



*Imperial Valley-Mexicali  
Economic Delay Study:  
Initial At-Border  
Survey Results*



# Introduction & Approach

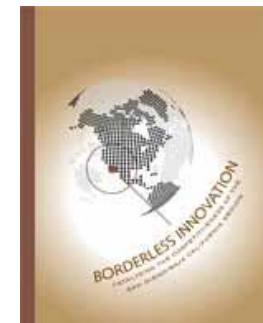
## ■ About Crossborder Business Associates

- California-based crossborder market research and strategic consulting firm specializing in border business and policy
- Founded in 1996; in 2006, CBA became division of Crossborder Group Inc.



## ■ Background of Kenn Morris:

- President/CEO of Crossborder Group Inc. & Director of Crossborder Business Associates (CGInc's market research division)
- Former Director of UCSD San Diego Dialogue's *Crossborder Innovation & Competitiveness Initiative*
- Lead researcher and lead author of *Borderless Innovation* report
- MBA in International Business (SDSU, UAG), and BA in Economics (SDSU)



# Sample of Survey Experience

- **Since 1999, have conducted more than a dozen at-border and crossborder field surveys for clients, including:**
  - *1999: Survey of 850+ commercial vehicles at Otay, Calexico/Mexicali, and El Paso/Ciudad Juarez*
  - *2003: Border health and economic impact surveys at SY/Otay Mesa POEs (2,200+ surveys)*
  - *2003: Blurred Borders field surveys (1,100+ residents of San Diego & Tijuana)*
  - *2005: 2,100 surveys at SY & Otay Mesa*
  - *2006: 1,500+ surveys at SY & Otay Mesa for Southbay Expressway; and Imperial Valley Association of Governments (2,800+ completes in two phases).*
- **Proud to be involved with Imperial Valley-Mexicali**

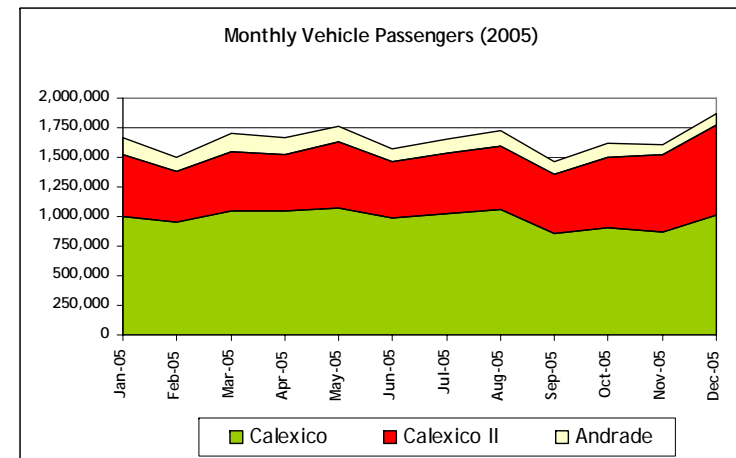
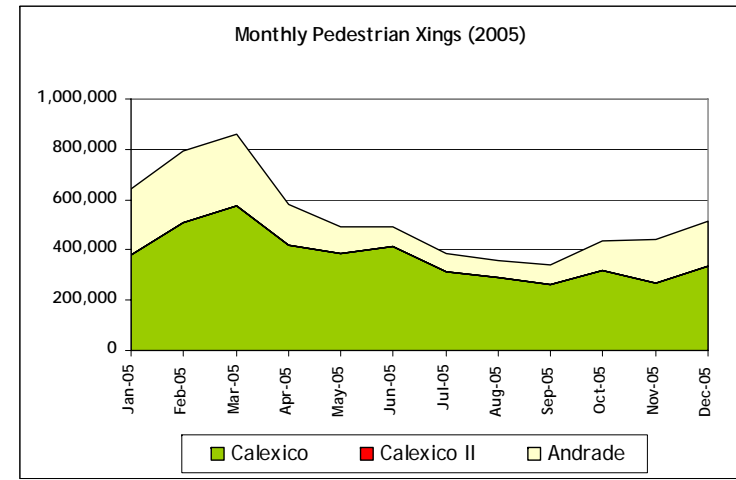


# Introduction & Approach



# Project Approach (1)

- **HDR|HLB and Crossborder developed a methodology & questionnaire that was approved by IVAG & CalTrans**
  - Used historic border crossing data (2005) to determine approximate sample size goals for each crossing
- **Original goal: 2,500 surveys – (ideally would provide confidence level of 95% +/- 2.5% overall)**
  - **Calexico/Mexicali 1: 900**
  - **Calexico East/Mexicali 2: 660**
  - **Andrade/Algodones: 600**
- **Modification: had to expand goals to include SENTRI**
- **Permissions: note of thanks to INDAABIN**



# Project Approach (2)

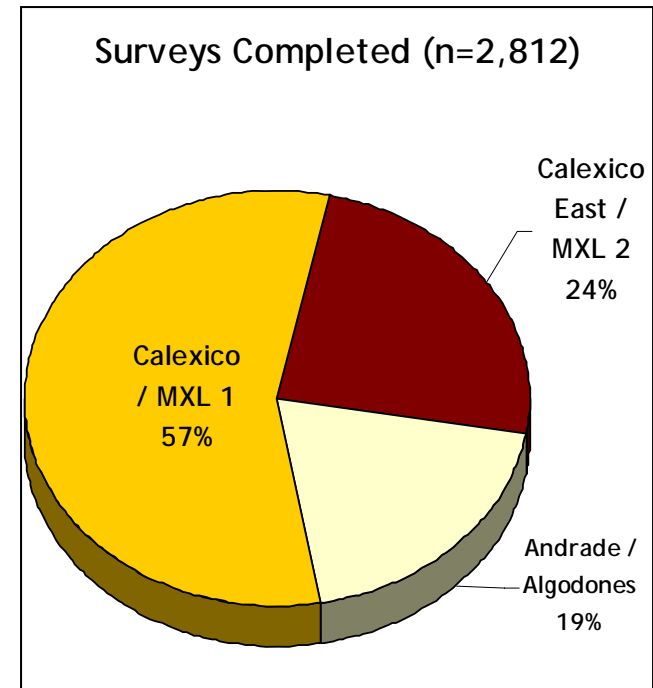
## ■ Surveying process

- Intercept surveys with randomized sampling procedure at border crossings
  - Using trained, bilingual interviewers (mostly from UABC)
  - Colorful, well-identified clothing and positive attitude to encourage candid participation
- Methodology: similar to exit poll, choose every N<sup>th</sup> target in survey location/area
  - Interviewers identify “initial target”, then chose 3<sup>rd</sup> following “actual target” to survey (to avoid sampling bias)
  - Refusals: went to next target in line
  - Multiple adult car passengers: rotated the survey
- Utilize PDAs & survey software to collect data



# Project Approach (3)

- **Really...two surveys:**
  - **Pre-test (approx. 40, to confirm that PDAs and questionnaire would work)**
  - **Final survey**
- **Final Survey done in two waves (phases)**
  - **Wave 1:**
    - **Holiday Season (Nov-Dec 2006)**
    - **Approx. 1,100 survey participants**
  - **Wave 2:**
    - **Winter/Non-Holiday (Feb 2006)**
    - **Approx. 1,700 survey participants**



# Key Challenges



# Key Challenges (1)

## ■ Weather

- Not heat, but cold (particularly in early-morning hours)
- Wind & rain, too (wind gusts up to 30MPH, dust storms)
- Reduces participation, forces cancellations
- Total of 9 survey shifts cancelled during project

## ■ Inherent Limitations

- Security of survey workers – daylight hours
- Timing/Seasonality – “ideally” would have surveys in Spring and Summer as well
- Length & complexity of questionnaire
  - Average time to complete: approximately 4 minutes
  - 1-2% of active surveys were terminated (length of time)

# Key Challenges (2)

## ■ Participation

- Based on experience, voluntary nature is preferable for accuracy...
- ...Although you also get about 1-in-2 to 1-in-4 that participate (self-selecting bias), depending on mode and flow of traffic
- But, overall, participants generally very interested in being surveyed

## ■ Lack of targets...

- Cases where during certain days and shifts, there were relatively no crossers (occasionally at Calexico East/Mexicali 2 and Andrade/Algodones)
- In some subcategories, few US targets (e.g.: US-residing but working in Mexico)

...On to the initial results!

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# Note About Initial Results: Not Weighted

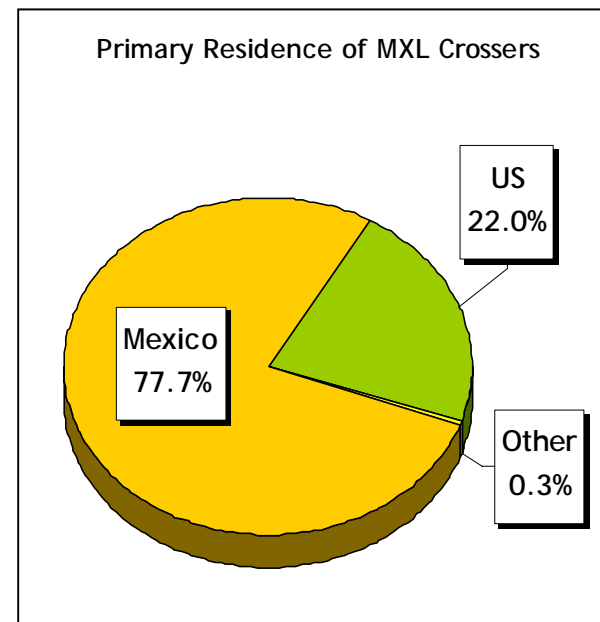


# Initial Findings: Wave 1 (Holiday)



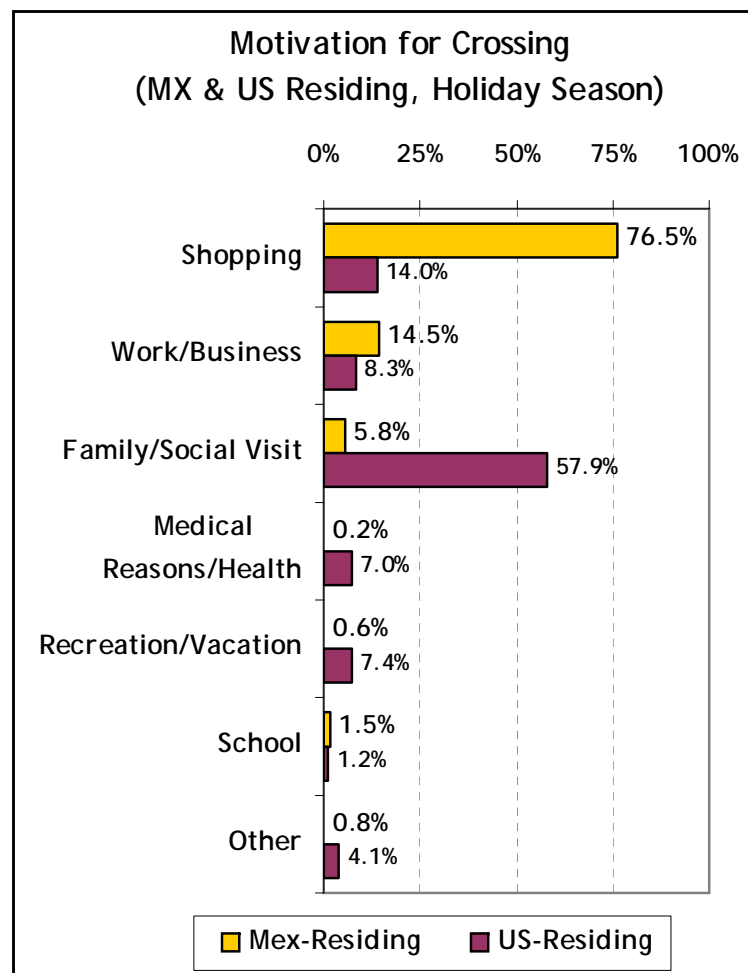
# Wave 1: Primary Residence

- **Border crossers were asked where they had their primary place of residence...**
  - **Approximately 77% stated Mexico**
    - More than 90% specifically mentioning Mexicali
  - **22% stated the US**
    - About one-third each stating either Imperial County, Arizona or “Other California”
  - **Only a small percentage indicated place other than US or Mexico**
- **Similar results in Wave 2...**



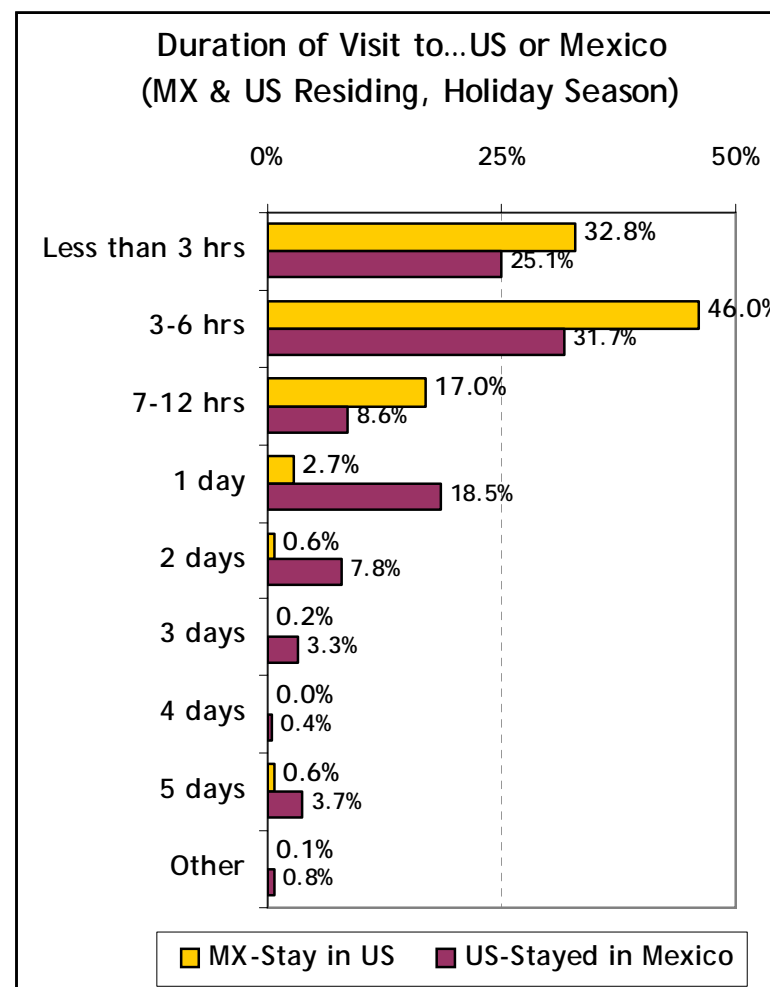
# Wave 1: Motivation for Crossing

- **Primary motivation for crossing at 3 POEs:**
  - **Mexico-residing**
    - Shopping (77%)
    - Work/business (15%)
    - Social/family visits (6%)
  - **US-residing**
    - Social/family visits (58%)
    - Shopping (14%)
    - Work/business (8%)
    - “medical reasons/health” (7%)
- *Some results likely to change with weighting...*



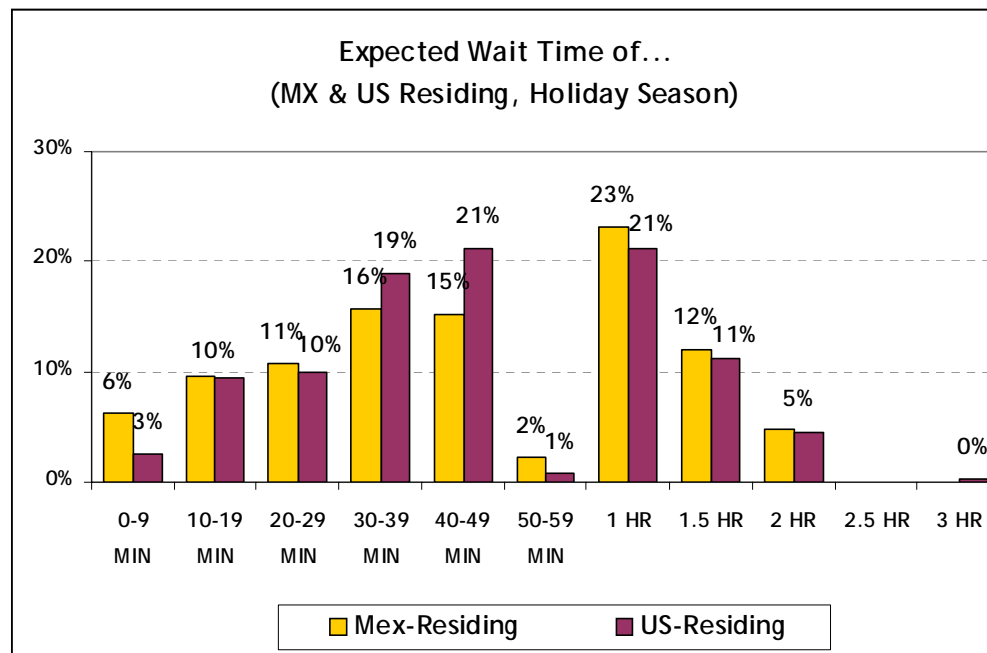
# Wave 1: Duration of Visit

- **When asked to estimate how long their stay in the US/Mexico would be...**
  - **78% of Mexico-residing respondents stated 6 hours or less**
    - 95% expected to stay less than one day
  - **56% of US-residing crossers stayed in Mexico 6 hours or less**
    - Nearly 35% of US-residing crossers had stayed one-or-more days
- **Majority of border crossings are for short periods of time**



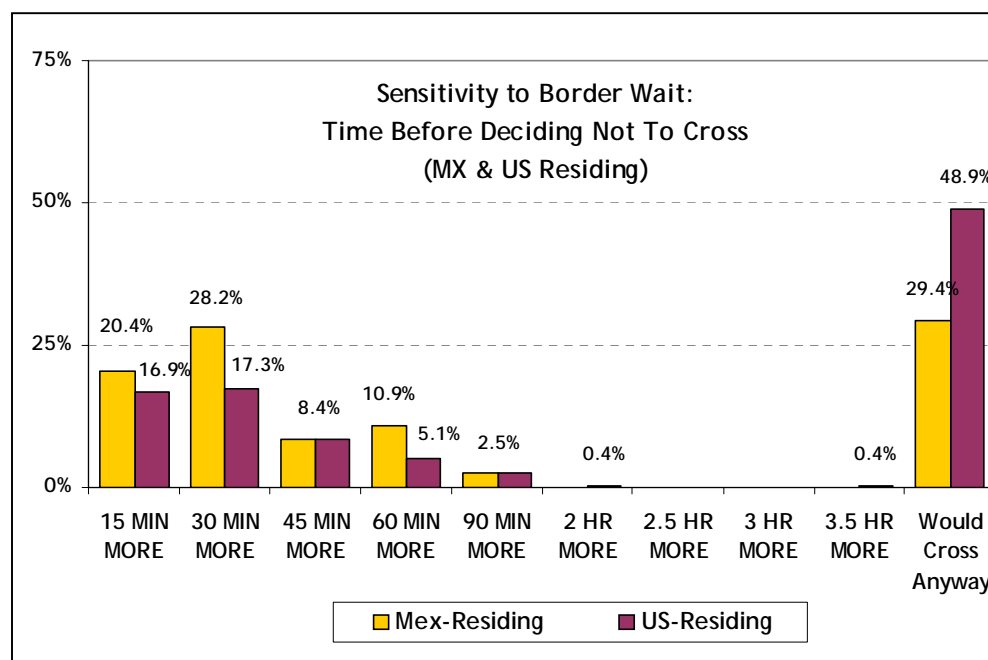
# Wave 1: Expected Wait Time...

- **Border crossers from both sides expect similar border wait times**
  - **40% expect to wait less than 40 minutes**
  - **Another 40% expect 40-60 minutes**
  - **Another view: 40% expect to wait 1+ hours to cross into Imperial Valley**



# Wave 1: Sensitivity to Waits...

- ...That said, Mexico-residing crossers appear to be more sensitive to longer waits
  - *“If you had known that the border wait would be longer than you expected, with how many additional minutes of waiting would you have decided not to cross?”*
  - Nearly 50% of US-residing crossers would cross anyway
  - Only 30% of Mexico residing crossers would have crossed...
- In fact, nearly half stated they would not have crossed if the wait would have been 15 or 30 minutes longer than expected...

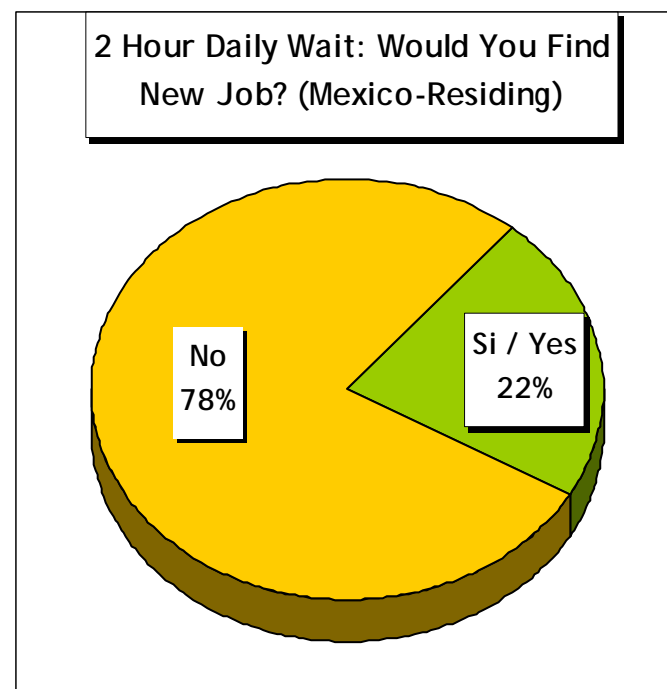


Initial Findings:  
Wave 2  
(February)  
&  
Some Wave  
1+2



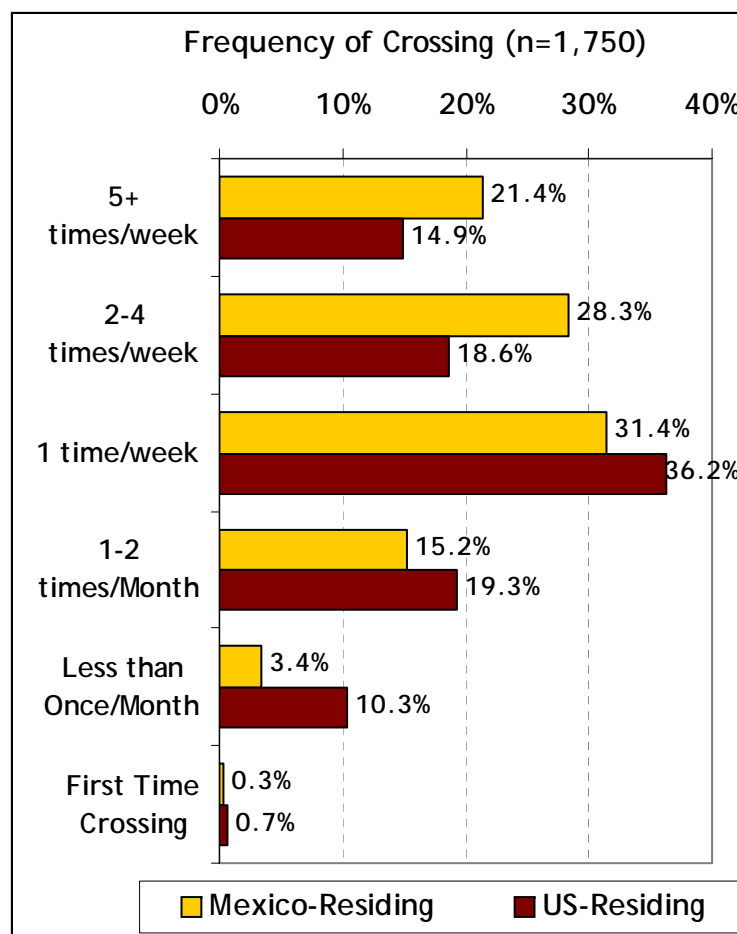
# Wave 2: Two-hour Wait & Work

- **As might be expected, Mexico-residing crossers for work are less sensitive to border waits**
  - Asked if they would find a new job if daily waits were two-hours, over three-quarters said “no”
    - Similar results in Wave 1
  - In fact, nearly half of these indicated that they would continue to cross at the same border crossing (i.e.: no change to POE or mode)
- **Too few US-residing respondents to be statistically valid...**



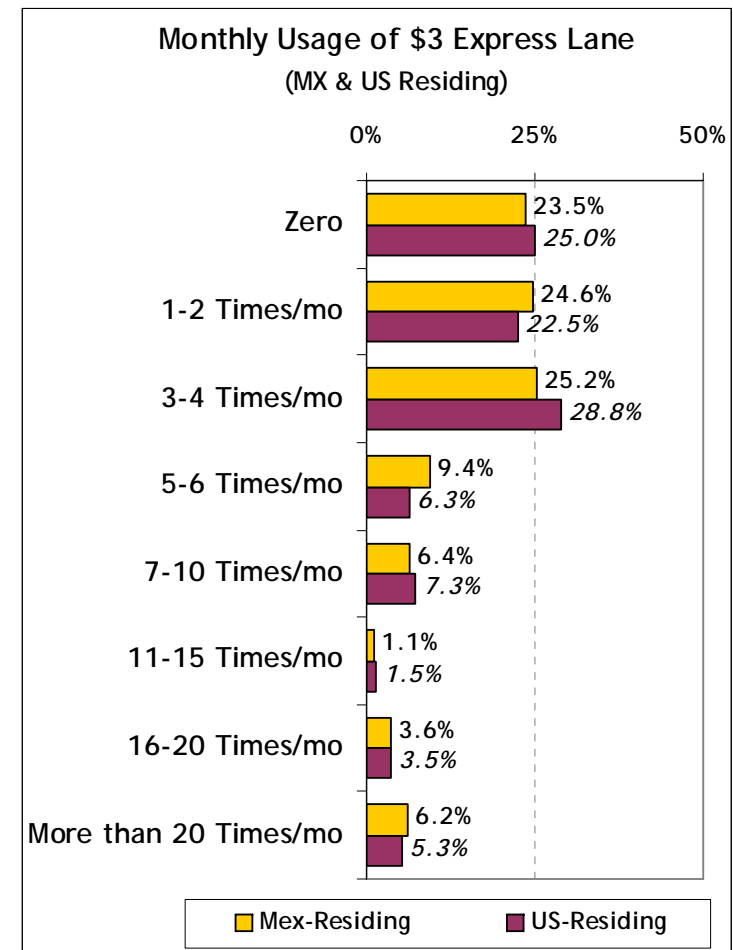
# Wave 2: Frequency of Crossing

- **Most crossers are frequent crossers...**
  - **Around 50% from Mexico cross 2 or more times/week**
    - **Compares to 33% of US-residing crossers...**
  - **Around 30% from US cross less than 2 times/month...**
  - **81% from Mexico stated they crossed at least weekly**
    - **Compared to 70% from US**
- ***Some results likely to change with weighting...***



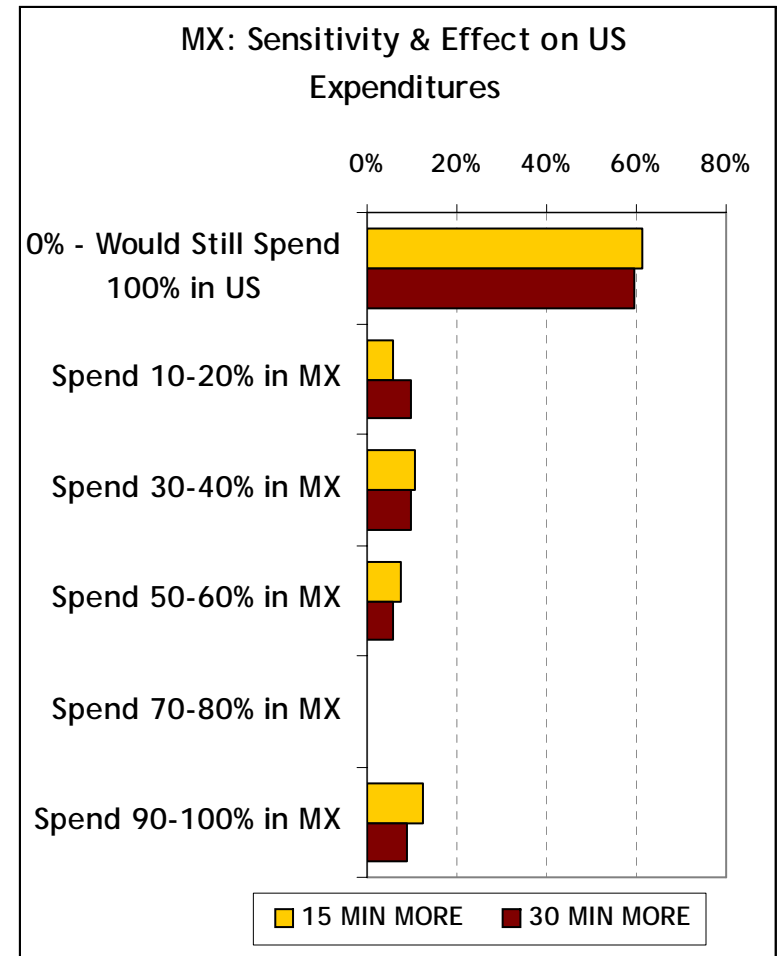
# Wave 2: Use of \$3 Express Lane

- **Asked to gauge how frequently crossers would use a \$3 express lane that offered a border wait of 20 minutes or less...**
  - **Around 25% said they'd use it more than weekly**
  - **Over 70% of both Mexico and US crossers stated they would use it weekly or less...**
    - **One quarter would not use it at all**
- **Additional question: how much to cut wait time 50%?**
  - **One-third stated "zero"**
  - **14% of US and 7% of Mexico crossers would pay \$5 or more...**



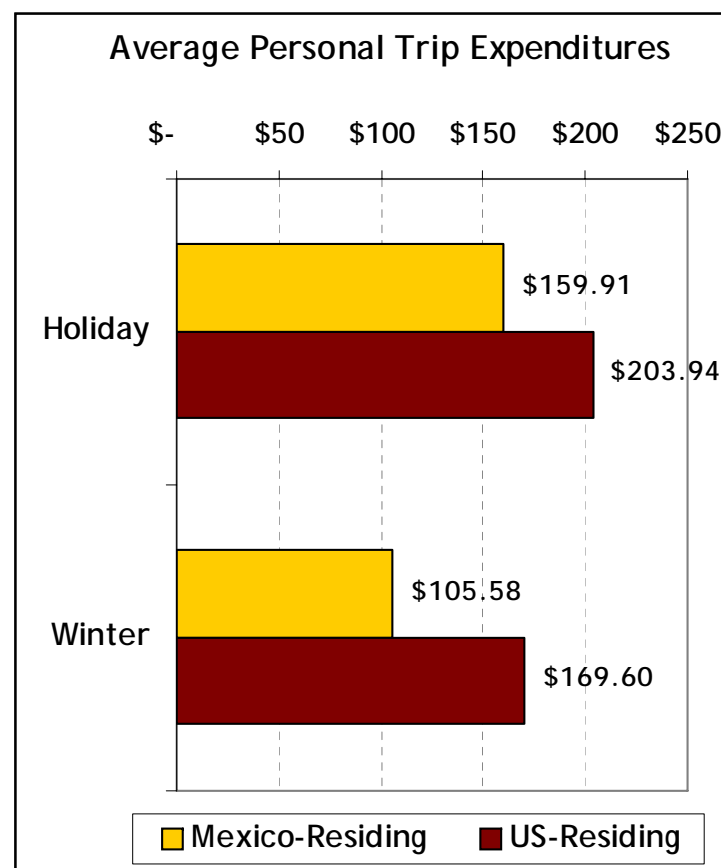
# Wave 2: Border Waits & Expenditures

- **Very preliminary...but to give idea of how border wait sensitivity & crossborder expenditures relate:**
  - **Looking just at Mexico-residing crossers that indicated they were very sensitive to longer border waits (15 or 30 minute increases beyond expected)**
  - **Around 60% indicated that they would likely still spend same amounts in US...**
  - **...Implies around 40% would likely spend less**



# Wave 1 + 2: Trip Expenditures

- In total, how much do you believe you spent/will spend on your trip...
  - Question worded slightly differently for Mexico- or US-residing participants
  - Initial results very impressive
- Consistent with results from other border communities



# Wave 1 + 2: US Residents Zip Code

- While mostly local, broad range of origination points for those coming from the US...



# Next Steps



# Next Steps

- **There are several steps remaining:**
  - **Confirming we met all of the survey target goals**
  - **Coding of open-ended questions**
    - **In process, but will take a few more weeks to finish**
  - **Finishing quality checks of collected data**
  - **Obtaining more recent DHS border crossing data to allow more accurate weighing of survey results**
  - **Update our initial survey data results**
    - **Including additional crosstabulations**
  - **Putting into format for economic modeling**



*Thank You – Gracias*

**HDR**

**HLB**  
Decision Economics Inc.

