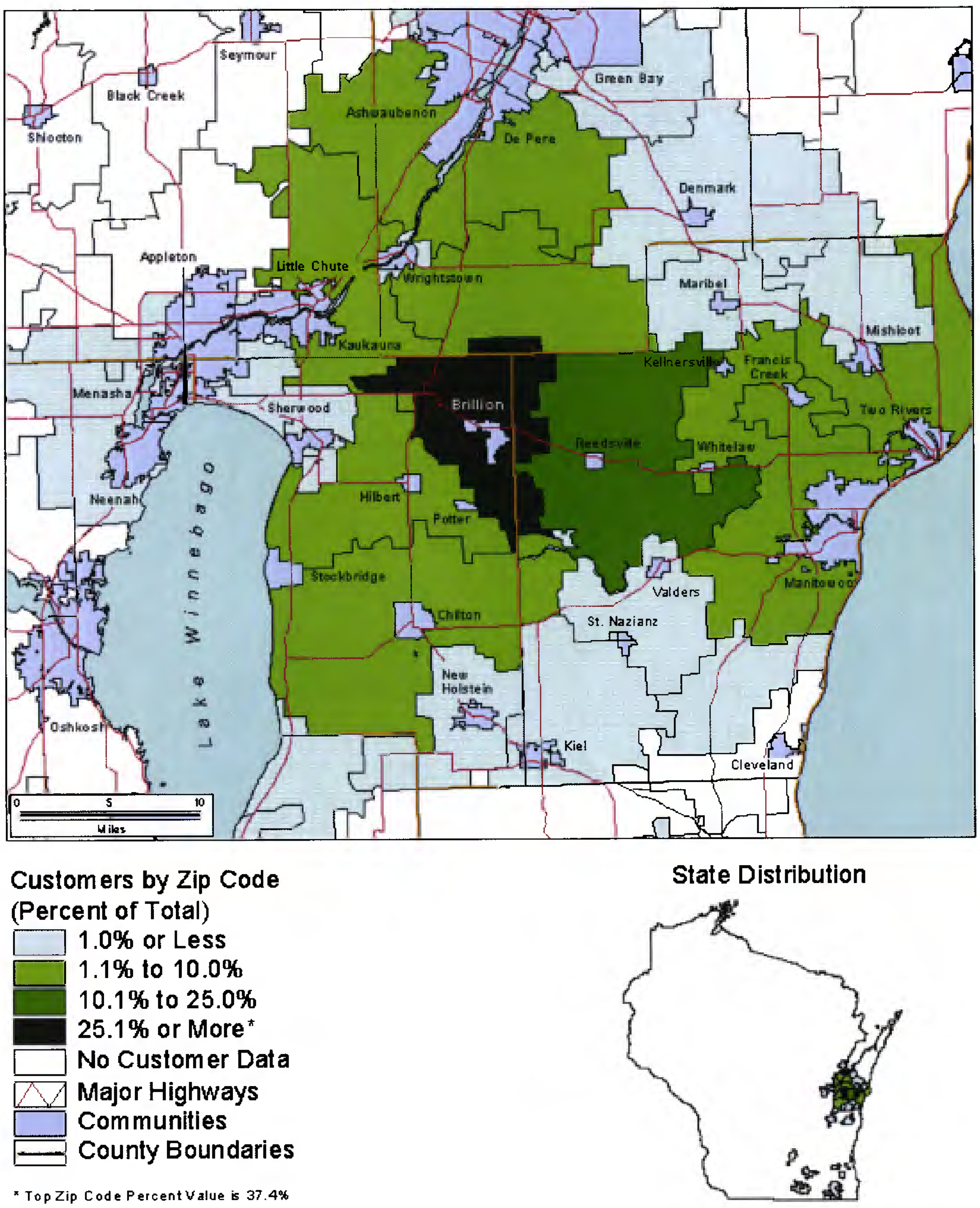
* Top Zip Code Percent Value is 31.9%

State Distribution

Business #2 Customers

Zip Code	Community	Customer Count	Customer Percent
54110	Brillion	560	31.9%
54230	Reedsville	464	26.4%
54129	Hilbert	170	9.7%
54126	Greenleaf	96	5.5%
	Subtotal	**1,290**	**73.5%**
53014	Chilton	78	4.4%
54123	Forest Junction	77	4.4%
54160	Potter	52	3.0%
54206	Cato	29	1.7%
54130	Kaukauna	24	1.4%
54169	Sherwood	20	1.1%
54220	Manitowoc	20	1.1%
54915	Appleton	20	1.1%
	Subtotal	**1,610**	**91.7%**

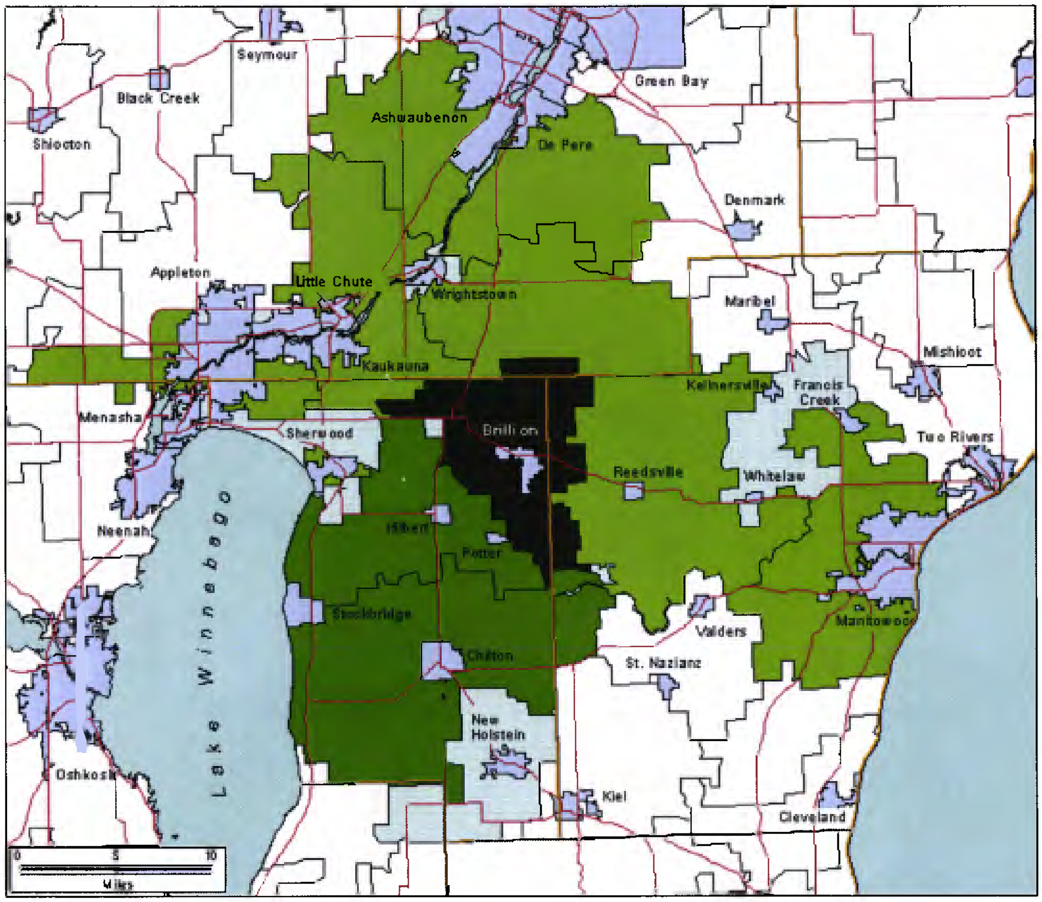
Business #3 Customers by Zip Code



Business #3 Customers

Zip Code	Community	Customer Count	Customer Percent
54110	Brillion	1,481	37.4%
54230	Reedsville	736	18.6%
54126	Greenleaf	347	8.8%
54129	Hilbert	241	6.1%
	Subtotal	**2,805**	**70.9%**
54220	Manitowoc	148	3.7%
54247	Whitelaw	101	2.5%
53014	Chilton	99	2.5%
54241	Two Rivers	95	2.4%
54123	Forest Junction	92	2.3%
54206	Cato	70	1.8%
54130	Kaukauna	61	1.5%
54160	Potter	51	1.3%
54115	De Pere	45	1.1%
	Subtotal	**3,567**	**90.0%**

Business #4 Customers by Zip Code



Customers by Zip Code
(Percent of Total)

- 1.0% or Less
- 1.1% to 10.0%
- 10.1% to 25.0%
- 25.1% or More*
- No Customer Data
- Major Highways
- Communities
- County Boundaries

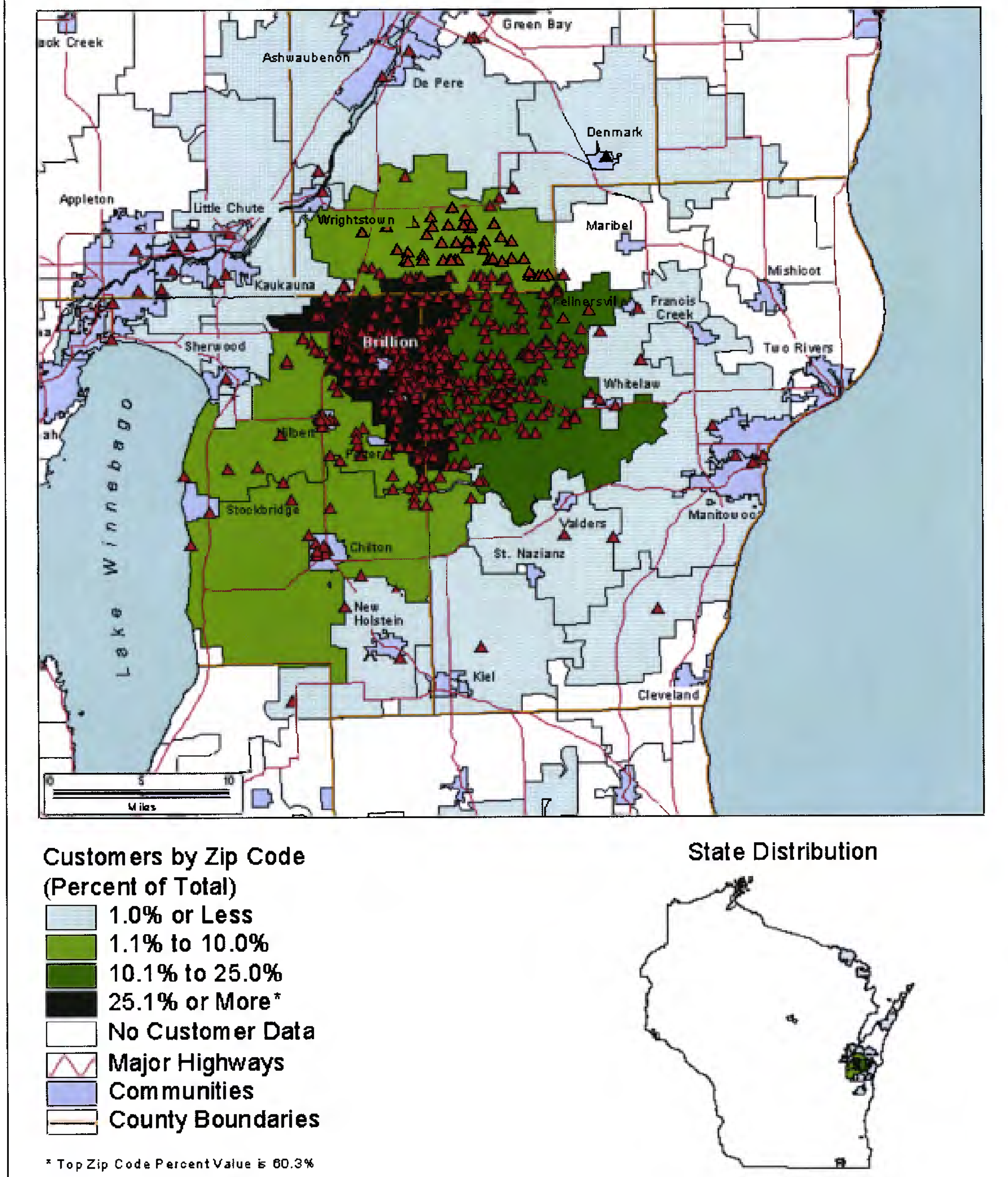
* Top Zip Code Percent Value is 44.1%

State Distribution

Business #4 Customers

Zip Code	Community	Customer Count	Customer Percent
54110	Brillion	400	44.1%
53014	Chilton	116	12.8%
54129	Hilbert	106	11.7%
	Subtotal	**622**	**68.6%**
54230	Reedsville	77	8.5%
54126	Greenleaf	48	5.3%
54115	De Pere	20	2.2%
54160	Potter	20	2.2%
54130	Kaukauna	18	2.0%
54169	Sherwood	16	1.8%
	Subtotal	**821**	**90.6%**

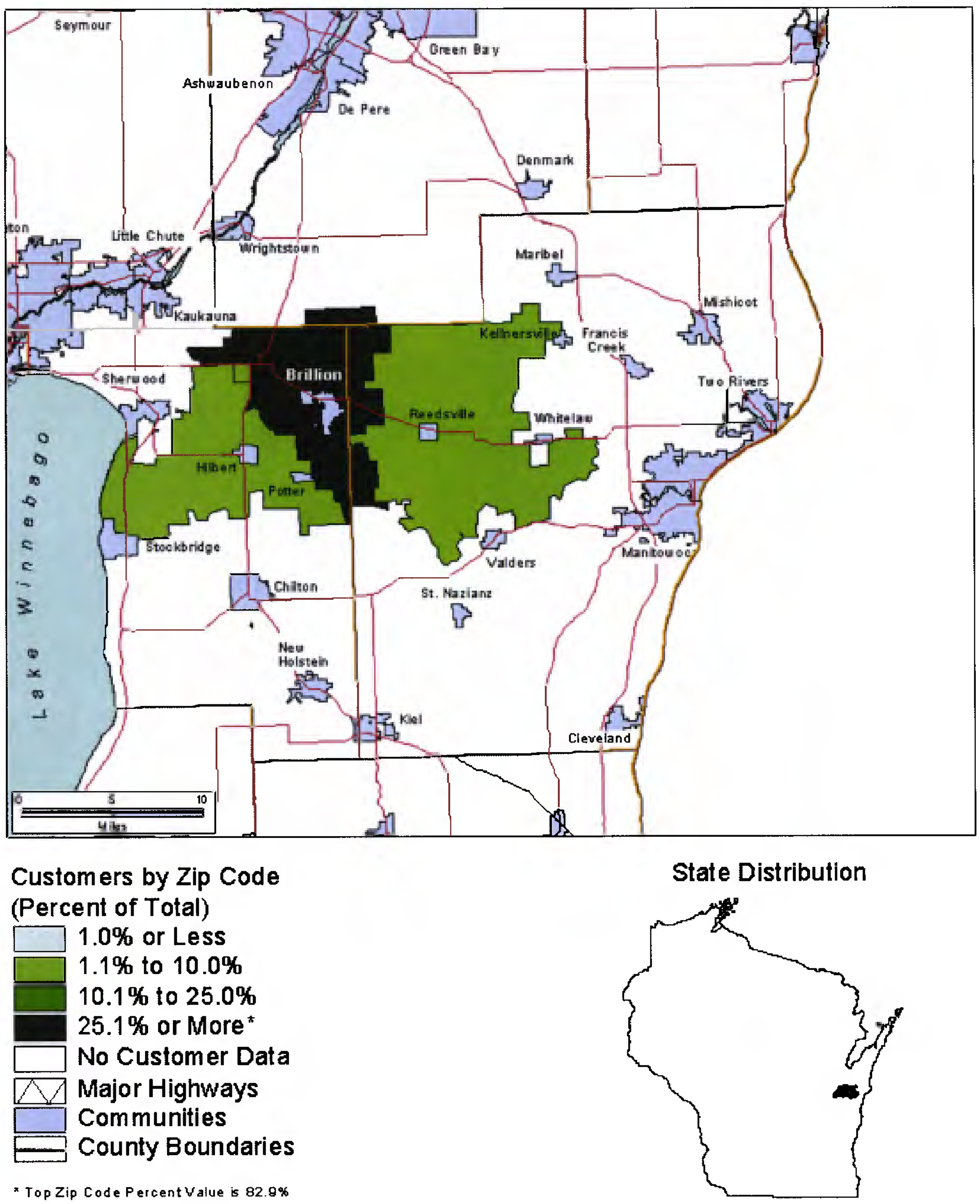
Business #5 Customers by Zip Code



Business #5 Customers

Zip Code	Community	Customer Count	Customer Percent
54110	Brillion	965	60.3%
54230	Reedsville	306	19.1%
	Subtotal	**1,271**	**79.4%**
54126	Greenleaf	94	5.9%
54129	Hilbert	64	4.0%
54160	Potter	43	2.7%
	Subtotal	**1,472**	**92.0%**

Business #6 Customers by Zip Code



Business #6 Customers

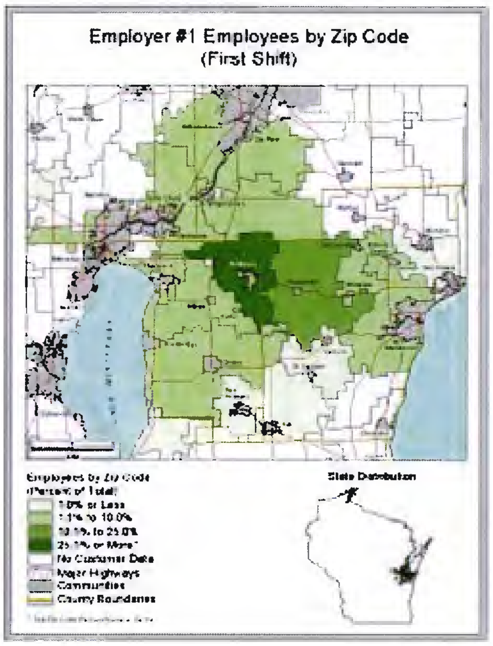
Zip Code	Community	Customer Count	Customer Percent
54110	Brillion	3,856	82.9%
	Subtotal	**3,856**	**82.9%**
54230	Reedsville	450	9.7%
	Subtotal	**4,306**	**92.5%**
54129	Hilbert	208	4.5%
54160	Potter	90	1.9%
54123	Forest Junction	50	1.1%
	Total	**4,654**	**100.0%**

Commuter Employee Market

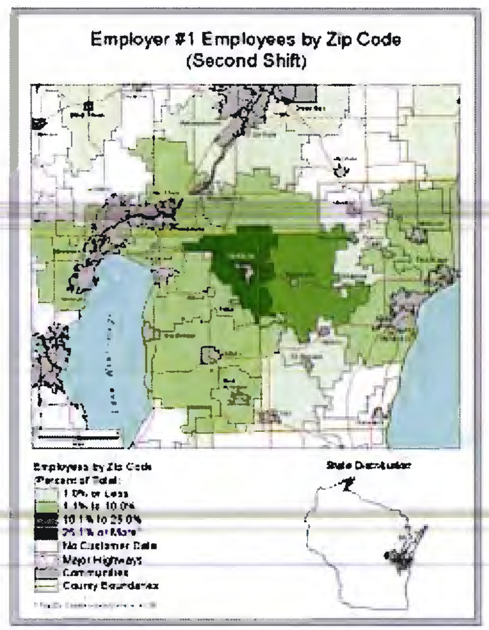
In this study, employees who commute to two of Brillion's major employers were also considered in defining the trade area. Employee addresses were obtained from two employers, Brillion Iron Works and Ariens.

Communities of origin for the employees of each of these businesses were input and analyzed using Geographic Information Systems software. A summary of the results is presented on the following representative maps and tables.

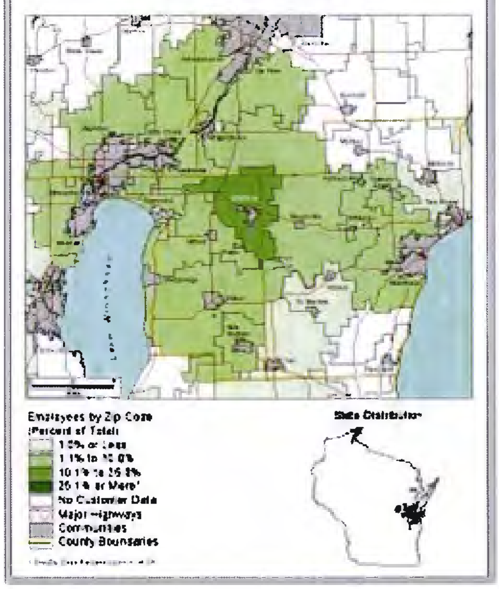
Ariens Employee Communities of Origin



Ariens First Shift Employee Residence, in %		
Zip Code	Community	Employee %
54110	Brillion	34.1%
54230	Reedsville	13.4%
53014	Chilton	8.8%
54126	Greenleaf	7.3%
54129	Hilbert	5.9%
54130	Kaukauna	5.2%
54220	Manitowoc	2.9%
54160	Potter	2.5%
54911	Appleton	2.3%
54115	De Pere	2.0%
	Subtotal	**84.6%**

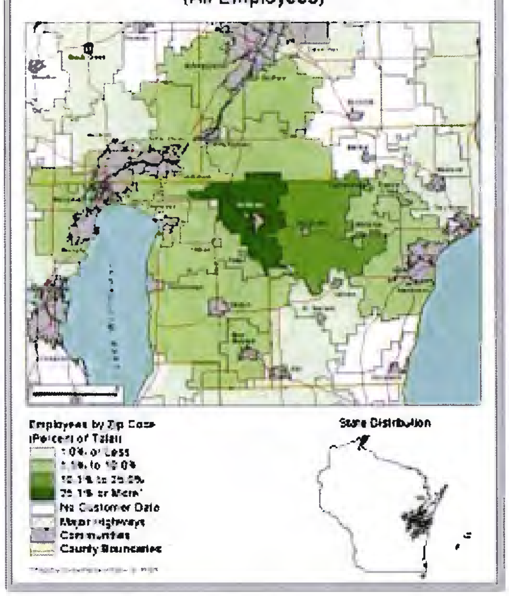


Ariens Second Shift Employee Residence, in %		
Zip Code	Community	Employee %
54110	Brillion	34.1%
54230	Reedsville	13.4%
54126	Greenleaf	8.5%
54129	Hilbert	7.5%
54952	Menasha	5.7%
54915	Appleton	4.7%
54130	Kaukauna	3.8%
53014	Chilton	2.8%
54956	Neenah	2.8%
	Subtotal	**76.4%**



Employer #1 Employees by Zip Code
(Office Employees)

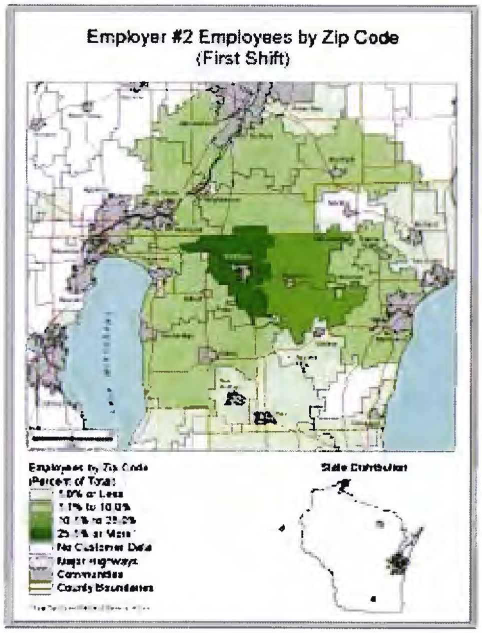
Ariens Office Employee Residence, in %		
Zip Code	**Community**	**Employee %**
54110	Brillion	24.3%
54115	De Pere	6.9%
54915	Appleton	5.8%
54230	Reedsville	5.3%
54130	Kaukauna	4.8%
54956	Neenah	3.2%
53014	Chilton	2.6%
47546	Jasper	2.1%
54129	Hilbert	2.1%
54220	Manitowoc	2.1%
54914	Appleton	2.1%
	Subtotal	**61.3%**



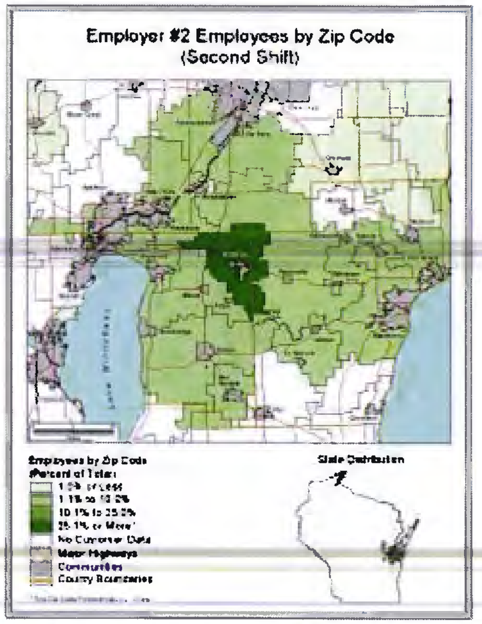
Employer #1 Employees by Zip Code
(All Employees)

Ariens All Shift Employee Residence, in %		
Zip Code	**Community**	**Employee %**
54110	Brillion	30.9%
54230	Reedsville	11.8%
53014	Chilton	6.4%
54126	Greenleaf	5.9%
54129	Hilbert	5.3%
54130	Kaukauna	5.0%
54115	DePere	3.1%
54220	Manitowoc	2.6%
54952	Menasha	2.3%
	Subtotal	**73.2%**

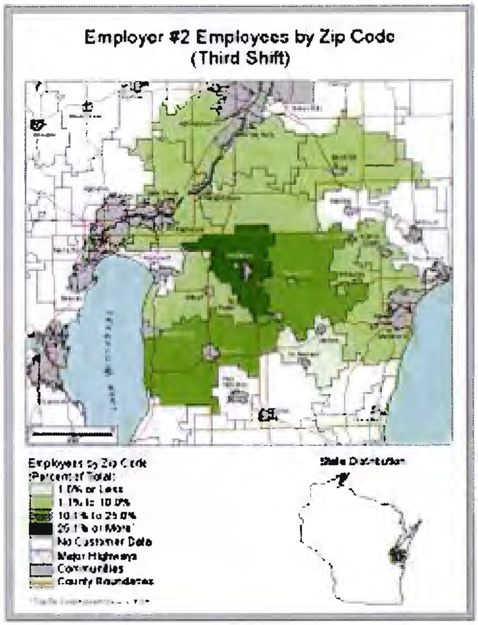
Brillion Iron Works Employee Communities of Origin



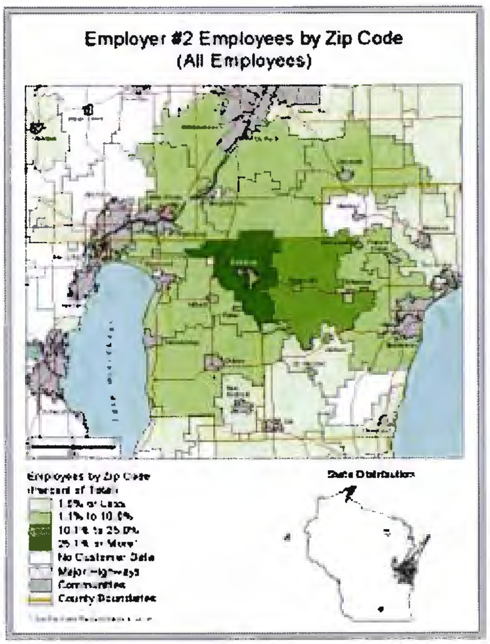
Brillion Iron Works First Shift Employee Residence, in %		
Zip Code	**Community**	**Employee %**
54110	Brillion	42.9%
54230	Reedsville	15.7%
54126	Greenleaf	5.3%
53014	Chilton	4.8%
54129	Hilbert	3.3%
54115	De Pere	3.0%
54220	Manitowoc	3.0%
54247	Whitelaw	2.3%
	Subtotal	**80.3%**



Brillion Iron Works Second Shift Employee Residence, in %		
Zip Code	**Community**	**Employee %**
54110	Brillion	39.4%
54230	Reedsville	14.4%
53014	Chilton	7.3%
54126	Greenleaf	5.0%
54129	Hilbert	3.9%
54115	De Pere	3.2%
54220	Manitowoc	2.9%
54130	Kaukauna	2.7%
54247	Whitelaw	2.0%
54915	Appleton	2.0%
	Subtotal	**82.8%**



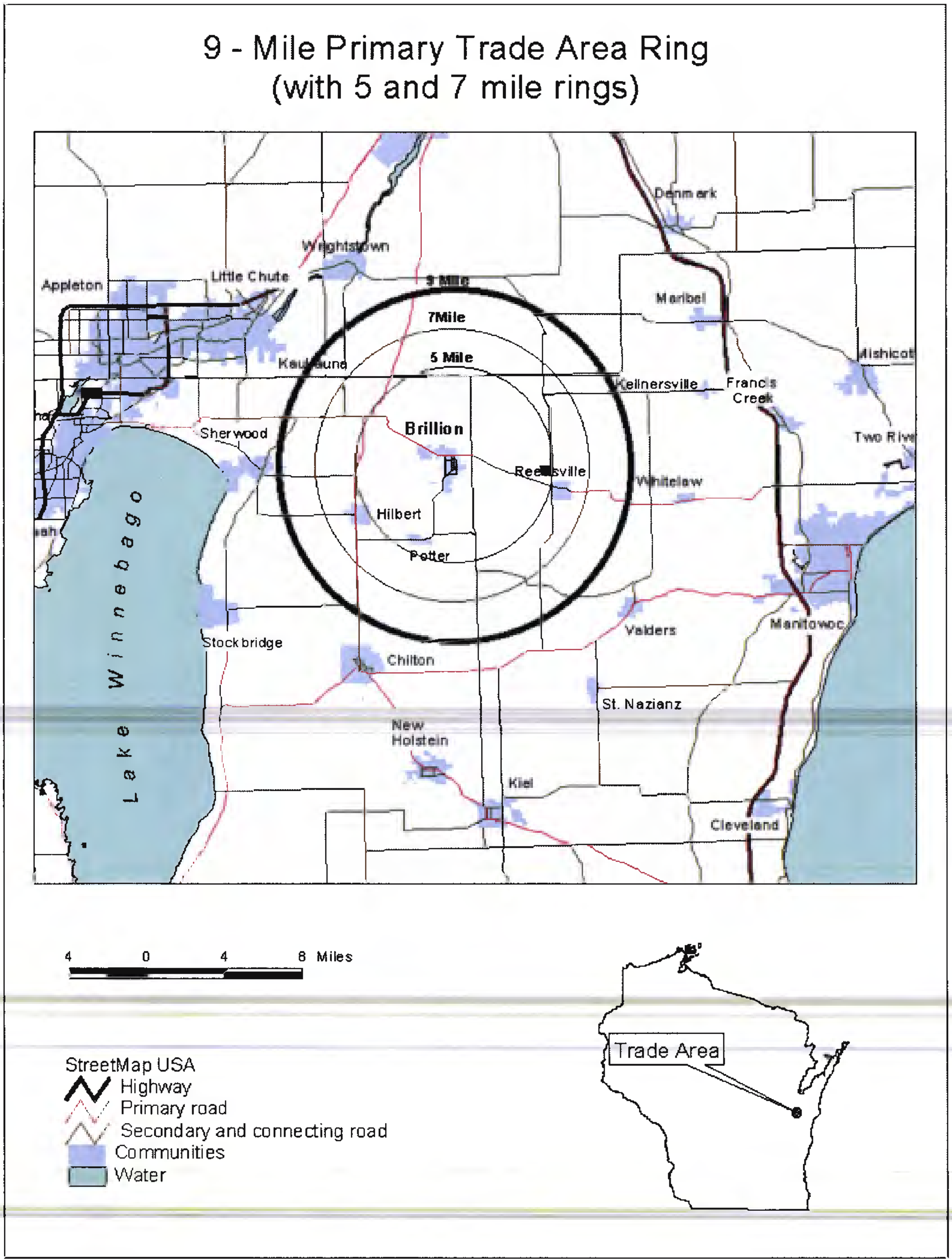
Brillion Iron Works Third Shift Employee Residence, in %		
Zip Code	**Community**	**Employee %**
54110	Brillion	36.8%
54230	Reedsville	16.7%
53014	Chilton	11.8%
54129	Hilbert	6.3%
54126	Greenleaf	4.2%
54220	Manitowoc	3.5%
54115	De Pere	2.8%
54208	Denmark	2.8%
54915	Appleton	2.8%
	Subtotal	**87.5%**



Brillion Iron Works All Shifts Employee Residence, in %		
Zip Code	**Community**	**Employee %**
54110	Brillion	39.4%
54230	Reedsville	14.4%
53014	Chilton	7.3%
54126	Greenleaf	5.0%
54129	Hilbert	3.9%
54115	De Pere	3.2%
54220	Manitowoc	2.9%
54130	Kaukauna	2.7%
54247	Whitelaw	2.0%
54915	Appleton	2.0%
	Subtotal	**82.8**

Conclusion - Size and Shape of Trade Area

The Committee studied the customer and employee origin data along with the GIS maps. After analyzing the size and shape of area zip codes, it was determined that some of them overlapped into the trade areas of the larger neighboring cities. Instead of using zip codes to define the Brillion trade area, a 9-mile ring around the community was used. This ring is presented below.



Section

4

Demographic, Customer, and Economic Characteristics

This section provides key economic, demographic and lifestyle data for the primary 9-mile ring trade area defined in Section 3. This data and the trends they reveal are important as they have a direct impact on the potential sales of retail goods and services. This section also summarizes economic, employment and highway data about Brillion and its surrounding trade area. It also provides some insight on potential impact of in-commuter spending on the community.

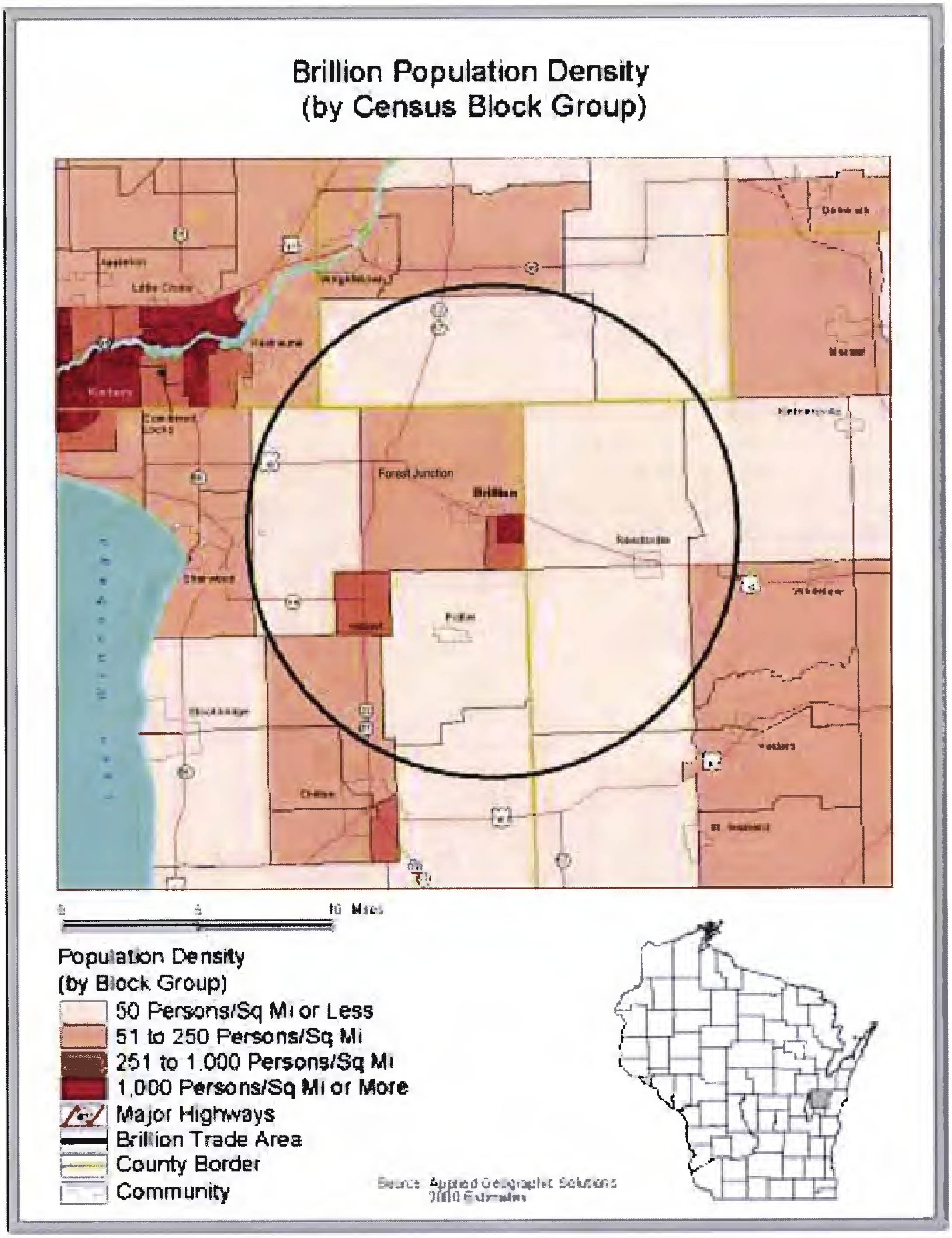
Demographic Trends

In this section are a number of 3-column demographic data tables. The first column of each table describes the primary trade area (an approximate 9-mile ring that surrounds the City of Brillion). The second and third columns in each table, respectively, convey data about the Appleton/Neenah/Oshkosh Fox Cities communities (hereafter referred to as the Appleton MSA – metropolitan statistical area) in a larger surrounding market area and data for the state of Wisconsin. The data presented in this section was purchased from CACI in the form of their Market Profile Report. Supplemental historical data (1970-1990) was also purchased from Applied Geographic Solutions, as CACI data was not available.

Population and Households

Population and household data allows you to quantify the current market size and examine future growth. **Population** is defined as all persons living in a geographic area. **Households** consist of one or more persons who live together in the same housing unit, regardless of their relationship to each other (including all occupied housing units). Typically, demand is generated by individual or household purchases. Households can be categorized by size, composition, or their stage in the family life cycle. Members of the family influence a household purchase, such as a new computer. Anticipated household or population growth may indicate future opportunities for a retailer.

The Brillion primary trade area includes the zip code areas of 54110, 54123, 54126, 54230, and 54129, which is roughly approximated by a nine-mile ring around the city, with a US Census 2000 population of 13,180. The following population density map (shown by census block group) displays the concentration of population in the primary trade area.



Larger population concentrations are located 15 miles to the west (Appleton/Fox Cities), 20 miles to the east (Manitowoc/Two Rivers) and 25 miles to the north (Green Bay). These communities have much larger trade areas that overlap the Brillion primary trade area in a few categories.

The following table provides population information for Brillion, the Appleton MSA, and the state of Wisconsin. It shows that Brillion's population is estimated to grow by 3% between 2000 and 2006.

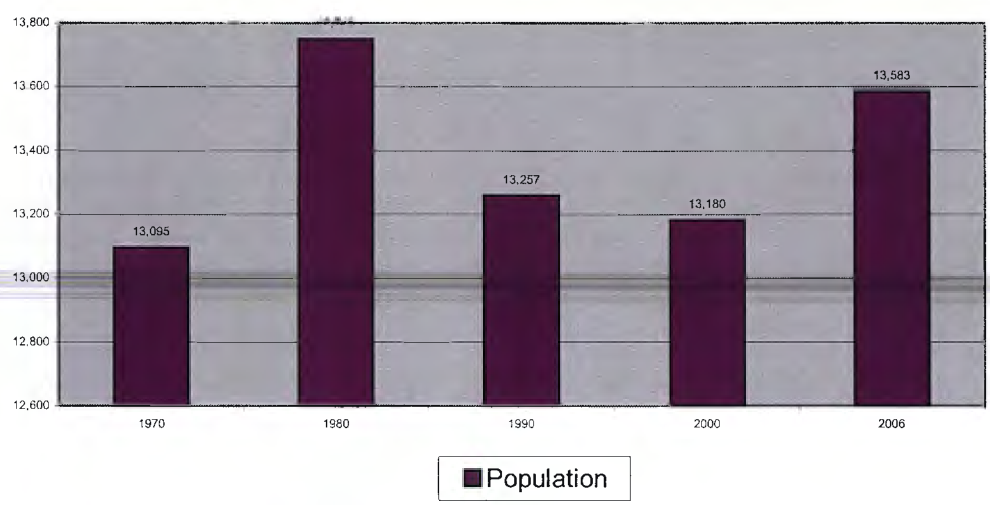
POPULATION Population information allows you to quantify the market size and measure future growth. Population is defined as all living persons in a geographic area. Group quarters included non-household living arrangements such as military barracks, college dormitories, long-term health care facilities, group homes, boarding houses, prisons, and ships.

	9-Mile Radius	Appleton MSA	Wisconsin
2006 Population Projection	13,583	382,326	5,587,344
2001 Population Estimate	13,247	363,149	5,408,886
2000 Census Population	13,180	358,365	5,363,675
2001 Population Per Square Mile	56	260	100
2001 Group Quarters Population	33	11,938	155,958

Source: CACI

As shown in the following chart, population growth in the Brillion trade area was fairly sporadic from 1970-2001, with growth between 1970 and 1980 followed by a decline in 1980. The Brillion trade area is expected to grow over the next five years by 3%. Growth in population, especially if related to new housing, will increase consumer spending potential in the primary trade area.

Brillion Trade Area Population 1970-2006



Source: CACI and AGS

Household Size

The average household size in the primary trade area is 2.75, higher than the averages for the Appleton MSA (2.53) and Wisconsin (2.49). In 2000, there were 4,741 households in the Brillion primary trade area. Like the population projections, the number of households will grow at a pace slightly lower than Appleton and the state.

HOUSEHOLDS Households consist of one or more persons who live together in the same housing unit, regardless of their relationship to each other. Households include all occupied housing units.

	9-Mile Radius	Appleton MSA	Wisconsin
2006 Household Projection	4,988	147,392	2,194,543
2001 Household Estimate	4,788	138,813	2,107,669
2000 Households	4,741	136,597	2,084,544
% Annual Household Growth: 2000-2001	1.0	1.6	1.1
2000 % Households			
With 1 Person	20.3	25.3	26.8
With 2 Persons	32.9	34.7	34.6
With 3 Persons	16.5	15.5	15.4
With 4 Persons	16.5	15.2	13.9
With 5 Persons	9.5	6.4	6.1
With 6 Persons	3.1	2.0	2.0
With 7+ Persons	1.2	1.0	1.1
2000 Average Household Size	2.75	2.53	2.49

Source: CACI

Age

Age is an important factor to consider because personal expenditures change as an individual ages. Drug stores and assisted care services flourish in areas with a large elderly population. Accordingly, drug stores often do well in communities with a larger number of people over the age of 65. Additionally, realizing and catering to the needs of an aging population can be beneficial to any retailer. Toy stores, day care centers, and stores with baby care items are successful in areas with many children and infants. Clothing stores and fast food establishments thrive in retail areas that contain a large concentration of adolescents. Theatres serve a broad section of the population; however, specialized entertainment and recreation options can target certain age segments.

Overall, there are no significant differences among the average and median population in the Brillion primary trade area and the comparison communities. However, it appears that there are higher numbers of youth ages 5-19 in Brillion.

2001 POPULATION BY AGE Population by age provides valuable information as to the relative maturity or youth of a particular market. Median age divides the age distribution into two equal parts, one-half falling below the median and one-half above.

	9-Mile Radius	Appleton MSA	Wisconsin
% Under Age 5	6.2	6.5	6.3
% Age 5-14	16.7	14.9	14.5
% Age 15-19	7.8	7.6	7.5
% Age 20-24	5.5	7.0	6.8
% Age 25-34	12.7	13.7	12.9
% Age 35-44	16.9	17.0	16.2
% Age 45-54	13.6	13.6	14.0
% Age 55-64	9.0	8.1	8.7
% Age 65-74	6.2	5.8	6.6
% Age 75-84	4.0	4.2	4.7
% Age 85+	1.3	1.7	1.9
Average Age of Total Population	35.9	36.0	37.0
Median Age of Total Population	35.7	35.2	36.3

Source: CACI

Household Composition

According to CACI, nearly 85% of households in the Brillion trade area were headed by married couples. This is significantly higher than the percentage of married couple families in the Appleton MSA (78.6%) and the state of Wisconsin (73%).

FAMILIES/HOUSEHOLDERS

	9-Mile Radius	Appleton MSA	Wisconsin
2000 Family Households	3,583	92,930	1,386,815
2000 Non-Family Households	1,169	43,667	697,729
2000 Family Households With Children	1,813	47,772	697,051
% Married Couple Family	84.9	78.6	73.0
% Male Householder	5.3	5.9	6.8
% Female Householder	9.8	15.6	20.3
2000 % Households			
% W/children < 18	38.5	35.4	33.9
% W/person 65+	22.4	20.3	22.6
% W/householder 65+	21.3	19.5	21.5

Source: CACI

Housing

The number of homeowners and the rate of housing turnover is an important factor for numerous retailers. Home ownership directly correlates with expenditures for home furnishings and home equipment. Home improvement, furniture, appliances, hardware, paint/wallpaper, floor covering, garden centers and other home products all prosper in active housing markets.

The Brillion trade area has a larger percentage of single family detached housing units than do both the Appleton MSA and the state of Wisconsin (75.5% verses 69.5% and 65.3%), respectively. Likewise, the rate of owner-occupied units in the Brillion area (83%) is higher than the Appleton MSA (71.3%) and the state of Wisconsin (68.4%).

HOUSING Housing units are defined as a house, apartment, mobile home or trailer, a group of rooms, or a single room occupied as separate living quarters or, if vacant, intended for occupancy as separate living quarters.

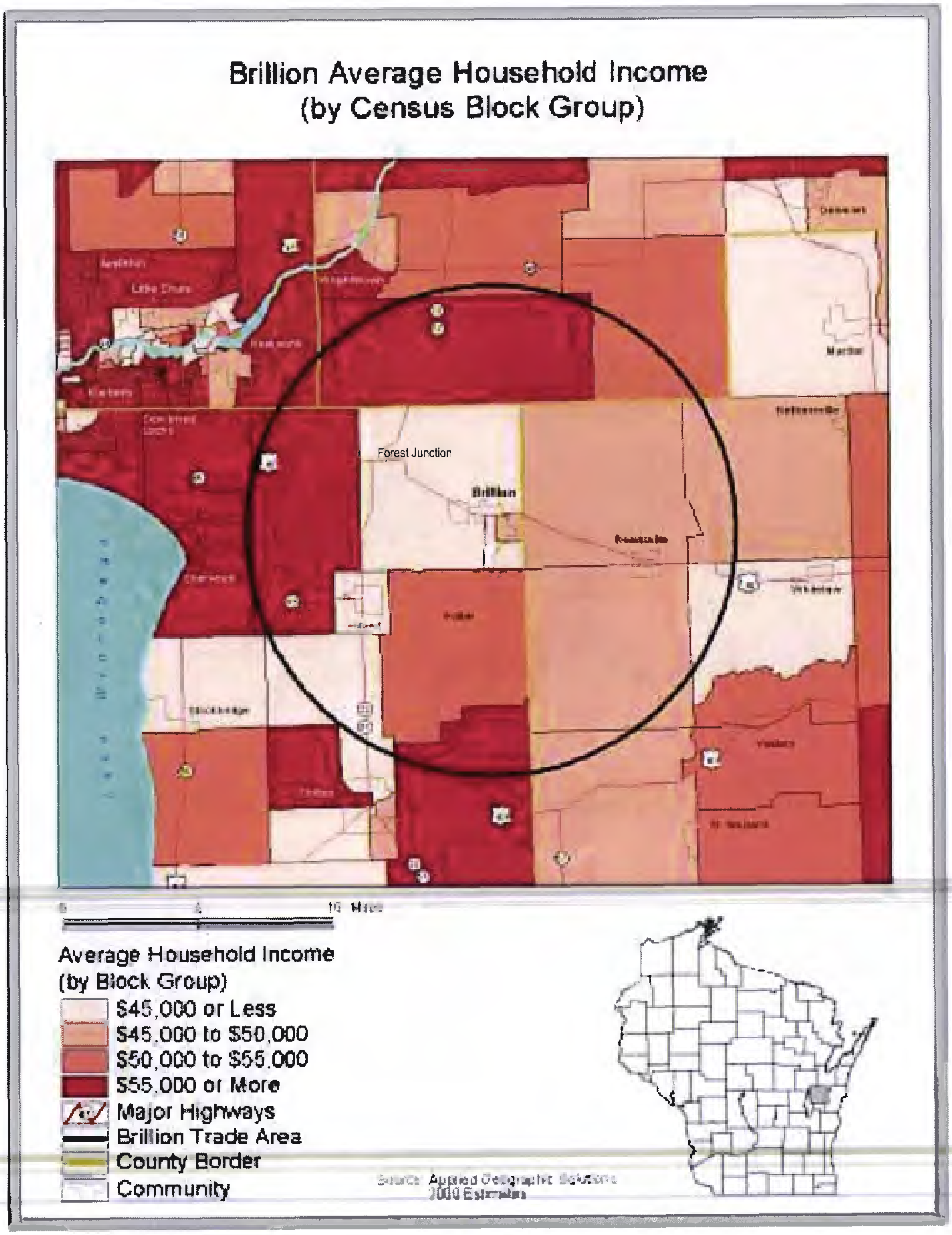
	9-Mile Radius	Appleton MSA	Wisconsin
2000 Total Housing Units	4,985	143,093	2,321,144
% Occupied	95.1	95.5	89.8
% Vacant	4.9	4.5	10.2
% Year-round	4.2	3.5	4.1
% Seasonal	0.7	1.1	6.1
1990 Total Housing Units in Structure	4,569	120,511	2,055,774
% Single, Detached	75.5	69.5	65.3
% Single, Attached	0.6	2.3	2.5
% 2 Units	7.0	10.7	9.6
% 3-9 Units	4.3	7.1	7.8
% 10-49 Units	2.0	5.1	6.4
% 50+ Units	0.0	1.6	2.1
% Mobile Home or Trailer	9.2	2.7	4.9
% Other Units	1.3	1.0	1.4
2000 Total Occupied Housing Units	4,741	136,597	2,084,544
% Owner-occupied Units	83.0	71.3	68.4
%Renter-occupied Units	17.0	28.7	31.6
Owner/Renter Ratio	4.9	2.5	2.2

Source: CACI

Income

Household income is a good indicator of spending power of residents. Household income positively correlates with retail expenditures in many product categories. Retailers may consider the median or average household income in a trade area or seek a minimum number of households within a certain income range. Another common practice is to analyze the distribution of household incomes. Discount stores avoid extreme high or low-income areas. Traditional department stores focus on markets with incomes over $35,000, while some specialty fashion stores target incomes above $75,000. A few store categories including auto parts are more commonly found in areas with lower household incomes. Using income as the sole measure of a market's taste preference, however, can be deceptive.

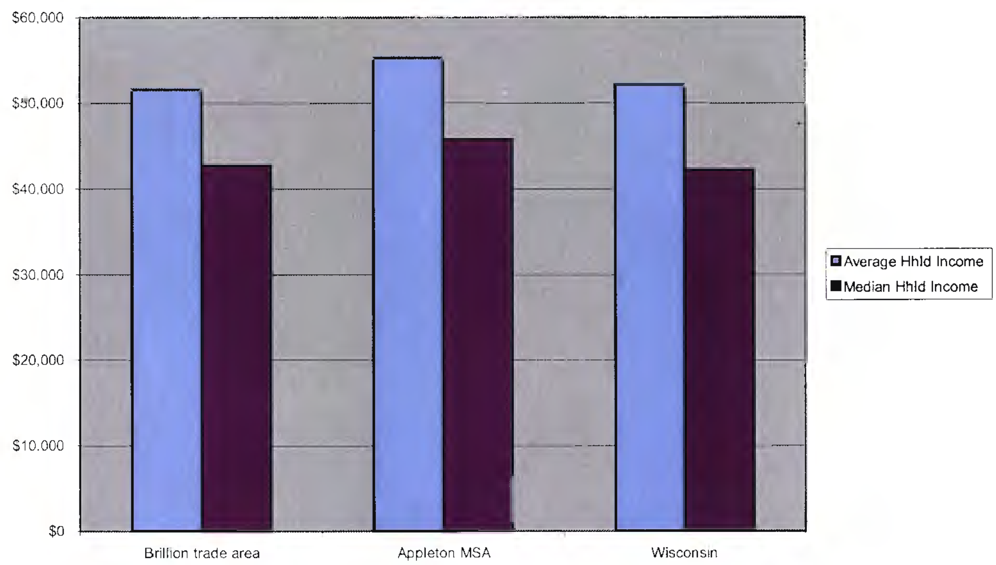
Sections of the Brillion trade area have higher average household incomes than others. The accompanying map illustrates average household income levels by block group for an area including the primary trade area and surrounding areas. Some of the relatively higher income neighborhoods within the primary trade area are located north and west of Brillion, and in the area south of Brillion including and surrounding the Village of Potter.


Brillion Average Household Income
(by Census Block Group)
Forest Junction
Brillion
Average Household Income
(by Block Group)
$45,000 or Less
$45,000 to $50,000
$50,000 to $55,000
$55,000 or More
Major Highways
Brillion Trade Area
County Border
Community

The following chart and table show that the Brillion primary trade area is estimated to have similar income levels as the Appleton MSA and the state. The primary trade area had an estimated median household income in 2001 of $42,669, approximately $450 more than the state. However, it trails the Appleton MSA by approximately $3000.

Approximately 19% of the Brillion primary trade area households earn between $35,000 and $49,999. This compares to 18% each for the Appleton MSA and the entire state. In the $50,000 to $99,999 median household income category there are 34.3% of the households in the Brillion primary trade area, compared to 35.5% in the Appleton MSA and 33.9 in Wisconsin. The largest single category of households in the Brillion primary trade area (23.7 %) fall in the household income category of $50,000-$74,999.

2001 Average and Median Household Income Levels



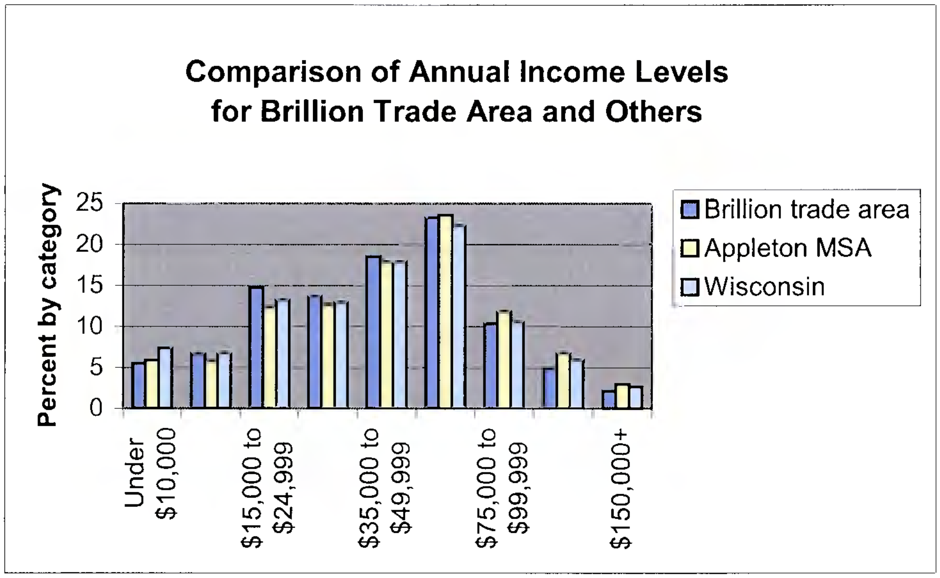
Source: CACI

2001 INCOME Income is a good indicator of the spending power of your market. Per Capita income includes the income of all persons 15 years old and over. Median income divides the income distribution into two equal parts, one-half falling above the median and one-half below.

	9-Mile Radius	Appleton MSA	Wisconsin
% Under $10,000	5.3	5.9	7.4
% $10,000-$14,999	6.5	5.8	6.8
% $15,000-$24,999	14.7	12.4	13.3
% $25,000-$34,999	13.3	12.7	13.0
% $35,000-$49,999	18.6	17.9	17.9
% $50,000-$74,999	23.7	23.6	22.3
% $75,000-$99,999	10.6	11.9	10.6
% $100,000-$149,999	5.2	6.8	6.0
% $150,000+	2.1	3.0	2.7
2001 Per Capita Income	$18,628	$21,293	$20,499
2001 Average Household Income	$51,535	$55,262	$52,115
2001 Median Household Income	$42,669	$45,663	$42,226

Source: CACI

The following chart shows Brillion annual incomes by category as compared to the Appleton MSA and the State of Wisconsin.



Source: ESRI BIS 2002

Education

Education is another way to determine the socio-economic status of an area. Because income increases with advancing educational attainment, many retailers focus on income level rather than education. One exception is bookstores which are often sited by developers based on the number of college educated individuals in the trade area. Similarly, computer and software stores are often located in areas with high levels of education.

The Brillion trade area has a higher percentage of people who have attained up to a high school degree (50.7%) compared to the Appleton MSA (41.7%) and the state (37.1%). However, it has a lower percentage of people with bachelor and graduate degrees (8.3%) than the Appleton MSA (17%) and state (17.7%), for an overall average of one less year of school completed.

EDUCATION The education variables are another way to determine the relative socioeconomic status of an area. Population enrolled in school provides information on the population ages 3 & over. Educational attainment classifies persons age 25 & over according to their highest level of school or degree completed.

	9-Mile Radius	Appleton MSA	Wisconsin
1990 Educational Attainment	7,725	196,589	3,094,226
% Elementary School (0-8 Years)	14.1	8.8	9.5
% Some High School (9-12 Years)	10.5	10.3	11.9
% High School Graduate only (12 Years)	50.7	41.7	37.1
% Some College (13-15 Years)	16.4	22.2	23.8
% Bachelor Degree	7.0	12.2	12.1
% Graduate Degree	1.3	4.8	5.6
Average Years of School Completed	11.4	12.4	12.4

Source: CACI

Employment

Many retailers use the concentration of white or blue-collar workers as another gauge of a market's taste preferences. Specialty apparel stores thrive on middle to upper income areas and above average white-collar employment. Second hand clothing stores and used car dealerships are successful in areas with a higher concentration of blue-collar workers. Office supply stores and large music and video stores are especially sensitive to the occupational profile. These retailers target growth areas with a majority of white-collar workers.

Due to the presence of several large manufacturers in Brillion and the related trade area, a large number of employed residents work in blue collar positions (47.9%) as compared to 34.4% in the Appleton MSA and 31.6% in the state of Wisconsin. Likewise, the number of white collar employees living in the Brillion trade area is lower than that in the Appleton MSA and the state of Wisconsin.

	9-Mile Radius	Appleton MSA	Wisconsin
2001 Civilian Employed Persons 16+	7,530	202,638	2,927,840
% White Collar	34.2	49.6	50.9
% Executive & Managerial	5.6	8.5	8.9
% Professional Specialty	5.0	9.9	10.7
% Technical Support	3.0	4.2	4.1
% Sales	7.9	11.3	11.2
% Administrative Support	12.7	15.7	16.0
% Blue Collar	47.9	34.4	31.6
% Precision, Production, Craft & Repair	13.8	11.2	11.1
% Machine Operator	21.9	14.2	11.5
% Transportation & Material Working	6.3	4.6	5.0
% Laborers	5.9	4.4	4.1
%Service	15.5	15.4	16.7
% Private Household	0.5	0.2	0.2
% Protective	0.6	1.7	1.7
% Other	14.4	13.5	14.8
%Farming, Forestry, & Fishing	2.4	0.5	0.7
White/Blue Collar Ratio	0.7	1.4	1.6

Source: CACI

Consumer Classification and Lifestyle Segmentation

This section provides a description of the people who live in the trade area. This is important because different consumer groups will have different buying behaviors. These differences must be understood before retail development strategies can be established.

ACORN,™ (A Classification of Residential Neighborhoods) consumer classification data was purchased from CACI™ Marketing systems to provide a useful information about households in the trade area. ACORN™ data is available for individual neighborhoods for the entire country. Consumers are classified into 40 demographic and behaviorally distinct clusters. The clusters are based on type of neighborhood (urban, suburban, rural); the residents socio-economic status (age, income, occupation, type and value of residence); and their buying behaviors and preferences. ACORN™ data is updated annually using various national and local data sources.

In the Brillion Primary Trade Area, the overwhelmingly predominant consumer classification is 7A-Middle America, which is described in further detail below.

Consumer Type 7A: Middle America

The largest consumer market is rural, slightly older, and family oriented. The neighborhoods are newer, owner-occupied, single-family homes; the income, average.

Demographic: The demographic profile of these communities is similar to the U.S. population--just a little older, more white, and more family. The median age is 35.6 years; slightly older with more householders aged 35-44 and fewer under 25 years. Seventy percent of households are married couples, compared to 55 percent for the U.S. The distribution of children is similar; family size is average, 3.1 persons per family.

Socioeconomic: Middle America is a megamarket, representing almost 8 percent of U.S. households and a market share of almost 7 percent. Median household income is $33,300. Almost 35 percent of these households earn less than $25,000, but very few are below the poverty level. Labor force participation is average; unemployment, 5.2 percent, below average. Most of the work force is employed in manufacturing or farming. Thirty percent commute to a different county or state to work.

Residential: Middle America is rural nonfarm neighborhoods, located primarily in the Midwest (41 percent) or South (34 percent). Single-family and mobile homes predominate. More than 15 percent are mobile homes, twice the national proportion. Their homes are owner-occupied and valued at an average of $79,700, 30 percent lower than the national average. Most were built after 1970.

Buying Habits: How does the Middle America market spend its time and money? Their lives are busy and centered around the home. Leisure activities include hunting, fishing, and needlework. Their budget priorities are home-oriented: improvements, children's apparel and toys, footwear, videos, and lawn, garden, and camping equipment. Most of the families own pets. They are likely to take domestic trips by car. This market ranks high for having personal loans (not education), and is also likely to have auto loans (for new cars), secured line of credit, savings, home mortgage loans, and CDs. However, this market tends not to use credit cards. Media preferences include reading newspapers 3 times a week, and reading magazines such as *Family Circle*, *Field & Stream*, *Country Living*, *Country Home*, and *Ladies Home Journal*.

Economic Data

Personal Income Trends

Personal income trends provide an important measure of economic activity for a local area over time. Personal income consists of the income that is received by persons from participation in production, from government and business transfer payments, and from government interest. When compared to state and national trends, it provides an indication of how well the local area's economy is performing.

Personal Income Trends
Calumet County, 1991 - 2000 (in Millions of Dollars)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Calumet	590	661	687	743	780	829	870	935	990	1,038
Index	100%	112.0	116.4	125.9	132.2	140.5	147.5	158.5	167.8	175.9
Wisconsin	92,669	99,453	104,337	110,569	115,959	121,863	128,920	136,958	143,704	150,963
Index	100%	107.3	112.6	119.3	125.1	131.5	139.1	147.8	155.1	162.9
U S (billions)	5,065	5,376	5,598	5,878	6,192	6,538	6,928	7,418	7,769	8,314
Index	100%	106.1	110.5	116.1	122.3	129.1	136.8	146.5	153.4	164.1
Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, Regional Accounts Data, Local Area Personal Income										

This table provides data to describe Calumet County's personal income trends. An index was added to show how different areas have grown since 1990 (i.e. an index of 175.9% indicates that the personal income has grown 76% since 1991). In this example, Calumet County has exceeded the U.S. and state growth in personal income. This provides one indicator of the relative economic health of this region.

Earnings Mix

While personal income trends relate a community's relative economic health as a whole, the earnings in various sectors provide a snapshot of the industry mix in an area. Earnings include wage and salary disbursements, other labor income, and proprietor's income (both farm and non-farm). These numbers can be related as individual numbers, or as a percentage to provide an understanding of the industry distributions. Furthermore, comparing the numbers for a local area to those of a larger area, such as an entire state, point to differences in the local economy.

Earnings Mix Comparison

Industry Sector	Calumet County	State of Wisconsin
Farm	1.9%	0.4%
Construction	7.7%	6.6%
Manufacturing	46.6%	25.7%
Transportation	2.7%	5.9%
Wholesale Trade	6.0%	6.1%
Retail	7.6%	9.0%
F.I.R.E *	3.8%	7.0%
Services	10.7%	24.3%
Government	10.5%	14.3%
Source: U.S. Department of Commerce, Bureau of Economic Analysis		

* F.I.R.E. is the acronym for finance, insurance and real estate

The table on the previous page compares Calumet County with the State of Wisconsin. These numbers relate percentages of total earnings in a variety of industry sectors. An analysis of these numbers show that the local area has a large manufacturing base when compared that of the State. Furthermore, the service sector shows a lower percentage of earnings.

Employment Data

A number of the largest employers in the Brillion primary trade area are presented below with an approximate number of full time employee equivalents. As shown, there is a strong reliance on manufacturing employment within the trade area, with schools, government, the medical community and service/retail also employing large numbers of people.

Major Employers, Brillion Primary Trade Area

Company	Product	Approx. # of Employees
City of Brillion		
Ariens Company	Manufacturer of lawn mowers and snow blowers	750
Brillion Iron Works	Gray and ductile iron products production	715
Endries	Materials management/ sourcing of fasteners & parts	210
Professional Plating	Plating and powder coating services	120
Brillion Public Schools	Pre-K thru 12 education	115
City of Brillion	Municipal government	20
Sentry	Grocery, deli, floral, bakery	7 full-time, 32 part-time
T&C	Grocery, deli, bakery	30 full-time, 48 part-time

In-Commuter Economic Impact

Small communities with large employers often have a significant day-time population made up of commuters. These in-commuters offer the retail and service businesses in a community an additional market opportunity to generate sales.

Research by Steve Deller and Martin Shields suggests that sales are higher in regions with higher levels of in-commuting[1]. Further, research by Gary Green points to significant dollars spent by commuters in their daily travels to and from work[2].

Significance of Commuter Spending

Commuter expenditures will vary based on commuter characteristics and their travel time to places of employment. Recent research by Green highlights the significance of commuter spending in Kenosha County. During the summer of 2001, a sample of Kenosha County workers who were employed outside of the county were studied. The average weekly costs of commuting (primarily vehicle costs) from this particular county are presented below:

Gasoline	$24.86
Maintenance/Repairs	$ 4.10
Tolls	$ 2.30
Other	$ 2.05
Total Commuting	$33.31

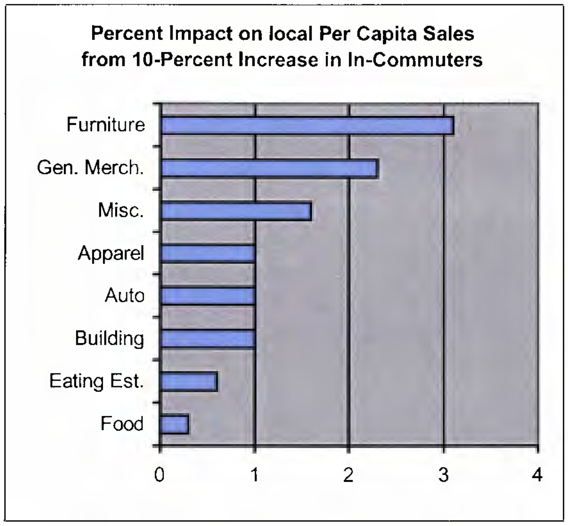
In addition, commuters spent a significant amount each week on retail and other expenses as presented below. These expenditures total over $75 per commuter per week or $3,500 per year.

Groceries	$16.83
Restaurants	$17.68
Retail Purchases	$34.13
Other	$ 7.08
Total Retail/Services	$75.88

These expenditures point to significant expenditure leakage from a commuter's home community. Further, grocery, restaurant and retail expenditures, together, were almost three times greater than gasoline expenditures.

Distribution of Commuter Expenditures

Research by Steve Deller and Martin Shields using county-level sales data for Wisconsin has found statistically significant relationships between the number of in-commuters and retail spending in eight out of ten general retail categories as presented in the chart on page 4-17[2]. The only exceptions were drug stores and, surprisingly, gas stations (not presented in the chart). The percentage increase in local per capita sales (of host community resident population excluding commuters) due to a 10 percent increase in number of in-commuters varied from 0.3 percent (food) to 3.1 percent (furniture). The following chart illustrates which retail categories in a community benefit most from in-commuting according to this study.



While this chart will probably look different from community to community, it does indicate that commuters can have an impact on more than just food (groceries) and eating establishments. In fact, furniture and general merchandise stores can also capture in-commuter dollars.

Capturing Commuter Expenditures

The magnitude of spending that a community can capture from in-commuters depends on whether commuters are prone to spend their money near their place of work or near their residence. For many products and services, the factors that influence a commuter's decision on where to shop are based on convenience and minimizing drive-time. Factors include:

- **Availability of specific retail and service businesses** in the host community that may not be available in the commuter's home community;
- **Location** on key commuting routes and on the appropriate side of road during drive time;
- Clear **visibility** of the business;
- Traffic speed, traffic lights and dedicated turn-lanes that help the commuter **access** a site;
- **Convenient hours** during primary commuting hours (early morning, late afternoon);
- **Drive-through** windows (banks, dry cleaners, take-out food, pharmacies, etc.);
- **Chain affiliation** that has an appeal and is recognized by out-of-town commuters;
- Convenient **parking** that allows commuters to and park in sight of the door; and,
- A **critical mass** of other businesses that make a stop more convenient for the commuter.

It is important to remember that not all commuters are the same. The demographics and lifestyles of in-commuters will dictate what they will buy. As with any consumer segment, business operators must always pay attention to their building's appearance, management and personnel, and overall service.

Finally, expansion or development of retail and services for commuters does not necessarily require highway strip development on the edge of town. In fact, in-fill locations closer to the center of the host community or even walking distance to places of employment offer commuters the opportunity to make their purchases before (or after) they embark on their commute.

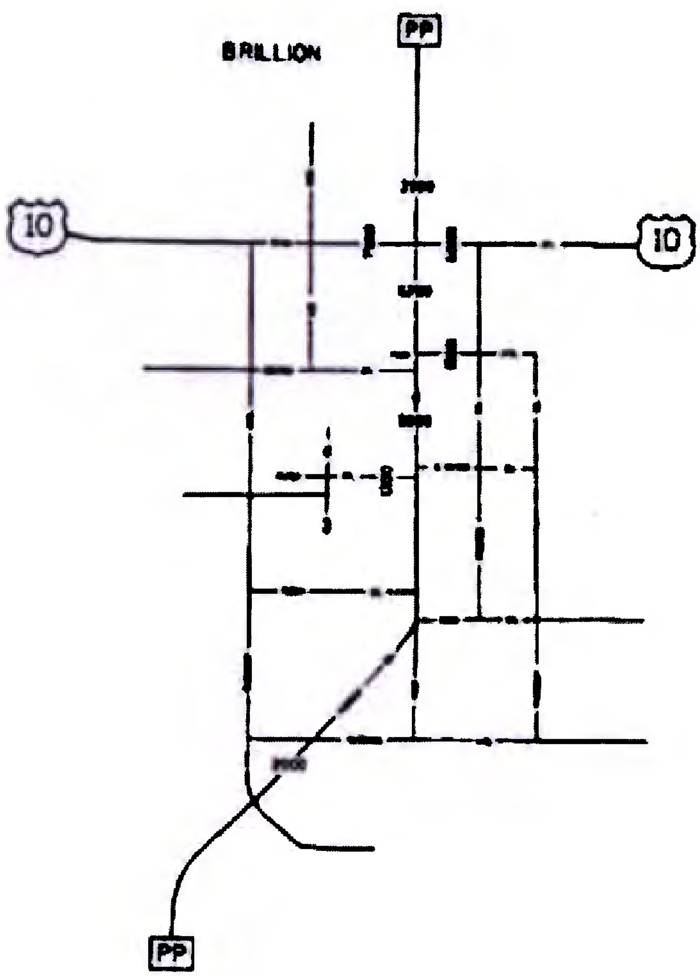
Sources:

1. Martin Shields and Steven C. Deller, "Commuting's Effect on Local Retail Market Performance." Review of Regional Studies 28(2), 1998,: 71-79
2. Green, Gary P., "Kenosha County Commuter Study", Department of Rural Sociology, University of Wisconsin-Madison, 2001

Traffic Data

Brillion's business districts are along the Highway 10/Ryan Street corridor running east/west through the northern edge of Brillion, and the Hwy PP/Main Street corridor running north/south through Brillion's central business district. According to the Wisconsin Department of Transportation annual average traffic counts, the **highest traffic volume is along Hwy 10 west of the Hwy PP intersection with an average count of 7900 vehicles on an average day**. The average daily traffic count on **Hwy 10 east of Hwy PP is 6000 vehicles per day**. Along **Main Street/Hwy PP, there are 2900 vehicles on** an average day at the intersection just north of Hwy 10; **6,200 vehicles per day just south of Hwy 10**; **5,800 vehicles per day south passing The Hub; and 2,000 vehicles per day just south of National Avenue**. The following map indicates these counts.

Average Daily Traffic Counts, Wisconsin Department of Transportation, 2000



Section

5

Assessing Consumer Attitudes

This section summarizes survey research conducted by the City of Brillion. It includes retail and service sector information taken from the City/Town of Brillion Community Survey conducted in 2001; a Downtown Revitalization Survey conducted in 2001 by the Brillion Downtown Revitalization Group/Chamber of Commerce; and results of personal interviews conducted by the City of Brillion with local businesses in late 2000. It concludes with a summary of consumer attitudes compiled by the Brillion Market Analysis Committee in July 2002.

Surveys of customers and potential customers provide a useful set of data about the interests, spending habits, and wishes of these current and potential customers. Survey results can be a useful tool to help existing businesses assess customer satisfaction. They can also be considered one component of market research for potential businesses or business expansion.

1) Personal Interviews

Personal interviews were conducted of businesses and residents in the City of Brillion regarding downtown economic development issues and the city. These interviews took place from October 2000 to January 2001.

- **Problems**

Businesses are leaving, and there is no competition coming into town to push them out.
Development on Hwy 10 is good. Gets people to come to Brillion, who would otherwise not come. From there we can direct them to the downtown. This works well for Chilton.
People wander
We can blame Appleton on our problems but they have always been there
The only thing constant is change.
Roll with the punches
You cannot compete with the big stores – must find the hook – become a chameleon
Every business on Main Street supports every business
Can't have businesses set up to fail. This reflects on the perspective of the City
Need repeat business – all businesses thrive on this

- **Need support for Main Street program**

Civic organizations to become involved as well.
Synergy with all businesses for support and action
Architecture – common theme within the Main Street – how to do that with modern and historic buildings on same block

- **Signage**

Attractive and functional to attract/keep business; signage too small

- **Marketing**

Special Promotions with all businesses within city – keep people shopping in Brillion

PR – Getting HWY 10 traffic to come to Main Street. – Peak their interest for them to take a slight detour to see what the City has to offer
Focus on a business in the Brillion News 1 time a month
To promote business/retail/City good will
Gets other communities to view Brillion as community-minded
May get Appleton residents to come to Brillion because services are enticing.

- **Publicize funding opportunities for new business development**

i.e. the Revolving Fund Loan
Compile a hit list for the types of businesses Brillion wishes to attract.
Tag for monetary incentives for business development
For downtown, create additional incentives
Add these funding incentive opportunities in the developers folder

- **Empty/Run Down Buildings**

Run down buildings taking away visual appeal to the rest of Main St.
Very difficult to sell existing businesses with unattractive and vacant buildings surrounding it
City to buy Brandt's and put in green space/park next to bank
Rumors of T&C leaving downtown – wants them to stay
T&C moving
Ross Procknow to move downtown if T&C moves? Incentives?
T&C moving will hurt many businesses still in downtown. Will take business away from downtown.

- **Business Support**

Can Brillion support more retail businesses?
New businesses must be competition-minded
Clothing stores may suffer b/c they cannot provide a variety like the big malls can.
The bank is a good traffic builder for retail.
New businesses should ideally compliment current businesses – not compete with them
Service businesses may look nice, but will not promote traffic like retail would. This in turn, could hurt existing retail stores

- **Aesthetics**

Make Downtown more visually appealing:
"Cozy-up" downtown and give it a small town welcoming feel
"People pay good taxes and should expect this [cozy, small town] atmosphere."
Benches, flowers, awnings are inviting
Landscaping good idea, but some property owners may not keep them up.
Vacant buildings not attractive
Fountain across from bank not appealing
Storefronts converted to apartments – not a good idea – better to have the storefronts be a business in downtown
Storefronts should remain storefronts – apartments are better on upper levels
Downtown should be quaint-looking to attract shoppers – especially women – they spend the money! i.e. Cedarburg
Make more appealing like Ripon.

- **Main Street vs. Highway 10**

Improvements cost less tax money – spread improvement value increases over a period of years.
Is there a potential that WalMart could come to Brillion?
Can Brillion support this
Will it be detrimental to the downtown
Will there be a pharmacy in it and what will it do with the current pharmacy?
HWY 10 development will take business away from downtown if nothing is done about it.

- **Programming**

Community Center to promote more adult activities – perception that it's just for kids

Nursery School should be relocated. That room was intended to be a youth center.

- **Youth-focused ideas**

Younger Citizens to become more involved (i.e. Jaycees dissolved)
Teen bars would offer youth more things to do in City. May not frequent Appleton as much
Youth to be more respectful – mentorship program?
Day care needed – old Spindler building with playground access?
More youth-centered activities now that GDL's are in effect

- **Downtown retail/building utilization ideas**

Bakery/Café/Small Coffee Shop
Good place to take clients
More intimate environment/atmosphere
Wouldn't be competition with other establishments
Could be open only during the AM
Antique Shop
Hardee's vs. McDonalds
Jeweler
Daycare
Veterinarian
Thrift stores – clothing liquidators – odd lots of name brand clothes (attracts people from all other communities)
Family Dollar Store
Attract "satellite" businesses – obtain Chamber listing from Appleton and Green Bay and mail a developers folder to them.
Plan to contact potential investors to get businesses
Shawano
Wrightstown
Clintonville
Need new business development
It doesn't matter the size of the business as long as it brings people into Brillion and to our downtown.
There has to be a hook to bring people downtown.
Get new businesses established at an attractive rate
Help from City?
Help from Chamber?

- **Management of Brillion Businesses do not live in Brillion**

Why?
Seems that if they make money in Brillion, they should keep it here
There are many opportunities for their families that they do not know about...

2) Downtown Revitalization Survey

This survey tool was distributed in Brillion businesses during the winter of 2001. Approximately 40 people completed the survey.

Survey Results

	Yes		Don't purchase at all	No	
	Quality	3	13	Lack of quality	1
	Like owners	6		Dislike owners	1
	Know price is lower	0		Know price is lower	11
Appliances	Loyalty	7		Brand not available	1
	Service	3		Poor service	1
	Convenience	12			
	Totals	**31**			**15**
	Quality	7		Lack of quality	3
	Like owners	5	10	Dislike owners	1
	Know price is lower	4		Know price is lower	3
Automobiles	Loyalty	4		Brand not available	11
	Service	7		Poor service	0
	Convenience	8			
	Totals	**35**			**18**
	Quality	15	5	Lack of quality	1
	Like owners	12		Dislike owners	0
	Know price is lower	3		Know price is lower	0
Banking	Loyalty	15		Brand not available	0
	Service	25		Poor service	1
	Convenience	24			
	Totals	**94**			**2**
	Quality	2	20	Lack of quality	1
	Like owners	2		Dislike owners	0
	Know price is lower	1		Know price is lower	2
Contractors	Loyalty	2		Brand not available	2
	Service	6		Poor service	1
	Convenience	8			
	Totals	**21**			**6**
	Quality	14	6	Lack of quality	1
	Like owners	16		Dislike owners	0
	Know price is lower	2		Know price is lower	3
Floral/Gifts	Loyalty	11		Brand not available	0
	Service	16		Poor service	0
	Convenience	22			
	Totals	**81**			**4**
Furniture	Quality	11	11	Lack of quality	1
	Like owners	10		Dislike owners	0
	Know price is lower	1		Know price is lower	13
	Loyalty	5		Brand not available	0

	Service	11		Poor service	0
	Convenience	11			
	Totals	**49**			**14**
	Quality	18	0	Lack of quality	2
	Like owners	13		Dislike owners	0
	Know price is lower	10		Know price is lower	3
Groceries	Loyalty	10		Brand not available	1
	Service	22		Poor service	0
	Convenience	27			
	Totals	**100**			**6**
	Quality	18	7	Lack of quality	0
	Like owners	17		Dislike owners	0
	Know price is lower	9		Know price is lower	1
Hair Care/Tanning	Loyalty	13		Brand not available	0
	Service	19		Poor service	0
	Convenience	18			
	Totals	**94**			**1**
	Quality	7	4	Lack of quality	1
	Like owners	13		Dislike owners	1
	Know price is lower	2		Know price is lower	6
Hardware	Loyalty	7		Brand not available	1
	Service	11		Poor service	1
	Convenience	22			
	Totals	**62**			**10**
	Quality	9	4	Lack of quality	2
	Like owners	7		Dislike owners	0
Medical Professionals	Know price is lower	2		Know price is lower	2
	Loyalty	9		Brand not available	1
	Service	14		Poor service	0
	Convenience	21		Insurance	1
	Totals	**62**			**6**

Where do you shop for the majority of items that you don't purchase in Brillion?

Appleton	33
Manitowoc	10
Green Bay	11
Chilton	6
Fond du Lac	0
Darboy	1
Kaukauna	1
Total	**62**

Do you work in Brillion?

Yes	23
No	9

Retired	8
Total	**40**

Where do you live?

City of Brillion	25
Reedsville	2
Grimms	1
Hilbert	1
Maple Grove	1
Town of Brillion	5
Woodville	2
Total	**37**

3) City and Town of Brillion Community Survey

In mid-2001, a community survey was sent to all citizens living in the City and Town of Brillion as part of the Comprehensive Planning efforts underway in those communities. The results included in this report are those replies and comments which were determined to have relevance to the Community Market Analysis.

- Demographics of Survey Sample

After reviewing the survey data and the 2002 census information, it was determined that the survey sample very closely represents the profile of the City of Brillion Community. For example, those respondents age 25-34 represent 13% of those returning surveys. Census information shows that this age bracket represents 13.6% of the City's total population. 50% of the respondents have lived in the City of Brillion for 25 years or more, yet, only 39% of the respondents are in combined age classifications of 55-75+ years of age.

- Perspective on Community

Top 5 answers for personal importance placed on community characteristics:

Sense of safety and security.. 99%
Local personal and professional services 86%
New economic and business development...................... 86%
Local retail shopping... 84%
Small-town atmosphere.. 84%

Top two characteristics most important (after sense of security at 62%) are:

Small town atmosphere 31%
New economic and business development...................... 33%
Local retail shopping... 28%
Combined econ and retail = 61%

- Perspective on FUTURE Development in the Community

New Commercial Development and Services: Types of commercial and service-related development most encouraged:

Child care facilities.. 79%
Restaurants 75%
Health facilities (i.e. doctor, dentist, etc.) 75%
Shopping Centers... 70%
Antique, craft, and specialty stores.................................. 67%
Grocery Stores.. 54%
Office Facilities 54%
Convenience stores/Gas stations..................................... 35%

New Industry and Production: Types of industrial development most encouraged*:

- Manufacturing and assembly 84%
- Agriculture-related business 65%
- Warehousing/distribution 63%
- Heavy industry 58%
- Large-scale livestock operations 34%
- Mineral extraction (gravel quarries, etc.) 21%

*included in summary for possible niche gap ideas.

Where within the City should new commercial and service-related development occur?

- Near new high school 29%
- Brillion downtown 28%
- City of Brillion and the immediate surroundings 10%
- Forest Junction and the immediate surroundings 9%
- Highway 10 east of City of Brillion 6%
- Corridor between City of Brillion and Forest Junction 5%
- Forest Junction downtown 2%

Which areas would you most like to see new commercial/service development occur?

- City of Brillion and immediate surroundings 56%
- No opinion...15%
- Forest Junction and the immediate surroundings 13%
- The entire town of Brillion outside the City or Forest Junction 12%
- None 4%

Where should the following types of development occur within the City of Brillion?

Convenience stores/gas stations
28%........ This type of development should not occur
27%........ On the edge of existing developments

Antique, craft, and specialty stores
32%........ In specially zoned areas
17%........ No opinion

Shopping centers
37%........ In specially zoned areas
26%........ On the edge of existing developments

Restaurants
29%........ On the edge of existing developments
27%........ In specially zoned areas

Office facilities
38%........ In specially zoned areas
21%........ No opinion

Health facilities (doctor, dentist, etc.)
26%........ In specially zoned areas
21%........ In neighborhoods

- Other Highlights

Community Services

To what extent would you support community-funded programs to help local businesses maintain, rehabilitate, and improve their places of business?

54%........ Supportive or strongly supportive
24%........ Unsupportive or strongly unsupportive
19%........ Neutral

- Comments from the City of Brillion respondents.

(Note: all comments directly related to commercial/service businesses are as they are reported in the "Additional Comments" section of the survey.)

I feel that when cities try to "plan" for economic development, they end up doing more harm than good. The best thing a community can do is provide a good economic environment: lower taxes, lower fees on businesses, lesser regulations on business while still providing good basic services (i.e. get to roads plowed before noon on the day after a snowstorm.)

Why is Brillion so high taxed? 6 to 10 dollars per thousand higher than any city in the valley. We need tax relief. Build a new high school and enrollment is down? We need to attract new business. Take a lesson from Chilton. A Wal-Mart in Brillion would have been huge. Nobody is moving to Brillion they are moving out because it is too expensive to live here. Very clicky. If BIW or Ariens close up so will Brillion.

I feel that we have an outstanding school system and facility. We need to attract young people to our community for it to keep growing. I would like to see more utilization of school auditorium for the community maybe even a weekly movie? (Don't know if equipped for it.) This small Town of Brillion offers many good things. Let's work together with Forest Junction to promote the total community. We need a variety store to come back, perhaps a clothing store again. Need more information on small business funding. Need affordable single-family or duplex housing for 22-32 year range. Too many high-priced lots and high-priced houses. Not everyone can afford to live on a golf course.

Tourism – Brillion's German Heritage – rather than "Welcome neighbor days." Along with Christmas Fest/Old World Theme.

Becker's Lake needs a new dock – maybe even 2 and more space to park and turn vehicles around. 2) I would like to see Hardees go and get a McDonalds instead. They would have 10 times more business. I even bet if you take a survey on it others would agree too. Or even a Taco Bell Express. 3) Also would like to see a Wal-Mart or other store come to our area. Target? Something. 4) [*Brillion retail business*] is nice, but prices are higher in Brillion. I'd rather travel to Appleton-Chilton-or Manitowoc to get what I need than pay higher prices here. Same goes with [*Brillion retail business*].

Summary/Combination of Consumer Attitude Surveys

During a July, 2002 meeting, the Brillion Market Analysis Committee compiled a summary of consumer survey results and consumer attitudes based on its analysis of findings in the three studies included on the preceding pages. Primary conclusions are listed below.

- There is a strong work ethic in Brillion among residents and local employees.
- ***Small Town Values*** -- Strong overall values, work ethic, and opportunity to preserve rural small town values.
- A strong labor force, especially among younger employees.
- Consumers have an interest in a large department store or general merchandisers like Wal-Mart or Target
- There is a perception of a split between businesses on Hwy 10 and those on Main Street.
- Consumers have an interest in youth-based entertainment such as a movie theater, game room, etc.)
- People living in Brillion feel a sense of security and personal safety
- There is a strong sense of trust by residents/consumers in business owners, especially for bigger ticket items
- Outsiders do not understand Brillion, including where Brillion is located and what's available (this is a marketing opportunity)
- Consumers perceive a need to leave Brillion to get a better deal than what can be found locally (the idea of driving 20-30 miles to save $.25 on a gallon of milk)
- Consumer jealousy – consumers are jealous or suspicious of local business owners who are successful (i.e., owners who drive nice cars or have a nice house are perceived to be taking advantage of consumers)
- A perception among business owners and consumers that Brillion has a marketing problem. Beyond the Brillion News, there's no single radio or TV "broadcast mechanism" that captures all of Brillion consumers.
- Interest in health care facilities and services
- Limited business access – need more extended service hours

Section 6

Analysis of Retail Opportunities

This section of the report provides detailed information on consumer demand and competition (supply) for specific retail business categories. The purpose is to identify potential market opportunities for business expansion or recruitment.

The categories selected for inclusion in this section were based on local research findings, professional knowledge of members of the study committee, findings from downtown survey efforts, and preliminary conclusions drawn from local demographic and lifestyle data.

Market conditions are assessed quantitatively using supply and demand (1) of retail space (square feet) as the measure. Market conditions are also assessed spatially to measure the proximity of existing supply to the trade area. Finally, other more qualitative considerations are discussed that help describe market potential for a specific store category.

In this section, supply and demand are measured by "store type" so that the results are more useful in business expansion and recruitment efforts. Specific store categories are used to add precision to the analysis. Standardized categories using three and five digit codes from the North American Industry Classification System (NAICS) are used.(2)

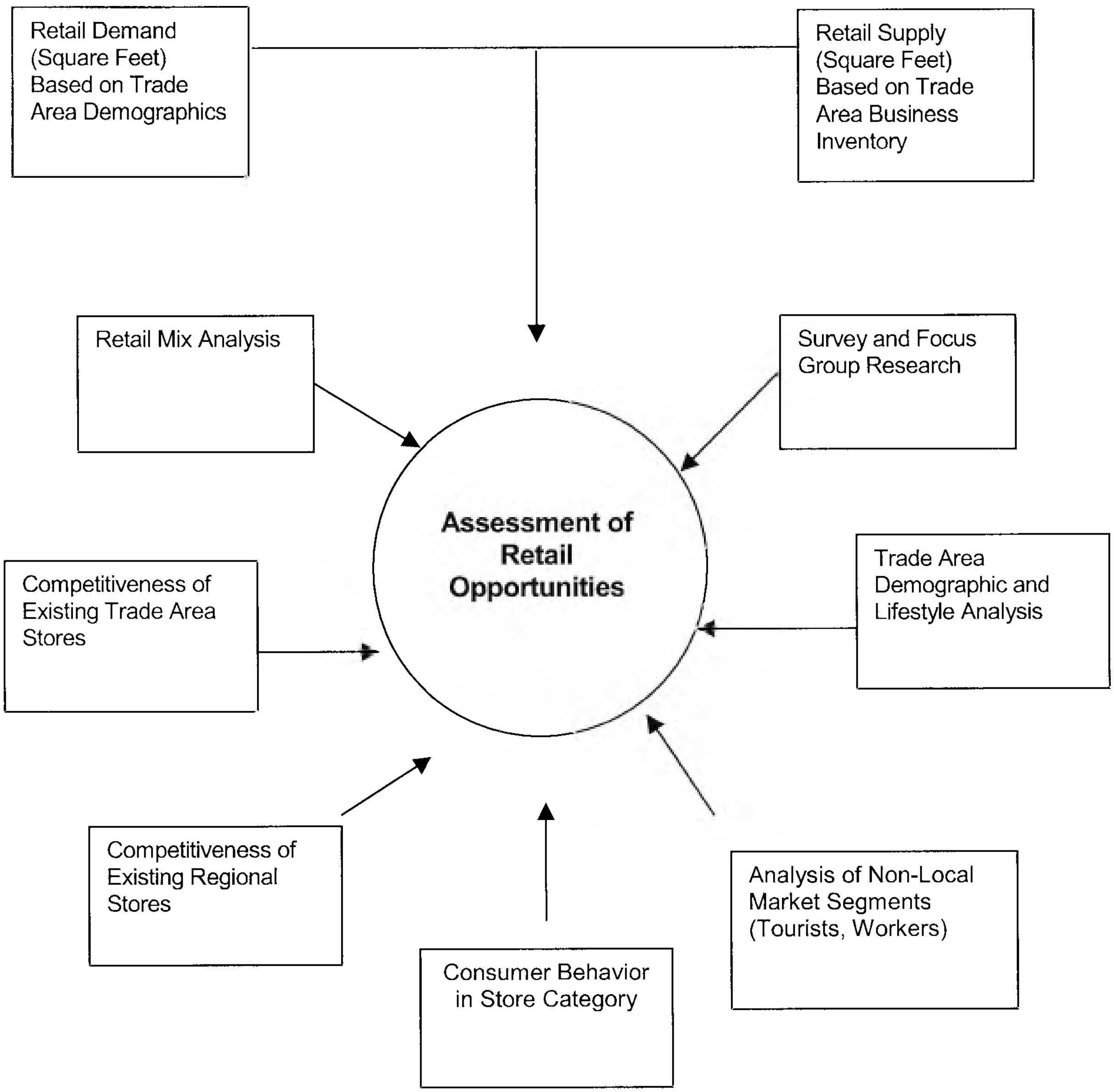
Supply refers to the actual square feet of retail space, sometimes called Gross Leasable Area (GLA), that currently exists in the trade area. Demand refers to the amount of retail space that could be supported by consumers residing in the trade area based on estimates of their spending potential. A comparison of supply and demand by store type can help identify gaps where demand clearly exceeds supply. After considering other market factors including how and where local residents shop, conclusions could be drawn regarding potential business categories worthy of further market research.

Appendix A and Appendix B provide data that was used in calculating demand for the store types in this section. The data in these tables can also be used to study other store categories (not included in this report) on an as-needed basis.

(1) Using the Economic Census, actual retail sales levels for the state can be used as a surrogate for consumer demand. The underlying assumption is that aggregate consumer demand at the state level is fairly well represented by the aggregate retail sales captured at the state level. This is a reasonable assumption in states that do not experience significant sales leakage to adjacent states. By dividing actual state sales by state population, state estimates of per capita consumer demand can be made. These state estimates can then be localized through an adjustment for per capita income differences.

(2) Another way to analyze the retail market is to estimate spending by product type. This data is not presented in this report.

Evaluating Retail Opportunities By Store Type



Apparel
(NAICS 4481)

This industry comprises establishments primarily engaged in retailing a general line of new clothing for men, women, children or families. These establishments may provide basic alterations, such as hemming, taking in or letting out seams, or lengthening or shortening sleeves.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
Total Supply - Current Year				**0**	
Competitors in other Store Categories					
45299	Bullseye Screenprinting	210 S. Main Street	54110	50	Also sells crafts, common sport clothing, tux rentals
44511	T&C Market	205 N. Main Street	54110	20	1-2 racks of t-shirts and sweatshirts

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$1,052,277,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending - 1997	$203.75
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$185.15
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$2,452,683
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	
÷ Estimates Sales per Square Foot (c)	$164.60
= Estimated Store Demand - Current Year	**14,901**
Notes: *(a) Based on US Census of Retail Trade.* *(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.* *(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.*	

Other Market Considerations

Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

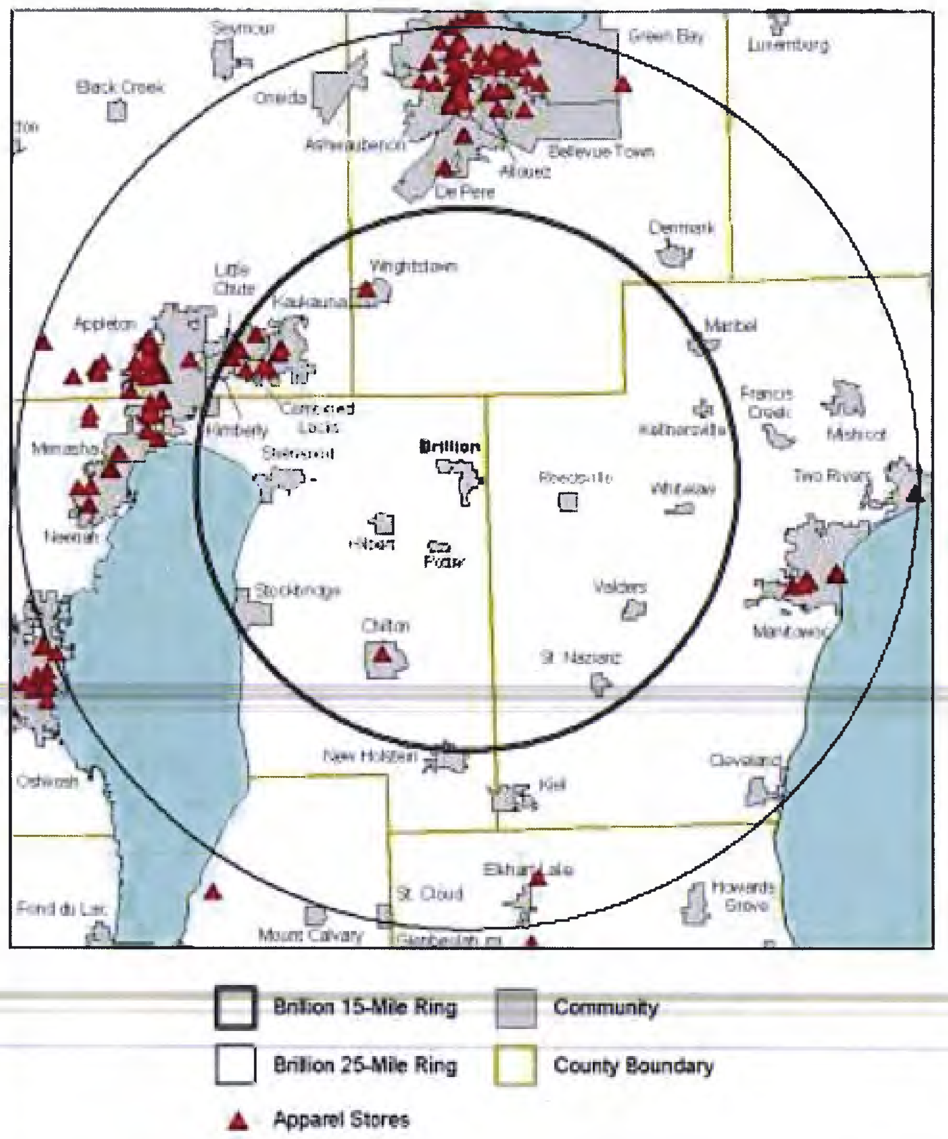
Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local survey results indicate consumers are interested in local apparel purchases. Results also indicate consumers are willing to shop for quality, trust their local retailers for big ticket items, and have strong small town values.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	61.5% of comparison communities have apparel stores. Of those with populations between 2000 and 4500 only 37.5% have apparel stores (3 out of 8). Special note: those communities experience a heavy tourism economy.
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Not significant. Most business will come from the locals.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Comparison. Branding is important. Consumers often prefer regional malls that offer both comparison and complementary shopping opportunities.
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	None
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	High competition.
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	Virtually none. Note: Bullseye provides school apparel.
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	Women's clothing, yes. Children's and men's, no.
Demand from other businesses. Are business to business sales an important consideration?	No. Only possibility may be safety shoes. Uniforms generally provided by franchises.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: 0	**Demand in Square Feet: 14,901**
Other Considerations: Difficult to establish a new store with specialized attire. A difficult market given the close proximity of department stores, and mobility of residents in the area.	
Conclusions: Possible approach is providing a business incubator to get fledgling specialized apparel store started. An apparel-only store in the community may be a difficult sell.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.

Brillion Area Apparel Stores
(NAICS 4481)



Beer/Wine/Liquor Store (NAICS 44531)

This industry comprises establishments primarily engaged in retailing packaged alcoholic beverages, such as ale, beer, wine, and liquor.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
	None				
Total Supply - Current Year				**0**	
Competitors in other Store Categories					
44511	T&C Market	205 N. Main Street	54110	500	Limited selection
44511	Sentry Foods	707 N. Main Street	54110	500	Limited selection
44711	Brillion Self Serve (Mobil)	457 W. Ryan Street	54110	1000	Broader selection
44711	Kwik Trip	108 W. Ryan Street	54110	100	Very limited
44711	TownMart	Reedsville	54230	100	Very limited
	Railway Jct Fast Stop	Forest Junction	54123	100	Very limited

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$359,298,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending - 1997	$69.57
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$63.22
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$837,464
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	
÷ Estimates Sales per Square Foot (c)	$249.67
= Estimated Store Demand - Current Year	**3,354**
Notes: *(a) Based on US Census of Retail Trade.* *(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.* *(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.*	

Other Market Considerations

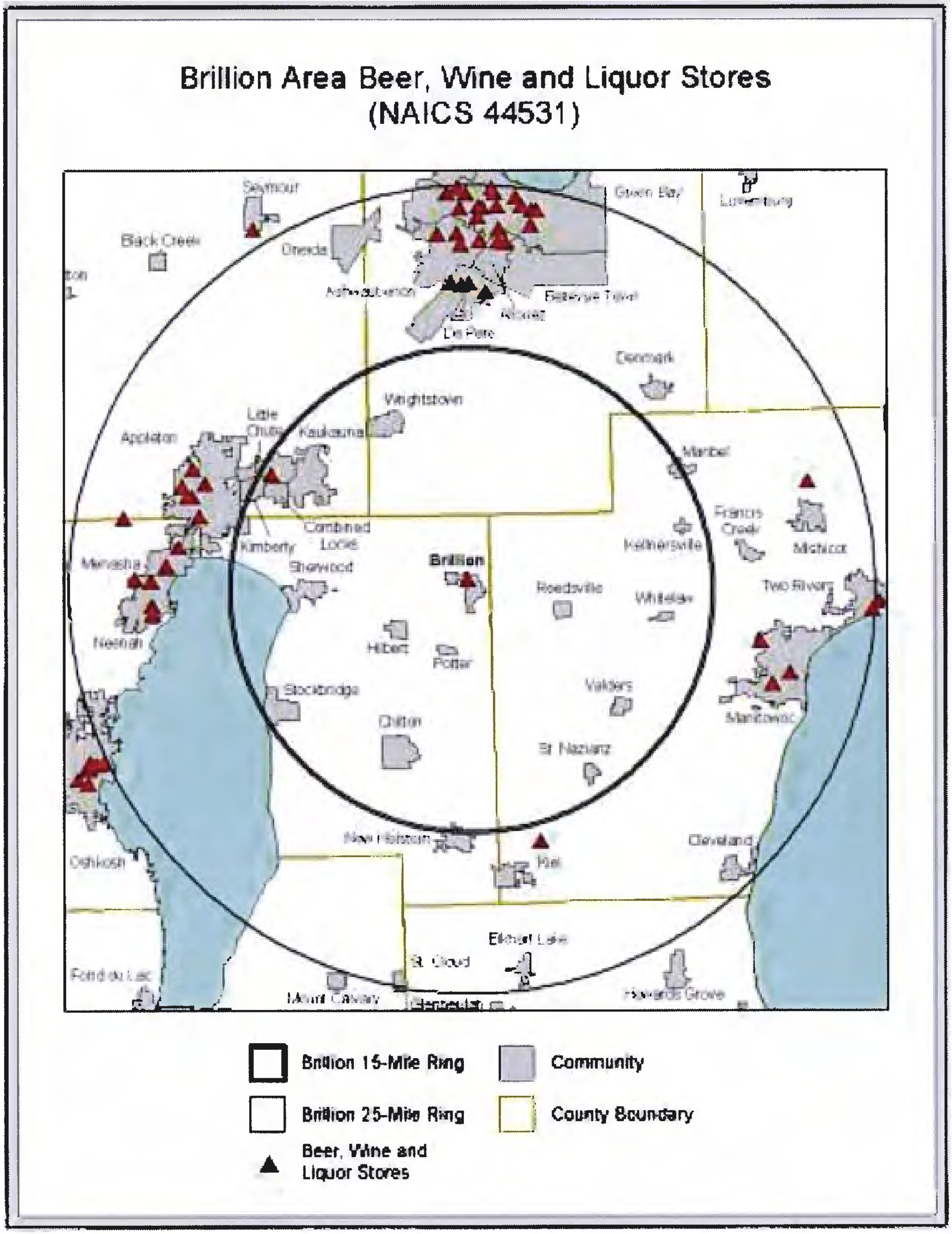
Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local survey results did not specifically address this category. However, results indicate consumers are willing to shop for quality, trust their local retailers, and have strong small town values.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	10 of the 13 comparison communities support this store type. Of those with populations 2000-4500, 5 support this store type.
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Possibly with a speciality niche market, otherwise not. Factory workers who commute in may purchase items in this type of business while in the community.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Convenience, there is no data to suggest otherwise.
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	Yes, with the exception of niche items (fine wines, beers, etc.)
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	Yes
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	Yes
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	Yes, there is strong purchase potential.
Demand from other businesses. Are business to business sales an important consideration?	No.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: 2,300	**Demand in Square Feet: 3,354**
Other Considerations: Specialty niche opportunities are possible for beer and wine connoisseurs.	
Conclusions: There is a possibility for existing retailers to expand sales by adding niche items to existing sales area.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.



Book Stores
(NAICS 45121)

This industry comprises establishments primarily engaged in retailing new books, newspapers, magazines, and other periodicals.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
	None				
Total Supply - Current Year				**0**	
Competitors in other Store Categories					
44511	T&C Market	205 N. Main Street	54110	20	Limited: Bestseller paperbacks, magazines, children's activity books
44511	Sentry Foods	707 N. Main Street	54110	20	Limited: Bestseller paperbacks, magazines, children's activity books

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$193,091,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending – 1997	$37.39
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$33.98
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$450,070
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	
÷ Estimates Sales per Square Foot (c)	161.16
= Estimated Store Demand - Current Year	**2,793**
Notes: *(a) Based on US Census of Retail Trade.* *(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.* *(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.*	

Other Market Considerations

Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

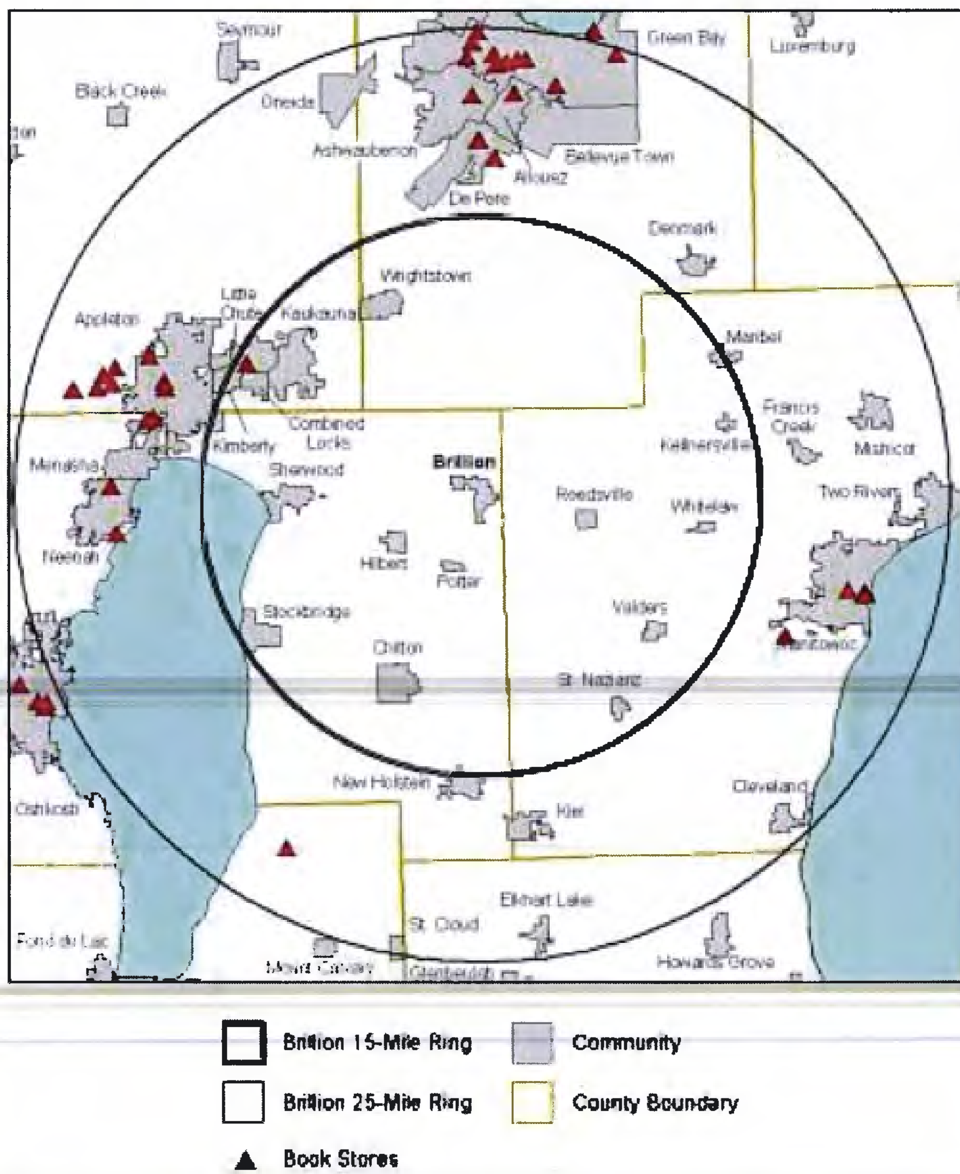
Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local survey results did not specifically address this category. However, results indicate consumers are willing to shop for quality, trust their local retailers, and have strong small town values.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	Approximately 54% of the comparison communities have at least one book store. Of the 8 communities with populations 2000 – 4500, only 3 have bookstores.
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Brillion has no significant tourist attraction, but does host commuters who work at local manufacturers. Possible church members outside the area.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Arguable. Convenience is a strong possibility, but usually, buying books is based on the interest of the individual.
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	None in trade area, although the local library holds a big presence.
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	High – especially through internet sales.
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	Minimal at best. Local grocery stores provide a small section of best sellers, and a good assortment of periodicals.
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	Yes.
Demand from other businesses. Are business to business sales an important consideration?	Minimal.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: 0	**Demand in Square Feet: 2,793**
Other Considerations: Internet marketing has shown a considerable increase in sales – from 34% in 1994 to 45% in 1997 in total book sales!	
Conclusions: A bookstore must be more specialized, perhaps geared toward children or a religious niche. Possible partnership with schools and churches. Possibly coupled with a small gift store.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.

Brillion Area Book Stores (NAICS 45121)



Computer and Software Stores (NAICS 44321)

This industry comprises establishments primarily engaged in retailing new computers, computer peripherals, and prepackaged computer software without retailing other consumer-type electronic products or office equipment, office furniture and office supplies; or retailing these new products in combination with repair and support services.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
	None				
Total Supply - Current Year				**0**	
Competitors in other Store Categories					
	None				

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$261,211,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending - 1997	$50.58
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$45.96
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$608,840
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	
÷ Estimates Sales per Square Foot (c)	$336.53
= Estimated Store Demand - Current Year	**1,809**

Notes:
(a) Based on US Census of Retail Trade.
(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.
(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.

Other Market Considerations

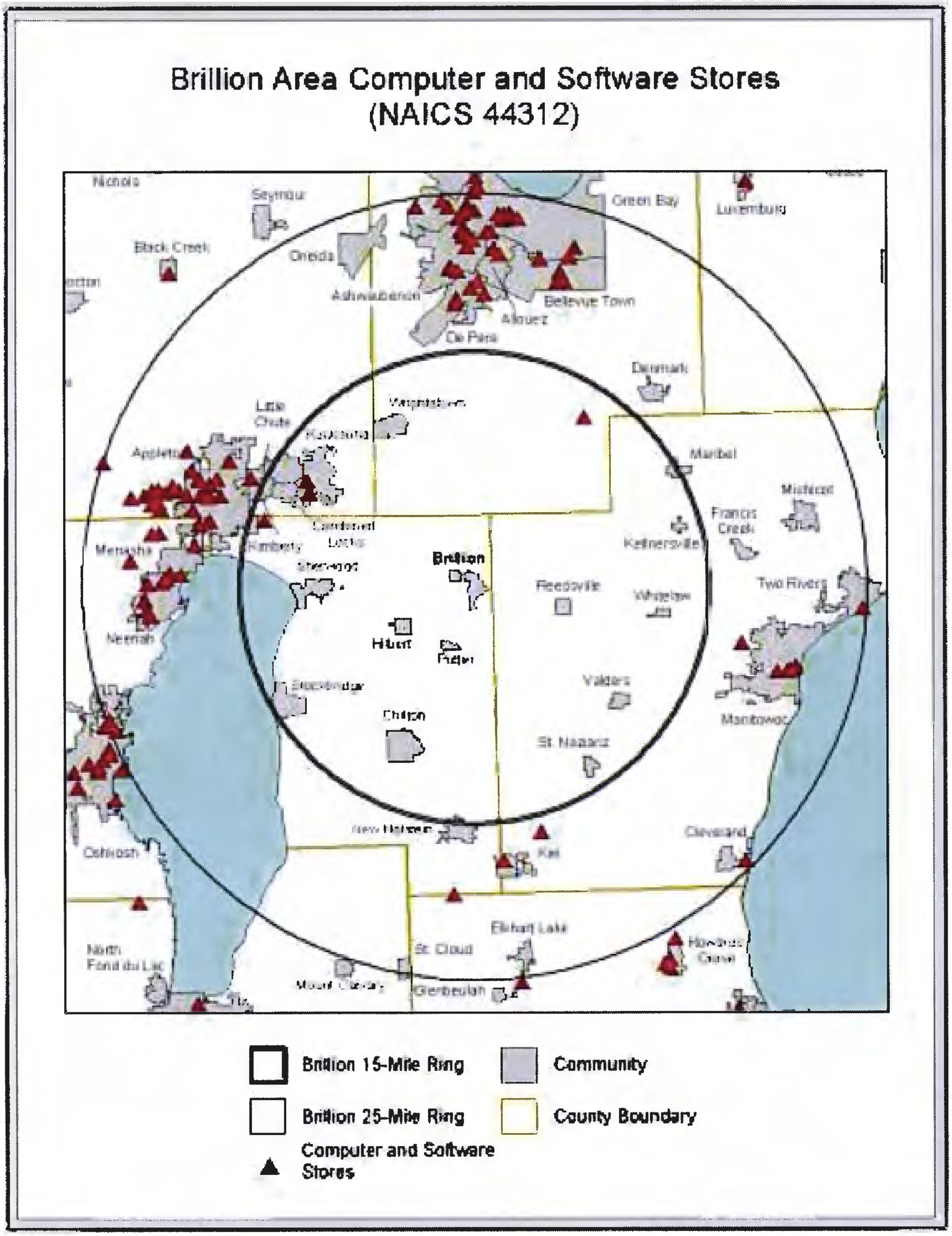
Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local survey results did not specifically address this category. However, results indicate consumers are willing to shop for quality, trust their local retailers for big ticket items, and have strong small town values.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	About half of comparable communities have at least 1 computer/radio/music store, with numbers ranging from 1-8. Of the 8 communities with populations of 2000-4500, 4 have stores in this category.
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Minimal demand
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Both to a certain extent, but more dependent on convenience.
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	None
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	Large competition from internet sales and major retailers in the Appleton area.
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	None, but there is major competition from retailers in the Appleton area.
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	Unsure, probably a 50-50- chance.
Demand from other businesses. Are business to business sales an important consideration?	Yes, if the retailer would prove themselves and offer support services.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: 0	**Demand in Square Feet: 1,809**
Other Considerations: There was a local store, Abalux, that provided computer sales and service and sold software and related peripherals for approximately 5 years until closing in the late 1990's for personal reasons. That store was quite successful, so there is a belief another retail/service store could equal that success.	
Conclusions: There is an opportunity if a strong service component is included. Square footage needs are lower than the recommended store size.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.



Department Stores (NAICS 45211)

This industry comprises establishments known as department and general merchandise stores primarily engaged in retailing a wide range of the following new products with no one merchandise line predominating: apparel, furniture, appliances and home furnishings; and selected additional items, such as paint, hardware, toiletries, cosmetics, photographic equipment, jewelry, toys, and sporting goods. Merchandise lines are normally arranged in separate departments.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
None					
Total Supply - Current Year				**0**	No competitors
Competitors in other Store Categories					
None					

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$5,308,110,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending - 1997	$1027.78
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$933.97
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$12,372,326
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	
÷ Estimates Sales per Square Foot (c)	142.31
= Estimated Store Demand - Current Year	**86,939**
Notes: *(a) Based on US Census of Retail Trade.* *(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.* *(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.*	

Other Market Considerations

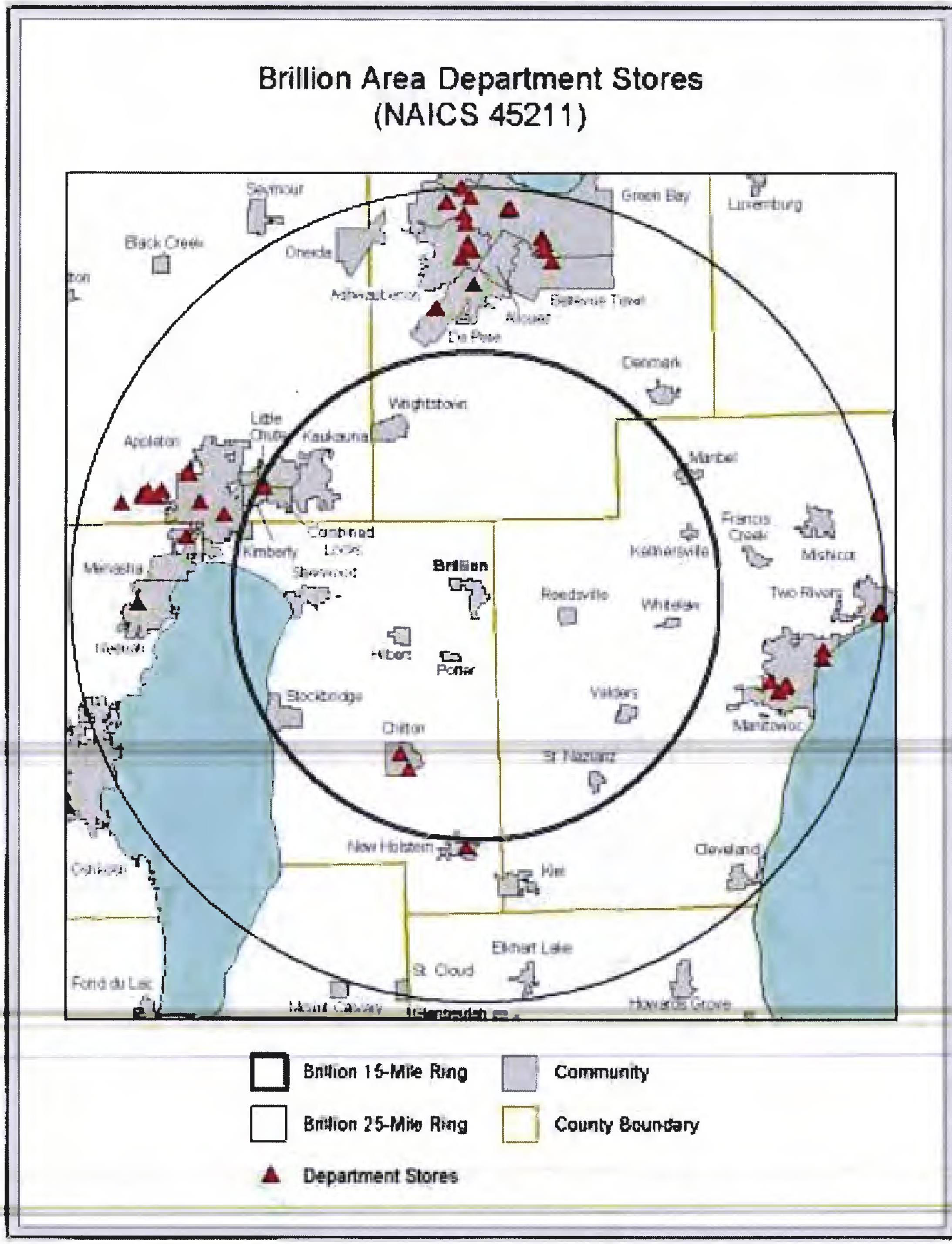
Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Survey results indicate Brillion residents are very interested in having a large department store or general merchandise store located in Brillion.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	Most comparable communities have at least 1 department store, with the exception of Omro, Columbus, and Waterford. Of the 8 communities with populations of 2000-4500, 5 have department stores, Dodgeville claiming 2.
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Yes, there could be significant demand from commuters who work in the Brillion trade area.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Primarily convenience (There's a need to acknowledge the mentality that "you need to leave Brillion to get a deal."
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	None exist
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	Competition is extensive. There are two WalMarts (Chilton and Darboy) and several other shopping centers in the Fox Cities.
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	No
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	The purchasing potential is huge
Demand from other businesses. Are business to business sales an important consideration?	Could potentially be very big, depending on the type of items carried.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: 0	**Demand in Square Feet: 86,939**
Other Considerations: Space availability is an issue. Adequate space is likely not available in Brillion's downtown area. If a department-type store were opened, it would need to be located on the Hwy 10 corridor.	
Conclusions: The potential exists to consider a Big Lots or Family Dollar type of store.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.



Jewelry Stores
(NAICS 44831)

This industry comprises establishments primarily engaged in retailing one or more of the following items: (1) new jewelry (except costume jewelry); (2) new sterling and plated silverware; and (3) new watches and clocks. Also included are establishments retailing these new products in combination with lapidary work and/or repair services.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
					No competitors
Total Supply - Current Year				0	
Competitors in other Store Categories					
45311	Schroth's Floral & Gifts	119 S. Main Street	54110		One small display case

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$311,575,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending - 1997	$60.33
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$54.82
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$726,230
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	
÷ Estimates Sales per Square Foot (c)	263.92
= Estimated Store Demand - Current Year	**2,752**

Notes:
(a) Based on US Census of Retail Trade.
(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.
(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.

Other Market Considerations

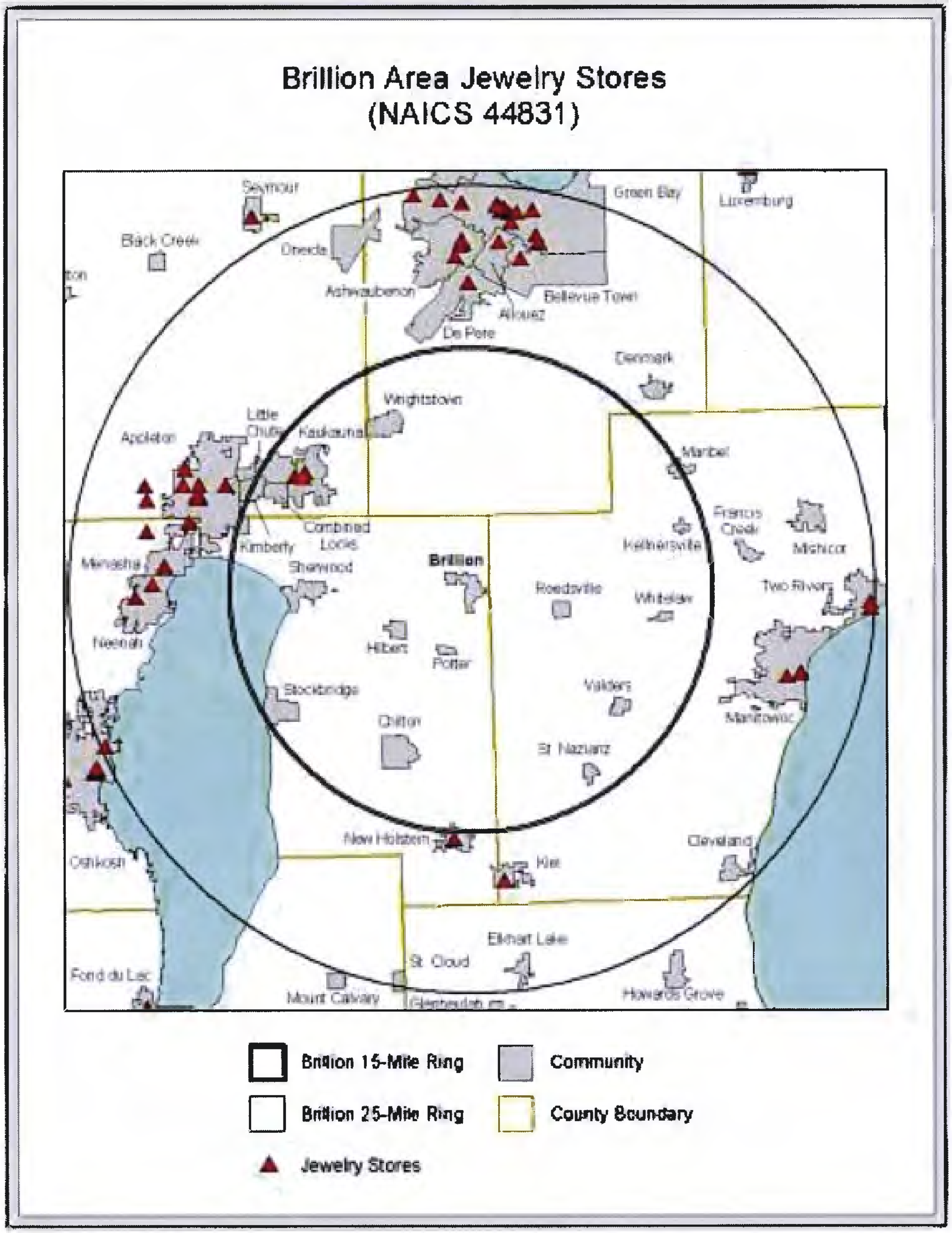
Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local survey results did not specifically address this category. However, results indicate consumers are willing to shop for quality, trust their local retailers for big ticket items, and have strong small town values.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	Over 69% of comparison communities have at least one jewelry store. Four (4) out of the 8 communities with populations 2000 – 4500 have jewelry stores. Kiel is included in that number.
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Demand would not likely be strong.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Purchases would be driven more by comparison shopping, but there is potential for convenience shopping for lower cost purchases such as costume jewelry.
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	There are no existing competitors.
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	There is fairly significant competition to the west of the trade area from fine jewelers in the Appleton area and from department stores (Kohl's, WalMart, Sam's Club) that carry costume and fine jewelry.
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	There is no competition from other types of stores within the trade area, but several competitors exist just west of the trade area.
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	There is strong purchasing potential within the trade area, with likely interest in costume jewelry more so than fine jewelry. Biggest fine jewelry demand is for wedding sets and watches.
Demand from other businesses. Are business to business sales an important consideration?	No

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: 0	**Demand in Square Feet: 2,752**
Other Considerations: The overall Brillion trade area retail mix would be improved/increased if there were another store type in the area.	
Conclusions: There is a possible opportunity for jewelry to be sold if clustered with another store(s) type such as apparel, bridal, or ear/body piercing.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.



Motorcycle/Boat/Other
(NAICS 44122)

This industry comprises establishments primarily engaged in retailing new and used motorcycles, boats, and other vehicles (except automobiles, light trucks, and recreational vehicles), or retailing these new vehicles in combination with activities, such as repair services and selling replacement parts and accessories.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
Total Supply - Current Year				**0**	
Competitors in other Store Categories					
44112	Mobile Sales and Equipment	530 N. Main Street	54110	NA	Sells wave runners.
44111	Horn Ford Mercury Marine	666 W. Ryan Street	54110	NA	Sells new boats/marine equipment.

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$652,128,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending - 1997	$126.27
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$114.74
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$1,520,002
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	NA
÷ Estimates Sales per Square Foot (c)	
= Estimated Store Demand - Current Year	**NA**
Notes: *(a) Based on US Census of Retail Trade.* *(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.* *(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.*	

Other Market Considerations

Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local survey results did not specifically address this category. However, results indicate consumers are willing to shop for quality, trust their local retailers for big ticket items, and have strong small town values.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	6 of the 13 communities support Boat/RV/Snowmobile sales. 50% of the communities with populations 2000-4500 support these sales, the top being Waterford, pop. 4000.
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Demand from nonresidents who would travel based on reputation and quality is possible. Factory workers who commute in may purchase items in this type of business while in the community.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Comparison
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	Local demand is unknown, but assumed to be strong based on knowledge of local vehicle ownership. Demand depends on weather and economic conditions.
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	Yes, competition from outside the trade area is strong. Branding is strong. Consumers will not stop at a 25 mile radius to find good quality.
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	Limited competition, such as Ken's Sports.
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	High PPI for this type of activity, but equally high PPI for stay at home activities.
Demand from other businesses. Are business to business sales an important consideration?	No.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: NA	**Demand in Square Feet: NA**
Other Considerations: Vacant Hardee's Restaurant could be an ideal location to sell motorcycles and other vehicles (ATVs), perhaps in combination with Recreational Vehicles, considering Horn Ford's proximity to the west.	
Conclusions: There could be good potential for this category in combination with RV sales, especially with a strong service/supply component offered.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.

Brillion Area Motorcycle, Boat and Other Vehicle Dealers (NAICS 44122)

Office Supply Stores
(NAICS 45321)

This industry comprises establishments primarily engaged in one or more of the following: (1) retailing new stationery, school supplies, and office supplies; (2) selling a combination of new office equipment, furniture, and supplies; and (3) selling new office equipment, furniture, and supplies in combination with selling new computers.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
Total Supply - Current Year				**0**	
Competitors in other Store Categories					
44511	Sentry Foods	707 N. Main Street	54110	50	Small display of basic needs i.e. pens and pencils
44511	T&C Market	205 N. Main Street	54110	50	Small display of basic needs i.e. pens and pencils

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$205,600,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending - 1997	$39.81
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$36.18
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$479,220
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	
÷ Estimates Sales per Square Foot (c)	$262.26
= Estimated Store Demand - Current Year	**1,827**

Notes:
(a) Based on US Census of Retail Trade.
(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.
(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.

Other Market Considerations

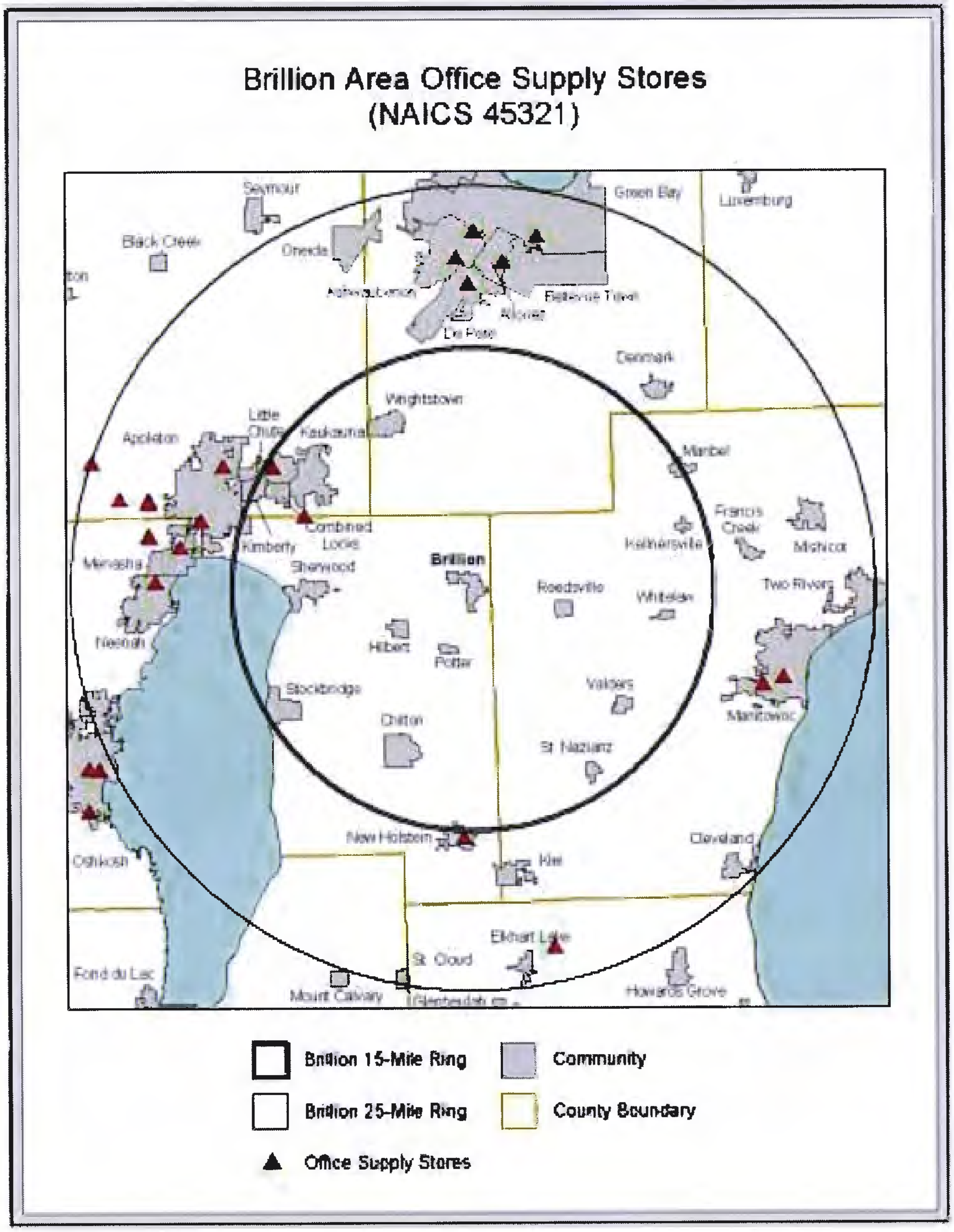
Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local survey results did not specifically address this category. However, results indicate consumers are willing to shop for quality, would like to shop locally for additional items, trust their local retailers, and have strong small town values.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	4 of the 13 comparison communities host office supply stores. Only 1 comparison community with populations of 2000-4500 have office supply stores (Columbus, pop. 4500)
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Yes.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Convenience
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	None
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	Yes. Businesses from neighboring cities will send sales reps to local businesses to fill their needs. Otherwise, residents seem conditioned to purchase in department stores or big office supply retailers.
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	Minimal
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	Residents will more than likely spend money on small ticket items. Larger items will be purchased from big office supply retailers or department stores.
Demand from other businesses. Are business to business sales an important consideration?	Yes.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: 0	**Demand in Square Feet 1,827**
Other Considerations: Local businesses also purchase bulk items such as paper towels, toilet paper, coffee, filters, etc. and currently purchase through sales reps or Sam's Clubs.	
Conclusions: Good potential. Inventories may be too daunting to maintain in the smaller community, but could include printing and other office services.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.



Recreational Vehicle
(NAICS 44121)

This industry comprises establishments primarily engaged in retailing new and/or used recreational vehicles commonly referred to as RVs or retailing these new vehicles in combination with activities, such as repair services and selling replacement parts and accessories.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
Total Supply - Current Year				0	
Competitors in other Store Categories					
44112	Mobile Sales and Equipment	530 N. Main Street	54110	NA	Sells wave runners and occasional RVs and snowmobiles
44111	Horn Ford Mercury Marine	666 W. Ryan Street	54110	NA	Sells new boats/marine equipment. No RVs or snowmobiles

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$171,432,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending - 1997	$33.19
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$30.16
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$399,580
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	NA
÷ Estimates Sales per Square Foot (c)	
= Estimated Store Demand - Current Year	**NA**

Notes:
(a) Based on US Census of Retail Trade.
(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.
(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.

Other Market Considerations

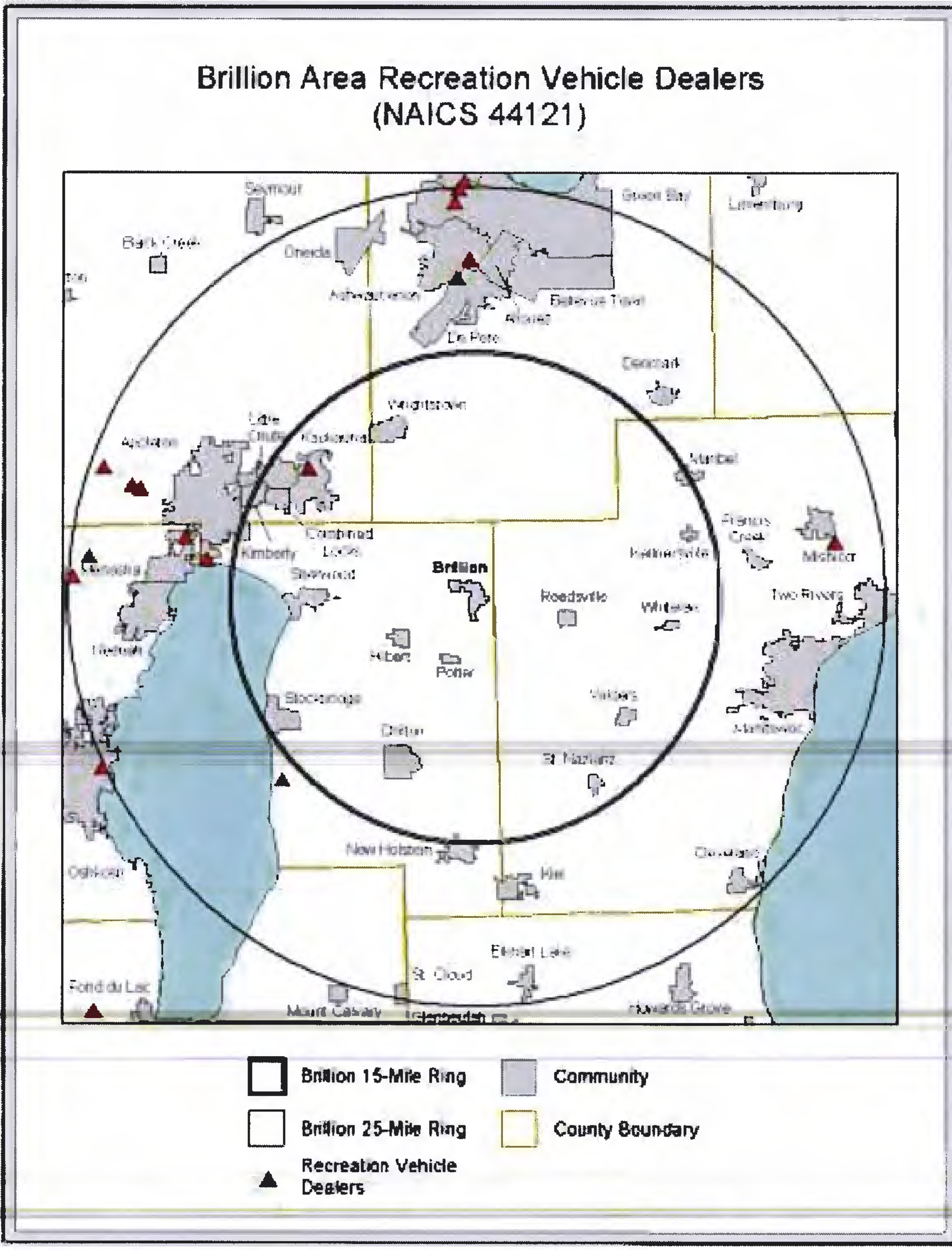
Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local survey results did not specifically address this category. However, results indicate consumers are willing to shop for quality, trust their local retailers for big ticket items, and have strong small town values.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	6 of the 13 communities support Boat/RV/Snowmobile sales. 50% of the communities with populations 2000-4500 support these sales, the top being Waterford, pop. 4000.
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Demand from nonresidents who would travel based on reputation and quality is possible. Factory workers who commute in may purchase items in this type of business while in the community.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Comparison
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	Local demand is unknown, but assumed to be strong based on knowledge of local vehicle ownership. Demand depends on weather and economic conditions.
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	Yes, competition from outside the trade area is strong. Branding is strong. Consumers will not stop at a 25 mile radius to find good quality.
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	Limited competition.
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	PPI indicates high potential for this cateogory.
Demand from other businesses. Are business to business sales an important consideration?	No, with the possible exception of farm purchase of ATVs.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: NA	**Demand in Square Feet: NA**
Other Considerations: Vacant Hardee's Restaurant could be an ideal location to sell RVs, perhaps in combination with motorcycles and other vehicles (ATVs), considering Horn Ford's proximity to the west.	
Conclusions: There could be good potential for this category in combination with motorcycle and other equipment sales, especially with a strong service/supply component offered.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.



Shoe Stores
(NAICS 44821)

This industry comprises establishments primarily engaged in retailing all types of new footwear (except hosiery and specialty sports footwear, such as golf shoes, bowling shoes, and spiked shoes). Establishments primarily engaged in retailing new tennis shoes or sneakers are included in this industry.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
	None				
Total Supply - Current Year				**0**	
Competitors in other Store Categories					

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$323,280,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending - 1997	$62.59
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$56.88
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$753,512
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	
÷ Estimates Sales per Square Foot (c)	$158.81
= Estimated Store Demand - Current Year	**4,745**
Notes:	
(a) Based on US Census of Retail Trade.	
(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.	
(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.	

Other Market Considerations

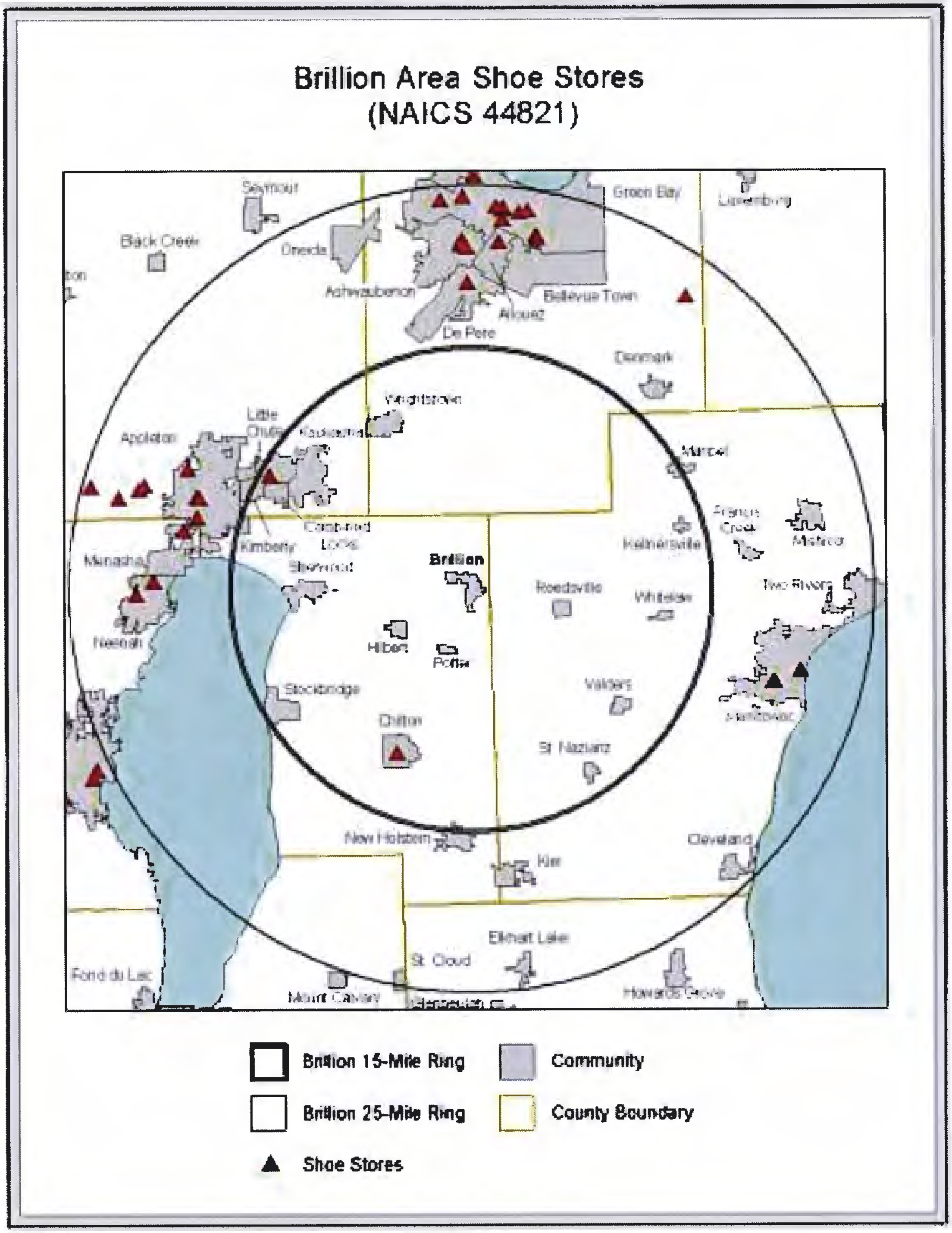
Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local survey results did not specifically address this category. However, results indicate consumers are willing to shop for quality, trust their local retailers, and have strong small town values.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	5 of the 13 communities (38%) support at least 1 shoe store. No communities (0%) with populations of 2000-4500 support a shoe store.
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	No.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	It depends on the type of shoe/demographics. May be driven more by convenience. Consumers often prefer regional malls that offer comparison and complementary shopping opportunities.
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	None
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	Yes, department stores and big box stores siphon business.
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	None.
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	People shop through department stores or other major retailers such as Fleet Farm.
Demand from other businesses. Are business to business sales an important consideration?	Not significant, but it may be possible to sell work shoes to manufacturing employees.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: 0	**Demand in Square Feet: 4,745**
Other Considerations: Successful shoes stores in the past in Brillion offered repair service in additional to shoe sales.	
Conclusions: A shoe store in Brillion would likely not stand alone. It would need to be part of a department store.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.



Specialty Food Stores
(NAICS 4452)

This industry group comprises establishments primarily engaged in retailing specialized lines of food.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
4452	Roehrborns' Meat Market	640 W. Ryan Street	54110		Meats, and some cheeses
	Brillion Bakery	212 N. Main	54110		bakery
Total Supply - Current Year					
Competitors in other Store Categories					
44511	Sentry Deli & Bakery	707 N. Main Street	54110		Deli and bakery
44511	T&C Deli & Bakery	205 N. Main Street	54110		Deli and bakery

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$182,382,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending – 1997	$35.31
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$32.09
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$425,102
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	
÷ Estimates Sales per Square Foot (c)	$162.57
= Estimated Store Demand - Current Year	**2,615**
Notes: *(a) Based on US Census of Retail Trade.* *(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.* *(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.*	

Other Market Considerations

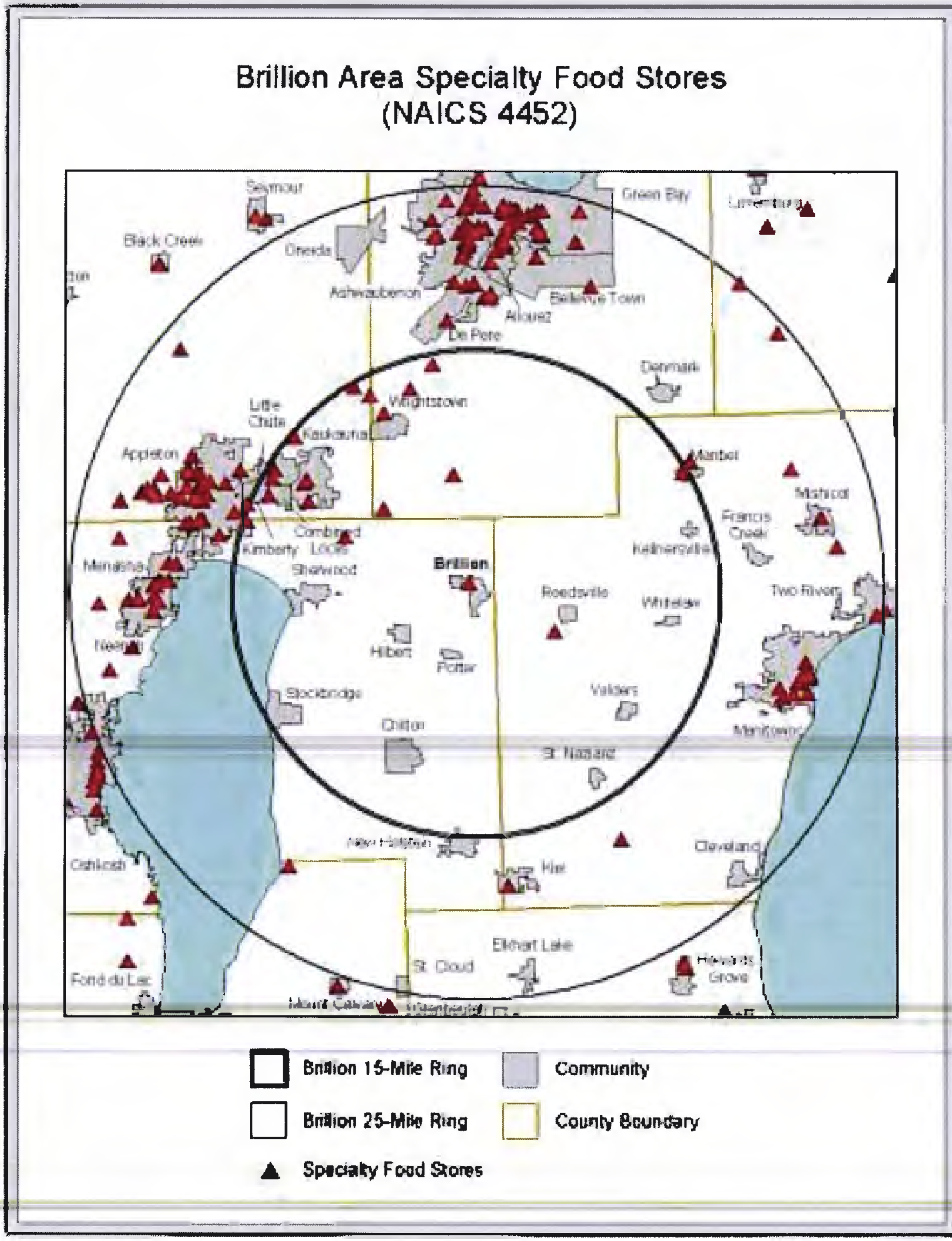
Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local survey results did not specifically address this category. However, results indicate consumers are willing to shop for quality, trust their local retailers, and have strong small town values.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	All communities, except for one (Sigourney, IA pop. 2200) have specialty food stores. The average number of these stores in communities with populations 2000-4500 is 1.88 stores. Dodgeville, pop. 4200 has 5, Omro, pop. 3200 has 3.
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Possible demand from commuters if it is highly visible on Hwy 10 and fits the right niche.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Convenience
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	The Meat Market is, but other stores are not.
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	Yes
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	Mainstream needs are being met, but niche demands are not.
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	Yes, there is demand for "nichey," nontraditional items.
Demand from other businesses. Are business to business sales an important consideration?	Yes, potentially depending on the type.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet:	**Demand in Square Feet: 2,615**
Other Considerations: The Bakery is only open one day per week. It may have more traffic if it were open more predictably. Other specialty food stores could have an opportunity in highly visible locations.	
Conclusions: There are opportunities to expand product offerings.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.



Sporting Goods
(NAICS 45111)

This industry comprises establishments primarily engaged in retailing new sporting goods, such as bicycles and bicycle parts; camping equipment; exercise and fitness equipment; athletic uniforms; specialty sports footwear; and sporting goods, equipment, and accessories.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
	None				
Total Supply - Current Year				**0**	
Competitors in other Store Categories					
44413	Brillion True Value	205 N. Main Street	54110		Ammunition, fishing supplies, seasonal camping supplies, seasonal swimming accessories – no big ticket items.

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	$423,731,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending - 1997	$82.04
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	$74.56
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	$987,647
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	
÷ Estimates Sales per Square Foot (c)	$153.46
= Estimated Store Demand - Current Year	**6,436**
Notes: *(a) Based on US Census of Retail Trade.* *(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.* *(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.*	

Other Market Considerations

Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

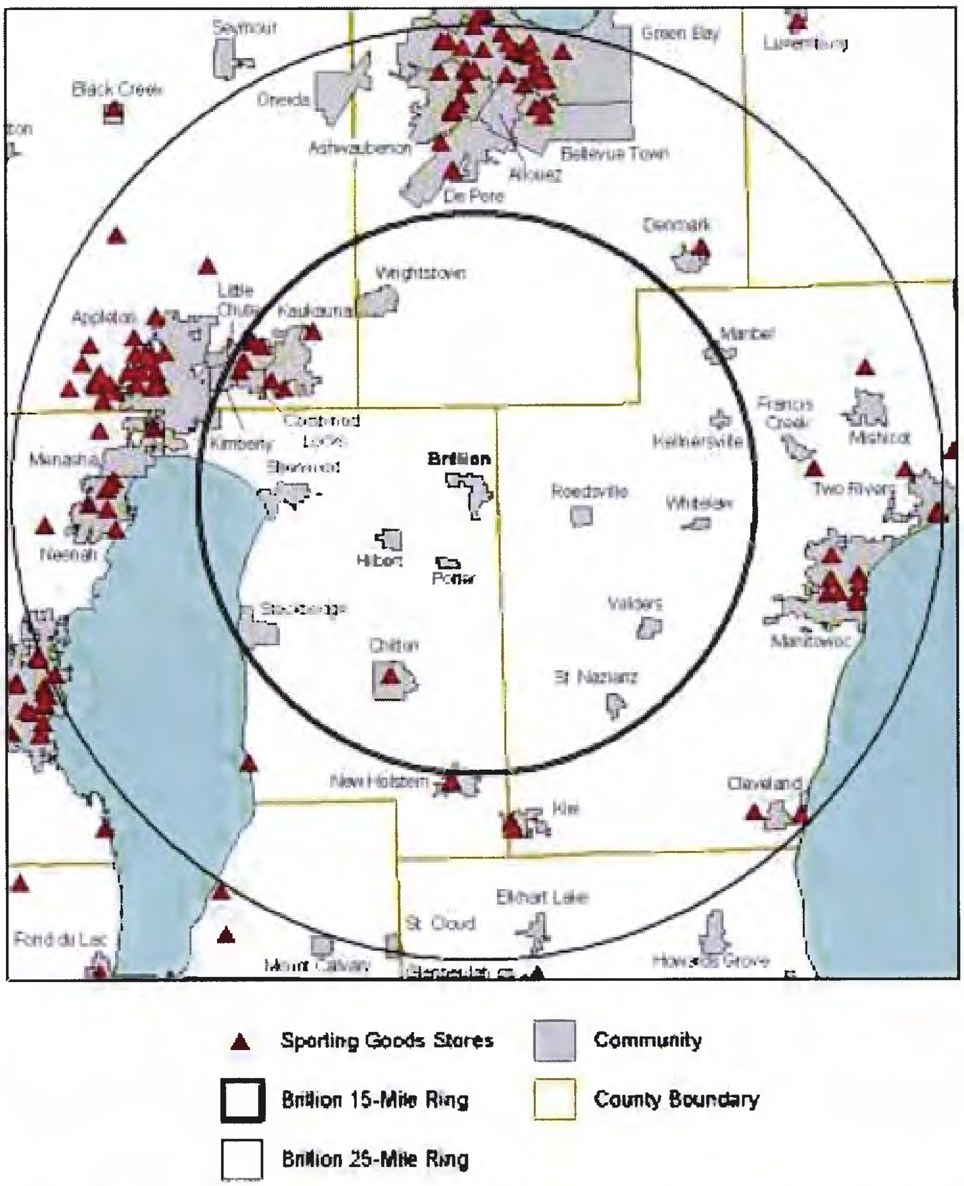
Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local survey results did not specifically address this category. However, results indicate consumers are willing to shop for quality, trust their local retailers, and have strong small town values.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	Of the 13 communities 9 have sporting goods stores. Of those with populations 2000-4500, 6 host these stores (75%). Dodgeville, pop. 4200 and Peshtigo, pop. 3400 each support 4.
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Factory workers who commute in may purchase items in this type of business while in the community.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Both, probably more comparison
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	No existing stores in this category.
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	Yes.
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	Yes, although it may be the best kept secret in Brillion.
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	Yes
Demand from other businesses. Are business to business sales an important consideration?	Probably not.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: 0	**Demand in Square Feet: 6,436**
Other Considerations: According to demographic findings, consumers in this area do a great deal of outdoor sporting activities such as hunting and fishing. Offering last minute supplies for these activities may prove to be a valuable convenience.	
Conclusions: It may be possible to expand choices in current businesses that already carry sporting goods, however, at this point it may be more advisable to advertise more aggressively before offering more to the trade area.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.

Brillion Area Sporting Goods Stores (NAICS 45111)



Tape/CD/Record Stores (NAICS 45122)

This industry comprises establishments primarily engaged in retailing new prerecorded audio and video tapes, compact discs (CDs), and phonograph records.

Retail Supply

The table below lists all of the stores in this category within the primary trade area. In addition, there are other stores that compete to varying degrees for the sale of similar goods and services, but are classified in other categories.

NAICS	Business Name	Address	Zip Code	Sq Feet	Comments
Competitors in this Store Category:					
	None				
Total Supply - Current Year				**0**	
Competitors in other Store Categories					
	Express Video	210 N. Main Street	54110		Video rental

Retail Demand

Consumer expenditure demand represents the amount of annual spending of residents of the primary trade area in this store category. It was calculated as follows:

Consumer Demand Calculation	
Step 1: Calculate Statewide per Capita Spending	
1997 US Census of Retail Trade Sales for Wisconsin (a)	\$100,546,000
÷ Wisconsin Population 1997	5,164,635
= Estimated Per Capita Spending - 1997	\$19.47
Step 2: Adjust for Differences in Primary Trade Area Per Capita Income	
x Adjustment for Per Capita Income (b)	.909
= Estimated Primary Trade Area Per Capita Spending	\$17.69
Step 3: Calculate Primary Trade Area Store Demand in Dollars	
x Primary Trade Area Population -current year	13,247
= Estimated Consumer Spending Demand (for current year expressed in 1997 dollars)	\$234,356
Step 4: Calculate Primary Trade Area Store Demand in Square Feet	
÷ Estimates Sales per Square Foot (c)	\$163.04
= Estimated Store Demand - Current Year	**1,437**
Notes: *(a) Based on US Census of Retail Trade.* *(b) Based on Primary Trade Area Per Capita Income ÷ State Per Capita Income. 2000 CACI estimates.* *(c) Based on 1997 Dollars & Cents of Shopping Centers, Community Shopping Centers, Urban Land Instit.*	

Other Market Considerations

Differences in retail space supply and demand need to be analyzed in context of other market factors. The following are additional considerations that add to the analysis of this retail category.

**** Highlighted sections are to be completed by the group in discussions led by the assigned member.***

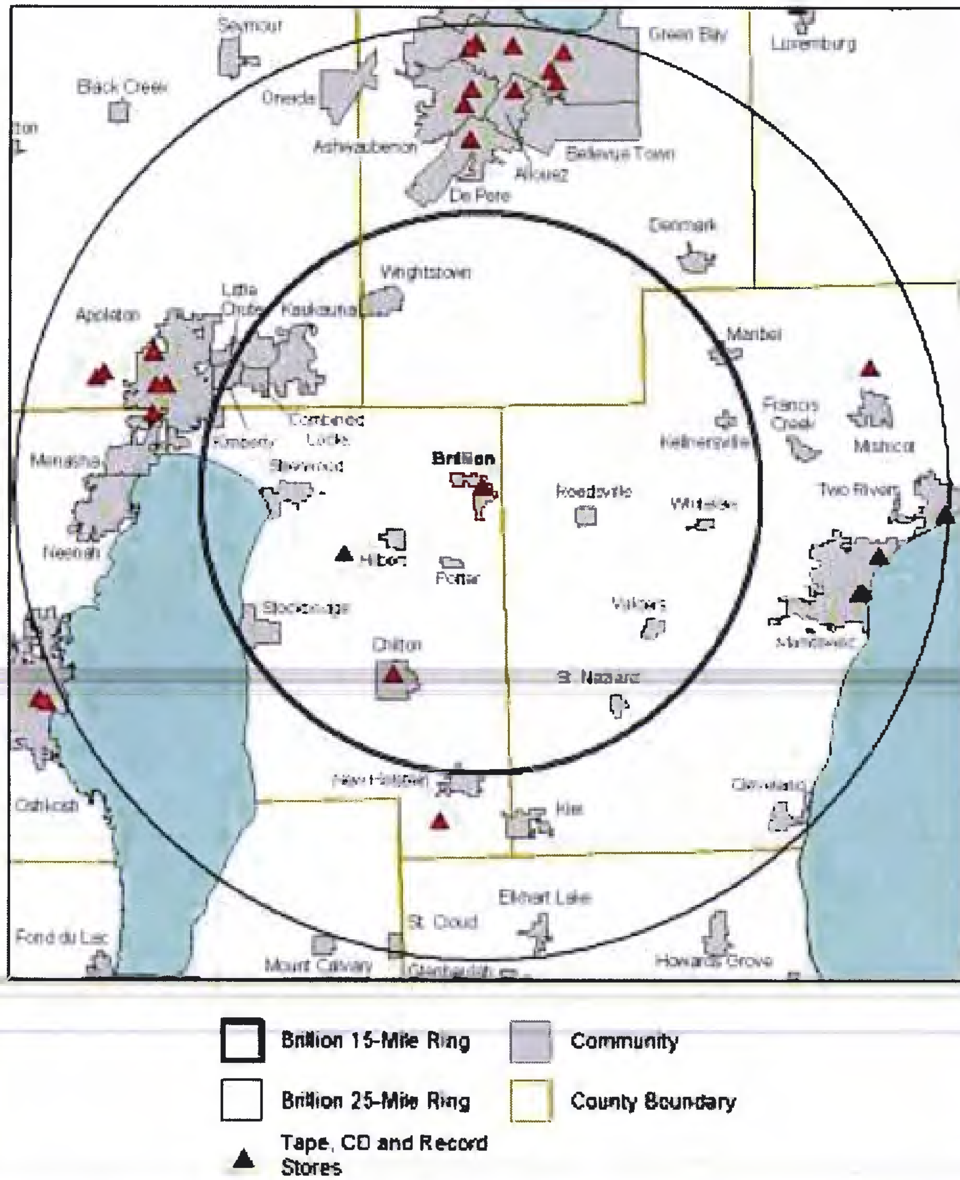
Consideration	Local Analysis
Survey and focus group findings. What have we learned from local research about consumer behavior and perceptions of the business district?	Local Brillion consumers have shown they support the Express Video store. No specific survey data regarding this category.
Retail Mix in Comparable Communities. How many businesses in the category are located in the downtown areas of comparable communities?	
Demand from non-residents. Is there significant market potential from nonresident customer segments such as tourists and commuters?	Factory workers who commute in may purchase items in this type of business while in the community.
Consumer behavior in this retail category. Are purchases driven by convenience or comparison shopping?	Convenience.
Quality of existing competitors. Are existing stores in this category providing the merchandise and service local shoppers' demand?	None.
Competition from outside the trade area. Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?	Yes, there are many stores in this category in surrounding communities.
Competition from other types of stores in the primary trade area. Do local discount department stores or supermarkets already fill the niche of more specialized store types?	Express Video rents video tapes and sells used. No other specific competition.
Lifestyle and purchasing potential information. Does lifestyle segmentation data indicate that local residents are more likely to purchase goods within this store category?	Not necessarily.
Demand from other businesses. Are business to business sales an important consideration?	No.

Conclusions and Recommendations for (Store Category)	
Supply in Square Feet: 0	**Demand in Square Feet: 1,437**
Other Considerations: Public library, Express Video, and the internet would be competitors.	
Conclusions: The committee recommends no further pursuit of this category unless it were clustered with another business.	

Analysis of Regional Competition Surrounding the Trade Area

The supply of stores in the region beyond the Brillion trade area describes the competitive market surrounding the subject communities. The following map for this store category shows the approximate location of existing competition within 15-25 miles.

Brillion Area Tape, CD and Record Stores (NAICS 45122)



Appendix A - Calculation of Retail Sales Demand per Capita
State of Wisconsin, 1997 Dollars
Based on the 1997 Economic Census, U.S. Census Bureau

NAICS	Description	Estab.	Sales $000	Sales/Estab	$ Per Capita
44-45	Total Wisconsin Retail Trade	1,717	50,520,463	2,326,309	9,782
44111	New car dealers	668	10,808,194	16,179,931	2,093
44112	Used car dealers	540	692,820	1,283,000	134
44121	Recreational vehicle dealers	81	171,432	2,116,444	33
44122	Motorcycle, boat, and other motor vehicle dealers	334	652,128	1,952,479	126
44131	Automotive parts and accessories stores	753	831,980	1,104,887	161
44132	Tire dealers	240	287,125	1,196,354	56
44211	Furniture stores	537	736,673	1,371,831	143
44221	Floor covering stores	377	376,063	997,515	73
44229	Other home furnishings stores	308	163,854	531,994	32
44311	Appliance, television, and other electronics stores	634	1,052,063	1,659,405	204
44312	Computer and software stores	198	261,211	1,319,247	51
44313	Camera and photographic supplies stores	38	23,801	626,342	5
44411	Home centers	47	*747,361*	15,901,305	145
44412	Paint and wallpaper stores	179	*207,667*	1,160,149	40
44413	Hardware stores	440	433,376	984,945	84
44419	Other building material dealers	1,031	3,028,918	2,937,845	586
44421	Outdoor power equipment stores	136	113,798	836,750	22
44422	Nursery and garden centers	534	1,238,995	2,320,215	240
44511	Supermarkets & other grocers (ex convenience)	1,209	7,163,345	5,925,017	1,387
44512	Convenience stores	201	125,130	622,537	24
4452	Specialty food stores	472	182,382	386,403	35
44531	Beer, wine, and liquor stores	490	359,298	733,261	70
44611	Pharmacies and drug stores	724	1,646,621	2,274,338	319
44612	Cosmetics, beauty supplies, and perfume stores	108	55,619	514,991	11
44613	Optical goods stores	277	109,865	396,625	21
44619	Other health and personal care stores	239	92,124	385,456	18
44711	Gasoline stations with convenience stores	1,931	3,364,307	1,742,262	651
44719	Other gasoline stations	753	1,087,545	1,444,283	211
44811	Men's clothing stores	180	111,377	618,761	22
44812	Women's clothing stores	642	340,874	530,956	66
44813	Children's and infants' clothing stores	53	32,856	619,925	6
44814	Family clothing stores	298	441,492	1,481,517	85
44815	Clothing accessories stores	107	21,061	196,832	4
44819	Other clothing stores	209	104,617	500,560	20
44821	Shoe stores	524	323,280	616,947	63
44831	Jewelry stores	522	311,575	596,887	60
44832	Luggage and leather goods stores	25	10,186	407,440	2
45111	Sporting goods stores	610	423,731	694,641	82
45112	Hobby, toy, and game stores	244	205,783	843,373	40
45113	Sewing, needlework, and piece goods stores	147	56,140	381,905	11
45114	Musical instrument and supplies stores	84	83,366	992,452	16
45121	Book stores and news dealers	254	193,094	760,213	37
45122	Prerecorded tape, CD, and record stores	137	100,546	733,912	19
45211	Department stores (ex. leased depts.)	272	5,308,110	19,515,110	1,028
45291	Warehouse clubs and superstores	12	*920,588*	76,715,659	178
45299	All other general merchandise stores	336	*563,584*	1,677,334	109
45311	Florists	485	118,331	243,981	23
45321	Office supplies and stationery stores	105	205,600	1,958,095	40
45322	Gift, novelty, and souvenir stores	806	248,109	307,828	48
45331	Used merchandise stores	345	97,988	284,023	19
45391	Pet and pet supplies stores	161	90,682	563,242	18
45392	Art dealers	135	30,898	228,874	6

Estimates in italics based on adjusted US Total $/Establishment

Population for determining per capita income based on 1996 estimates from Urban Decision Systems, Inc.

Appendix B - Estimates of Retail Sales per Square Foot GLA

US Community Shopping Centers, Selected Store Categories

Based on the 1997 Dollars and Cents of Shopping Centers, Urban Land Institute

NAICS	Description	Median GLA	Median Sales/S.F	ULI Descriptions/Notes
44111	New car dealers			
44112	Used car dealers			
44121	Recreational vehicle dealers			
44122	Motorcycle, boat, and other motor vehicle dealers			
44131	Automotive parts and accessories stores	6,038	147.52	Automotive (Tire/Battery)
44132	Tire dealers			
44211	Furniture stores	7,471	141.84	Furniture
44221	Floor covering stores	2,545	88.04	Floor Coverings
44229	Other home furnishings stores	4,821	166.54	Home accessories
44311	Appliance, television, and other electronics stores	2,100	207.17	Electronics
44312	Computer and software stores	2,130	336.53	Computer/Computer Software
44313	Camera and photographic supplies stores	1,069	542.63	See "Regional Centers"
44411	Home centers			
44412	Paint and wallpaper stores	3,533	164.55	Paint and Wallpaper
44413	Hardware stores	7,857	121.08	Hardware
44419	Other building material dealers			
44421	Outdoor power equipment stores			
44422	Nursery and garden centers			
44511	Supermarkets & other grocers (ex convenience)	42,228	371.79	Supermarket
44512	Convenience stores			
4452	Specialty food stores	1,800	162.57	Specialty Food
44531	Beer, wine, and liquor stores	2,648	249.67	Liquor/Wine
44611	Pharmacies and drug stores	11,153	247.29	Drug Store
44612	Cosmetics, beauty supplies, and perfume stores	1,520	258.40	Cosmetics/Beauty Supplies
44613	Optical goods stores	1,487	156.74	Eyeglasses-optician
44619	Other health and personal care stores			
44711	Gasoline stations with convenience stores	2,508	339.01	Service Station
44719	Other gasoline stations			
44811	Men's clothing stores	3,082	182.61	Men's Wear
44812	Women's clothing stores	3,616	146.31	Women's Ready to Wear
44813	Children's and infants' clothing stores	2,665	142.98	Children's Wear
44814	Family clothing stores	5,775	186.50	Family Wear
44815	Clothing accessories stores			
44819	Other clothing stores			
44821	Shoe stores	3,150	158.81	Family shoes
44831	Jewelry stores	1,263	263.92	Jewelry
44832	Luggage and leather goods stores	2,398	198.82	Luggage and Leather
45111	Sporting goods stores	4,100	153.46	Sporting Goods - General
45112	Hobby, toy, and game stores	2,740	183.33	Toys
45113	Sewing, needlework, and piece goods stores	10,254	74.91	Fabric shop
45114	Musical instrument and supplies stores	2.992	159.68	See "Regional Centers"
45121	Book stores and news dealers	2,905	161.16	Books
45122	Prerecorded tape, CD, and record stores	2,900	163.04	Records and Tapes
45211	Department stores (ex. leased depts.)	73,500	142.31	Discount Department Store
45291	Warehouse clubs and superstores			
45299	All other general merchandise stores			
45311	Florists	1,600	149.82	Flowers/Plant Store
45321	Office supplies and stationery stores	23,003	262.26	Office Supplies
45322	Gift, novelty, and souvenir stores	3,000	126.70	Cards and gifts
45331	Used merchandise stores			
45391	Pet and pet supplies stores	2,933	122.48	Pet Shop
45392	Art dealers	1,605	154.79	Art Gallery

Section 7

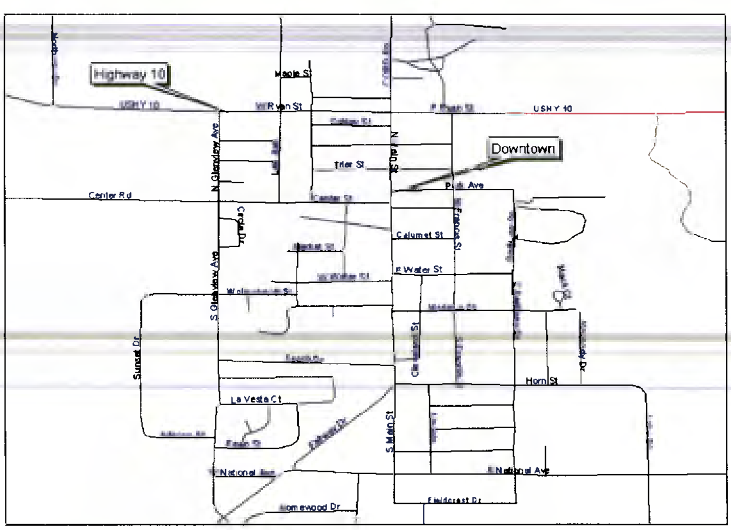
Analysis of Restaurant Opportunities

This section explores market opportunities for expanded or new restaurants in Brillion. It includes an analysis of downtown and Highway 10 as locations for future restaurant development, data on local resident demand and supply, and conclusions regarding possible restaurant concepts that might make market sense in Brillion.

Location Analysis

Analysis of the restaurant market needs to look beyond the local residential base to include <u>all</u> people who travel through or to the community (residents and non-residents). In this analysis, traffic patterns provide an important indicator of the level of exposure a restaurant would receive as a specific location. In addition to traffic patterns, potential "demand generators" in the community contribute to restaurant utilization levels. Company offices, manufacturing firms, schools and retail businesses generate a significant amount of restaurant business, often from nonresidents coming into the community.

The following worksheet summarizes the location analysis for two sites in Brillion: Downtown and the Highway 10 Corridor West.



Traffic and Demand Generator Considerations	Downtown Restaurant Site	Highway 10 Corridor West
Traffic volume and direction	High traffic volume in mornings and afternoons, more north in morning, and both directions in afternoon (6000 vehicles/day)	High traffic volume (8000 vehicles/day) including travel through the trade area (between Manitowoc and Appleton)
Visibility, Accessibility and Parking	Favorable for all	Favorable for all
Pedestrian Volume	Low pedestrian volume in mornings and afternoon, with a larger volume in evenings	No significant pedestrian volume (no sidewalks)
Major Demand Generators	No significant employers. However, there are several retailers that bring in a significant volume of customers	Transient traffic Large employers (Ariens) of market potential
Which meal periods are likely to draw the most customers?	- Lunch (convenience-oriented) - Somewhat smaller dinner volume	- 5:30-7:00 AM - 11:30 AM - 1:00 PM - Evening has large share of sales
Are there seasonal trends that could affect the business?	Winter curtails traffic Possible location for future drive-thru	Winter curtails traffic Night business is lower (except weekends)

Local Resident Demand

Lifestyle and demographic characteristics of local residents are analyzed here to better understand household spending potential. This data reflects local resident spending potential and does not include travelers to or passing through the community.

CACI ACORN Customer Classifications and their Purchasing Potential

ACORN™ consumer classification data from CACI™ Marketing systems was used to learn about dining-out activity among household groups in the primary trade area. Overall, ACORN suggests that the Brillion primary trade area is a fairly average market for restaurant demand.

The ACORN segment called "Middle America -7A" represents 98% of census block groups in the trade area. They are near the national average in number of times they dine out per year (Purchasing Potential Index (PPI) =97). However, they tend to prefer dining-in at fast food and family-style restaurants over ethnic restaurants (except pizza).

A sample of dining out behaviors for this segment as measured by PPI are presented below:

Category	PPI
Dine out in past year	97
Enjoy eating foreign food	86
Fast food - eat in	111
Fast food - take out	81
Take out - supermarket	104
Fast food - delivery	69
Family restaurant >2 times/Mo	119

Demographic Characteristics

Selected demographic data for the primary trade area (presented earlier in this report) is analyzed and compared with other communities and the state to gauge the overall attractiveness of local restaurant demand.

U.S. Dining-Out Characteristics, 1998	Analysis of Brillion Trade Area Demographics
Household Income - Expenditures on food away from home rises dramatically for households with income before taxes of $30,000 or more. Households with an annual income of $70,000 spent an average of $1,396 per capita on food away from home. In contrast, households with income before taxes between $15,000 - $19,999 spent an average of $570 per capita.	Median household income (year 2001) in the trade area is $42,669, approximately the same as the U.S. ($42,228) and the Wisconsin ($42,226). Accordingly, local household income should not have an effect on the trade area's ability to capture its fair share of state per capita spending levels.
Age - Households headed by persons between the ages of 45 and 54 spent the most per capita on food away from home ($967). Adults between the ages of 35 and 54 have median higher incomes, resulting in higher spending. However, adults between 35 and 44 are also in their prime years for raising kids; their larger household size reduced spending to $739 per capita. Spending also decreases among households headed by persons age 65 and older to $702 per capita.	Median age (year 2001) in the trade area is 35.7, similar to U.S. average (35.3) and Wisconsin average 36.3. Accordingly, it should not have an effect on the trade area's ability to capture its fair share of state per capita spending levels.
Household Size - One-person households posted the highest per-capita spending on food away from home of $1,232. The per-capita spending by two-person households was $1,034. Larger households allocated a smaller portion of their total food dollar on food away from home and, as a result, posted lower per-capita spending. Households with two or more persons allocated a $757 per capita on food away from home.	Household size in the trade area is 2.75, slightly larger than the U.S. average (2.59) and Wisconsin average (2.49). This will have a slight dampening effect on the trade area's ability to capture its fair share of state per capita spending levels.
Household Composition - This is one of the most important factors influencing restaurant spending. Households with only a husband and wife posted the highest per-capita spending on food away from home ($1,083). The addition of children increases household size and has a dampening effect on spending. Households with the oldest child age 18 and older spent about 24 percent more per capita than households with the oldest child under the age of 6 ($837 versus $676).	There are a large number of two parent households in the trade area (many of these are two-income families). The addition of children decreases the overall per capita spending (with the exception of fast food). There are fewer two-person households (without children), a segment that would have increased per capita spending. This will have a slight dampening effect on the trade area's ability to capture its fair share of state per capita spending levels.
Source: Restaurants USA, August 2000, article by Robert Ebbin	

Spending Potential in Restaurants

Based on the lifestyle and demographic data, trade area residents appear to have dining-out spending levels similar to the rest of Wisconsin. Spending potential can be calculated using the 1997 U.S. Economic Census for Wisconsin as follows:

Trade Area Population	13,247
x Statewide Per Capita Spending*	$724
= Total Restaurant Demand	$10,000,000

*1997 dollars based on the Economic Census and 1997Wisconsin Population of 5,165,000

NAICS	Description	Estab.	Sales	Sales per Capita
7221	Full-service restaurants	4,461	2,012,575,000	
7222	Limited-service eating places	3,613	1,726,554,000	
	Total	8,074	3,739,129,000	$ 724

Competitive Supply of Restaurants

Based on the restaurant concepts identified, competitive restaurants in the primary trade area were identified and analyzed. Information about these establishments are presented below:

Supply of Restaurants

Business Name	**Address**	**Zip Code**	**Concept**	**Peak Meal Volume/Comments**
Dairy Queen	521 N. Glenview	54110	Fast Food, burgers, ice cream	Busy Dining Room, Very Busy Drive Thru Quality, Location Open seven days/week
Michiel's Brillion Inn	740 W. Ryan	54110	Supper club/Banquets	Slow Lack of other large banquet facilities Limited hours
Mom's Place	527 N. Main St	54110	Family Restaurant	Busy Breakfast/Lunch Economical 5 AM - 7PM
Randy's	115 Jackson St	54110	Pizza/Carry out/Pub	Strong carry out/slow dining room Economical, Informal, Local niche for pasties Variable hours
Rudy's Diner	117 West Ryan St	54110	Family Restaurant	Busy lunch and dinner Successful box lunches/reputation
Subway	450 West Ryan St	54110	Sub sandwich shop	Limited sitdown
Bullwinkles	Main Street	54110	Pub/tavern	Very busy lunch Good quality/quantity
Deer Run Golf Course	Fairway Dr.	54110	Supper club/Banquets	Limited banquets/Friday fish fry Excellent desserts
Railway Junction	Forest Junction	54123	Family Restaurant	Economical
Non-Restaurant Competition				
Kwik Trip	West Ryan Street	54110	Convenience	Located in convenience gas station
T & C Deli	Main Street	54110	Deli	Located in grocery store
Sentry Deli	Main Street	54110	Deli	Located in grocery store

Conclusions - Possible Restaurant Concepts

A concept is a combination of ideas that forms the foundation for a particular type of restaurant operation. It means making decisions about the components of the restaurant including theme, menu, service style, hours of operation, price, entertainment and atmosphere.

The study group examined potential restaurant locations and market demand and supply conditions in a preliminary effort to identified restaurant concepts that might be successful in the community. The study committee considered the following:

- Is demand for the type of restaurants considered greater than the supply of restaurant seats now available?
- Which types of restaurants concepts considered have the capability to encourage segments in the primary trade area to dine out more frequently?

Concepts offered by the study committee are presented below.

Possible Restaurant Concepts	Compatibility with Local Consumer Behavior
Chinese carry-out	Highway 10 Drive-thru traffic
Coffee shop and bakery/sandwiches (perhaps combined with specialty food, or book store)	Main Street Need for more predictable supply Possible cluster with grocery stores
German Food/Brew Pub	Main Street German heritage (demographic draw from outside trade area)
Fast Food (co-branding potential)	Highway 10 Offer variety of options (Taco Bell over McDonalds) DQ Grill N Chill
Steakhouse/Sports/Casual Dining	Main Street (Destination-based) Evening dining beyond current options (e.g., Prime Quarter) Social/Lounge atmosphere

It should be noted that these concepts require more thorough and detailed analysis before business expansion or recruitment effort begin. However, much of the required data for a more comprehensive analysis of the restaurant market may be considered proprietary and difficult to obtain. Accordingly, further analysis of the restaurant market should be conducted in a collaborative effort with existing and prospective restaurant industry professionals.

Section

8

Analyzing Service Business Opportunities

This section presents a brief discussion of selected other business categories that have been examined by the market analysis study committee.

Service businesses have become increasingly important in the community and economic development of smaller towns across the country. These businesses are often essential conveniences for both personal and business needs. A sample list of service businesses that may be found in small town business districts is presented below:

- Copy Shops
- Banks and Credit Unions
- Security and Commodity Brokers
- Agencies, Brokerages, and Other Insurance Related Activities
- Offices of Real Estate Agents and Brokers
- Video Tape and Disk Rental Centers
- General Rental Centers
- Legal Services
- Accounting, Tax Return Preparation, Bookkeeping, and Payroll Services
- Photographic Services/Studios
- Travel Agencies
- Offices Of Physicians
- Offices Of Dentists
- Offices Of Chiropractors
- Offices Of Optometrists
- Child Day Care Services
- Fitness and Recreational Sports Centers
- Bowling Centers
- Automotive Repair & Maintenance Shops
- Electronic and Precision Equipment Repair & Maintenance Shops
- Hair, Nail, and Skin Care Services
- Dry Cleaning and Laundry Services

Three specific service business categories that go beyond this list were identified by the study group. These categories are presented on the following pages.

Rental Agencies

Rental agencies are businesses that provide equipment rentals for personal, homeowner and contractor uses. The following is a summary of items currently rented in the community (supply). Also included is a general list of rental categories that can be used to explore potential future rental opportunities in Brillion.

Current Supply of Rental Services:

Homeowner Equipment Rentals
Henry Carstens and Sons (114 W. Water Street, Brillion, WI 54110) supplies the Brillion area with primarily basic homeowner rental services. Items rented include: dollies, lawn rollers, edgers, tillers, thatchers, aerators and carpet cleaners (i.e. Rug Doctors)

Brillion True Value (205 N. Main Street, Brillion, WI 54110) supplies the Brillion area with primarily basic homeowner rental services. Items rented include: pressure washer, tiller, edger, lawn spreader, chipper, Rug Doctor carpet cleaning machines. The operator is exploring additional rental service options, due to customer requests for expanded rental services.

Farm and Home, (Chilton) is where Brillion residents may go for additional needs. This business provides homeowner equipment rentals as well as some basic contractor equipment rentals. Items rented in include: drywall to concrete tools, lawn and garden, popcorn machine and grills engine hoists, lawn mower, pressure washers, floor sander, nail guns, construction tools, roto tillers and ladders. Farm and Home also offers full service small engine repair services, initially to repair rental items, but then expanded to offer the service to the customers.

Formalwear Rentals
Bullseye Screenprinting, LLC, (210 S. Main Street, Brillion, WI 54110) supplies the Brillion area with men's formal wear rentals, specializing in weddings and high school proms.

Video Tape and Disk Rental
Express Video (210 N. Main Street, Brillion, WI 54110) supplies the Brillion area with video tape, DVD rentals, as well as video game and video game stations rentals. Other businesses who offer similar but limited rentals include T&C Market (205 N. Main Street) which offers video rentals.

Truck and Utility Trailer Rentals
U-Haul (530 N. Main Street, Brillion, WI 54110) supplies the Brillion area with U-Haul company moving vehicles such as truck and utility trailer rentals.

Other Rental Categories:

The following are general categories of rental goods used by the U.S. Census Bureau. It is provided here only to offer ideas for additional rental services that might be offered in Brillion.

- Rental & leasing services
- Automotive equipment rental & leasing
- Passenger car rental & leasing
- RV rental & leasing
- Consumer goods rental
- Consumer electronics & appliances rental
- Costume rental
- Other consumer goods rental
- Home health equipment rental
- Recreational goods rental

- All other consumer goods rental
- General rental centers
- Commercial & industrial machinery & equipment rental & leasing
- Office machinery & equipment rental & leasing
- Computer rental & leasing

Potential Opportunities for Brillion
It may be advisable for current businesses to consider expanding related rental offerings, especially in the homeowner rental services category. Demographic analysis indicates that consumers in the trade area spend more money than the national average on do-it-yourself home improvements and lawn and garden care.

Computer Related Businesses

Computer related businesses represent broad areas covering diverse industries and professional expertise. Based on the Census of trade categories for computer related businesses, the following general categories describe these businesses:

- Computer and equipment stores
- Software development
- Web designers
- Training
- Repairing
- Leasing
- Internet service providers

A search for computer related service providers in the region indicates that these businesses are clustered around the population centers of Green Bay and Appleton.

Kaukauna	1
Menasha	1
Little Chute	1
Two Rivers	1
Allouez	2
Neenah	3
Manitowoc	4
Green Bay	22
Appleton	26

Potential Opportunities for Brillion
As determined in the retail analysis conclusion of Computer Sales, there was a successful computer sales and service outlet in Brillion. Although it closed in the late 1990s, it was not due to lack of business. It was speculated that most of their business came from Computer service and repair.

According to Market Analysis Committee discussions, it is very likely that a business could succeed solely on computer service and repair, especially for business to business support. Most businesses who need computer support call companies out of the trade area, and many times have to wait a full day for service due to the heavy work load of the computer service provider.

Youth Entertainment Possibilities

One of the topics that came up repeatedly in community surveys and personal interviews was the perceived lack of youth entertainment venues. Whereas people have acknowledged the valiant efforts of the public schools systems, church groups, Public Library, and the City Park and Recreation/Aquatics Department, they still felt that the teenaged segment needed something more. One respondent pointed out that the Graduated Driver's License law that went into effect February 2000 further limited early drivers with entertainment opportunities, due to drive time and passenger restrictions. Historically, Brillion area youth have traveled to neighboring communities like Appleton and Green Bay to frequent teen bars and dance clubs, movie theaters, and other entertainment venues such as golf parks and laser tag.

The Brillion Retail Market Analysis Committee has identified this topic as a possible business opportunity, however, due to the study's limitations, cannot research it to a fuller extent. Instead, the committee has identified possible "next steps" that can be followed for further study.

These next steps include, but may not be limited to:

1. Conduct surveys of both parents and teenagers, themselves, to determine needs and concerns.
2. Compile an inventory of youth-centered activities and venues currently available within the primary trade area.
3. Identify restrictions and challenges faced by teens seeking entertainment options.
4. Identify concepts and venues that may fit into the Brillion area business mix, or opportunities that the schools, Park and Recreation/Aquatics Department, or other established organizations and businesses may like to explore.

Groups or other organizations with which to partner may include:

- Brillion Park and Recreation/Aquatics Department
- Brillion Public School System
- UW-Extension, Calumet County
- 4-H, local chapter

Surveying/feedback-retrieving methods include:

- Focus group discussion with the Brillion High School Student Council
- Program surveys already in place for the Park and Recreation/Aquatics Department
- Community Development personal interviews
- County and State agency studies
- UW-Extension
- Entertainment industry research

Questions that need to be answered, to aid in pin-pointing opportunities include:

- What is the teen-aged segment doing for entertainment now?
- What does the Brillion area currently offer?
- How does the graduated driver's license affect teen entertainment choices?
- What should be the target age for this type of entertainment?
- What type of entertainment is currently offered in the established primary trade area?
- Would there be a youth group with adult leadership, to form their own group, and develop their own entertainment venue, based at the Brillion Community Center?

Other Services Identified

Although the Market Analysis Committee devoted most of its discussions toward the previous three service categories, representatives also recognized that there are other potential service needs in the Brillion Trade Area:

- Offices of Optometrists
- Dry Cleaning services
- Shoe Repair
- Offices of Physicians and other Medical Providers

Unfortunately, due to the nature of this Market Analysis process, further in-depth study of these areas was not feasible. Further discussions regarding these service sectors may be advisable in future economic development discussions.

Section
9

Recommendations

The final part of the market analysis brings information together to develop realistic strategies for the community. They *are preliminary and have been developed to stimulate additional business development ideas for the community*

To this point, the market analysis process has focused on collecting and analyzing data to understand market conditions and identify market opportunities by sector. The final part of the market analysis brings this data together to identify business retention, expansion and recruitment opportunities, niche strategies and marketing plan recommendations. These strategies were developed with input from the public provided during a open meeting on October 9, 2002. The overall market analysis process is presented below:

The Process	The Outcomes
Understanding Market Conditions • Business Mix Analysis • Trade Area Definition • Customer Demographics and Lifestyles • Local Economics • Consumer Attitudes	Data on general market conditions provides business operators and investors the opportunity to better understand the competitive environment facing downtown. Data can be used to improve marketing activities, address design issues, improve business operations, and begin business expansion and recruitment activities.
Identifying Market Opportunities by Sector • Retail • Service Business • Restaurant	The detailed review of specific business sectors provides a solid and justifiable base for business expansion and recruitment activities. The data analysis for each sector addresses the market demand and supply conditions of relevance to that sector.
Developing Market-Driven Strategies • Business Expansion & Recruitment • Niche Strategies • Space Utilization • Marketing Plan Recommendations	Strategies are provided based on the proceeding data and community input. They provide a roadmap for determining a viable market position for the business districts in the community. Strategies are also provided to put the market analysis to work and keep it working for local economic development.

Key Findings

There are a number of conclusions and key findings that are apparent as a result of conducting the Brillion Market Analysis.

When examining Brillion's retail business mix, it appears that there are fewer retail and service businesses in Brillion than in the comparison communities examined in this study. Unlike other communities, Brillion has fewer specialty food, gift shops, eating places, building material stores sporting good stores, among others.

Based on data provided by several Brillion retailers and employers, Brillion's trade area is defined as a 9-mile ring around the community. This is an area that includes the communities of Hilbert, Forest Junction, Potter and Reedsville, among others.

There are approximately 13,000 residents in the trade area. The population in this trade area tends to be family oriented with a larger number of children per household than both the Appleton area and the state. Home ownership rates are well above average. The average income of residents in the trade area is about the sale as the state, but below that of Calumet County. Manufacturing (durable goods) employment is by far the largest employment sector in the trade area. Brillion's trade area has higher than average numbers of high school graduates, but lower than average post-high school degree graduates.

Lifestyle segmentation data from the firm CACI describes this type of community a place where people have a high level of pride in neighborhoods, maintenance of their property and "Midwestern values."

When looking at economic factors in the community, commuters to and thru the community provide significant economic opportunities for the community. The highest traffic volume in the community is on Highway 10 with approximately 8,000 vehicles on an average day. The Downtown area on N. Main Street accommodates approximately 6,000 vehicles per day. The major employers of Brillion Iron Works, Ariens Company, Endries, Inc., and Professional Plating employ over 2000 people across three shifts.

Consumer surveys suggest that small town values are very important in Brillion. Consumers have a high level of trust in local retailers but believe they need to leave Brillion to get a "deal". Consumers have an interest in attracting a department store, youth entertainment and better service hours.

Business Retention, Expansion and Recruitment

Data from the prior sections of this report were analyzed by the market analysis study committee and then presented to the public. Both the study committee and public were asked for feedback regarding ways to expand commerce through business expansion and recruitment.

It should be noted that the market analysis committee and the participating public strongly support retaining existing businesses to the greatest extent possible. However, since the emphasis of this report is on expansion and recruitment opportunities, specific recommendations for business retention are not included.

One of the challenges in this analysis was identifying market opportunities that make sense in a small community only 20-minutes from a much large commercial center (Appleton). The presence of a Wal-Mart Superstore and other developments on the east side of Appleton make it more difficult to capture resident spending of the 13,000 person Brillion trade area.

Nevertheless, input from the committee and public focused on realistic opportunities that included both product/service expansions of existing businesses as well as identification of new businesses to the community. It is important to keep in mind that the committee and public acknowledged and stressed the importance of existing local businesses, and are hopeful that a number of the expansion or new business ideas could represent opportunities for local existing businesses or entrepreneurs. These recommendations (in random order) are presented below:

Expansion Opportunities For Further Consideration

- RV's, motorcycles and service (possible local store expansion)
- Rentals (possible local store expansion)
- Apparel (possible local store expansion)
- Computer/Technology (possible local store expansion)
- Apparel/Catalog/UPS storefront - (possible expansion at or adjacent to a local retailer)
- Restaurant/Carry-Out (possible local store expansion)
- Tapes/CD's (possible local store expansion)
- Lodging (possible expansion of local facility)
- Plumbing supplies and service
- Beer, liquor and wine specialty items
- Jewelry if combined with another business
- Shoes if combined with another business
- Office supplies if combined with another business
- Restaurants-Fast Food (possible enhancement of the existing Dairy Queen as a DQ Grill N Chill)

Business Recruitment Opportunities for Further Consideration

- Variety/Department Store with some basic apparel (i.e. Family Dollar, Dollar General, "Ben Franklin" or a Big Lots type store)
- Gift shop with children's items, crafts and some apparel
- Restaurant serving as both coffee shop and bakery
- Specialty foods
- Bookstore with coffee shop and children's play area. Possible niche centered on children's or religious books.
- Computers/electronics sales/service *(downtown) including* TV/VCR's/DVD's, multiple electronics; service and possible training programs. A strong service component is suggested.
- Sporting goods appealing to sportsman niche
- Outlet Mall creating Brillion as a new niche shopping destination
- Movie theater co-branded with chain pizza
- Youth Center with movies, pizza, pool tables
- Lodging facility focused on the business traveler market (pending further committee study)
- Restaurants. In addition to the Dairy Queen recommendation (above), possible new concepts include a Chinese carry-out, coffee shop/bakery (see above), German food and brewpub, and a sports-theme steakhouse.

Niche Strategies

Niche Strategies allow a business district to gain a dominance in certain categories and co-exist with major retailers in the region. Niches can be enhanced from existing businesses or newly created. Niches can include both consumer market segments (such as students, retirees, ethnic groups and tourists) or goods and services (such as home furnishings, antiques, crafts and children's products).

Successful communities often have two or three successful niches. These communities also benefit from an expanded trade area as their specialization often draws customers from more distant communities. Once a niche is established, other businesses are often attracted to the community as they are interested in selling to the same targeted consumer segments.

The Brillion study committee reviewed the data in prior sections and its list of business expansion and recruitment possibilities to develop possible niche strategies for the community. These strategies were based on the research contained in this report as well as the wealth of local knowledge offered by study committee members. Possible niche strategies that the committee has identified are presented below as well as a recommended location to develop each niche.

Possible Consumer Segment Niches

- In-commuter market (especially manufacturing employees). This niche could be served by offering products and services before and after work shifts as well as during the midday lunch hour. Businesses serving these consumers could be clustered near major existing employers both downtown and on highway 10.

- Highway 10 Thru-Traffic (between Manitowoc and Appleton). This niche could be served by offering additional convenience products (such as specialty foods) and services that could be offered to regional commuters along this state highway, perhaps with drive-thru facilities. Businesses serving these consumers could be clustered on highway 10 and directed downtown (see marketing plan recommendations)

- Youth Market serving local high school market and including food, entertainment and recreation. A youth center and any related businesses (theater, food) could be located downtown.

Possible Goods and Service Niches

- Wedding related services - Michiels-facility; Bullseye-tux; Zander Press-invites; Studio 205-photography, etc. Wedding retail and services could be clustered downtown and serve a regional market.

- Sportsman niche (guns, ammo, hunters services, camping, swimming, fishing). These businesses could be clustered on Highway 10 and appeal to the in-commuting market.

- Antiques. Historic downtown buildings could provide an appropriate setting for these businesses

- Community-centered goods and services. Here, a mix of specialty shops focused on a sense of place for community residents. Components might include a coffee shop, youth-child entertainment, eclectic and interesting shops for bargain hunters among others. This niche could be offered downtown.

Space Utilization

While not discussed as part of this study, the locations for business expansion and recruitment need to be addressed. This is especially true to create an appealing area for niche development that might occur in the downtown. Strategic business placement enhances the synergy and competitiveness of downtown. The following items provided by the UW-Extention Center for Community Economic Development should be used to guide business location and relocation in the downtown where pedestrian interaction should be encouraged.

- *Place retailers in a manner that preserves retail continuity.* In Brillion, the Hub's parking lot, while clearly important, disrupts the retail continuity on Main Street. To create a central shopping district on Main Street, there needs to be some economic activity on the west side of Main Street along the edge of the Hub's parking lot. Possibilities include a small retail building at the corner of Jackson and North Main or a cluster of seasonal retail kiosks along the west side of the 200 block of North Main Street

- *Consider the accessibility needs for convenience-based stores.* Intuitively, convenience-based businesses require an easily accessible location for success. Consequently, nearby parking for these types of stores is a must.

- *Restrict retail shopping to a limited distance.* People will more likely walk shorter distances and avoid a choppy, disconnected shopping path. If the Hub is the central place in the downtown area, downtown retail development should occur as close to this shopping center as possible.

- *Reconcile the needs of drive-through customers and pedestrians.* Many convenience businesses have particular location requirements. Businesses such as banks, fast-food establishments, and increasingly, dry-cleaners and pharmacies, require drive-thru locations. While locations on highway 10 may be more suitable for drive-thru businesses, they could exist in downtown Brillion if placed properly.

Marketing Recommendations

The information and findings resulting from this market analysis should be put to use to help Brillion's businesses capture more sales (through existing and expanded goods and services) and to help the community recruit new businesses,

- Develop a market information packet (executive summary of the market analysis) to hand out to all existing and prospective businesses and commercial property owners. Information should be packaged to first help existing business operators make more informed advertising, inventory and operational decisions. Also, make available the full study as follows:

  - Reference copies (City Hall, Library, Chamber, High School, etc)
  - Web site version
  - Integrating in all business counseling and educational programs (including SBDC and SCORE)

- Focus on reaching and meeting the shopping needs of local consumers and the specific market segments identified earlier in the report. Address image problems and specific deficits or gaps in Brillion's business mix.

- Improve physical linkage to and awareness of Downtown. There is opportunity to build commerce downtown by helping travelers along Highway 10 become aware of downtown Brillion. Specifically, design and physical improvements are needed at the corner of Main Street and Highway 10 to create an attractive "gateway" to downtown

- Advertising/marketing to reach the local and regional population. Consider community Billboard Advertising. A billboard(s) could be erected on the edge of the community to inform motorists of the goods and services available in Brillion's business districts. A tasteful billboard could enhance the image of the community while directing customers to a variety of retail, service and restaurant businesses.