

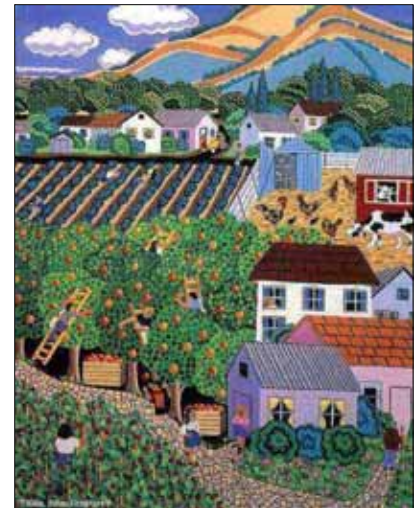
# 2.0 ISSUES & OPPORTUNITIES

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## Introduction

The Issues and Opportunities Element is the background information on the local government unit(s) and the overall visions to guide future development and redevelopment of the area. The Issues and Opportunities Element must include population, household and employment forecasts, demographic trends, age distributions, education levels, income levels and employment characteristics.

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## Visioning Process

To identify community issues and opportunities, a three-step process was employed, which resulted in the development of individual vision statements for each of the nine required Smart Growth planning elements. This process included: community SWOT meetings, cognitive mapping, and element vision development. What follows is a description of the activities and the major issues and opportunities identified through the issues and opportunities process.

### SWOT Analysis

A SWOT is a planning exercise used to get communities thinking about where they are, where they've been, where they want to be in the future, and how they want to get there.

#### Town of Brillion SWOT Analysis.

On October 17, 2000, the Town of Brillion Land Use Committee participated in an informal SWOT discussion facilitated by OMNNI Associates. The Town Land Use Committee agreed on the following, which was later used as a starting point to develop the community survey.

Four (4) primary strengths:

- A central location in Northeast Wisconsin with easy access to Manitowoc, Fond du Lac, Green Bay and the Fox Cities;
- Two (2) major highways;
- The sanitary district in Forest Junction, which helps to concentrate development; and
- A strong farming tradition.

Two (2) weaknesses to address:

- The town's limited tax base; and
- The loss of railroads in the Town of Brillion. (At one time, there were two (2) lines serving the area, but both were abandoned in 2002).

Three (3) opportunities the Town should focus on in the future:

- As a result of the railroad abandonment, the Town needs to consider alternative uses for these corridors. One option available is a rails-to-trails project.

### S.W.O.T. DEFINITIONS

#### Strength

Something that makes a community stand out when compared to other communities. Something that makes you proud to call the community home. A strength can be a physical asset, a program, or an environmental condition (i.e. friendly community atmosphere).

#### Weakness

Opposite of strength. Problem that needs to be addressed.

#### Opportunity

Something that could be done to improve the community. A potential.

#### Threat

A threat may be internal or external. A threat can be anything that could jeopardize the future success of a community.

- Farmland preservation
- Controlling development to avoid situations where something is approved that is contrary to the plan.

The Land Use Committee identified annexation as the most pressing threat facing the Town of Brillion, particularly, the potential development areas around the high school.

#### City of Brillion SWOT Analysis

Monday, March 5, 2001, the City of Brillion Comprehensive Plan Committee participated in a SWOT workshop facilitated by OMNNI Associates. Fifteen (15) members of the Committee were in attendance, including several Planning Commissioners and Mayor Robert Mathiebe.

The SWOT analysis was updated as a result of additional studies which were developed after the initial adoption of this plan.

Brillion's strengths include:

- High-quality, well-maintained housing;
- A large industrial sector to support the local tax base;
- A good quality of life and family-friendly environment; and
- A great location between Appleton, Green Bay, and Manitowoc.

Weaknesses the City of Brillion must address include:

- A high municipal tax rate;
- Limited shopping opportunities;
- A high vacancy rate downtown; and
- Lack of diversity in the local job market.

Opportunities identified at the workshop include:

- Downtown redevelopment;
- The City's central location as a marketing draw; and
- USH 10 and the overall transportation network provide strong connections to the region that can bring additional business and other opportunities for the City
- Business Park Development

Threats to the successful future of the City of Brillion include:

- Increased taxation;
- Sprawl ("strip mall" looking) development along USH 10 and elsewhere in the City;
- Fear of change on the part of residents and local businesses; and
- Limited jobs and activities for youth.
- Loss of services due to budget cuts
- High costs of new infrastructure to aid new development

## NRCS Cognitive Mapping Meetings

Cognitive maps, or mental maps, are used to delineate geographic areas of a community people like, dislike, frequently visit, feel are important, travel through regularly, feel safe, etc. Since they are based on an individual's preferences and opinions there are no "right" or "wrong" maps.

At the workshop on June 5, 2001, committee members were provided 3 maps of the Town of Brillion and the City of Brillion.

On the first map, members were asked to each indicate districts they identify with (i.e. natural areas, business districts, residential neighborhoods, etc.) and travel routes. The most common weekday travel paths were USH 10, STH 57 and CTH PP. On the weekends, these roads were still the most common travel routes, but people indicated that they traveled more along CTH PP. When asked to identify different development areas of the community:

- The area along USH 10 in the City was most commonly listed as an industrial development area;
- Farming was most commonly associated with the northeast and southwest corners of the township;
- The Brillion Marsh was the most common response when identifying recreational areas; and
- Residential areas were expected to develop primarily around Forest Junction and in the City of Brillion.

On the second map, each member outlined portions of the Brillion Area based on their opinion of aesthetic appeal. The members indicated that the least attractive places in the area were associated with the mobile home parks in the City and Forest Junction and the industrial areas on the east side of the City. Inversely, the Brillion Marsh and Town's farmland areas were considered to be the community's most attractive features. Respondents indicated that it was important to protect farmland and open space near Conservation Road, in the middle of the township on either side of USH 10, and the area north of Forest Junction and CTH K.

On the third map, each member outlined those areas where they would like to see new commercial/industrial development, new residential development, new recreation areas, open space, and farmland in the Brillion Community. Growth areas identified included:

- Residential growth was recommended on the east side of Forest Junction, on the south side of City, and near the new Brillion High School.
- Commercial development was encouraged in Forest Junction around the intersection of STH 57 and USH 10, by the new high school along USH 10, and on the east side of the City along USH 10.
- Recreational development was encouraged along an old railroad right-of-way that is to be converted into a regional trail.

## Community Vision Development

In February 2001, a vision assignment was distributed to the Coordinated Plan Committee. Each member was asked to answer a series of questions about what they would like to see in the Brillion Community in 20 years.

At the first Community Vision Workshop held on April 3, 2001, members worked in small groups to share answers and arrive at collective answers to each of the first 10 questions. Then each group presented their answers to the entire committee. At the second Community Vision Workshop, the last 10 questions on the assignment distributed in February were reviewed in the same manner.



Dr. Thomas Greene Facilitating Cognitive Mapping Exercise  
June 5, 2001

The results produced draft vision statements for each of the 9 required elements. The final vision statements are provided at the beginning of each chapter.

## Visions

Working together on a plan was a tremendous commitment for both communities, which historically have had differences on important land use and development issues.

To ease concerns and establish a focus for the planning program, the Coordinated Comprehensive Planning Committee participated in an extensive visioning process. This process was critical to establish a unified vision for both the City and Town and provide a direction and focus for the planning effort.

The community vision statements represent the broad interests of the City of Brillion and Town of Brillion residents, elected/appointed officials, business leaders and property owners. These visions established the planning framework and a direction for subsequent planning efforts. These visions illustrate that:

- City residents take pride in their small-town character, school district and park system.
- Town residents share a strong sense of community identity and pride closely associated with the rural character.

## Demographic Profile

The planning process began with a profile of the people who live, work and own property in the City and Town of Brillion. This information is critical to forecasting the need for community facilities and services, and will be used to consider school, road, park, job and public service decisions.

### Population Trends & Projections

The population growth rate in the Town of Brillion compares favorably with the City of Brillion and the State of Wisconsin. **Table 1** compares the rate of population change between 1990 and 2000 for the Town of Brillion, City of Brillion, Calumet County, and the State of Wisconsin. While the Town is growing at a faster rate than the State and the City, it is growing at a slower rate than Calumet County. The largest area of county growth was in that portion of the City of Appleton that lies in Calumet County.

To put the Town of Brillion's population growth rate into context, **Table 2** compares the population changes for all towns in Calumet County. The only town experiencing a higher population growth rate than the Town of Brillion is the Town of Harrison, which is adjacent to the City of Appleton. The Town of Harrison has seen a lot of residential development in the 1990s as people in the Fox Valley seek affordable housing near job opportunities in the cities of Appleton, Neenah, Menasha and the Heart-of-the-Valley area.



Vision Discussion Groups  
April 3, 2001

### DEFINITIONS

#### Vision

An overall statement related to each of the nine required elements expressing the Town's expectations for the future. These statements provide a framework and context to consider when making future land use decisions.

#### Goal

A statement that describes, usually in general terms, a desired future condition. Goals will usually only address one specific aspect of the vision.

#### Objective

A statement that describes a specific action or condition that is to be attained within a stated period of time. Objectives include ordinances changes, new programs, and other tasks. The objectives serve as a "to do" list to implement the plan. To be effective, objectives must be evaluated regularly and updated as necessary.

#### Policy

A course of action, or rule of conduct, used to achieve the goals and objectives of the plan. Policies are based on specific research. Therefore, they are developed after vision statements. In some cases, the policies relate closely to the vision, but provide more refined, specific actions.

The City and Town have a history of population growth. This trend is expected to continue in the future. Figure 2 was developed using a linear projection technique based on the area's historic population trends. In 2003, the Wisconsin Department of Administration (DOA) will release population projections through 2025. The City and Town should review this information against the figures included in Figure 2.

Historically, DOA projections have been low. In fact, the last projections completed by the DOA through 2015 (using 1990 Census information) were well below the actual population in 2000.

### Population Characteristics

In 2000, there were 730 males and 708 females living in the Town of Brillion and 1,436 males and 1,501 females living in the City of Brillion. Nearly 100% of the residents reported their race as white in both communities according to the 2000 U.S. Census. The most common ancestry of residents in both communities is German.

Figure 3 examines the age of City and Town residents in 1990 and 2000. It is interesting that, when comparing the charts, the population breakdown by age groups are quite similar, especially since cities and towns typically attract residents at different stages and ages of life.

Also noteworthy, nearly equal senior populations live in the Town and City. This is of some concern since the Town is predominately a farming community which offers relatively few alternative housing opportunities and no senior support services. Seniors may need to seek residency elsewhere if they cannot live independently.

**TABLE 1  
POPULATION TRENDS**

Location	1990 Population	2000 Population	% Change 1990-2000
Town of Brillion	1,300	1,438	10.6%
City of Brillion	2,588	2,937	3.4%
Calumet County	34,291	40,631	18.5%
State of Wisconsin	4,891,769	5,363,675	9.6%

**TABLE 2  
CALUMET COUNTY TOWN POPULATION CHANGES 1990- 2000**

Town Name	1990 Population	2000 Population	% Change
Brillion	1,300	1,438	10.2%
Brothertown	1,409	1,404	0%
Charlestown	875	789	-9.8%
Chilton	998	1,130	13.2%
Harrison	3,195	5,756	80.1%
New Holstein	1,406	1,457	3.6%
Rantoul	895	841	-6.0%
Stockbridge	1,317	1,383	5.0%
Woodville	1,071	993	-7.3%
All Towns in County	12,466	15,191	21.98%

### POPULATION PROJECTION TECHNIQUES

Linear – Straight-line projection based on historic population trends.

Cohort Survival-Advanced projection method based on birth rates, death rates, and in- and out-migration history of a community. Requires detailed data about resident's based on age breakdowns.

Shift-Share – Technique that compares a local community population (i.e. City or Town) to its share of a county or regional population.

Other population projection techniques and sources were considered (i.e. cohort survival, ECWRPC projections in the Sewer Service Plans) but required data was unavailable or in the case of the ECWRPC data, the projections indicated a decline and were based on the outdated projections completed by the DOA. Additionally, the shift-share technique was also used. However, due to the impact of the City of Appleton on the Calumet County population this technique was unreliable. Linear projection techniques indicate that the City's population will increase by 10 persons annually and the Town's population will increase by 14 persons annually.

## General Household Trends

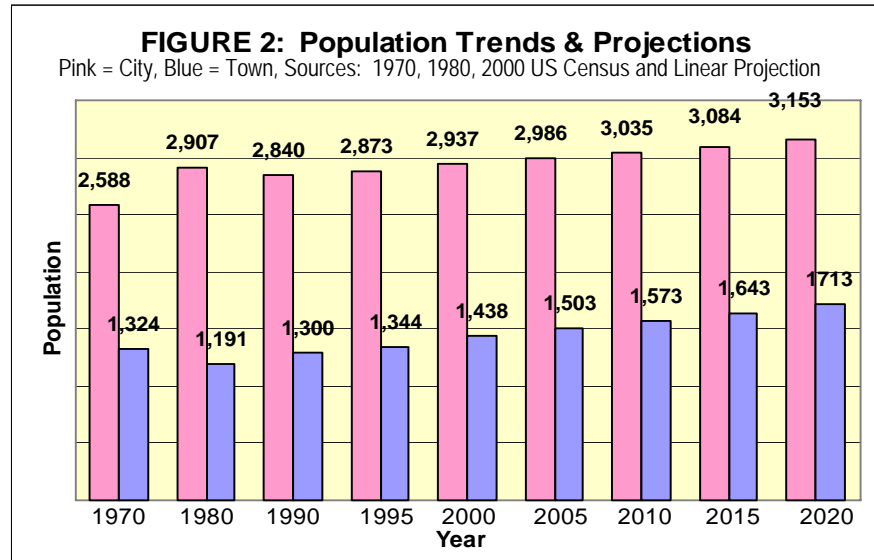
National, state, and local trends have seen an increase in the number of households, along with a decrease in the average number of persons per household. The main reasons for this decrease include:

- Decrease in birth rate
- People waiting longer to get married
- Increased divorce rate
- Increase in the average life span thereby resulting in more elderly people living either alone or with another family member.

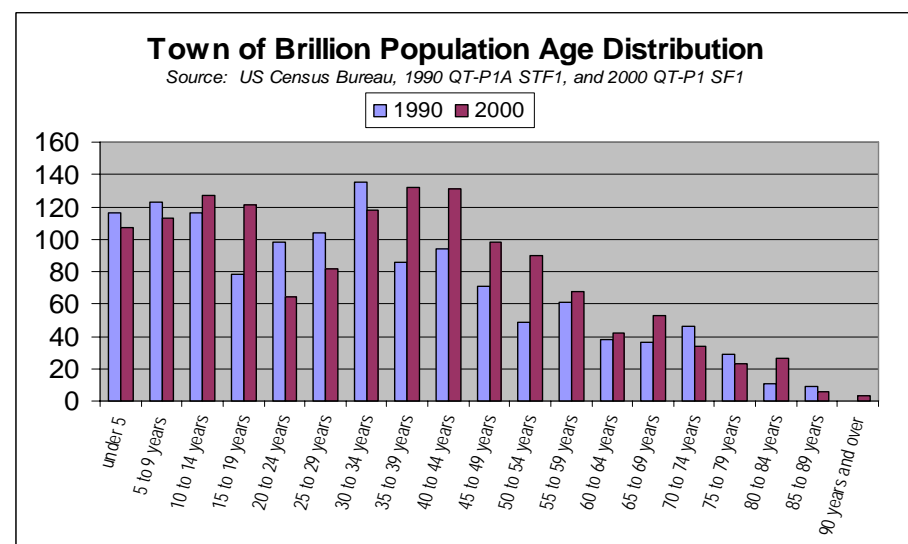
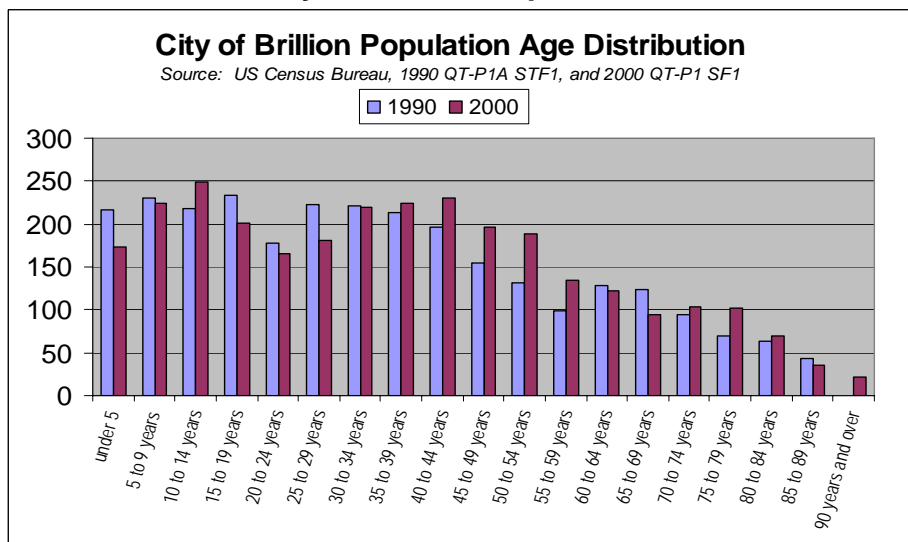
**Table 3** demonstrates that the number of persons per household decreased, and the expectation this trend will continue in the City and Town through the year 2020.

According to the 2000 U.S. Census, there were 501 households in the Town of Brillion. The vast majority (384) were married couple households, which accounted for 1,184 of the 1,300 Town residents in 1990. The second largest category was the one-person household (60).

In 2000, there were 1,155 households in the City of Brillion, an increase of 124 households since 1990. The majority of these households (700) were married couple households. The second largest category was the one-person household (291).



**FIGURE 3: City and Town Population Distribution**



## Economic Profile

Economic conditions have a direct impact on the supply, demand and costs for housing, infrastructure and services within a community. It is necessary to examine the economic situation, to predict additional housing, infrastructure and service needs.

This section profiles the economic environment of Calumet County and the Brillion Community by examining factors, including:

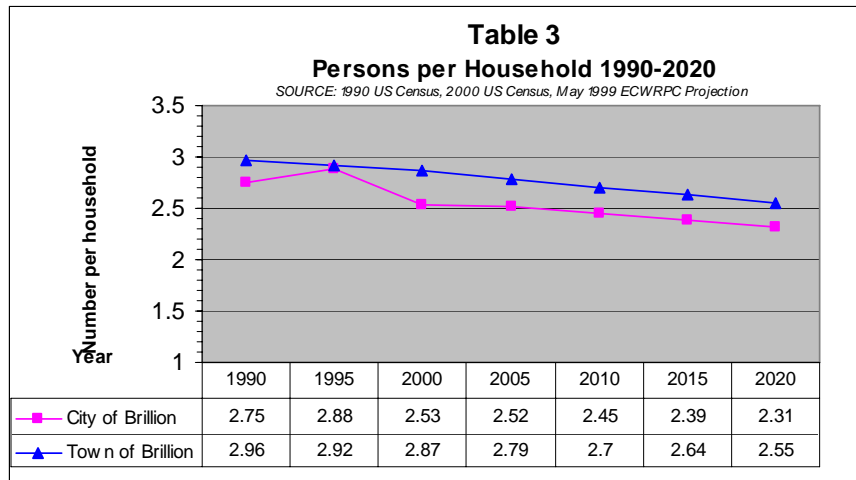
- Per capita income;
- Poverty rate; and
- Unemployment rate.

Much of the information in this section was obtained through the U.S. Census Bureau. Unfortunately, not all information is available specifically for the City and Town. In these cases, county information serves as a good economic environment indicator.

### Labor Force

**Table 3** tracks the employment rate in Calumet County between 1995 and 2000. Over this period, the labor force in Calumet County increased by 830.

Participation rates are often affected by economic, cultural, and demographic conditions. Calumet County has traditionally had a higher participation rate than the State. This can be partially attributed to the easy access to employment opportunities in Green Bay and the Fox Cities, Fond du Lac, and Manitowoc areas.



### DEFINITION: WHAT IS A “HOUSEHOLD?”

A household is a group of people living together in a single dwelling unit. This could include a family, a single person, or a group of unrelated individuals sharing a house or an apartment, but excluding those persons living in group quarters.

### DEFINITIONS: ECONOMIC PROFILE TERMS

#### Labor Force

The sum of employed and unemployed persons who are 16 years of age and older.

#### Participation Rate

Describes the relationship between the labor force and the population

#### Per Capita Income

The total income divided by the number of residents in an area.

### 2000 PARTICIPATION RATES

The City's labor force participation rate is slightly behind the overall county participation rate, but still above the state rate.

The Town's labor force participation rate exceeds the rates for the City, County and State.

City of Brillion: 71.7%  
Town of Brillion: 77.5%  
Calumet County: 75.1%  
Wisconsin: 69.0%



The Ariens Company, Endries International, and the Brillion Iron Works are among Calumet County's Top 10 Private Sector Employers.

### Major County Employers

About half of all employed Calumet County residents work outside of the county.

- 54.7% of the outbound commuters travel to Outagamie County
- 30.6% of the outbound commuters travel to Winnebago County

*Table 5* shows the number of Calumet County residents that commute beyond the county limits versus how few people commute into the county.

Calumet County, outside of farm employment, remains a manufacturing county. Evidence of this is seen in *Tables 6 and 7*.

- Four (4) of the ten largest industry groups are in manufacturing, and make up over 60% of the ten largest industries in the county.
- Eating and drinking establishments are also responsible for a large portion of the employment in Calumet County.
- The educational services industry, made up primarily of local school districts, private schools, and the state technical colleges, is the fifth largest industry in the county.

**TABLE 4**  
**CALUMET CIVILIAN LABOR FORCE DATA**

	1995	1996	1997	1998	1999	2000
Labor Force	24,500	24,800	25,100	25,098	24,682	25,330
Employed	23,400	24,100	24,300	24,407	24,124	24,688
Unemployed	1,100	700	800	691	558	642
Calumet County Unemployment Rate	4.5%	2.9%	3.3%	2.8%	2.3%	2.5%
State of Wisconsin Unemployment Rate	3.7%	3.5%	3.7%	3.4%	3.6%	4.4%

**TABLE 5**  
**CALUMET COUNTY COMMUTING PATTERNS**

County	Commute Into Listed County	Commute From Calumet County	Net Gain or Loss of Workers
Brown	316	348	32
Fond du Lac	204	570	366
Manitowoc	194	1,370	1,176
Outagamie	4,691	817	-3,874
Sheboygan	554	362	-192
Winnebago	2,622	375	-2,247
Total	8,581	3,842	-4,739

Work within Calumet County: 8,689  
SOURCE: WI DWD, Bureau of Workforce Information. Wisconsin Commuting Patterns, 1994

**TABLE 6**  
**TOP 10 INDUSTRY GROUPS IN CALUMET COUNTY**

Industry Group	Employees
Industrial Machinery	3,355
Primary Metals	1,038
Eating and Drinking Establishments	928
Food and Kindred	616
Educational Services	542
Government	533
Fabricated Metals	496
Health Services	485
Food Stores	479
Special Trade Contractors	426

SOURCE: UW-Extension for Calumet County 1998

## Income & Wages

Average annual income earned by Calumet County residents was 97% of the state average in 2000.

Traditionally, Calumet County has lagged behind state and national averages in per capita personal income because of few opportunities for higher paying professional and technical jobs. In recent years, an increasing number of residents who live in Calumet County commute to other counties, where there are more opportunities for higher paying professional and technical jobs. As a result, per capita income in Calumet County has been rising at a greater rate than the state or nation. It is anticipated that by the year 2005 the average annual wages earned by county residents will surpass both state and national averages.

**Table 8** provides information about the relative income for residents living in the City and Town compared to Calumet County and Wisconsin residents. The table includes statistics for per capita income, median family income, median household income, and adjusted gross income. Generally, the City and Town compare favorably to the similar statistics for the county and state.

The 2000 Calumet County per capita income figure (\$21,919) also compares favorably to the figures for Brown (\$21,784), Fond Du Lac (\$20,022), Manitowoc (\$20,285), Outagamie (\$21,943) and Winnebago (\$21,706) counties.

**TABLE 7**  
**TOP 10 PRIVATE SECTOR EMPLOYERS IN CALUMET COUNTY**

Company	Product or Service	Location	Employees
Tecumseh Products	Small Engines	New Holstein	2,000
Brillion Iron Works	Iron Castings	Brillion	1,000
Ariens Company	Yard & Garden Equipment, Snow Throwers	Brillion	700
Chilton Products	Steel & Plastic Tanks, Cylinders	Chilton	420
Ameriquip Corp.	Heavy Equipment	New Holstein	250 – 499
Calumet County	County Gov.	Chilton	354
Endries, Inc.	Fasteners	Brillion	350
Kaytee Products	Bird & Pet Feeds	Chilton	320
Foley/ASC*	Aluminum Cookware	Chilton	150
Professional Plating	Electroplating	Brillion	116
Wal-Mart	General Merchandise	Chilton	110
M-B Corp.	Sweepers and Paint	Chilton	103
Briess Industries	Malt Projects	Chilton	100
Calumet Medical Center	Health Care	Chilton	100

SOURCE: UW-Extension for Calumet County, 1998

\* Out of Business

**TABLE 8**  
**PER CAPITA PERSONAL INCOME COMPARISON**

Location	1995 Per Capita Income	2000 Per Capita Income	2000 Median Household Income	2000 Median Family Income	2000 Adjusted Gross Income
Wisconsin	\$21,960	\$21,271	\$43,791	\$52,911	\$40,570
Calumet County	\$20,714	\$21,919	\$52,569	\$58,654	\$43,504
City of Brillion	NA	\$20,754	\$46,633	\$52,989	\$38,140
Town of Brillion	NA	\$21,927	\$52,500	\$58,403	\$36,088

SOURCE: US Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System, 2000 US Census, and Wisconsin Department of Revenue

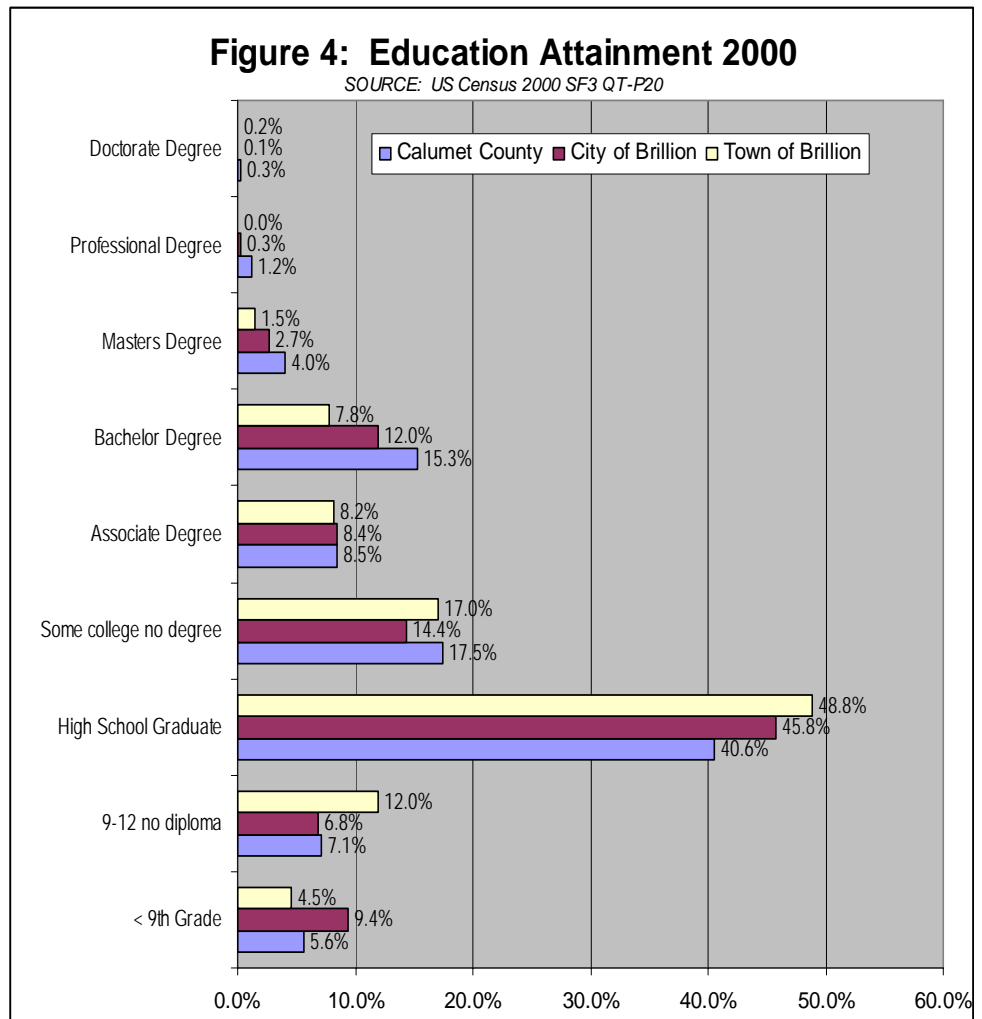
**TABLE 9**  
**TOWN INCOME COMPARISON, CALUMET COUNTY, WI**

TOWN NAME	Average Household Income 2000	Average Household Income 1990	Difference Between 1990 & 2000	1990 Rank	2000 Rank
Harrison	\$66,094	\$42,626	\$23,468	1	1
New Holstein	\$58,050	\$38,880	\$19,170	6	2
Stockbridge	\$55,096	\$37,182	\$17,914	7	3
Chilton	\$53,603	\$39,002	\$14,601	5	4
Brillion	\$52,500	\$34,032	\$18,468	8	5
Woodville	\$52,375	\$40,883	\$11,492	3	6
Charlestown	\$52,300	\$39,833	\$12,467	4	7
Brothertown	\$49,861	\$33,480	\$16,381	9	8
Rantoul	\$48,000	\$42,310	\$5,690	2	9
Average for All Towns	\$54,209	\$38,692	\$15,517	NA	NA
City of Brillion	46,633	28,250	18,383	NA	NA

Source: 1990 and 2000 US Census

It concerns economic development professionals that retail trade employment represents approximately 17 percent of employment in Calumet County, yet less than 7 percent of the wages earned by Calumet County residents. Retail average hourly pay rates are also lower than those in other industries.

Manufacturing employment represents approximately 50 percent of total employment and over 60 percent of wages earned by Calumet County residents. Some of this difference can be attributed to several large employers who have collective bargaining agreements. The dominance of manufacturing employment raises some concerns about the overall strength of the county economy. Given recent manufacturing trends that show companies are relocating out of state, the county should seek to expand its economic base to generate more diverse industry and employment opportunities.



**Table 9** compares the relative income position of the Town of Brillion to the other 8 towns in the county. The table demonstrates that the Town has seen a significant increase in per capita income over the last decade to allow its rank to increase from 8th to 5th. For comparison, information about the City of Brillion is provided at the bottom of this table.

### Education Attainment

A good quality of life indicator in a community is the education attainment of its residents. Generally, a high level of education attainment reflects a skilled population with higher earnings potential. Figure 4 illustrates the level of education attainment for persons age 25 and over in the Brillion Community and Calumet County in 2000.

### Employment Forecast

This employment forecast is presented at the county level, which offers the most comprehensive sources of data, and is an excellent indicator of local conditions.

The strong national economy from 1990 to 2000 had a positive impact on Calumet County. The economy now supports a variety of service industries, including tourism. Low-interest mortgage loan rates spurred housing construction, particularly in the western portions of Calumet County. Unemployment rates in Calumet County were at a 10-year low. Workers were finding employment faster and getting paid more.

A recession began for the US in March 2001, evidenced by the declining stock market and rising energy prices. The war in Iraq impacted gas rates causing Calumet County residents to pay more at the pump. This, in turn, contributed

to an increased cost of living. It is important to monitor the economy and prepare for a potential economic downturn by supporting a diversified economic base.

The City and Town are confident they will fare well over the recession and beyond. The Brillion Community offers a high quality of living that is attractive to employers seeking locations for business development. Population projections indicate the City and Town will continue to grow, which will help support additional business development and job opportunities. Moreover, the central location of the Brillion Community in the region, with easy access to USH 10, will spur continued economic growth in the long-term.

According to various sources including ECWRPC, Fox Cities Chamber of Commerce and Green Bay Chamber of Commerce, area employment has improved significantly in the last year as compared to unemployment levels between 2001 and 2003. Employment forecasts predict employment rates will continue to increase at a slow, but steady pace.

To monitor and improve local employment levels, the City employs a Community Development Director who works closely with local employers to help improve their efficiencies and facilitate expansion, and also seeks to attract new employers to the City.

**TABLE 10**  
**PERCENTAGE OF TOTAL EMPLOYEES BY INDUSTRY**

Industry	Town of Brillion		City of Brillion		Calumet County	Wisconsin	Midwest	U.S.
Agriculture, forestry, fishing, hunting & mining	104	13.1%	20	1.3%	4.5%	1.5%	1.9%	2.7%
Construction	54	6.8%	58	3.6%	5.8%	6.8%	6.1%	5.9%
Manufacturing	293	36.9%	689	43.1%	33.3%	14.1%	18.5%	22.2%
Wholesale trade	21	2.6%	81	5.1%	3.0%	3.6%	3.5%	3.2%
Retail trade	58	7.3%	124	7.8%	10.7%	11.7%	11.7%	11.6%
Transportation and warehousing	50	6.3%	29	1.8%	4.0%	4.3%	4.3%	3.7%
Utilities	-	-	-	-	-	0.9%	0.9%	0.8%
Information	10	1.3%	13	0.8%	2.0%	3.1%	2.5%	2.2%
Finance and insurance	23	2.9%	143	9.0%	6.3%	5.0%	5.0%	4.9%
Real estate and rental and leasing						1.9%	1.5%	1.2%
Scientific and technical services	36	4.5%	46	2.9%	4.2%	5.9%	4.9%	4.0%
Administration and support						3.4%	2.9%	2.5%
Educational services	59	7.4%	233	14.6%	15.3%	8.8%	8.6%	8.5%
Health care and social assistance						11.2%	11.5%	11.6%
Arts, entertainment and recreation	58	7.3%	69	4.3%	5.0%	1.8%	1.5%	1.5%
Accommodation and food services						6.1%	5.8%	5.8%
Other services (except public administration)	18	2.3%	73	4.6%	3.9%	4.9%	4.6%	4.1%
Public administration	10	1.3%	19	1.2%	2.0%	4.8%	3.9%	3.5%

SOURCE: 2000 U.S. Census Data  
NOTE: Finance, Insurance, Real Estate Data is only available in a combined category for the City, Town and Calumet County. The same census data consolidation for reporting purposes exists for three other combined categories: (1) scientific, technical, administration and support positions, (2) education, health care and social assistance, and (3) arts, entertainment, recreation, accommodation and food services. This consolidation is required to maintain anonymity in census reporting.

### Location Quotient Analysis

A location quotient for an industry is the simple ratio of the percentage of local employment in the industry divided by the percentage of employment in the industry for a comparison unit, such as a state, region or the nation. Within the Issues and Opportunities Element of this plan is a breakdown of the major employers in Calumet County and the Brillion Community. *Table 10* provides a breakdown of employment by industry sector as reported by Brillion residents in the 2000 U.S. Census.

The figures in **Table 10** provide little insight about the employment in the City. Are these percentages higher than average? Are they lower than average? Comparing employment in the City to nearby communities provides additional insights into the City economy. **Table 11** includes similar data for the U.S., Midwest, Wisconsin and Rock County.

**Table 10** reveals differences in employment between the City, Town and greater region. From the table it is apparent that the City of Brillion and the region have a significantly higher percentage of the workforce employed in manufacturing than Wisconsin and the Midwest. Comparing these employment percentages is useful, but somewhat cumbersome. Location Quotients (LQ) are an easier way to compare communities and analyze the Brillion economy.

<b>TABLE 11</b>					
<b>LOCATION QUOTIENTS FOR INDUSTRIES IN BRILLION, WI</b>					
Industry	Area Communities*	Wisconsin	Midwest	U.S.	
Construction	0.65	1.26	1.40	1.45	
Manufacturing	1.27	1.36	1.03	0.86	
Wholesale trade	1.71	0.68	0.69	0.76	
Retail trade	0.70	1.12	1.12	1.13	
Transportation and warehousing	0.45	0.81	0.82	0.94	
Utilities	0.44	0.33	0.34	0.37	
Information	0.45	0.29	0.35	0.41	
Finance and insurance	1.55	1.62	1.61	1.64	
Real estate and rental and leasing	0.76	0.16	0.20	0.25	
Scientific and technical services	0.50	1.11	1.31	1.61	
Management of Companies & Enterprises	4.52	3.46	2.80	2.75	
Administration and support	0.97	0.99	1.14	1.35	
Educational services	1.32	0.98	1.00	1.02	
Health care and social assistance	0.72	1.41	1.36	1.36	
Arts, entertainment and recreation	1.37	0.90	1.06	1.08	
Accommodation and food services	0.78	0.37	0.38	0.39	
Other services (except public administration)	1.13	0.43	0.46	0.52	
Public administration	0.57	0.55	0.69	0.52	

SOURCE: UW-Extension Community Indicators Software based on 2000 U.S. Census Data  
 \* Composite comparison to results for New Holstein, Chilton, and Hilbert and aggregate results for Calumet County.

LQ are used to help identify export industries in a community (those industries producing more than needed to meet local demand) and import industries (those producing less than enough to meet local demand).

- LQ greater than 1.0 indicates that a community has proportionately more people than the national average employed in a specific industry. This implies that a community is producing more of a product than is consumed locally. The excess is available for export.
- LQ less than 1.0 suggests that a community is not producing enough of a product or service to meet local demand, and is importing to meet local demand.
- LQ approximately equal to 1.0 indicates that a community is producing enough to meet local demand.

Experts suggest that LQ of at least 1.25 is required to consider classifying a local industry as an exporter. Similarly, they recommend that a location quotient of .75 or less is needed to categorize an industry as an importing sector.

Identifying local export industries (LQ > 1.25) provides a measure of industry specialization within a community. A community with a high location quotient in a specific industry may mean that the local economy has a competitive advantage in that industry. There may be economic development opportunities because of existing economies or synergies that make a community more attractive to businesses in related industries. LQ significantly lower than 1.0 may indicate an import substitution opportunity, the potential to develop local businesses to fill the gap and meet local demand.

Traditionally, LQ are calculated by comparing local employment to national or regional employment. Calculating LQ by comparing nearby communities provides a new perspective and insight into a local economy. **Table 11** compares the City of Brillion to communities within Calumet County, as well as Wisconsin, the Midwest and the US.

The LQ for the City of Brillion compared to area communities shows higher LQ for manufacturing, wholesale trade, finance and insurance, management, educational services, and arts, entertainment and recreation. However, when compared to Wisconsin, the situation changes. For example, the LQ for management of companies and enterprises falls from 4.52 to 3.46. This means that while Brillion is particularly strong in this area compared to other communities in Calumet County, but it is somewhat weaker when compared to the state as a whole. On the other hand, the LQ for finance and insurance rises from 1.55 to 1.62. This LQ information is presented as a tool for the Brillion Community and local business owners to use to identify targeted business and industry. It is also useful in forecasting employment by industry sector.

Local employment growth is likely in those areas with LQ around 0.75.

In particular, there is room for employment expansion in the retail, food service and health care industries. Those industries with an LQ below 0.50 are not as likely to be targeted due to competitive advantages elsewhere in the state and Midwest. This is not to say these types of businesses are not welcome, they are just less likely to establish locally. As expected, the Brillion Community will seek to retain its exporting manufacturing industries as they are the foundation of the local economy.

### Regional Employment Forecasts

To further consider employment forecasts for the Brillion Community, an effort was made to review the economic development planning efforts of the East Central Wisconsin Regional Plan Commission (ECWRPC).

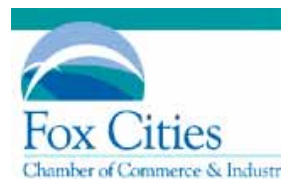
In preparing its regional Smart Growth Comprehensive Plan, the ECWRPC relies on the State of Wisconsin's projections of employment for Wisconsin Metropolitan Statistical Areas (MSA's). The nearest MSA's to Brillion are the Green Bay MSA and the Appleton-Oshkosh-Neenah MSA. Given that many residents of the Brillion Community commute to employers within these MSA's employment forecasts for these areas are very relevant to the workforce living in Brillion.

ECWRPC reports indicate that all MSAs in Wisconsin are expected to see an increase in employment over the next ten years. Employment forecasts between 2001 and 2006, however, are lower in most MSAs when compared to growth between 1995 and 2000. The impacts of the 2001 economic downturn and the weaker labor market have lowered future employment growth accordingly. Metropolitan areas that depend heavily on manufacturing have been more affected by the current economic employment slowdown. However, while a slowdown has occurred in the Appleton-Neenah-Oshkosh MSA because of its dominant manufacturing employment, other areas of the State, such as Milwaukee and Racine, has suffered greater manufacturing employment setbacks. For the time period of 2001 to 2006, it is anticipated a 5.1% employment growth will occur. The strongest growth is expected in the finance, insurance, and real estate sector and in the services sector.

### Chamber Employment Forecasts

The Green Bay and Fox Cities Chambers of Commerce provide additional employment information for their respective markets. Again, this information is important to understanding employment forecasts impacting the Brillion Community, as many residents of the Brillion Community commute to these areas to work.

The Green Bay Chamber of Commerce does little actual employment forecasting, but does monitor historic trends in employment. Over the last five years employment trends have reflected the forecasts included in the ECWRPC



Fox Cities Chamber of Commerce and Industry  
<http://www.foxcitieschamber.com/>



Green Bay Area Chamber of Commerce  
<http://www.tittletown.org/default.asp>

Smart Growth Comprehensive Plan. Unemployment rates in the late 1990s remained steady at around 2.6 percent. In 2001, the rate increased to 3.9 percent. The unemployment rates continued to increase in 2002 (5.3 percent) and 2003 (4.9 percent) as several large manufacturing employers reduced their local workforce. However, in the last year unemployment rate decreased to 4.3 percent. The unemployment rate for the entire period has been about a half to full percentage point lower than the state and national averages over the same period. The Green Bay Chamber, based on comments from its membership, is hopeful that the unemployment rates will continue to decline back toward the 2.6 percent level experienced in the late 1990s within 5 years.

- The Fox Cities Chamber of Commerce conducts an annual survey of its members to understand their staffing changes in the previous year and make predictions for the next. The most recent results from that survey reveal:
- In 2004, 51 percent of businesses predicted their staff size would increase during the coming year. According to the 2005 survey, 43 percent did indeed increase employment during 2004.
- With respect to the health of the Fox Cities' economy, 56 percent of businesses surveyed rated the economic vitality as excellent to good while 35 percent believe it to be average. Only 8 percent of this year's respondents characterize the economy as below average to poor. In comparison to other U. S. cities of similar size, 73 percent indicated the Fox Cities as a better place to conduct business.
- Fifty-three percent of participating businesses predict staff size to grow during 2005 with another 45 percent anticipating that it will remain the same.

The 2005 Economic Outlook Survey suggests a confidence in the Fox Cities' business community that has not been present for the past few years. In general, survey respondents are optimistic about the local economy and their own individual businesses ability to grow and prosper. Sales, profits and employment levels are all expected to increase during the coming year for a significant percentage of the survey respondents. This is not only true for the retail and service sectors that have experienced solid growth over the last three years, but manufacturing as well which bore the brunt of the recent soft economy.

### **Local Employment Forecast**

Based on available data described in this section, the assessment of community strengths and weaknesses for attracting economic development (refer to the Economic Development Element), and the anticipated impact associated with the successful implementation of the smart growth plan, employment forecasts for Brillion are for slow but consistent growth. The recovering manufacturing economy will bode well for Brillion.

New employment growth, based on the results of the location quotient, is projected in the retail, food service and health care industries.

It is anticipated that unemployment rates will drop to around 3.0 percent through 2010 and reduce to 2.6 percent through 2015.