Imperial County
Community and Economic Develpment Department

Imperial Valley Border Economic Impact Study

February 2017

IMPERIAL VALLEY BORDER ECONOMIC IMPACT STUDY

Summary Report

Prepared For:

County of Imperial
Community & Economic Development Department
940 W. Main. St. Suite 203
El Centro, CA 92243

Prepared By:

Michael Baker International
2729 Prospect Park Drive, Suite 220
Rancho Cordova, CA 95670

With Support From:

Crossborder Group
9605 Airway Road, Suite
B San Diego CA 92154

February 2017

EDA Grant # 07-86-07262

This document was prepared under an Award from the
U.S. Department of Commerce
Economic Development Administration.
This publication was prepared by Imperial County Community & Economic Development Department. The statements, conclusions, and recommendations are those of the author(s) and do not necessarily reflect the views of the Economic Development Administration.

Table of Contents

Appendices

Tables

Charts

EXECUTIVE SUMMARY

The County of Imperial hired Michael Baker International and Crossborder Group to administer a travel behavior survey of cross-border travelers from the City of Mexicali to Imperial Valley. According to the US Bureau of Transportation Statistics, in 2014 there were a total of 18.6 million people traveling northbound into Imperial County through the Calexico West/Mexicali I Port of Entry (POE) and Calexico East/Mexicali II POE. Based on the above, the Calexico West POE had 32,300 average daily northbound person crossings and the Calexico East POE had 18,800 daily border crossers, for a total of 51,100 Calexico/Mexicali daily border crossers. In 2015 the average number of Calexico/Mexicali daily border crossers increased to 52,357. The overall goal of this travel behavior survey of cross-border travelers from the City of Mexicali to Imperial Valley is to quantify the impact and benefits of northbound border crossers in Imperial County's retail industry, and position Imperial County as a prime location for investment.

The scope of work included the following:

- Develop a survey methodology to gather data that can be replicated for future updates
- Quantify the spending trends of those who cross the border and the impacts and benefits to Imperial Valley's economy
- Identify specific industries and products targeted by Mexicali residents

There were 1,073 survey respondents, 1,045 of which were from Mexicali representing 97.4 percent of the respondents. Nearly all of the respondents used Spanish to complete the survey. There was a slightly higher proportion of male respondents than female respondents. The most frequent age range of the respondents was 27–46. Notably, nearly 70 percent of respondents visit the United States at least once a week and nearly 60 percent of respondents shop in retail stores in the Imperial Valley at least once a week.

A sample of the spending habits of the respondents:

- The top four purchases targeted by these cross-border shoppers, in order of demand, were clothing, food, footwear, and electronics.
- Frequency and amount of spending:
  - Roughly 17 percent of respondents spend an average of over $100 per week on groceries and retail items in the Imperial Valley.
  - Nearly 60 percent of all respondents cross the border at least once a week and also spend $50 or less each week at retail stores in the Imperial Valley.

- Those crossing the border on a weekend planned on spending more during that visit than those crossing on a weekday.

- Those who spent over $100 per week on retail items in Imperial Valley, and especially those who spent over $200, bought electronics and toys more frequently than moderate or minimal spenders did. Those who spent over $200 bought clothing, food, footwear, and gasoline less frequently than all other respondents.

Impacts and Benefits:

According to the US Bureau of Transportation Statistics, the average number of daily Calexico/Mexicali border crossers in personal vehicles and on foot in 2015 was 52,357. A total of 1,045 cross-border travelers from the City of Mexicali to the Imperial Valley participated in the survey. This represents 2 percent of the daily number of border crossings.

Survey respondents spend an average of $63 on groceries and $77 on retail items (for a combined $140) per week in the Imperial Valley, which equals $3,276 on groceries and $4,004 on retail items (for a combined $7,280) per person per year.

If the survey sample is representative of typical Calexico/Mexicali border crossers in personal vehicles and on foot, then annually this group accounts for a total of approximately $380 million in spending on retail items and groceries.

According to Esri (2017), the total spending in Imperial County in 2016 on retail, food, and drink (spending in restaurants and bars was excluded, while spending on groceries was included) was $1.93 billion. As noted above, Calexico/Mexicali border crossers annually spend approximately $380 million on retail items and groceries in Imperial Valley. This means that Calexico/Mexicali border crossers contributed approximately 20 percent of the total spending in Imperial County in 2016 on retail and groceries. The Imperial County economy, while not completely dependent on visitor sales, would be noticeably impacted by changes in visitor spending or trip habits.

The report concludes with recommendations for further research and analysis and a comprehensive retail retention and attraction strategy and marketing program.

INTRODUCTION

The overall goal of this study is to quantify the impact and benefits of northbound border crossers, the majority of whom are residents of Mexicali, Mexico, on Imperial County's retail and workforce to assist in positioning Imperial County as a prime location for investment.

According to the US Bureau of Transportation Statistics, in 2014 there were a total of 18.6 million people traveling northbound into Imperial County through the Calexico West/Mexicali I Port of Entry (POE) and Calexico East/Mexicali II POE. Based on the above, the Calexico West POE had 32,300 average daily northbound person crossings and the Calexico East POE had 18,800 daily border crossers, for a total of 51,100 Calexico/Mexicali daily border crossers. In 2015 the average number of Calexico/Mexicali daily border crossers increased to 52,357.

Study Goals:

- Develop a survey methodology to gather data that can be replicated for future updates
- Quantify the spending trends of those who cross the border and the impacts on and benefits to the Imperial Valley's economy
- Identify specific industries and products targeted by Mexicali residents

The study was funded by the US Department of Commerce Economic Development Administration. The survey was administered by Crossborder Group. This report was prepared by Michael Baker International.

SURVEY METHODOLOGY

To ascertain information on the travel and spending behavior of cross-border travelers from the City of Mexicali to the Imperial Valley, a survey questionnaire was prepared and administered (see Appendix A). The survey was developed with input from Imperial County as a bilingual instrument (English and Spanish). Questions and answers were exchanged verbally, while bilingual survey administrators logged responses on handheld electronic devices pre-programmed with survey software and the previously approved bilingual questionnaire. Survey administrators also observed each respondent and noted information. The list of questions and observations are in Table 1, below.

The survey was administered to Mexico-residing northbound travelers (pedestrians, pedestrians with bicycles, and passenger vehicles using SENTRI, Ready Lane, and regular lanes) at two border crossing locations: Calexico West/Mexicali I, and Calexico East/Mexicali II. Survey participants were selected following a two-step procedure to randomize sampling and avoid selection bias in the following manner: field workers first visually identified an initial prospective target (vehicle or pedestrian), then counted to the third (n=3) vehicle or pedestrian after the initial target; this vehicle/pedestrian was approached and, following a short (bilingual) introduction/screening script, was invited to participate. If amenable (and if they met all criteria), the survey was conducted. If not amenable to participating, each successive vehicle/pedestrian was approached until participation was successful. Following entry of survey responses, participants were thanked, and the selection process was repeated.

Table 2, below, shows the breakdown of respondents by lane type and location. The first wave of surveys took place on five consecutive days from Thursday, November 17, 2016, to Monday, November 22, 2016. The second wave of surveys took place on five consecutive days from Friday, December 9, 2016, to Tuesday, December 13, 2016. Surveys were conducted between the hours of 7:00 a.m. and 5:00 p.m. (daylight hours to ensure field staff security) on both weekdays and weekends.

Table 1: Survey Questions and Observations

Questions
In what city or area do you have your primary residence or do you live?
For demographic purposes only, in what year where you born?
What is the purpose of your visit to U.S today?
How frequently do you cross the border to the U.S.?
How often do you shop at retail stores in the Imperial Valley?
In dollars, approximately how much do you estimate you will spend during this trip to the US?
On a weekly basis, how much do you spend on Groceries in Imperial Valley?
On a weekly basis, approximately how much do you spend at other retail stores (clothing, other products) in Imperial Valley?
In the past 30-days, what are the top three types of products you have purchased in Imperial Valley stores? [OPEN ENDED]
What are the main reasons you like to shop at stores in Imperial Valley? [MULTIPLE CHOICE]
Observations by Survey Administrator
Language used for survey
Gender/Sex of participant
General location of survey
Traveler type
General POV Type
License plate of vehicle (location)
Number of adults in car
Number of children in car
Day Surveyed
Time Survey Started
Time to Complete Survey
Survey is Complete

Table 2: Traveler Type by Time and Location

Port of Entry (POE)	First Wave	Second Wave	Total
	Pedestrian		
Calexico West/Mexicali I	142	140	282
Calexico East/Mexicali II	0	0	0
Total	142	140	282
	Pedestrian with Bike		
Calexico West/Mexicali I	1	0	1
Calexico East/Mexicali II	0	0	0
Total	1	0	1
	SENTRI		
Calexico West/Mexicali I	114	128	242
Calexico East/Mexicali II	0	0	0
Total	114	128	242
	Ready Lane		
Calexico West/Mexicali I	0	0	0
Calexico East/Mexicali II	159	132	291
Total	159	132	291
	Regular		
Calexico West/Mexicali I	122	135	257
Calexico East/Mexicali II	0	0	0
Total	122	135	257
	Total (all modes of travel)		
Calexico West/Mexicali I	379	403	782
Calexico East/Mexicali II	159	132	291
Total	538	535	1,073

RESULTS AND ANALYSIS

Overview of Data Collected

The charts throughout this report use a combined dataset from both waves of surveys (November and December) and present a selection of the survey questions. Appendix B has summary tables for the complete set of questions, with total responses as well as separate responses from each wave of surveys. As noted in the list of Appendices, the raw data was provided as separate Microsoft Excel files. The charts in the section immediately below draw from the entire dataset of 1,073 respondents. The sections that follow, beginning with Cross-Tabulations, use a dataset of just Mexicali residents (N = 1,045), which represent 97.4 percent of the respondents.

As seen in the following three charts:

- Nearly all of the respondents used Spanish to complete the survey.
- There was a slightly higher proportion of male respondents than female respondents.
- The most frequent age range of the respondents was 27–46.

Chart 1: Language Used for the Survey

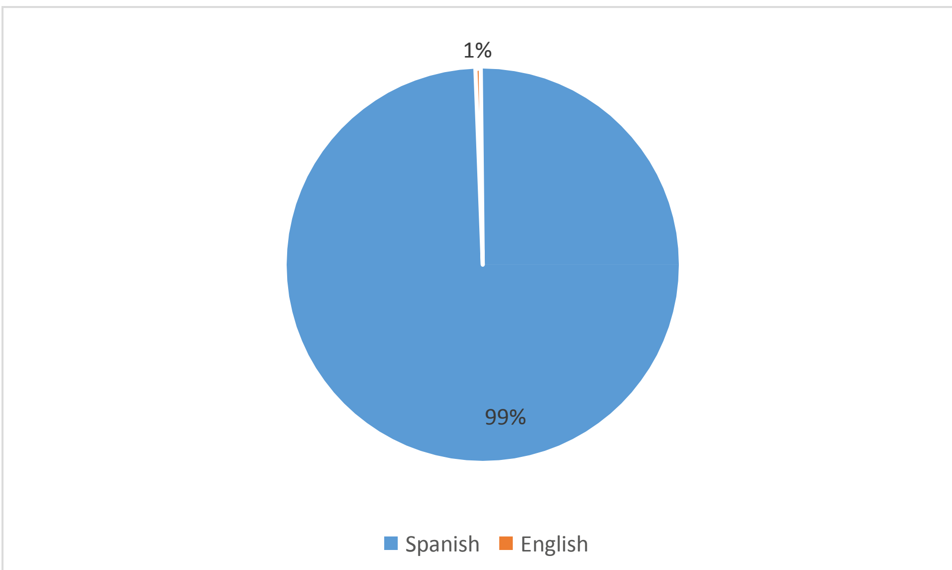


Chart 2: Gender of Participant

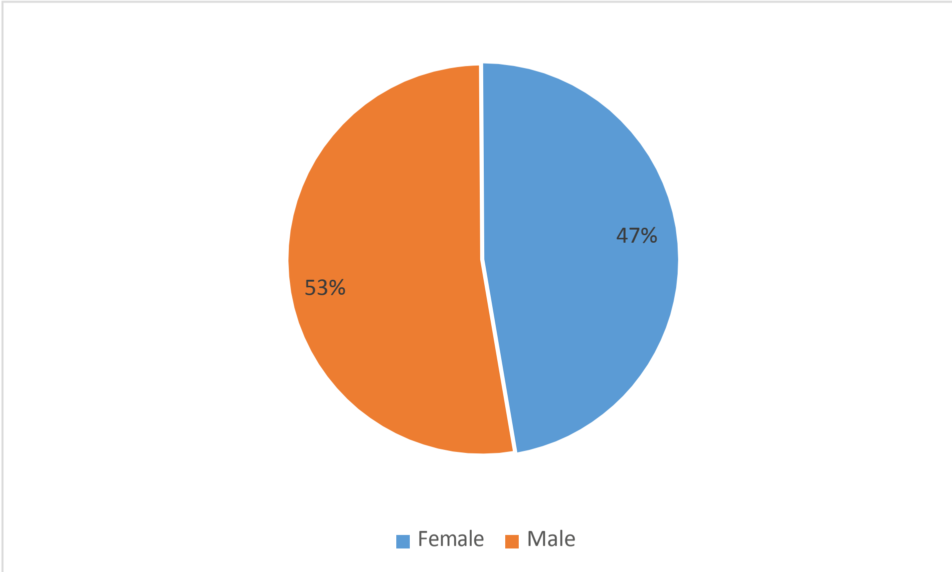
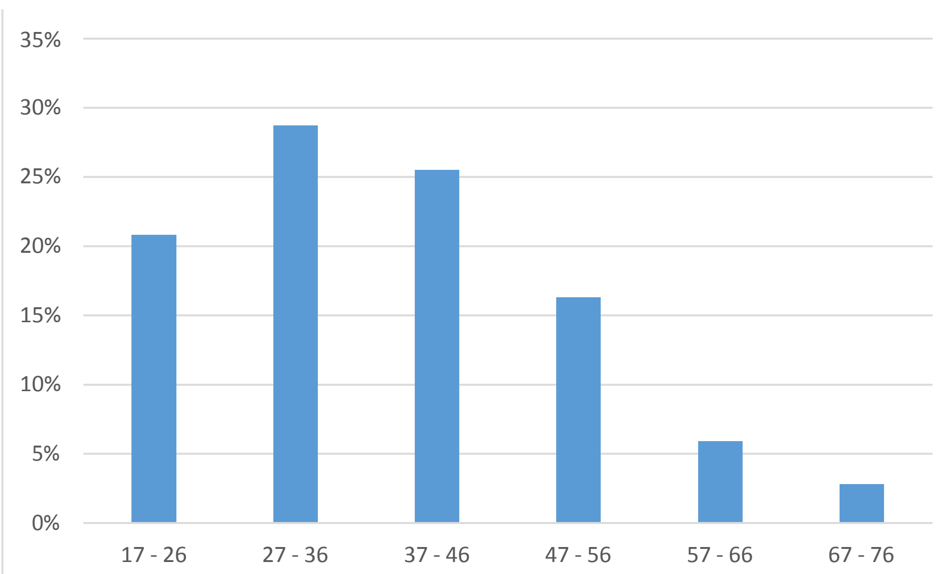


Chart 3: Age



As seen in Chart 4, the majority (60%) of the respondents cited shopping as the purpose of their visit.

Chart 4: Purpose of Visit

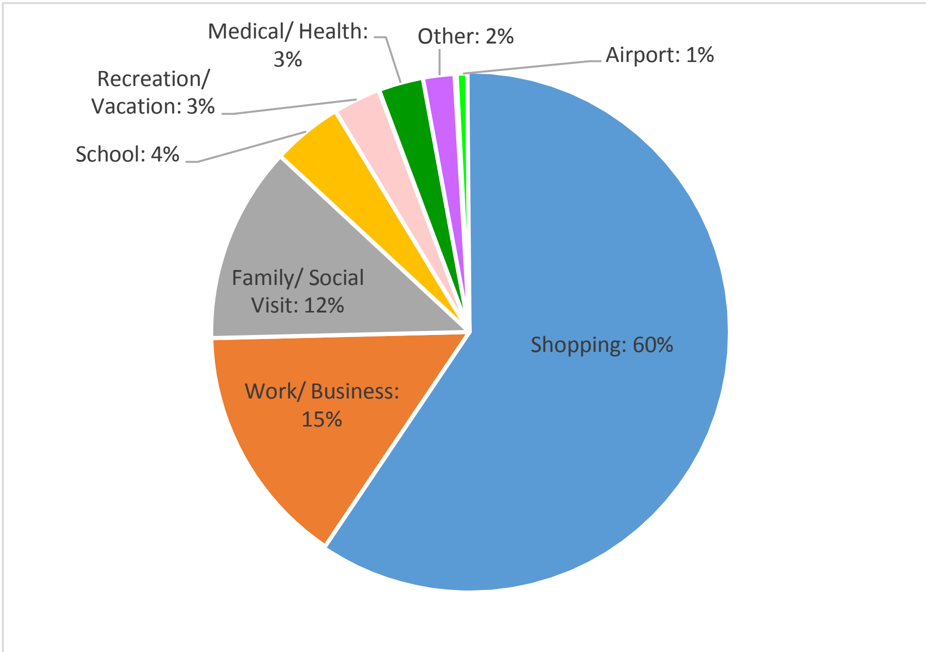


Chart 5 compares how frequently respondents shopped at retail stores in the Imperial Valley and how frequently they crossed the border into the United States. One to two times per week was the most common response for both categories. The survey did not ask respondents how long they stayed in the United States after crossing the border. Respondents could be staying in the United States for multiple days or weeks at a time and shopping at stores in the Imperial Valley multiple times during their visit.

Notably, nearly 70 percent of respondents visit the United States at least once a week and nearly 60 percent of respondents shop in retail stores in the Imperial Valley at least once a week.

Chart 5: Frequency of Shopping in the Imperial Valley and Crossing the Border

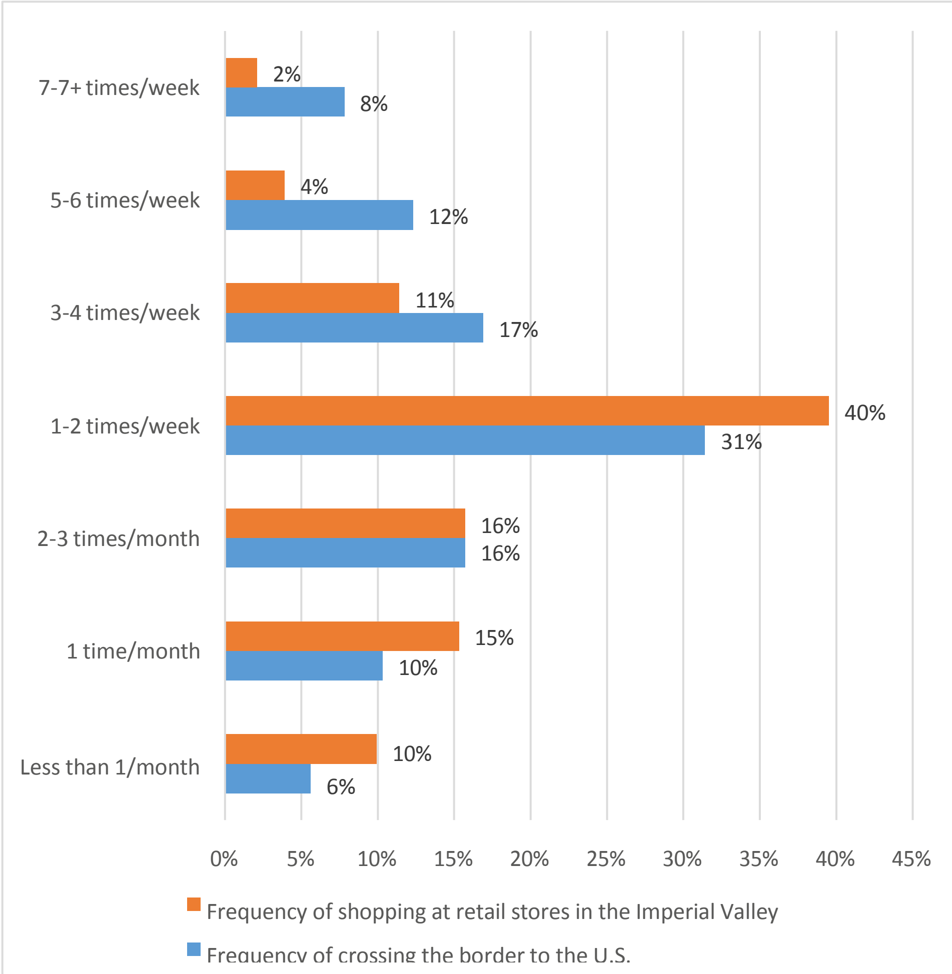


Chart 6 compares the amounts of money respondents spend in these three categories:

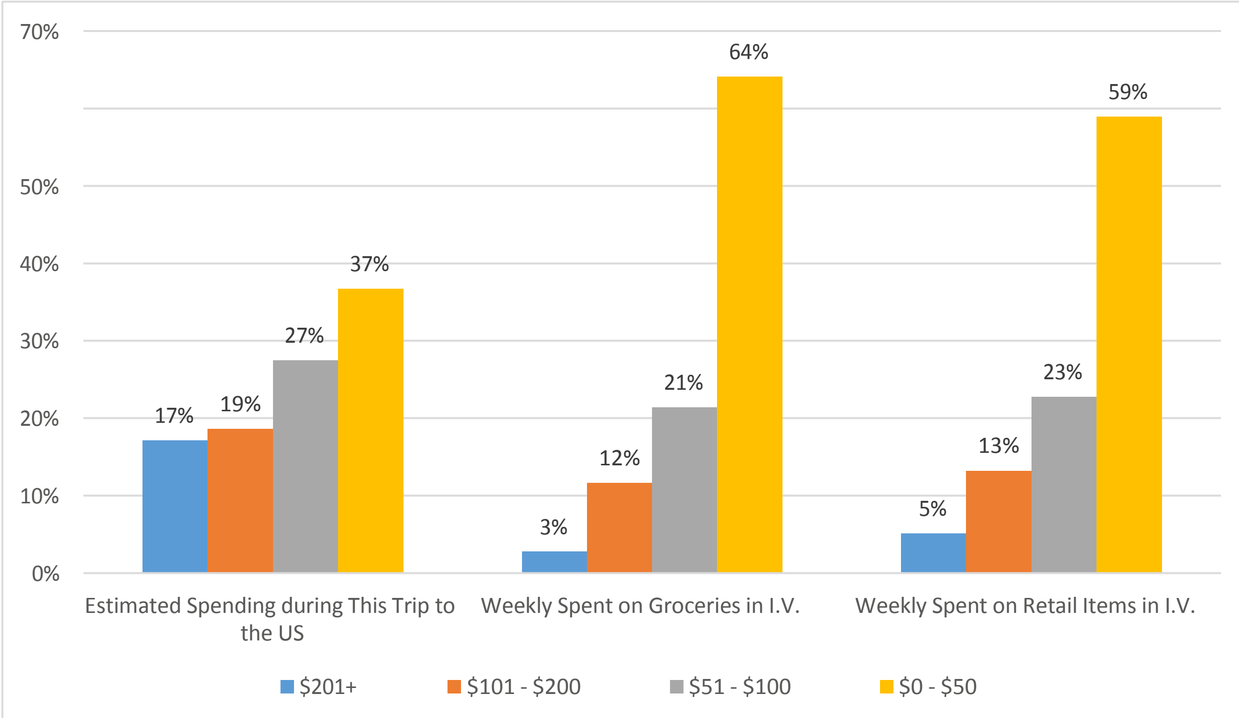
1. Amount expected to be spent on that trip to the United States.

2. Weekly amount spent on groceries in the Imperial Valley.

3. Weekly amount spent at other retail stores (clothing, other products) in the Imperial Valley.

Approximately 60 percent of the respondents planned to spend over $50 on this particular trip to the United States and 36 percent of the respondents planned to spend over $100 on this particular trip. However, weekly total amounts of spending in the Imperial Valley on groceries and retail items were lower than what respondents planned to spend on this trip. Roughly 60 percent of respondents spend less than $50 per week on groceries and retail items in the Imperial Valley. Roughly 17 percent of respondents spend an average of over $100 per week on groceries and retail items in the Imperial Valley.

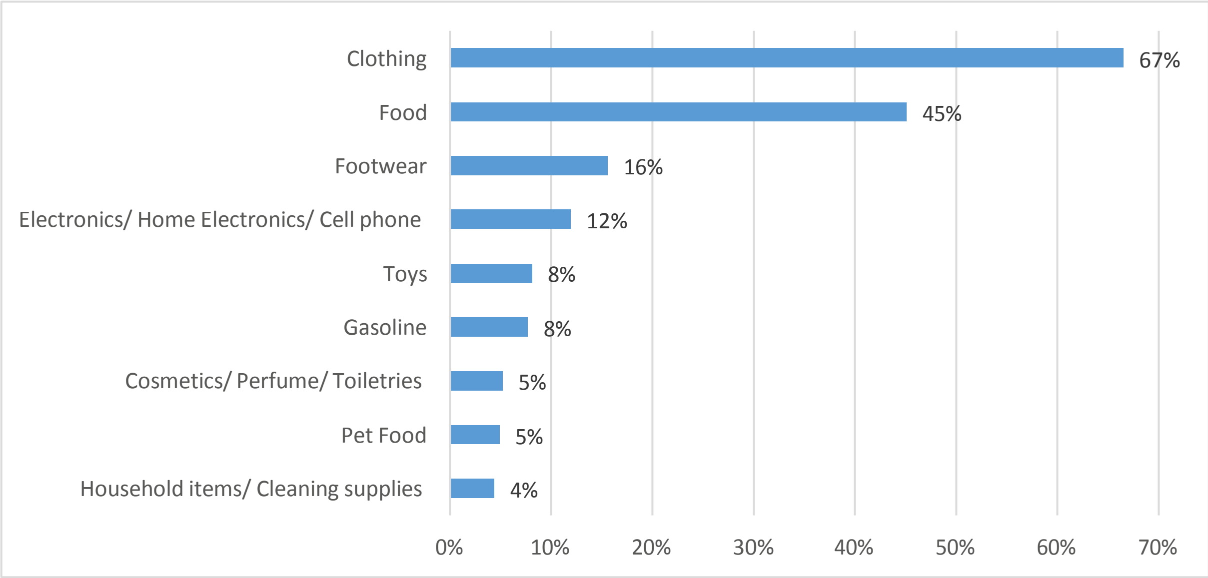
Chart 6: Comparison of Spending



Respondents were asked to name the top three types of products that they purchased in Imperial Valley stores in the past 30 days. As seen in Chart 7, clothing (67%) and food (45%) were the most common types of purchases, by a wide margin, followed by footwear (16%) and electronics (12%). Toys and gasoline (8%) tied for fifth and sixth while cosmetics/perfume/toiletries and pet food tied for seventh and eighth (5%). Household items/cleaning supplies (4%) was the ninth most common type of purchase.

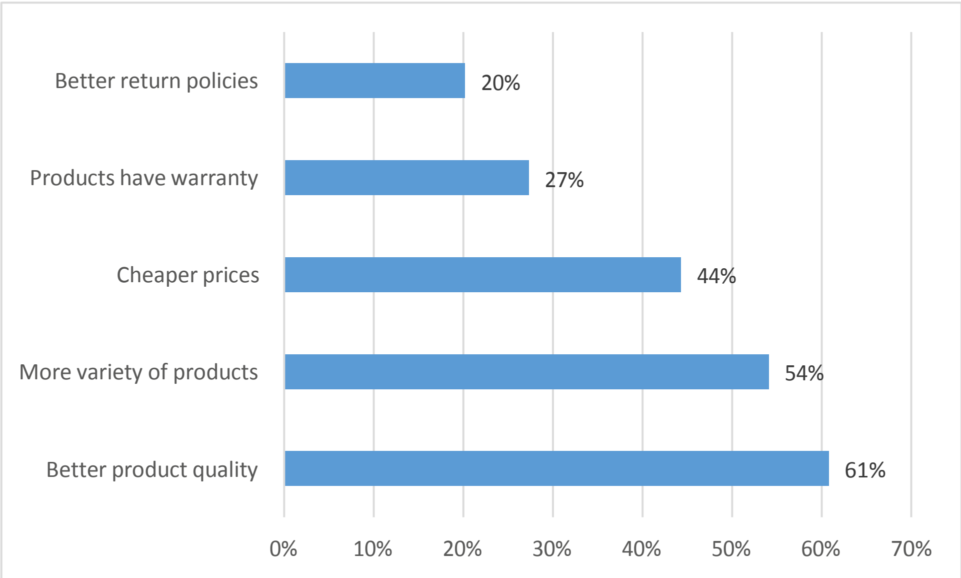
Types of purchases that were indicated in fewer than 4 percent of the responses are not included in the chart below. They are listed here in descending order of frequency: baby items (including diapers and formula), restaurant/fast food, gifts, medication/medical visit, tools, alcoholic beverages/beer, fashion accessories/jewelry, school supplies, auto parts, accessories/tires, Christmas items, drinks, furniture, cigarettes, entertainment, musical instruments, sporting goods, lights, books, cellular accessories, lottery, coffee, and car.

Chart 7: Types of Products Purchased in Imperial Valley



Respondents were asked about the main reasons they like to shop at stores in the Imperial Valley. They were given five possible reasons and allowed to select as many as they agreed with. 'Better product quality' was the reason selected most often (61%), with 'More variety of products' a fairly close second (54%).

Chart 8: Main Reasons to Shop at Stores in the Imperial Valley



Cross-Tabulations

The tabulations in this section use a combined dataset from both waves of surveys (November and December). The 28 residents from places other than Mexicali were removed. The resulting number of respondents was 1,045.

Charts 9 and 10 show the relationships between the amounts of money that respondents say they spend, on average, per week on retail items in the Imperial Valley and frequency of crossing the border to come into the United States. As seen in the charts, the respondents were split into four “spending groups” and four “frequency groups.”

Spending Groups

- $201+
- $101–$200
- $51–$100
- $0–$50

Frequency Groups

- Regularly (4 or more times per week)
- Often (1–3 times per week)
- Occasionally (1–4 times per month)
- Rarely (less than once a month)

Chart 9 shows the frequency by percentage that each spending group crosses the border. For example, the chart shows that a slightly higher percentage of those that spend over $200 weekly on retail items in the Imperial Valley cross the border regularly, as compared with the other spending groups. However, overall, people seem to be crossing the border at relatively the same frequencies, no matter what amounts they spend per week on retail items in the Imperial Valley. Notably, nearly 42 percent of all respondents cross the border at least once a week and also spend $50 or less each week at retail stores in the Imperial Valley. A comparison of the purpose of the visit for this group and the other 58 percent of respondents is provided in Chart 14.

Chart 9: Frequency by Amount Spent

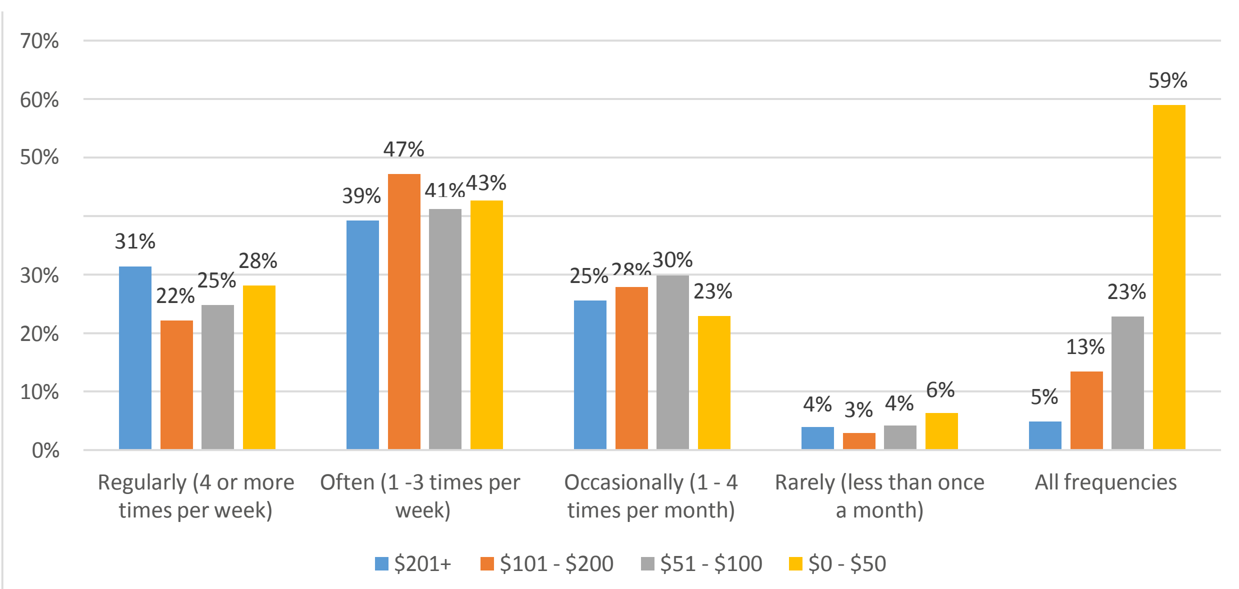
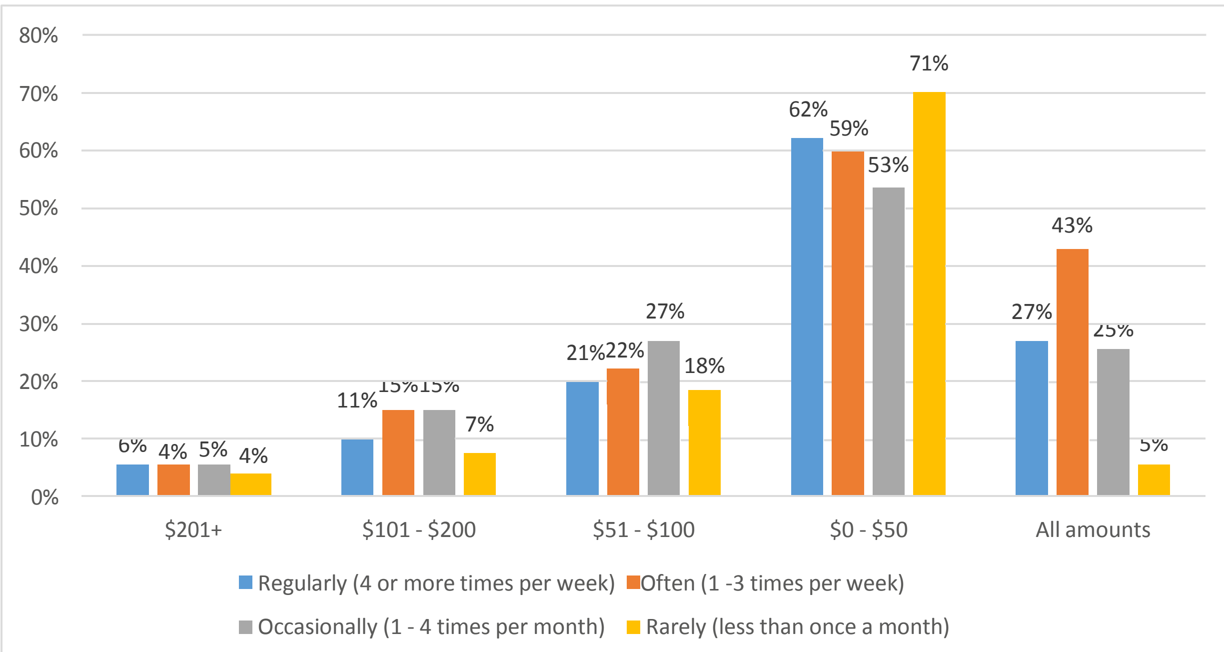


Chart 10 draws from the same data but looks at it differently. This chart shows the percentage that each frequency group spends at different levels. For example, the chart shows that a slightly higher percentage of respondents that rarely cross the border spend an average of $50 or less each week on retail items in the Imperial Valley, as compared with respondents that cross the border more frequently. However, overall, people seem to be spending approximately the same average weekly amount, no matter how frequently they go.

Notably, 70 percent (N = 726) of respondents cross the border into the United States at least once a week.

Chart 10: Amount Spent by Frequency



When Mexicali residents cross the border, they tend to spend money in the Imperial Valley on both groceries and retail items. Only 11 percent of the respondents (N = 110) indicated that they spend nothing on groceries and retail items in the Imperial Valley. For the remaining 89 percent of the respondents (N = 935), the average amount that they spend per week in the Imperial Valley:

- On groceries is $71.
- On retail items is $86.
- The median for each is $50.

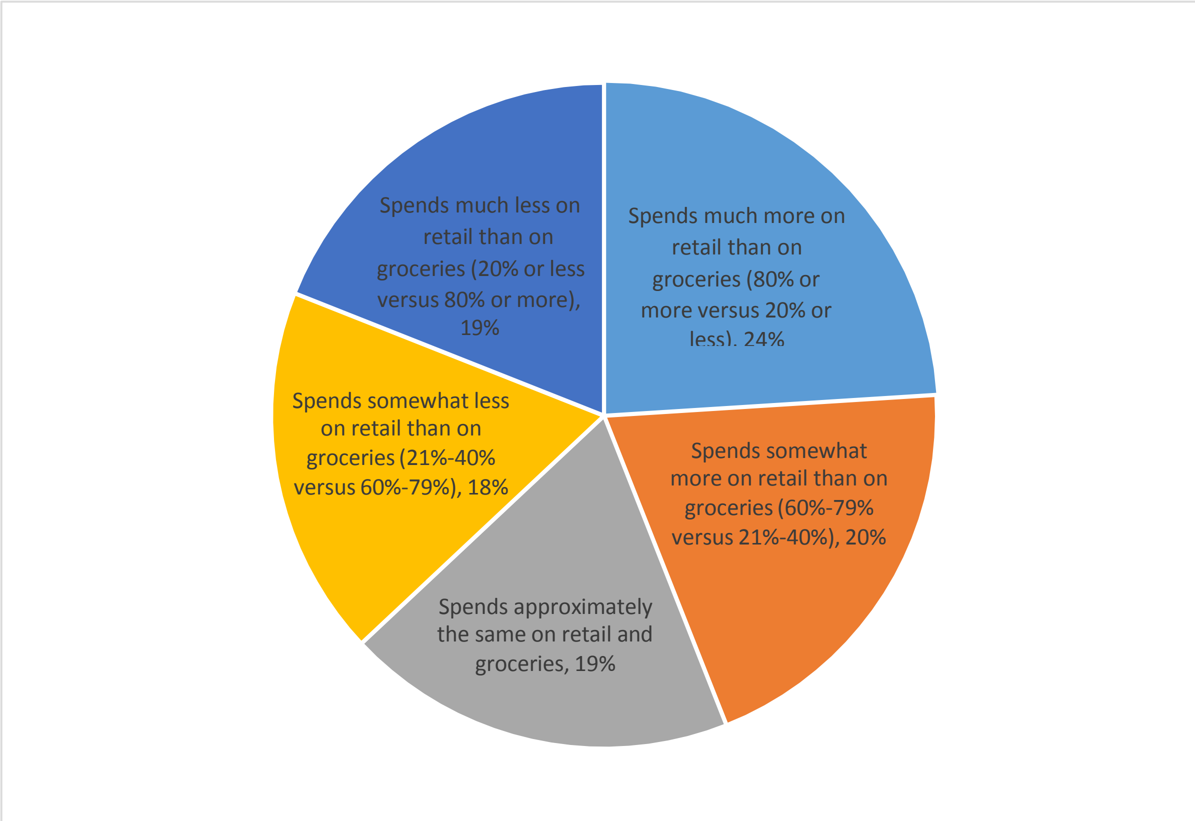
If including those who spend nothing on groceries and retail in the Imperial Valley in the above calculation, the average amount spent by respondents per week in the Imperial Valley on groceries and retail is $63 and $77, respectively.

The respondents' average weekly retail spending and their average weekly grocery spending can be thought of as a combined spending amount. The analysis below was conducted to determine whether respondents spend a majority of their combined average weekly spending amount on either retail or on groceries, or if they spend approximately equal portions of their weekly spending on groceries and retail items. Chart 11 looks at the ratio of retail to grocery spending and uses the five categories listed below:

1. Spends ***much more*** on retail than on groceries (80% or more versus 20% or less)
2. Spends ***somewhat more*** on retail than on groceries (60%–79% versus 21%–40%)
3. Spends ***approximately the same*** on retail and groceries
4. Spends ***somewhat less*** on retail than on groceries (21%–40% versus 60%–79%)
5. Spends ***much less*** on retail than on groceries (20% or less versus 80% or more)

In the list above and the chart below, the numbers in the parentheses represent the percent of the respondents' combined average weekly spending amount which was allocated to retail, versus to groceries. Interestingly, each of the five categories had approximately the same number of respondents, which indicates that, overall, groceries and retail items are both a big draw for Mexicali consumers.

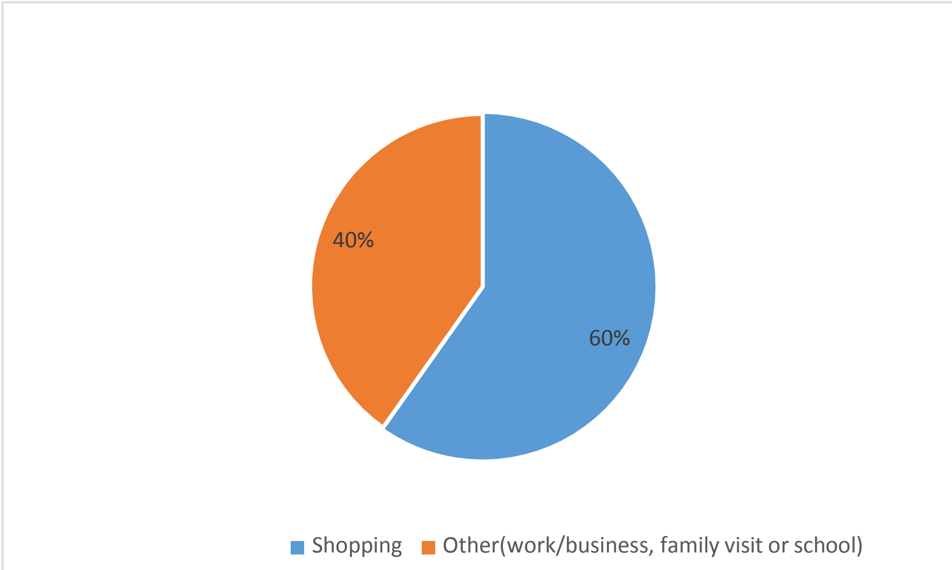
Chart 11: Ratio of Retail to Grocery Spending*



**N = 935, which does not equal the total number of respondents because respondents who spend zero dollars on both retail items and groceries each week in the Imperial Valley were excluded.*

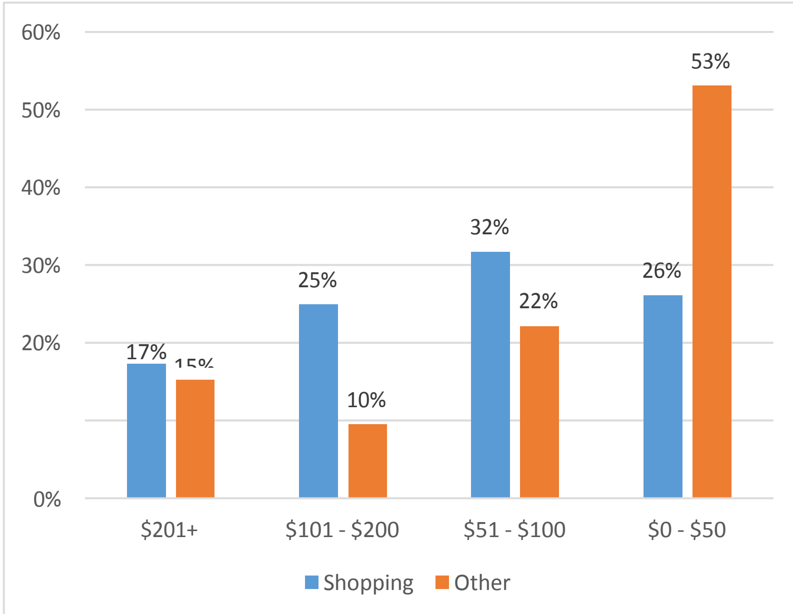
As shown in Chart 12, out of the 1,045 respondents, 625 (60%) selected 'shopping' as the purpose of the trip and 420 (40%) went with another purpose (such as work/business, family visit or school).

Chart 12: Purpose of Visit



As shown in Chart 13, respondents who crossed the border with a purpose other than shopping planned to spend less on that visit to the United States than respondents who were crossing the border with the purpose of shopping. However, of those who estimated they would spend over $200 during that visit, the purpose of the trip was irrelevant. In addition, the average amount of expected spending for that visit did not differ very much between the two groups ($150 for 'shopping' versus $135 for 'other'). Although the average was similar, the median was not. The median amount of expected spending for those who went with shopping as their purpose was $100, whereas the median for those who went with another purpose was $50.

Chart 13: Amount of Spending on Current Visit and Purpose of Trip



As noted earlier, in the discussion about Chart 9, 42 percent of all respondents cross the border at least once a week and also spend less than $50 each week at retail stores in the Imperial Valley. As shown in Chart 14, this specific group, compared to all of the other respondents, is more likely to cross the border with the purpose of school, family/social visit, or work/business and less likely to cross the border with the purpose of shopping. However, among this group, shopping is still the most common reason to cross the border, with 69 percent indicating that shopping was the purpose of their visit.

Chart 14: Purpose of Trip for Frequent Crossers who are also Low Spenders

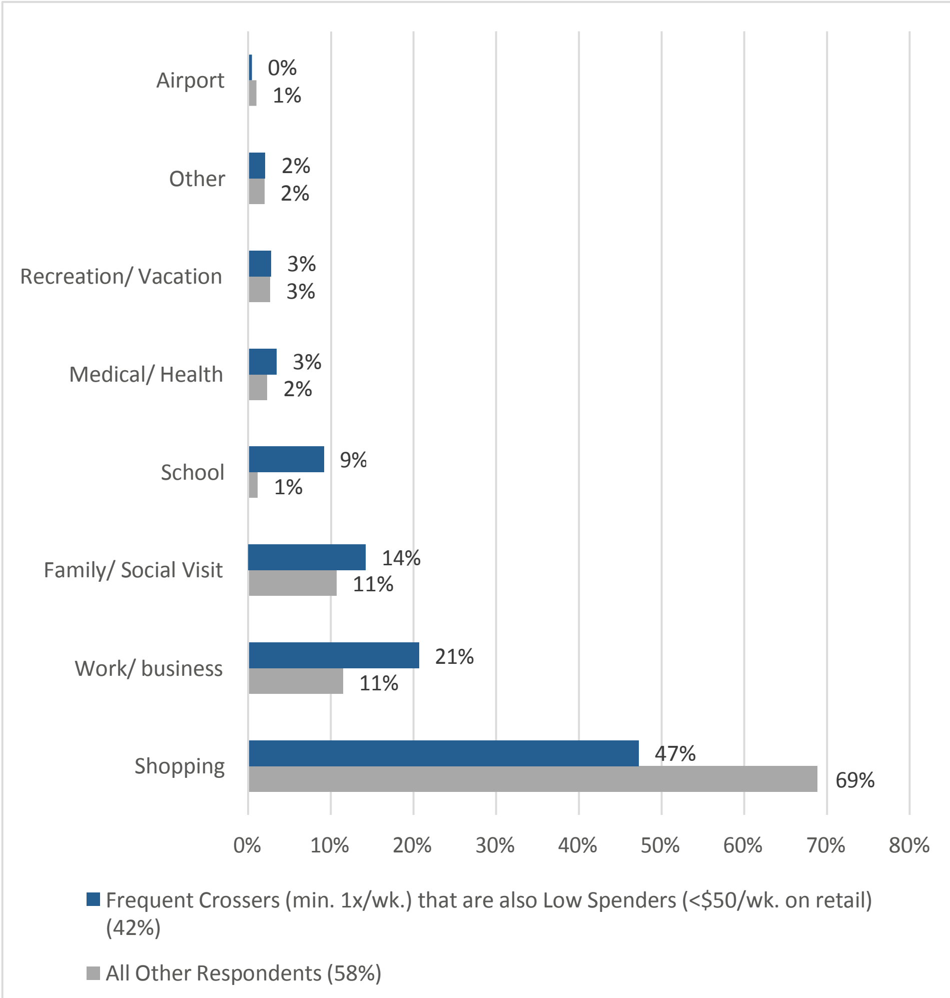


Chart 15 compares the amounts respondents spend, on average, per week on retail items in the Imperial Valley with the types of products that they indicated that they purchased in Imperial Valley stores in the past 30 days. The chart uses the four "Spending Groups" used earlier and listed below:

Spending Groups

- $201+
- $101–$200
- $51–$100
- $0–$50

As shown below, those who spent over $100, and especially those who spent over $200, bought electronics and toys more frequently than the moderate or minimal spenders did. Those who spent over $200 bought clothing, food, footwear, and gasoline less frequently than all other respondents.

A much higher percentage of those that spent over $200 on retail items per week bought electronics, as compared with the other spending groups (35% as compared with 14%, 11%, and 10%). Also, twice the percentage of those in the $200 and over category bought toys, as compared with the other spending groups (16% as compared with 8%, 6%, and 8%). Those who spent $50 or less on retail items per week bought food by a higher percentage than the other spending groups (50% as compared with 40%, 40%, and 35%). A smaller percentage of those in the $200 and over category bought clothing, as compared with the other spending groups (57% as compared with 79%, 71%, and 63%).

Chart 15: Type of Products by Weekly Amount Spent on Retail

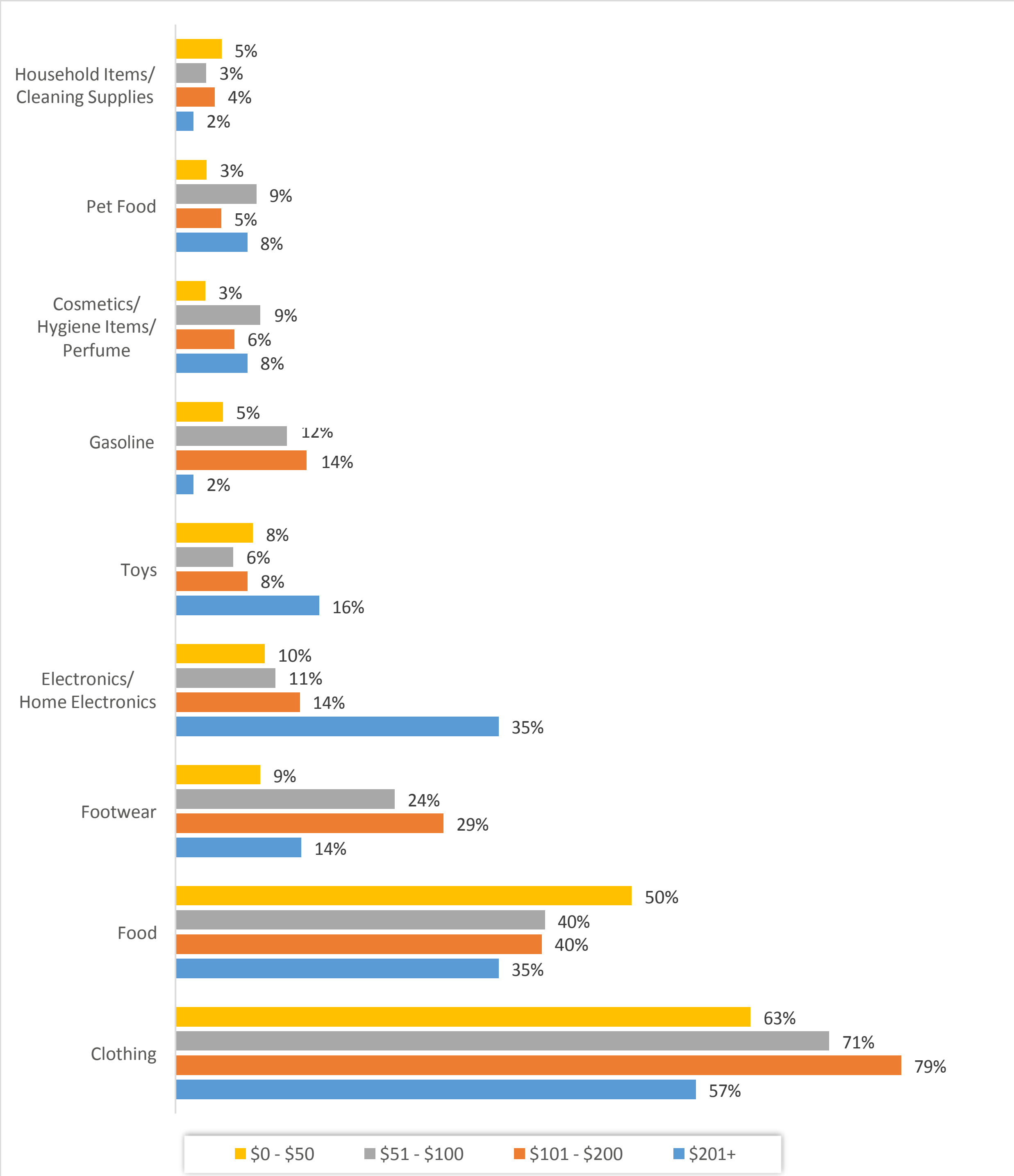
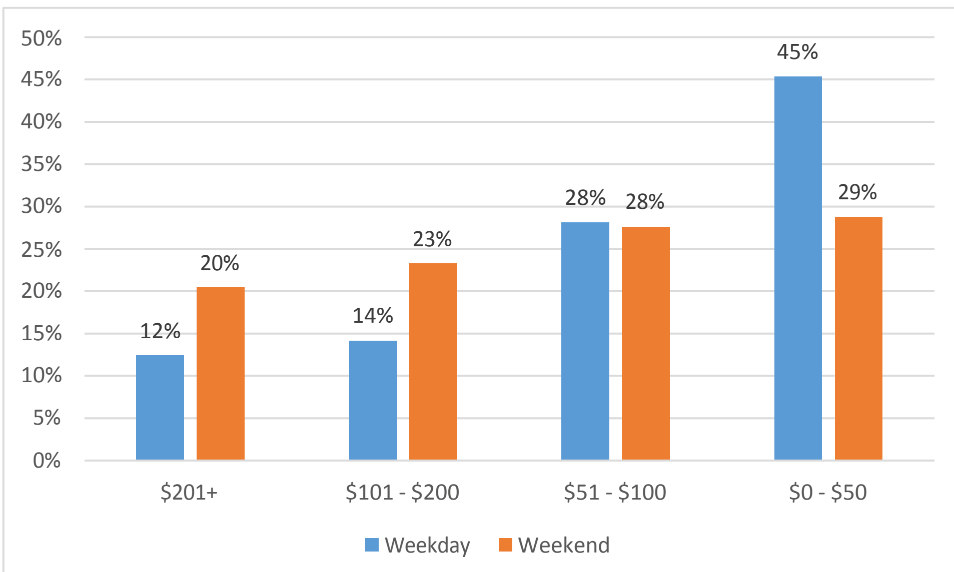


Chart 16 compares the amounts respondents said they planned to spend on that particular trip based on whether they crossed the border on a weekday or on a weekend. As shown in the chart, a higher percentage of those who crossed the border on the weekend planned to spend $100 or more on the trip, as compared with those who crossed the border on a weekday (43% versus 26%). Conversely, a much higher percentage of those who crossed the border on a weekday planned to spend $50 or less, as compared with those who crossed the border on a weekend (45% versus 29%).

Of the 1,045 respondents, 516 were surveyed on a weekday, while the other 529 were surveyed on a Saturday or Sunday. Regarding the amounts they planned to spend on that particular trip:

- Weekday border crossers planned to spend an average of $132 on that trip. The median amount of expected spending was $70.
- Weekend border crossers planned to spend an average of $157 on that trip. The median amount of expected spending was $100.

Chart 16: Amount Spent by Weekday and Weekend



Super Shoppers

290 out of 1,045 (28%) respondents fit these characteristics:

- They cross the border to the United States a minimum of once a week.
- They spend a minimum of $50, each week, at retail stores in the Imperial Valley.

For the purposes of this study, they are referred to as Super Shoppers.

As seen in Charts 17 and 18, here are some notable features of this group:

- Super Shoppers are most likely to be either
  - A man or woman between the ages of 30 and 45, or
  - A male between the ages of 46 and 60
- In total
  - About half of the Super Shoppers are between the ages of 30 and 45. Ages 29 and under and over 46 each represent about a quarter of the Super Shoppers.
  - 58 percent are men.
  - Only 5.5 percent of Super Shoppers are in the 61 and over group. It is also the only age group with a female majority.

Chart 17: Age of the Super Shoppers

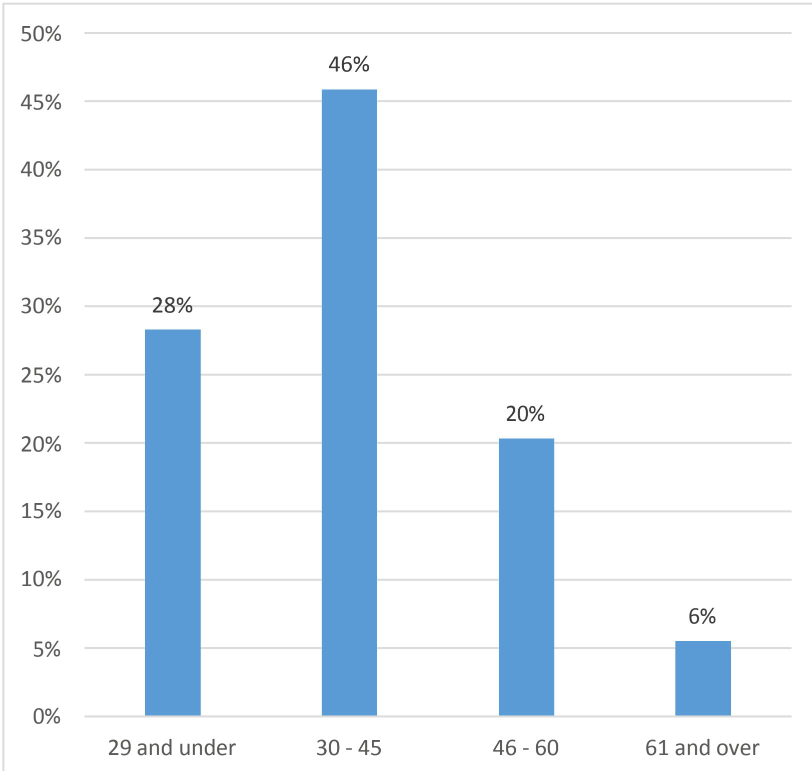
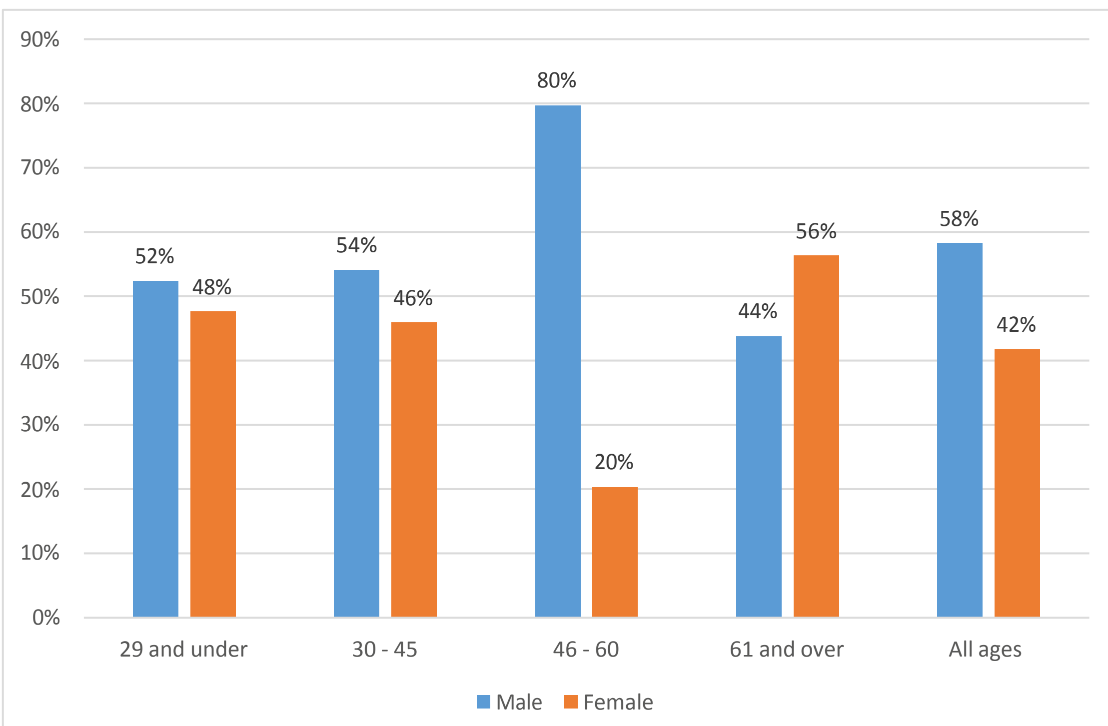
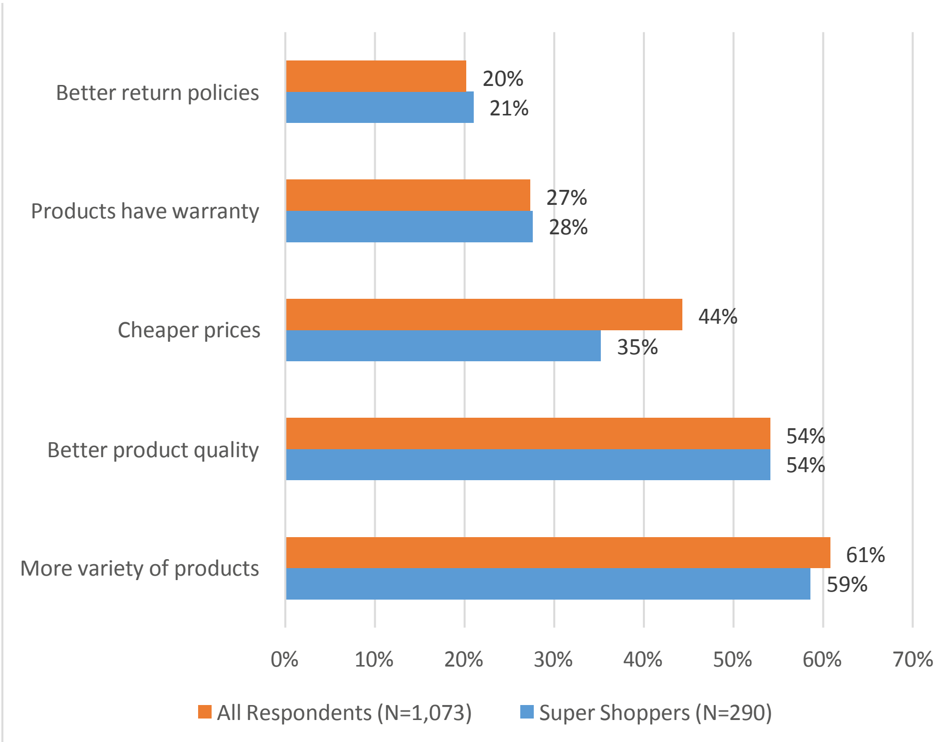


Chart 18: Age and Gender of the Super Shoppers



As Chart 19 shows, the Super Shoppers group share nearly all of the same reasons to shop at stores in the Imperial Valley as the total group of survey respondents. The one notable exception is that the Super Shoppers are less concerned about cheaper prices than the total group of survey respondents.

Chart 19: Main Reasons to Shop at Stores in Imperial Valley for Super Shoppers



CONCLUSION AND RECOMMENDATIONS

Significant Trends

The following summarizes the key findings.

- The majority (60%) of respondents cited shopping as the purpose of their visit.
- Nearly 70 percent of respondents visit the United States at least once a week and nearly 60 percent of respondents shop in retail stores in the Imperial Valley at least once a week.
- Better quality and more variety of products were the top reasons for shopping in the Imperial Valley.
- Respondents crossing the border with a purpose other than shopping planned to spend less on that visit to the United States than respondents crossing the border with the purpose of shopping. However, of those who estimated they would spend over $200 during that visit, the purpose of the trip was irrelevant. In addition, the average amount of expected spending for that visit did not differ very much between the two groups ($150 for 'shopping' versus $135 for 'other'). Although the average was similar, the median was not. The median amount of expected spending for those who went with shopping as their purpose was $100, whereas the median for those who went with another purpose was $50.
- Spending habits:
  - Approximately 60 percent of respondents planned to spend over $50 on this particular trip to the United States, and 36 percent of respondents planned to spend over $100 on this particular trip. However, weekly total amounts of spending on groceries and retail items were lower than what respondents planned to spend on this trip. Roughly 60 percent of respondents spend less than $50 per week on groceries and retail items. Roughly 17 percent of respondents spend over $100 per week on groceries and retail items.
  - 42 percent of all respondents cross the border at least once a week and also spend less than $50 each week at retail stores in the Imperial Valley. This group, compared to all of the other respondents, is more likely to cross the border with the purpose of school, family/social visit, or work/business and less likely to cross the border with the purpose of shopping. However, among this group, shopping is still the most common reason to cross the border, with 69 percent indicating that shopping was the purpose of their visit.
  - Approximately 11 percent of the respondents spend nothing on groceries and retail items in the Imperial Valley. For the remaining 89 percent of the respondents, the average amount that they spend per week in the Imperial Valley:
    - On groceries is $71.
    - On retail items is $86.
    - The median for each is $50.

- If including those who spend nothing on groceries and retail in the above calculation, the average amount spent by respondents per week in the Imperial Valley on groceries and retail is $63 and $77, respectively.
- A higher percentage of those who crossed the border on the weekend planned to spend $100 or more on the trip, as compared with those who crossed the border on a weekday (43% versus 26%). Conversely, a much higher percentage of those who crossed the border on a weekday planned to spend $50 or less, as compared with those who crossed the border on a weekend (45% versus 29%).
    - Weekday border crossers planned to spend an average of $132 on that trip. The median amount of expected spending was $70.
    - Weekend border crossers planned to spend an average of $157 on that trip. The median amount of expected spending was $100.

- Types of purchases:
    - Clothing (67%) and food (45%) were the most common types of purchases, by a wide margin, followed by footwear (16%) and electronics (12%). Toys and gasoline (8%) tied for fifth and sixth while cosmetics/perfume/toiletries and pet food tied for seventh and eighth (5%). Household items/cleaning supplies (4%) was the ninth most common type of purchase.
    - Those who spent over $100, and especially those who spent over $200, bought electronics and toys more frequently than moderate or minimal spenders did. Those who spent over $200 bought clothing, food, footwear, and gasoline less frequently than all other respondents. 28 percent of the respondents are 'Super Shoppers':
    - They all fit these characteristics:
        - They cross the border to the United States a minimum of once a week.
        - They spend a minimum of $50, each week, at retail stores in the Imperial Valley.
    - They are likely to fit these characteristics:
        - Male or female between the ages of 30 and 45, or
        - Male between the ages of 46 and 60
    - Super Shoppers share nearly all of the same reasons to shop at stores in the Imperial Valley as the total group of survey respondents. The one notable exception is that the Super Shoppers are less concerned about cheaper prices than the total group of survey respondents.

Impact and Benefits

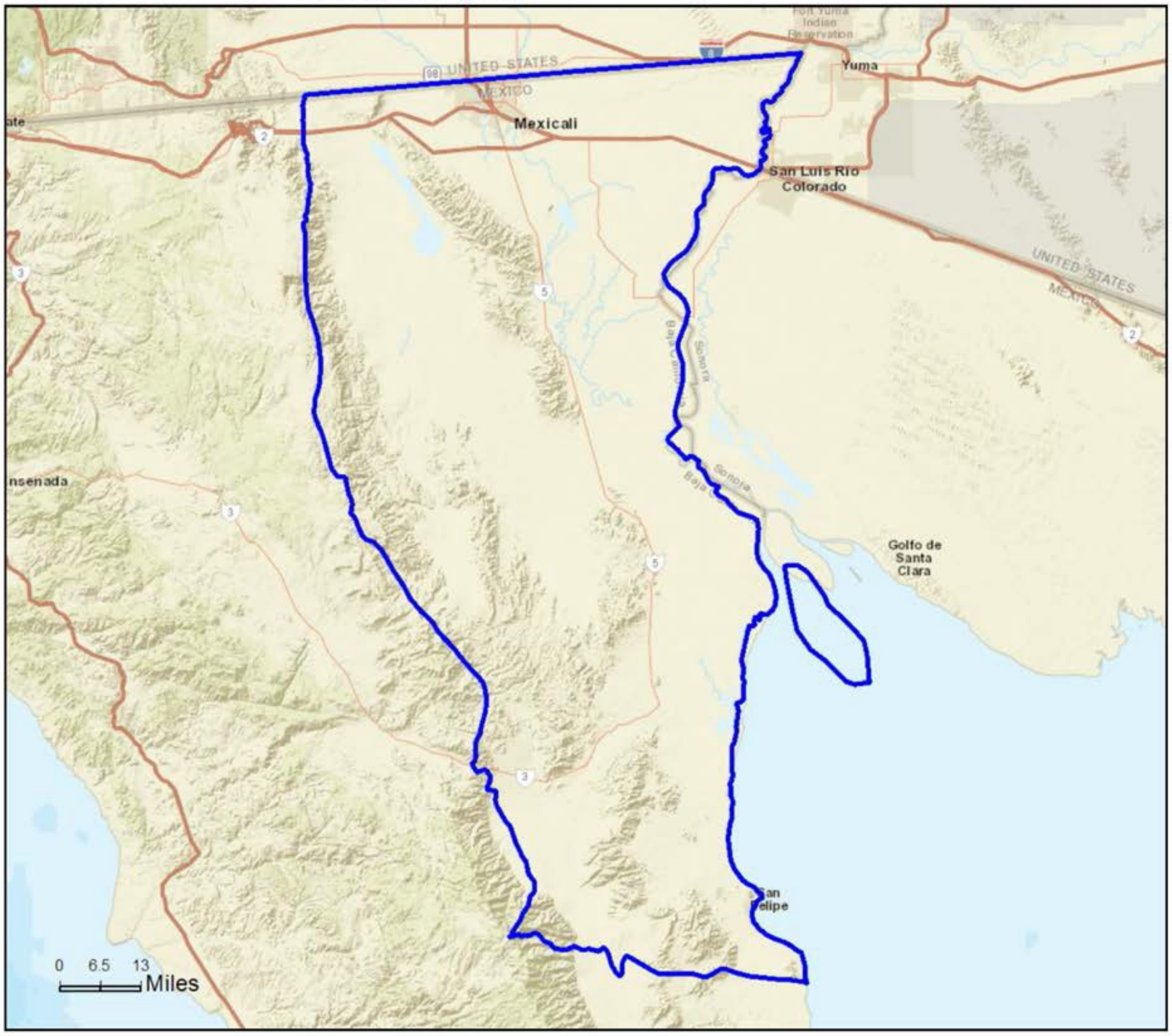
The Municipality of Mexicali is a region in Mexico which includes the City of Mexicali and 2,553 other localities. It is shown in Figure 1. In 2014, the population of the Municipality of Mexicali was 1,000,393. In 2014, the per capita disposable income ("Purchasing Power")[1] was $116,850 pesos annually ($6,040 in US dollars at present-day exchange rate). For reference, this is approximately $30,000 less than the per capita disposable income of Imperial County residents (Esri 2017). This data indicates that the average resident of the Municipality of Mexicali has approximately $6,000 US dollars of disposable income to spend. The data does not differentiate between those residents who routinely travel to the United States to go shopping; however, it is likely that those who do so have larger amounts of disposable income to spend than those residents who do not.

[1] Purchasing Power is comprised of statistical indices including net incomes from employment and assets (after taxes and social contributions), pensions, unemployment benefits, benefit payments and other national transfer payments (Michael Bauer Research GmbH 2015).

Site Map

02002 (Mexicali)
02002 (Mexicali)
Geography: Municipalities

Prepared by Esri



January 26, 2017

According to the US Bureau of Transportation Statistics, the average number of daily Calexico/Mexicali border crossers in personal vehicles and on foot in 2015 was 52,357. A total of 1,045 cross-border travelers from the City of Mexicali to the Imperial Valley participated in the survey. This represents 2% of the daily number of border crossings.

Survey respondents spend an average of $63 on groceries and $77 on retail items (for a combined $140) per week in the Imperial Valley, which equals $3,276 on groceries and $4,004 on retail items (for a combined $7,280) per person per year.

If the survey sample is representative of typical Calexico/Mexicali border crossers in personal vehicles and on foot, then annually this group accounts for a total of approximately $380 million in spending, broken into the following two major categories:

- $171,128,412 in spending on groceries in the Imperial Valley.
- $209,156,948 in spending on retail items in the Imperial Valley.

In addition, of the 52,357 people that cross the Calexico/Mexicali border every day, approximately:

- 31,400 do so with the purpose of shopping.
- 36,400 visit the United States at least once a week.
- 30,150 shop in retail stores in the Imperial Valley at least once a week.

The top four purchases targeted by these cross-border shoppers, in order of demand, are clothing, food, footwear, and electronics.

According to Esri (2017), the total spending in Imperial County in 2016 on retail, food, and drink (spending in restaurants and bars was excluded, while spending on groceries was included) was $1.93 billion. As noted above, Calexico/Mexicali border crossers annually spend approximately $380 million on retail items and groceries in Imperial Valley. This means that Calexico/Mexicali border crossers contribute approximately 20 percent of the total spending in Imperial County in 2016 on retail and groceries. The Imperial County economy, while not completely dependent on visitor sales, would be noticeably impacted by changes in visitor spending or trip habits.

Recommendations

1. Continued research and analysis

    a. Watch trends that affect the retail market. This study provides a snapshot of conditions in late 2016. The retail market is a volatile and ever-changing sector of the economy. Visitation patterns and spending habits of Mexicali residents in relation to the United States will likely shift based on larger changes related to:

        i. Fluctuations in wages and employment as part of the typical business cycle

        ii. Periods of recessions or economic growth

        iii. Dynamic structural shifts in individual retail subsectors

        iv. New political circumstances

        v. Popularity of online shopping

        vi. Exchange rates

            1. See Appendix C for a broader discussion of the impacts of changes in the exchange rate on overall expenditures by cross-border shoppers.

            2. As noted in Appendix C, between 1980 and 1999, for each percent decrease in the exchange rate, there was a corresponding decrease of -0.2588 percent% in Imperial County retail sales. If this coefficient is still representative of the existing economic and retail situation in Imperial County, it would imply that between 2010 and 2016, there would have been a possible negative impact on overall Imperial County retail sales of -9.7 percent%.

    b. Quantify the demand for specific types of additional retail establishments:

        i. Review available retail gap analyses. Using the Imperial Valley as the designated retail trade area (RTA), retail gap analyses measure the amount of leakage spending, or retail spending outside of the RTA. According to Esri (2017), in 2016 Imperial County experienced an 11.8 percent leakage factor on retail trade and food and drink. This represents an opportunity to capture additional sales in the county.

        ii. Ask cross-border shoppers what retail and other commercial establishments they perceive are lacking in the Imperial Valley.

        iii. Conduct a survey during a wider window of time to capture the responses of groups such as agricultural workers who cross the border early in the morning.

2. <u>Comprehensive retail retention and attraction strategy and marketing program</u>

   a. Once demand for particular types of retail establishments has been established with a finer level of detail, consider expanding existing businesses and evaluating the potential for establishing new businesses.

   b. Focus efforts on the retail store types that show the greatest opportunities for expansion. Customize the approach for different store types. Learn the site-specific needs of different store types. Evaluate opportunity sites within the Imperial Valley to match the sites with the specific needs of each retail store type.

   c. Expansion of existing business retention and expansion programs through proactive visitation, on a regular basis, of key retailers and property managers to understand potential issues and address concerns. Visitations can be supplemented by regular short surveys of all businesses to provide benchmarks and identify candidates for future business visits.

   d. An ongoing effort should include identifying and maintaining an inventory of existing opportunity sites viable for retail or mixed-use development. Marketing these sites in local and national site selection databases can improve the County's visibility and aid site selectors.

   e. During Land Use Element updates in Imperial County and its incorporated cities, evaluate potential changes to land use and zoning to improve opportunities for new retail investment, including infill and small store options. The existing shopping center layout and model is continuing to evolve and change. It is seeing less demand, nationally.

   f. Ensure continued coordination of retail land use and zoning with traffic patterns to provide opportunities in areas with more visibility and higher traffic counts. Conduct further analysis during the Land Use Element update process to ensure retail land uses are appropriately located to maximize visibility.

   g. Market site and RTA strength at International Council of Shopping Centers conferences, including the international conference and regional conferences.

   h. Focus on housing concurrently with retail growth so that housing (at appropriate income levels) is available for the workforce.

   i. Explore public-private partnership programs to assist small businesses, such as the establishment of business improvement districts and/or enhanced infrastructure financing districts, to allow for revenue sharing and reinvestment in existing retail areas to finance infrastructure improvements, parking, beautification, and marketing programs. Explore the functions of a small business liaison to assist retail businesses to provide permit and regulatory compliance assistance and coordinate with the state and federal governments for loan and grant programs, including SBA loans, new market tax credits, and infrastructure bank loans. The liaison can be a county position, but can also be provided by partner organizations such as a Chamber of Commerce.

REFERENCES

Esri. 2017. Esri Business Analyst Online.

Gerber, James and J. Michael Patrick. 2001. Shopping on the Border: The Mexican Peso and U.S. Border Communities. Accessed March 21, 2017. http://jamesgerber.sdsu.edu/docs/Shopping_on_border.pdf.

Michael Bauer Research GmbH. 2015. Methodological Notes and Usage of MB-Research Market Data. Nuremberg, Germany.

This page has no content.

APPENDIX A: SURVEY QUESTIONS

THE IMPERIAL VALLEY BORDER ECONOMIC IMPACT SURVEY

1. In what city or county do you have your primary residence or do you live most days?
   [ ] Mexicali [ ] Brawley [ ] Calexico
   [ ] Calipatria [ ] El Centro [ ] Holtville
   [ ] Imperial [ ] Westmorland [ ] Imperial County [ ] Other:__________
2. For demographic purposes only, in what year were you born? _______

3. What is the purpose of your visit to U.S today?
   [ ] Shopping
   [ ] Work or business
   [ ] Family or Social Visit
   [ ] Medical or Health
   [ ] Recreation/Vacation
   [ ] School
   [ ] Airport
   [ ] Other: _____________

4. How frequently do you cross the border to the U.S.?
   [ ] 7+ times/wk [ ] 6 times/wk [ ] 5 times/wk
   [ ] 4 times/wk [ ] 3 times/wk [ ] 2 times/wk
   [ ] 1 times/wk [ ] 3 times/month [ ] 2 times/month
   [ ] 1 time/month [ ] Less than 1/month [ ] 1st time crossing
   [ ] Other:__________ [ ] DK/NA

5. How often do you shop at retail stores in the Imperial Valley?
   [ ] 7+ times/wk [ ] 6 times/wk [ ] 5 times/wk
   [ ] 4 times/wk [ ] 3 times/wk [ ] 2 times/wk
   [ ] 1 times/wk [ ] 3 times/month [ ] 2 times/month
   [ ] 1 time/month [ ] Less than 1/month [ ] 1st time crossing
   [ ] Other:__________ [ ] DK/NA

6. In dollars, approximately how much do you estimate you will spend during this trip to the US? ________

7. A – ...On a weekly basis, how much do you spend on Groceries in Imperial Valley? (dollars) ______
8. D – ... On a weekly basis, approximately how much do you spend at other retail stores (clothing, other products) in Imperial Valley? (dollars) ______

9. In the past 30-days, what are the top three types of products you have purchased in Imperial Valley stores? [OPEN ENDED]

10. Why are the main reasons you like to shop at stores in Imperial Valley? [MULT CHOICE/MULT SELECT]
    - ☐ More variety of products
    - ☐ Cheaper prices
    - ☐ Better return policies
    - ☐ Products have warranty
    - ☐ Better product quality
    - ☐ Other:______

<u>Observations by Survey Administrator</u>

11. Language used for survey
12. Gender/Sex of participant
13. General location of survey
14. Traveler type
15. General POV Type
16. License plate of vehicle (location)
17. Number of adults in car
18. Number of children in car
19. Day Surveyed
20. Time Survey Started
21. Time to Complete Survey
22. Survey is Complete

APPENDIX B: SUMMARY TABLES

SUMMARY TABLES OF THE RAW DATA

Primary Place of Residence	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Mexicali	527	98.0%	518	96.8%	1,045	97.4%
Somewhere else in Mexico	11	2.0%	17	3.2%	28	2.6%
Total	538	100%	535	100.0%	1,073	100.0%

Decade of Birth*	Age	First Wave		Second Wave		Total	
		Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
1940s	76 - 67	17	3.2%	13	2.4%	30	2.8%
1950s	66 - 57	31	5.8%	32	6.0%	63	5.9%
1960s	56 - 47	67	12.5%	108	20.2%	175	16.3%
1970s	46 - 37	163	30.3%	111	20.7%	274	25.5%
1980s	36 - 27	162	30.1%	146	27.3%	308	28.7%
1990s	26 - 17	98	18.2%	125	23.4%	223	20.8%
Total		538	100%	535	100.0%	1,073	100.0%

*Categories were collapsed in post processing.

Purpose of Visit	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Shopping	362	67.3%	276	51.6%	638	59.5%
Work or business	67	12.5%	96	17.9%	163	15.2%
Family or Social Visit	54	10.0%	78	14.6%	132	12.3%
School	17	3.2%	30	5.6%	47	4.4%
Recreation/Vacation	9	1.7%	23	4.3%	32	3.0%
Medical or Health	14	2.6%	16	3.0%	30	2.8%
Other	13	2.4%	9	1.7%	22	2.1%
Airport	2	0.4%	7	4.3%	9	0.8%
Total	538	100.0%	535	1.3%	1,073	100.0%

Frequency of crossing the border to the U.S.*	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Percent of Responses	Number of Responses
Less than 1/month	31	5.8%	29	5.4%	60	5.6%
1 time/month	64	11.9%	47	8.8%	111	10.3%
2-3 times/month	85	15.8%	83	15.5%	168	15.7%
1-2 times/wk	194	36.1%	143	26.7%	337	31.4%
3-4 times/wk	83	15.4%	98	18.3%	181	16.9%
5-6 times/wk	57	10.6%	75	14.0%	132	12.3%
7-7+ times/wk	24	4.5%	60	11.2%	84	7.8%
Total	538	100.0%	535	100.0%	1,073	100.0%

*Categories were collapsed in post processing.

Frequency of shopping at retail stores in the Imperial Valley*	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Less than 1/month	51	9.5%	55	10.3%	106	9.9%
1 time/month	102	19.0%	62	11.6%	164	15.3%
2-3 times/month	88	16.4%	80	15.0%	168	15.7%
1-2 times/wk	222	41.3%	202	37.8%	424	39.5%
3-4 times/wk	47	8.7%	75	14.0%	122	11.4%
5-6 times/wk	12	2.2%	30	5.6%	42	3.9%
7-7+ times/wk	7	1.3%	16	3.0%	23	2.1%
Don't Know/Not Applicable	9	1.7%	15	2.8%	24	2.2%
Total	538	100.0%	535	100.0%	1,073	100.0%

*Categories were collapsed in post processing.

Estimated amount of spending during this trip to the US*	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
$50 or less	195	36.2%	199	37.2%	394	36.7%
$51-$200	199	37.0%	235	43.9%	434	40.4%
$201 or more	144	26.8%	101	18.9%	245	22.8%
Total	538	100.0%	535	100.0%	1,073	100.0%

*Categories were collapsed in post processing. Following table categorizes the same data differently.

Estimated amount of spending during this trip to the US*	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Nothing	20	3.7%	38	7.1%	58	5.4%
$1-$200	435	80.9%	396	74.0%	831	77.4%
$201-$400	61	11.3%	59	11.0%	120	11.2%
$401-$600	18	3.3%	20	3.7%	38	3.5%
$601-$800	3	0.6%	8	1.5%	11	1.0%
$801-$1,000	1	0.2%	9	1.7%	10	0.9%
$1,001-$5,000	0	0	5	0.9%	5	0.5%
Total	538	100.0%	535	100.0%	1,073	100.0%

*Categories were collapsed in post processing. Previous table categorizes the same data differently.

Weekly amount spent on groceries in Imperial Valley*	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Less than $20	158	29.4%	173	32.3%	331	30.8%
$20-$99	198	36.8%	207	38.7%	405	37.7%
$100-$200	169	31.4%	138	25.8%	307	28.6%
$201-$1,000	13	2.4%	17	3.2%	30	2.8%
Total	538	100.0%	535	100.0%	1,073	100.0%

*Categories were collapsed in post processing. Following table categorizes the same data differently.

Weekly amount spent on groceries in Imperial Valley*	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Nothing	101	18.8%	152	28.4%	253	23.6%
$1-$200	424	78.8%	366	68.4%	790	73.6%
$201-$400	9	1.7%	14	2.6%	23	2.1%
$401-$600	3	0.6%	1	0.2%	4	0.4%
$601-$800	0	0.0%	1	0.2%	1	0.1%
$801-$1,000	1	0.2%	1	0.2%	2	0.2%
Total	538	100.0%	535	100.0%	1,073	100.0%

*Categories were collapsed in post processing. Previous table categorizes the same data differently.

Weekly amount spent on retail (clothing, other products) in Imperial Valley*	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Less than $50	233	43.3%	305	57.0%	538	50.1%
$50-$100	175	32.5%	163	30.5%	338	31.5%
$101-$200	105	19.5%	37	6.9%	142	13.2%
$201-$800	25	4.6%	29	5.4%	54	5.0%
$801-$1,000	0	0.0%	1	0.2%	1	0.1%
Total	538	100.0%	535	100.0%	1,073	100.0%

*Categories were collapsed in post processing. Following table categorizes the same data differently.

Weekly amount spent on retail (clothing, other products) in Imperial Valley*	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Nothing	68	12.6%	196	36.6%	264	24.6%
$1-$200	445	82.7%	309	57.8%	754	70.3%
$201-$400	20	3.7%	18	3.4%	38	3.5%
$401-$600	3	0.6%	11	2.1%	14	1.3%
$601-$800	2	0.4%	0	0.0%	2	0.2%
$801-$1,000	0	0.0%	1	0.2%	1	0.1%
Total	538	100.0%	535	100.0%	1073	100.0%

*Categories were collapsed in post processing. Previous table categorizes the same data differently.

Type of product purchased in Imperial Valley	First Wave		Second Wave		Total	
	Number of Instances *	Percent of Respondents *	Number of Instances *	Percent of Respondents *	Number of Instances *	Percent of Respondents *
Clothing	376	69.9%	338	63.2%	714	66.5%
Food	205	38.1%	279	52.1%	484	45.1%
Footwear	116	21.6%	51	9.5%	167	15.6%
Electronics/ Home Electronics/ Cell phone	48	8.9%	80	15.0%	128	11.9%
Toys	38	7.1%	49	9.2%	87	8.1%
Gasoline	55	10.2%	28	5.2%	83	7.7%
Cosmetics/ Perfume/ Toiletries	36	6.7%	20	3.7%	56	5.2%

Type of product purchased in Imperial Valley	First Wave		Second Wave		Total	
	Number of Instances *	Percent of Respondents *	Number of Instances *	Percent of Respondents *	Number of Instances *	Percent of Respondents *
Pet Food	28	5.2%	25	4.7%	53	4.9%
Household items/ Cleaning supplies	15	2.8%	32	6.0%	47	4.4%
Baby items (including diapers and formula)	14	2.6%	13	2.4%	27	2.5%
Restaurant/ Fast Food	7	1.3%	20	3.7%	27	2.5%
Gifts	21	3.9%	0	0.0%	21	2.0%
Medication/ Medical Visit	12	2.2%	3	0.6%	15	1.4%
Tools	3	0.6%	8	1.5%	11	1.0%
Alcoholic beverages/ beer	1	0.2%	10	1.9%	11	1.0%
Fashion accessories/ jewelry	7	1.3%	3	0.6%	10	0.9%
School Supplies	4	0.7%	6	1.1%	10	0.9%
Auto parts, accessories/ tires	3	0.6%	6	1.1%	9	0.8%
Christmas Items	7	1.3%	1	0.2%	8	0.7%
I don't know/ nothing	7	1.3%	0	0.0%	7	0.7%
Drinks	0	0.0%	7	1.3%	7	0.7%
Furniture	1	0.2%	4	0.7%	5	0.5%
Cigarettes	0	0.0%	2	0.4%	2	0.2%
Entertainment	1	0.2%	1	0.2%	2	0.2%
Musical instruments	0	0.0%	1	0.2%	1	0.1%
Sporting Goods	1	0.2%	0	0.0%	1	0.1%
Lights	1	0.2%	0	0.0%	1	0.1%
Books	1	0.2%	0	0.0%	1	0.1%

Type of product purchased in Imperial Valley	First Wave		Second Wave		Total	
	Number of Instances *	Percent of Respondents *	Number of Instances *	Percent of Respondents *	Number of Instances *	Percent of Respondents *
Cellular accessories	1	0.2%	0	0.0%	1	0.1%
Lottery	1	0.2%	0	0.0%	1	0.1%
Coffee	1	0.2%	0	0.0%	1	0.1%
Car	1	0.2%	0	0.0%	1	0.1%

*The sum of the number of instances does not equal the total number of survey respondents and percents do not equal 100% because each respondent was asked for up to three types of products.

Main reasons to shop at stores in Imperial Valley	First Wave		Second Wave		Total	
	Number of Instances*	Percent of Respondents*	Number of Instances*	Percent of Respondents*	Number of Instances*	Percent of Respondents*
Better product quality	269	50.0%	383	71.6%	652	60.8%
More variety of products	326	60.6%	254	47.5%	580	54.1%
Cheaper prices	223	41.4%	252	47.1%	475	44.3%
Products have warranty	137	25.5%	156	29.2%	293	27.3%
Better return policies	112	20.8%	105	19.6%	217	20.2%

*The sum of the number of instances does not equal the total number of survey respondents and percents do not equal 100% because each respondent was able to select as many reasons as they wanted to.

Language used for survey	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Spanish	535	99.4%	532	99.4%	1067	99.4%
English	3	0.6%	3	0.6%	6	0.6%
Total	538	100.0%	535	100.0%	1,073	100.0%

Gender of participant	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Female	296	55.0%	211	39.4%	507	47.3%
Male	242	45.0%	324	60.6%	566	52.7%
Total	538	100.0%	535	100.0%	1,073	100.0%

General location of survey	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Calexico West	379	70.4%	403	75.3%	782	72.9%
Calexico East	159	29.6%	132	24.7%	291	27.1%
Total	538	100.0%	535	100.0%	1,073	100.0%

Traveler type	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Ready Lane	159	29.6%	132	24.7%	291	27.1%
Pedestrian	142	26.4%	140	26.2%	282	26.3%
Regular	122	22.7%	135	25.2%	257	24.0%
SENTRI	114	21.2%	128	23.9%	242	22.6%
Ped. w/Bike	1	0.2%	0	0.0%	1	0.1%
Total	538	100.0%	535	100.0%	1,073	100.0%

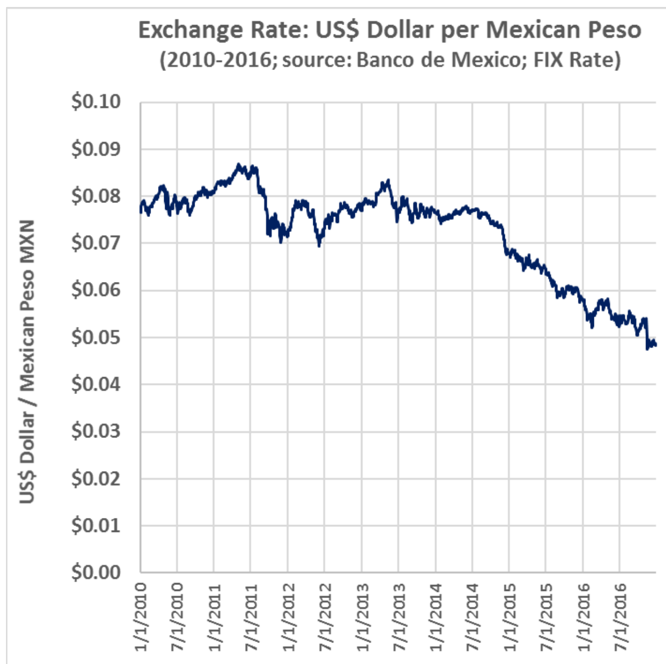
General POV Type	First Wave		Second Wave		Total	
	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses	Number of Responses	Percent of Responses
Car–Hatchback/ Coupe/Sedan	243	61.5%	248	63.6%	491	62.5%
Heavy Duty Truck	18	4.6%	21	5.4%	39	5.0%
Light Truck	43	10.9%	31	7.9%	74	9.4%
Mini Van	21	5.3%	19	4.9%	40	5.1%
SUV – Large	26	6.6%	34	8.7%	60	7.6%
SUV– Compact/Crossover	44	11.1%	35	9.0%	79	10.1%
Other	0	0.0%	2	0.5%	2	0.3%
Total	395*	100.0%	390*	100.0%	785*	100.0%

*Does not equal total number of survey respondents because it does not include pedestrians.

APPENDIX C: PESO IMPACT ON CROSS-BORDER SHOPPING

One issue that is useful to understand in context of the cross-border retail market is the importance of the exchange rate between the US dollar and the Mexican peso. Changes to the relative value of these currencies can have significant impacts on the overall expenditures by cross-border shoppers. Typically, if the value of the peso weakens (relative to the US dollar), expenditures in Imperial County (and other US locations) by cross-border shoppers from Mexico will tend to decrease; likewise, when the peso strengthens, cross-border shopping by Mexico visitors tends to increase.

As seen in the chart at right, the value of the Mexican peso has decreased significantly—largely starting in 2014 and continuing through early 2017. In fact, between January 2010 and December 2016, the value of the peso decreased by 37.5 percent.



While few studies have assessed the impacts of US-Mexico exchange rates on cross-border shopping, one such study, *Shopping on the Border: The Mexican Peso and U.S. Border Communities*, published in 2001, assessed changes in retail sales in eight counties on the US-Mexico border, using retail sales data from 1980 through 1999. Based on regression analysis, the study authors determined exchange rate coefficients that reflected changes in retail sales and the exchange rate.

Imperial County was included in this study, with the finding that for each percent decrease in the exchange rate, there was a corresponding decrease of -0.2588 percent in Imperial County retail sales. If this coefficient is still representative of the existing economic and retail situation in Imperial County, it would imply that between 2010 and 2016, there would have been a possible negative impact on overall Imperial County retail sales of -9.7 percent.