



# International Bridges Crossborder Survey

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# **El Paso-Ciudad Juárez Social and Expenditure Profile**

**Findings for October 1, 2019 to March 17, 2020**

**September 2020**

# Impact of personal crossings

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- Critical concern for regional policy is the influence of greater security, higher wait times and episodes of violence on social and purchasing activities
- Literature on impact from personal travel is scant
  - struggling for years w/ just anecdotal information
  - requires costly surveys that are time and labor consuming
- To overcome constraints of conducting personal surveys, IBD collaborated with El Colegio de la Frontera Norte (COLEF)

# Study objectives

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- Create database on crossborder travel behavior and expenditure activities
  - *Who is crossing, why are they crossing and what are they spending?*
- Estimate the **monetary impact** via input-output analysis
  - *What is the impact of Mexican spending on the El Paso economy?*
- Year-round repeated data collection
  - Within and between year comparisons captures seasonal and cyclical trends and effects of external shocks

# Study benefits

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- Mexican traveler is an important contributor and travel segment to the El Paso economy; quantifying their profiles, expenditures and impact is beneficial for:
  - **Economic Development** – for business recruitment and expansion efforts as companies research (i.e., feasibility studies) the El Paso market
  - **Destination El Paso** – to tailor marketing strategies to maximize information about El Paso’s hospitality sector
  - **International Airport** – to gauge current domestic utilization by Mexican residents and their potential demand for Chihuahua flights
    - Four questions were included about the El Paso airport

# Study timeline

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- Development phase
  - **August** 2019 – survey design, logistics and technical platform
  - **September** – tablet app and survey pre-test
- Implementation phase
  - **October** – short survey
  - **January** 2020 – long survey
  - Paused **mid-March** due to COVID; restart date unknown

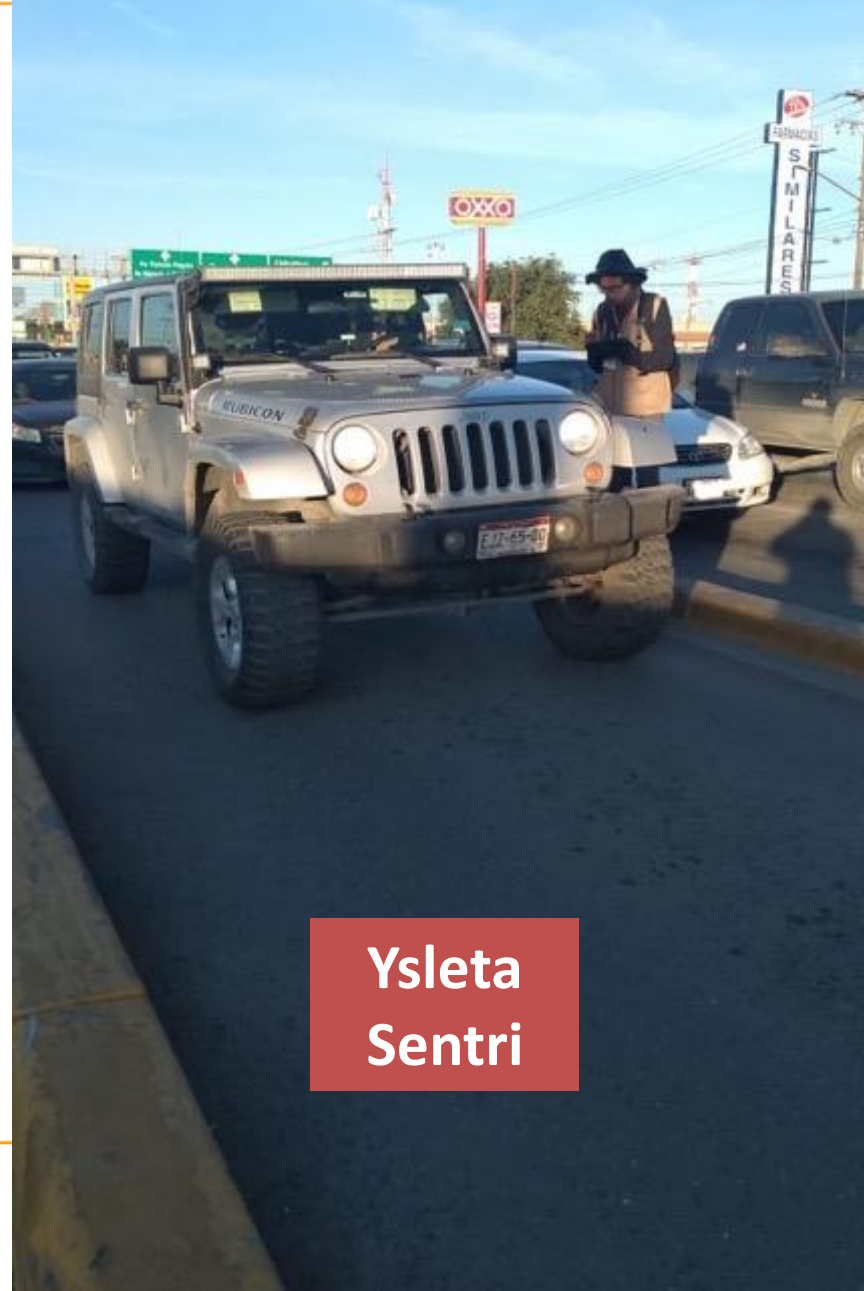
# Study methodology

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- Administered by COLEF interviewers in Mexico (entry and exit surveys)
- All days of the week (morning and afternoon shifts)
  - late night/early morning shift excluded due to safety concerns
- **Stratified random sampling**
  - vehicles and pedestrians at PdN, BOTA and Ysleta
  - Stanton SENTRI excluded due to fast flow traffic (working to address this)
  - **Sample size – 8,623** survey responses
  - **Population size – 7,617,473** personal crossings
    - based on applying sampling weights to the unweighted sample



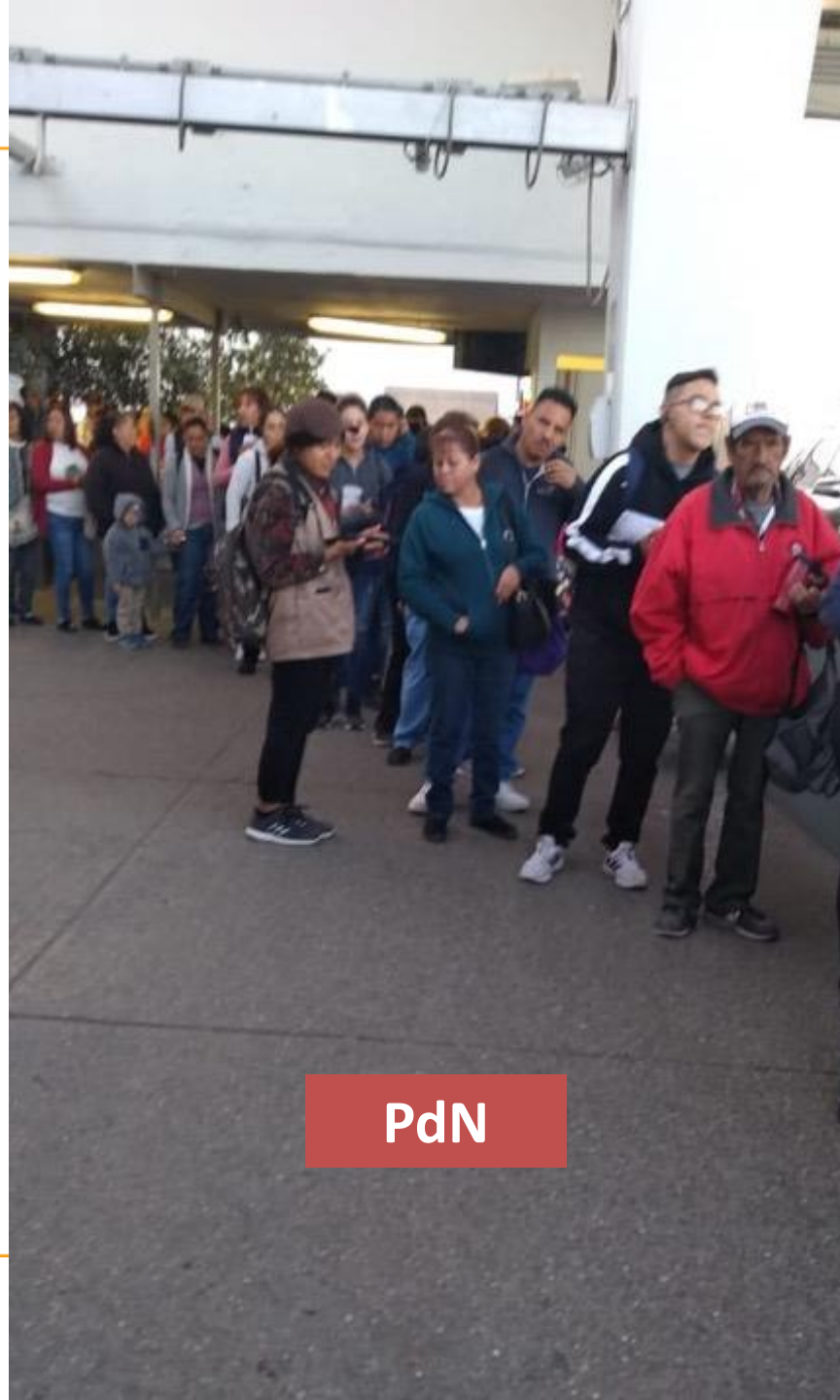
PdN  
Standard & Ready



Ysleta  
Sentri



BOTA

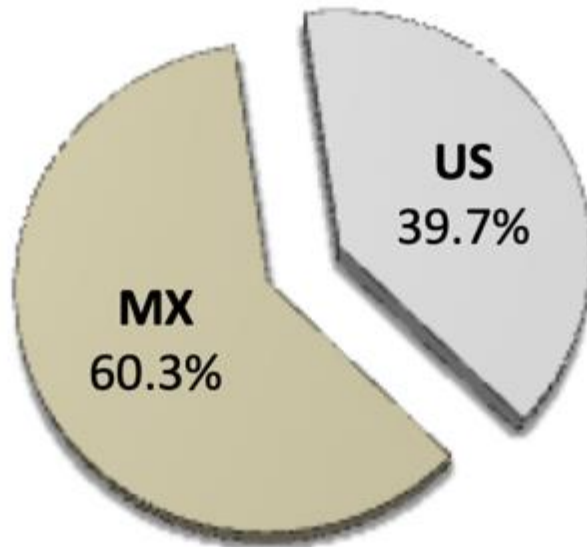


PdN

# Short Survey

## Demographics and Reasons for Crossing

# Primary residence

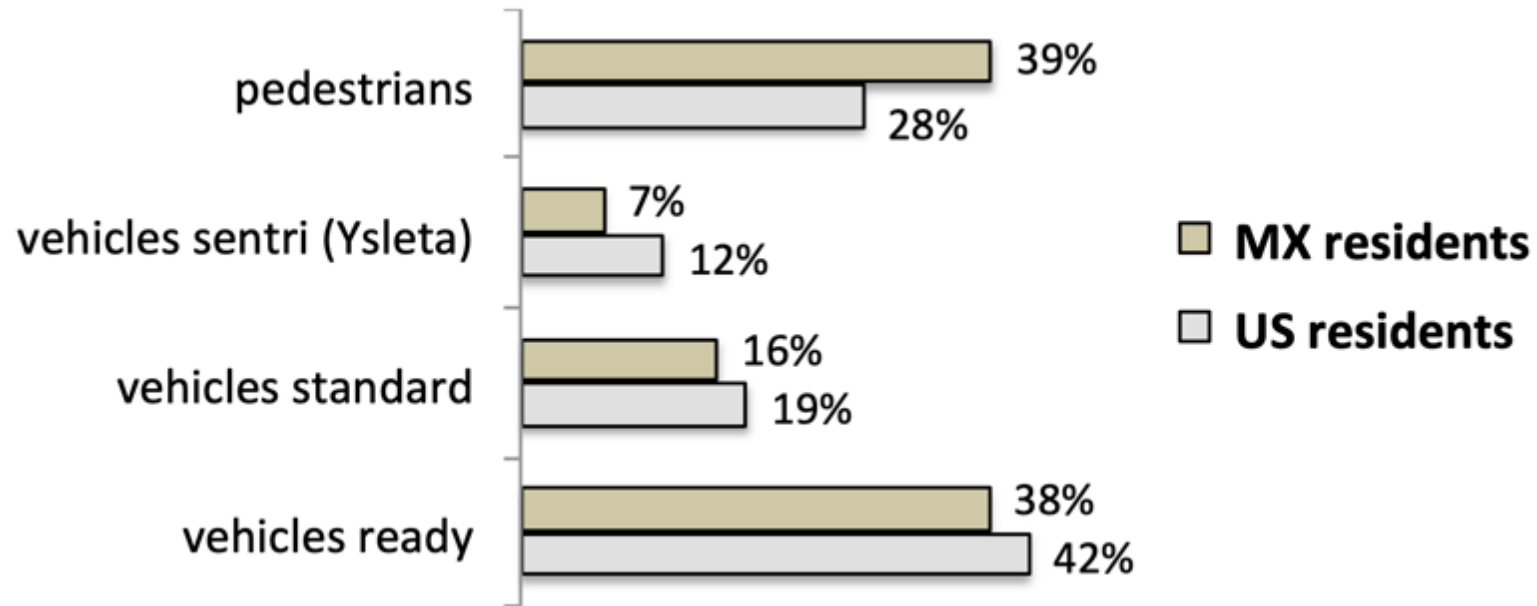


Juarez Municipio	58.9
El Paso County	37.3
Dona Ana County	1.2
Chihuahua Municipio	0.9
Other Texas place	0.2
Other New Mexico place	0.1
Other Chihuaua place	0.1
Other US place	0.8
Other MX place	0.6

97% are  
regional  
crossings

**\*\*** Henceforth “MX/US residents” refers to MX/US primary place of residence

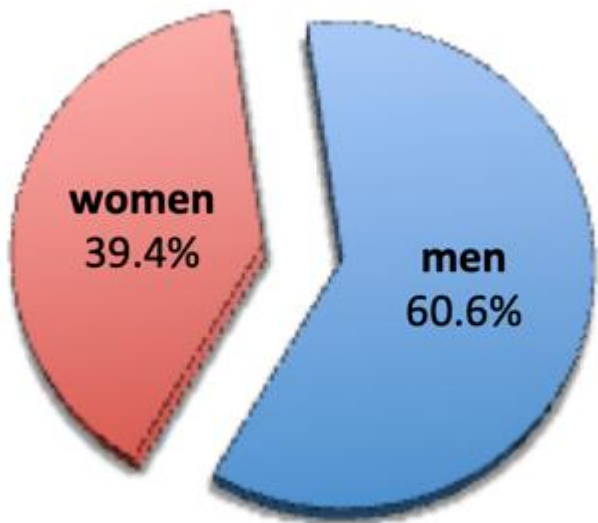
# Mode and vehicle lane



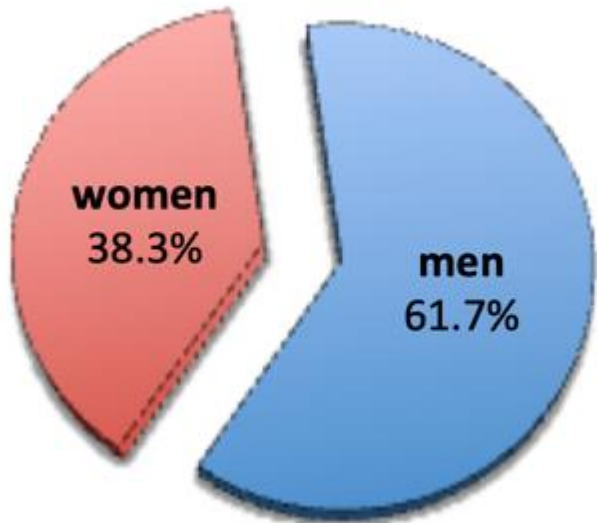
US residents more likely to drive across vs.  
MX residents walk across

# Gender

MX residents



US residents

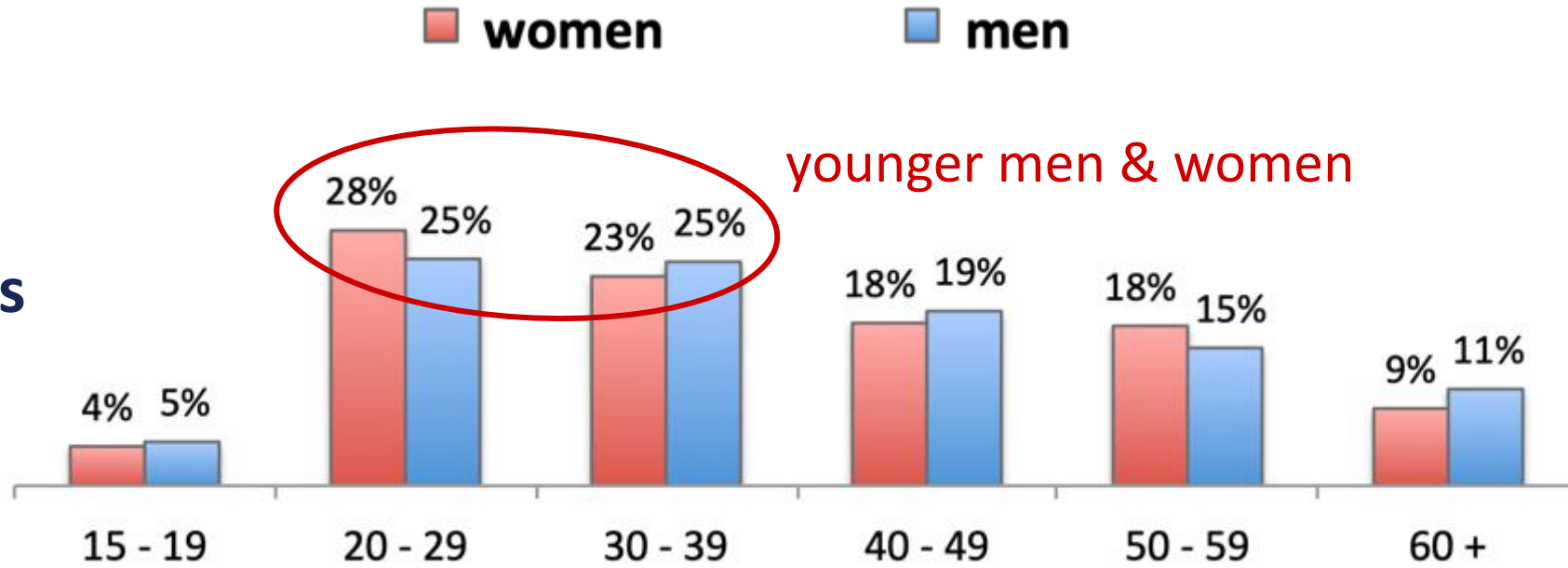


	MX residents (%)		US residents (%)	
	women	men	women	men
vehicles	31.8	68.2	33.4	66.6
pedestrians	51.5	48.5	50.8	49.2

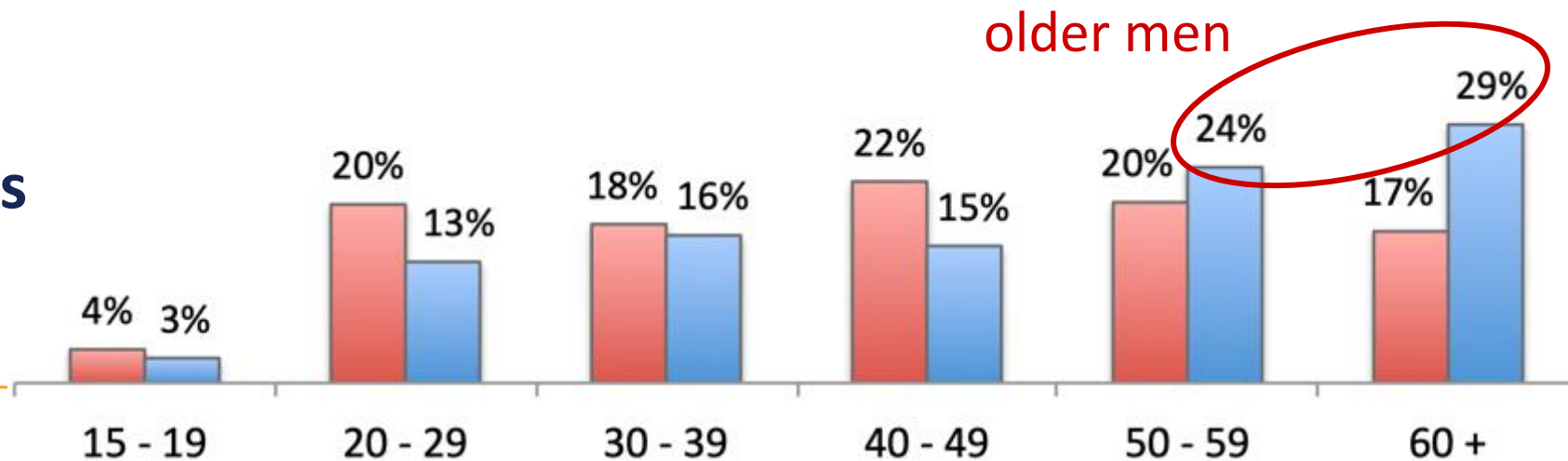
twice more  
men driving  
related to  
work

# Age groups

**MX  
residents**



**US  
residents**



# Main reasons for crossing (%)

	MX	US
<b>shop</b>	<b>40.7</b>	<b>14.9</b>
eat/drink	1.4	<b>4.7</b>
<b>health visit</b>	1.0	<b>8.1</b>
<b>social family</b>	<b>16.8</b>	<b>37.9</b>
social friends	2.0	3.2
social activity	2.1	3.8
<b>going to a house</b>	4.5	<b>10.8</b>
<b>job or work</b>	<b>16.9</b>	<b>6.9</b>
business activity	3.1	2.1
<b>school attend</b>	<b>3.9</b>	1.5
school drop/pick up/activity	1.6	0.8
drop/pick up person	2.6	2.4
vacation	0.8	0.9
other	2.7	2.2

- Reasons overlap
- 2 out of 5 from MX cross mainly to shop
- 1 out of 5 from MX cross for work reasons
- US residents cross mainly for social reasons
- 1 in 12 from US cross for health visit

# Reasons for crossing – group differences

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## ➤ Mode

- 1) Senti (Ysleta) crossings more linked to work and school

## ➤ Gender

- 1) women more likely to cross to shop or for family and health visits
- 2) men (especially from MX) more likely to cross for work reasons

## ➤ Age groups

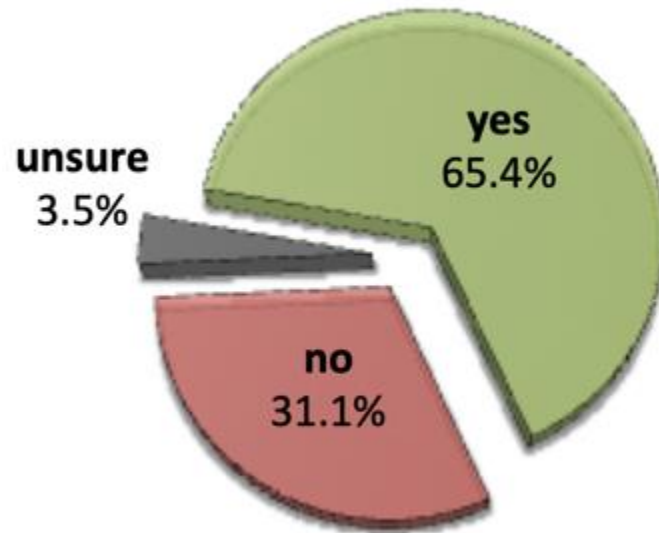
- 1) MX – social visits directly correlated w/ age; attending school indirectly correlated w/ age
- 2) US – social visits indirectly correlated w/ age; health visits directly correlated w/ age

# Short Survey

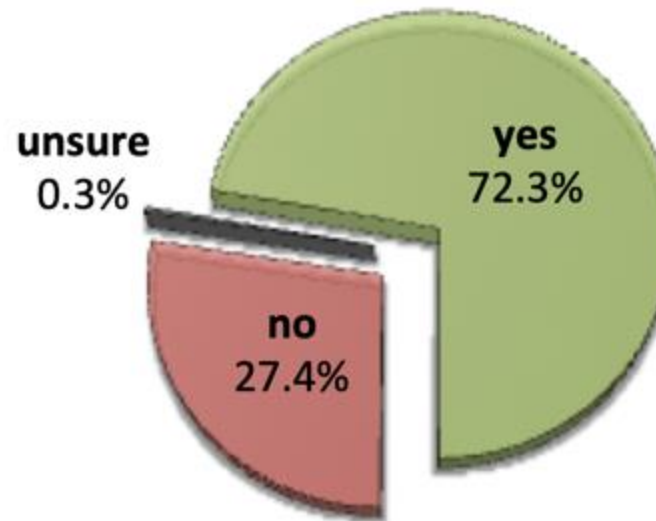
## Spending Characteristics

# Spending (local)

## MX residents



## US residents



US residents more likely to spend (there are many more MX crossers so their aggregate impact greater)

**\*\* This tells us if they spent or plan to spend, not how much**

# Goods purchases

78% of MX & 53%  
of US resident  
spending is retail

groceries rank  
#1 for US  
residents →

clothing ranks  
#1 for MX  
residents →

NAICS		% of spending visit		avg. spending	
		MX	US	MX	US
423	wholesale durable goods	0.65	0.22	\$268	\$458
4411	auto dealers	0.17	-	\$2,849	-
4413	auto parts & accessory stores	<b>2.43</b>	0.87	<b>\$203</b>	\$392
442	furniture & furnishings stores	<b>1.00</b>	0.55	\$127	\$267
443	electronics & appliance stores	<b>2.05</b>	0.72	<b>\$249</b>	\$169
444	building materials & garden supply	0.75	0.84	\$200	\$342
445	<u>food &amp; beverage stores</u>	<b>17.59</b>	<b>31.63</b>	<b>\$72</b>	<b>\$86</b>
446	<u>health &amp; personal care stores</u>	<b>1.65</b>	<b>8.52</b>	\$88	<b>\$177</b>
447	<u>gasoline stations</u>	<b>9.57</b>	<b>1.97</b>	<b>\$36</b>	<b>\$36</b>
448	<u>clothing &amp; accessory stores</u>	<b>26.34</b>	<b>1.70</b>	<b>\$150</b>	\$73
451	sporting, musical & books stores	<b>1.44</b>	0.40	\$169	\$260
452	<u>general merchandise</u>	<b>14.36</b>	<b>4.48</b>	<b>\$158</b>	<b>\$277</b>
453	misc store retail	0.87	0.83	\$115	\$57

# Services purchases

NAICS		% of spending visit		avg. spending	
		MX	US	MX	US
485	ground transport	<b>1.40</b>	0.85	\$10	\$11
4852	interurban transport	0.38	0.28	\$298	\$146
5121	motion picture (theatres)	0.14	0.81	\$16	\$37
522	credit intermediation	0.28	0.05	\$128	800
5419	other professional services	-	0.26	-	\$157
5614	business support services	0.25	0.02	\$65	\$200
621	<u>physicians, health pract. &amp; medical</u>	0.28	<b>9.52</b>	\$88	<b>\$229</b>
6212	dentists	0.02	<b>2.58</b>	\$50	<b>\$184</b>
622	hospitals	0.23	0.52	\$427	\$727
711	arts, spectator sports & music	0.14	0.65	\$33	\$129
713	amusement, gambling & recreation	0.14	0.30	\$191	\$285
7224	drinking places	0.54	<b>1.38</b>	\$38	\$84
7225	<u>restaurants</u>	<b>16.82</b>	<b>25.84</b>	<b>\$49</b>	<b>\$94</b>
811	repair & maintenance services	0.22	<b>2.07</b>	\$347	<b>\$125</b>
812	personal care services	0.07	<b>1.50</b>	\$44	\$269

1 in 8 US  
residents visit for  
health related  
services

restaurants top  
category but US  
residents spend  
twice as much

# Expenditures (in millions, over 24 weeks)

- Men make majority of purchases and spend more on average
- MX residents – middle ages largest consumer of U.S. retail & visitor of restaurants
- US residents – older ages largest consumer of MX goods & services

	MX	US
wholesale	\$3.92	\$1.75
retail	(87%) \$226.74	\$118.78
services	\$29.05	\$126.62 (51%)
total	<b>\$259.71</b>	<b>\$247.14</b>

Excludes:

- Stanton bridge
- BOTA fast flow
- 11 p.m. to 7 a.m. flow
- Santa Teresa bridge

# Trip characteristics

- Two-thirds stay 2-9 hours on the other side of the border
- Overnight visitors mostly stay w/ family; 6% use hotels
- 90% of vehicle, SENTRI & pedestrian crossers believe wait times should not exceed 60, 30 & 45 minutes, respectively

## Acceptable wait times into El Paso (in minutes)

percentile	vehicles	Ysleta	
		SENTRI	pedestrians
10%	20	5	5
25%	30	10	10
<b>50%</b>	<b>40</b>	<b>15</b>	<b>15</b>
75%	60	20	30
90%	60	30	45
<b>mean</b>	<b>45</b>	<b>16</b>	<b>22</b>

# Next steps

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- Long survey analysis
- Spending details and impact study
- Improvements to and resume survey
- Stanton online survey w/ Fideicomiso de Puentes Fronterizos de Chihuahua



# *Questions*

