

IMPERIAL COUNTY

RETAIL AND SERVICES LEAKAGE ANALYSIS

FOR THE CITIES OF:

BRAWLEY

IMPERIAL

CALIPATRIA

WESTMORLAND

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1. INTRODUCTION AND SUMMARY

This report analyzes retail trends and opportunities for the Imperial County communities of Calipatria, Brawley, Westmorland, and Imperial. This introduction to the report summarizes tasks associated with analyzing retail trends and opportunities in the County, and describes the sources of data and methodology employed, particularly with respect to characterizing the secondary markets for each of the four communities and with respect to estimating the volume of sales generated by retailers and certain types of service providers. After this introduction, this report then presents findings for each of the four communities with respect to demographic trends and projections, the gaps between retail supply and demand (retail leakage), and the amount of square footage that the retail leakage would support.

The report includes an appendix that lists businesses operating in the four market areas under study. This information comes from the InfoUSA database maintained by the California Employment Development Department. Another appendix includes demographic data from the US Census American Community Survey (ACS) for the communities of Calipatria, Brawley, Westmorland and City of Imperial, as well as the secondary markets surrounding these four areas respectively. A third and final appendix includes data for the four areas from the US Economic Census.

1.1 SCOPE OF WORK

There were five tasks associated with this study. First, the report analyzes the retail market and sales performance in Imperial County using a gap analysis (also known as a “retail sales leakage analysis”). The retail market in Imperial County includes retail stores, service businesses, entertainment venues, and restaurants. Second, the report identifies key retail opportunity areas (site specific) in Imperial County to the extent such data are readily available. Third, as part of the leakage analysis, the report identifies current and future consumers supporting each of the four areas’ retail market. Fourth, the report explores market assets and obstacles with respect to existing retail establishments in the four communities and with respect to their key retail opportunity areas to the extent such information is readily available. Fifth and finally, the report provides recommendations and an analysis of potential strategies to increase retail activity within the existing market areas at key retail opportunity sites in the northern part of Imperial County.

1.2 KEY FINDINGS

- The City of Brawley is experiencing retail sales leakage in the amount of \$59.3 million. Leakage is occurring in the broad category of Other Retail Stores (\$13.1 million), Food Stores (\$17.3 million), and home furniture/home furnishings (\$2.5 million).
- The current retail leakage of \$59.3 million supports an estimated 78,286 square feet of retail. At 35,621 square feet, slightly under half are in the “Other Retail Stores” category, and 32,014 square feet are in Food Stores.

- The City of Brawley is experiencing roughly \$2.9 million in leakage in services. However, close inspection of this figure indicates that the leakage would not support that much new store development; rather, existing stores might best take advantage of this leakage.
- The City of Imperial is experiencing retail leakage of \$54.4 million. Of this amount, an estimated \$16.8 million in leakage is in the General Merchandise Group, which is not enough to support a particular national chain retailer such as a standard-size Wal-Mart (average annual sales: \$42 million) but can possibly be of interest to other discount stores, including smaller operations such as Big Lots. There is also approximately \$22.3 million in leakage in supermarket/grocery stores, which might be enough to attract a national retailer willing to provide a smaller-format of its standard-size model, as new supermarket typically are looking at minimum store sales ranging from \$25 million to \$40 million in annual sales. There is also leakage in the home furnishings categories, although not enough for national retailers which are typically looking for \$8 million in sales.
- The current leakage of \$54.3 million in the City of Imperial supports 156,300 square feet of retail. Of the 156,300 supportable square feet, 45,000 square feet is in the Food and Beverage category and 74,700 in General Merchandise. It is important to note that the 74,700 general merchandise leakage must be evaluated against the backdrop of a Target and a Wal-Mart Supercenter located next door in El Centro. In addition, there is 23,500 supportable square feet in the Clothing category.
- Calipatria's retail leakage is estimated at \$46.2 million. Of this amount, there is an estimated \$8.6 million in leakage in the General Merchandise Group in Calipatria, which is not enough to support a particular national chain retailer such as a standard-size Wal-Mart (average annual store sales: \$42 million) but can possibly be of interest to other discount stores, especially smaller-sized stores. There is also approximately \$6.2 million in leakage in supermarket/grocery stores, which again is not enough to attract a national retailer but existing stores in this line of business can use the leakage information to expand operations.
- The current leakage of \$46.2 million in Calipatria supports 84,200 square feet of retail and services. Of the 84,200 supportable square feet, 21,000 square feet is for general merchandise, 11,200 square feet is for apparel, and 8,400 square feet for specialty retail. Included in the 84,000 square feet is enough space for new full- (6,300 sq. ft.) or limited-service (6,900 square feet) restaurants. Calipatria's existing supermarket can possibly use the 12,800 leakage-supported square footage to expand operations.
- Westmorland's retail leakage of \$6.9 million supports 14,300 square feet of retail and services. Information on amount of supportable square footage is potentially most useful to existing store owners interested in knowing how much they might expand operations. There is not enough support to attract new businesses.

1.3 DATA SOURCES AND METHODOLOGY

Retail sales leakage occurs when household demand in a particular geographic market area for specific types of retail goods or services exceed sales generated by stores in the same geographic market and in the same line of retail product, meaning households' spending in these retail lines are "leaking" outside of the market area as locals shop outside to satisfy their need for various types of retail goods and services. In an effort to create jobs, revitalize specific areas such as downtowns, and increase sales tax, local planners and officials can use "leakage" information to attract new retailers and to assist existing businesses capture sales leaking out to other communities. In order to conduct a retail leakage analysis, we need to compare "supply side" trends (i.e., dollar volume of sales by retailers and service providers) against trends on the "demand side" (i.e., retail and services expenditures by households and others). The discussion below first summarizes our approach with regard to estimating "supply side" trends in terms of retail and services sales activity. Then, we discuss our approach to characterizing trends on the "demand side" in terms of households and their respective retail expenditures.

Supply-side data come from a variety of sources. The cities of Brawley and Imperial provided retail sales tax revenue and retail sales revenue, respectively. For Calipatria and Westmorland, the analysis relies heavily on retail and services data specifically for these two areas from the US Economic Census 2007. We also used the Economic Census data to estimate services activity for Brawley and Imperial. In particular, from the US Economic Census, the consultant obtained retail and services activity in terms of employment and receipts by specific types of retail and services operating in each of the four study areas, as well as for other places in the County and for Imperial County as a whole. ADE generated sales-per-worker ratios for specific types of retail and services that reflected local conditions in place in 2007, which were then adjusted for inflation with the use of data from the US Bureau of Labor Statistics (BLS) and data from the California Franchise Tax Board (FTB). Their estimates were further adjusted for the effects of the historic downturn that started in 2008, from which the economy is still recovering. The adjusted sales-per-worker ratios were then applied to actual businesses operating in each of the four areas, the employment levels and retail/services industry codes of which are available from a database from the California Employment Development Department. In this way, the consultant was able to combine local data reflecting actual conditions in Imperial County in an effort estimate the dollar-volume of sales generated by specific types of retailers and service providers operating in Calipatria and Westmorland, and service providers in Brawley and the City of Imperial.

For purposes of characterizing trends on the demand side involving current and future households in the four areas, we relied heavily on data from the US Census ACS. In particular, we used the ACS five-year 2006-2011 data to segment households in Brawley, Calipatria, Imperial, and Westmorland by income, age, and ethnicity, on the grounds that spending patterns for particular goods and services differs by these key demographic characteristics. The ACS' five-year 2006-2011 data is the most current data available with regard to detailed demographic data critical for purposes of the leakage study.

In beginning the demand-side analysis, we gathered ACS demographic data for each of the four areas, as well as the census tracts immediately surrounding the four areas. For purposes of the analysis, we determined each of the four cities to represent the "primary market area" from which retailers and service-providers should cull their respective customers, and we referred the surrounding census tracts as the "secondary market." We expect that all household spending in the primary markets should go to

local retailers operating in these respective primary markets, while households residing in the four secondary markets would split their retail spending among multiple retail centers. We employed the Huff Retail Gravity Model to conservatively estimate the percentage of households in the secondary market who would shop at stores in the nearby primary market area, given the distance to and availability of other stores in other places, such as El Centro. The Huff Retail Gravity Model is “an analytic tool that measures the probability that a consumer will drive to a retail shopping area based on the distance they would have to drive to get there, the attractiveness of the retail shopping area, and the area competition. It is assumed that the probability that the consumer will travel to the retail shopping area increases as the size of the site increases and as the distance or travel time for the consumer to the site decreases.”¹ Then, using household projections issued by the Southern California Association of Governments (SCAG) for these four areas, we estimated the number of households in 2020, and developed estimates of the current (2011), incremental (2011 to 2020), and total projected (2020) retail leakage. While the ACS data is an annual average for the five-year period from 2006 to 2011, for purposes of analysis, we assume the data is for 2011.

We also included potential spending from workers working in any one of our four areas. To avoid double-counting, we did not include workers who either reside in the city in which they work, or those who reside in the surrounding secondary market area. To conduct this analysis, we relied on data from the US Census OnTheMap.

On a final note, in an effort to avoid over-estimating future demand, we only projected household growth in the primary market area from 2011 to 2020. We did not use SCAG data to project forward the number of households residing in the secondary market from 2011 to 2020 since some of the primary market area growth occur through annexations of property in the secondary market area. In addition, we did not increase the number of workers between 2011 and 2020. Instead, we assumed that the number of secondary market households and outside-of the-area workers would remain the same in 2020 as was the case in 2011.

¹Matthew DeMerrit, “A Formula for revitalization: Using ESRI Business Analyst for planning projects” (<http://www.esri.com/news/arcuser/0610/files/hershey.pdf>)

2. CITY OF BRAWLEY

2.1 DEMOGRAPHIC TRENDS

There are 10,992 consumer units² from which retailers and service businesses currently operating in Brawley can potentially draw as a source of demand for these stores respective goods and services. Of the 10,992, 7,205 are households residing within the boundaries of the City of Brawley. In addition to the 7,205, there is another 216 households residing in the secondary market surrounding Brawley. There are actually 354 households in the secondary market but, based on the gravity model employed for purposes of estimating the percentage of households in the secondary market likely to shop in Brawley given other shopping areas such as those in El Centro, 216 households (or 61 percent) are a likely source of demand for Brawley retailers, meaning only these households' expenditures should count toward estimating spending available to local shops.³ Of the 10,992 consumer units, another 3,571 are persons whose primary source of income is obtained from a job they have in the City of Brawley. The 3,571 employed persons do not include persons residing in Brawley or in the secondary market surrounding Brawley, to avoid double-counting these persons and their respective households.

Brawley is expected to grow by roughly 3 percent a year between 2011 and 2020, meaning over that time horizon an additional 2,726 households will be added to the current number of 7,205.⁴ For purposes of a conservative analysis, we assume that the households will be distributed in the way that current households are distributed by age and broad ethnicity status. Of the 7,205 households in Brawley right now, 5,909 are Latino households, with an average household income of \$46,600, and 1,696 are Not Latino households, with an average income of \$80,700. The average household income for all 7,205 households is \$53,800.

² Consumer units include households living in the primary and secondary market areas as well as in-commuters who live outside of either market area.

³ Matthew DeMerrit, "A Formula for revitalization: Using ESRI Business Analyst for planning projects" (<http://www.esri.com/news/arcuser/0610/files/hershey.pdf>) : The Huff Retail Gravity Model is "an analytic tool that measures the probability that a consumer will drive to a retail shopping area based on the distance they would have to drive to get there, the attractiveness of the retail shopping area, and the area competition. It is assumed that the probability that the consumer will travel to the retail shopping area increases as the size of the site increases and as the distance or travel time for the consumer to the site decreases."

⁴ Southern California Association of Government //www.scag.ca.gov/Documents/2012AdoptedGrowthForecastPDF.pdf

| TABLE: 2-1 DEMOGRAPHIC CHARACTERISTICS OF THE CITY OF BRAWLEY MARKET AREA | | | |
|--|------------------------|--------------------------|---|
| Brawley Market Areas | Current Consumer Units | Average Household Income | Incremental Consumer Units 2011-2020 Based on Brawley's SCAG Growth Rates** |
| PRIMARY MARKET | | | |
| Latino Households | | | |
| Householder under 25 | 470 | \$26,489 | 177 |
| Householder between 25-34 | 888 | \$49,949 | 336 |
| Householder between 35-64 | 3,178 | \$53,008 | 1,203 |
| Householder 65 and over | 973 | \$26,598 | 367 |
| Not Latino Households | | | |
| Householder under 25 | 98 | \$13,290 | 37 |
| Householder between 25-34 | 160 | \$113,093 | 62 |
| Householder between 35-64 | 1,001 | \$96,096 | 379 |
| Householder 65 and over | 437 | \$48,524 | 165 |
| SECONDARY MARKET | | | |
| Latino Households | | | |
| Householder under 25 | 4 | \$22,500 | |
| Householder between 25-34 | 1 | \$12,500 | |
| Householder between 35-64 | 73 | \$40,308 | |
| Householder 65 and over | 24 | \$77,812 | |
| Not Latino Households | | | |
| Householder under 25 | 3 | \$22,500 | |
| Householder between 25-34 | 0 | | |
| Householder between 35-64 | 61 | \$96,639 | |
| Householder 65 and over | 50 | \$82,749 | |
| DAY-TIME WORKERS* | | | |
| Employed Persons | 3,571 | \$27,500 | |
| TOTAL CONSUMER UNITS FROM WHICH CURRENT DEMAND AND INCREMENTAL IS ESTIMATED | 10,992 | \$45,592 | 2,726 |
| CONSUMER UNITS IN BRAWLEY ONLY: HOUSEHOLDS | 7,205 | \$53,843 | |

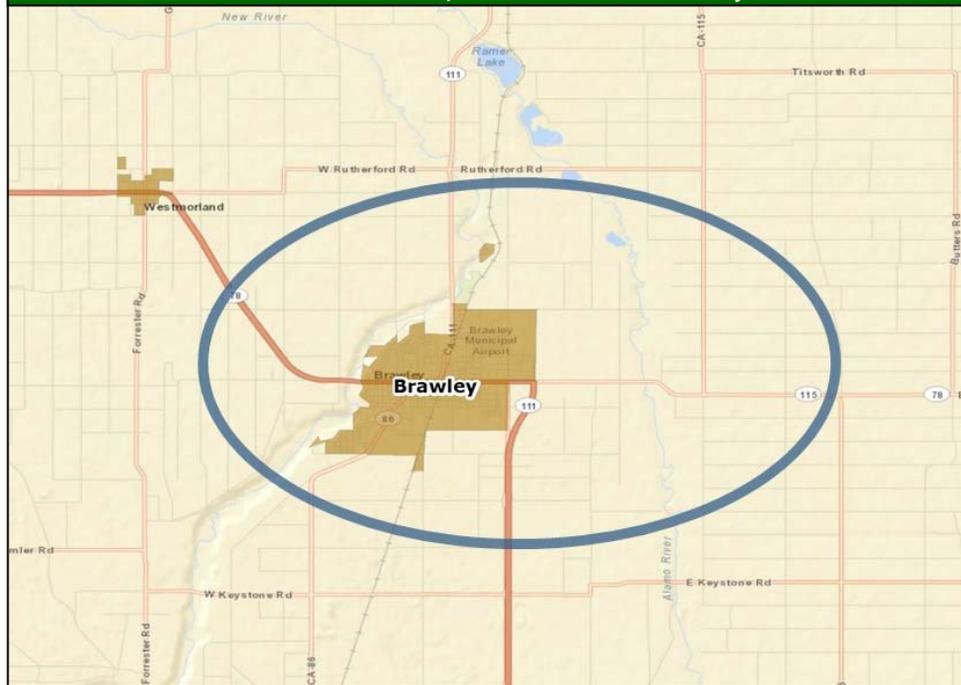
Source: Applied Development Economics, Inc.

* Daytime workers refers to individual persons whose primary source of income is derived from employment in Brawley, and these persons either do not reside in Brawley or the secondary market surrounding Brawley. Also: these workers' income refers to earnings from employment in Brawley, not household income.

** Incremental growth between 2011 and 2020 calculated only for Brawley for purposes of a conservative analysis -- analysis assumes same number of workers from outside of the Brawley market areas and same number of households in secondary market in 2020 as there are in 2011.

The primary market for Brawley consists of all areas within the boundaries of the city, whereas the secondary market consists of the sole census tracts contiguous to and surrounding the City of Brawley. This tract is Census Tract 103. The market areas are depicted below in Figure 2-1, with the primary market area as the City of Brawley and the secondary market area all the areas within the blue boundary line excluding Brawley.

**FIGURE 2-1:
CITY OF BRAWLEY MARKET AREAS: PRIMARY MARKET AREA
(CITY OF BRAWLEY) AND SECONDARY MARKET AREA (AREA WITHIN
BLUE BOUNDARY, EXCLUDING BRAWLEY)**



2.2 RETAIL AND SERVICES LEAKAGE ANALYSIS

The 10,992 consumer units in Brawley’s primary and secondary markets annually spend \$186.2 million at a variety of types of retail stores, and another \$11.1 million at a variety of services (Table 2-2). Of the \$186.2 million in retail spending, \$129.2 million comes from households in the City of Brawley and \$4.2 million from those in the secondary market. Workers in the City of Brawley are a potential source of demand for \$52.9 million of retail (see Table 2-2).

In comparison, retailers in the City of Brawley generate an estimated \$152.7 million in annual sales (see Table 2-2). Data come from the City of Brawley, which provided sales tax revenue data by seven broad retail categories, which were then converted into taxable and non-taxable sales. Of the \$152.7 million in taxable and non-taxable sales, \$35.6 million (or 23 percent) come from Service Stations. Retailers in the Food Stores category generate annually an estimated \$24.4 million in taxable and non-taxable sales, or almost 16 percent of the \$152.7 million in estimated retail sales. According to local officials, stores in the broad category of “Other Retail Stores” generate annually an estimated \$37.8 million in sales.

Based on a comparison of estimated sales activity versus potential demand, we estimate a total retail leakage of \$59.3 million. It is important to note that, for purposes of planning, what matters most is leakage by specific store types, not overall leakage. There is \$13.1 million in leakage in the broad category of “Other Retail Stores,” which in all likelihood includes specialty retail stores, apparel stores and general merchandise stores. It is important to note that some portion of the \$13.1 million in “Other Retail Stores” leakage may be taken by Brawley’s relatively new Wal-Mart Supercenter, although exactly

how much is difficult to estimate given the way local data is combined in the catch-all “Other Retail Stores.” Whereas a standard-format general merchandise store such as Wal-Mart generates on average \$42 million in sales, a Wal-Mart Supercenter generates on average \$70 million in annual sales, which suggests that the \$13.1 million in leakage may not be available when Brawley’s Supercenter hits full-stride.

In addition to the \$13.1 million in leakage in “Other Retail Stores,” there is approximately \$17.3 million in leakage in Food Stores category and \$2.5 million leakage in Furniture and Appliances. This suggests that local officials and planners might best take the approach of focusing on smaller foot-print retail stores typically found in the apparel, specialty retail, and, in some instances, home furnishings categories. Examples of specialty retail stores include book stores, gifts and novelty stores, jewelry stores, office supplies, cosmetic and beauty supplies stores, and pet stores, to name a few types. While \$17.3 million in leakage in the Food Stores category is not enough to attract a new full-size supermarket, which typically require roughly \$25 to \$40 million in sales, existing retailers in this line of work might use the information to improve their market share. There is also approximately \$26.3 million in leakage in new auto dealers in the Auto Dealers and Supplies Group. This leakage is mostly for auto dealers, which typically locate away from downtown areas, near highways and other high-traffic volume corridors, and in close proximity to other auto dealers. For these reasons, Brawley might experience difficulty in using the \$26.3 million figure to attract a new auto dealership, especially as dealers are already agglomerated in El Centro and Imperial.

TABLE: 2-2
RETAIL SUPPLY AND DEMAND IN THE CITY OF BRAWLEY MARKET AREA

| | Supply: Est. Receipts/Sales | Current Demand (A+B+C) | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Current Leakage |
|----------------------------|-----------------------------|------------------------|-------------------------------------|---------------------------------------|-------------------------------------|---------------------|
| Total (Retail Only) | \$152,665,121 | \$186,226,506 | \$129,175,231 | \$4,190,053 | \$52,861,222 | \$59,323,634 |
| Auto Dealers and Supplies | \$7,895,000 | \$34,225,134 | \$25,065,873 | \$913,416 | \$8,245,845 | \$26,330,134 |
| Building Materials | \$20,403,203 | \$6,631,547 | \$5,108,092 | \$168,601 | \$1,354,853 | \$0 |
| Eating and Drinking Places | \$23,350,556 | \$18,943,593 | \$13,222,239 | \$416,030 | \$5,305,323 | \$0 |
| Food Stores | \$24,412,056 | \$41,740,696 | \$27,647,227 | \$867,985 | \$13,225,484 | \$17,328,640 |
| Furniture and Appliances | \$3,233,367 | \$5,778,863 | \$4,471,818 | \$143,969 | \$1,163,077 | \$2,545,497 |
| Services Stations | \$35,584,740 | \$28,001,110 | \$19,255,950 | \$646,989 | \$8,098,171 | \$0 |
| Other Retail Stores | \$37,786,200 | \$50,905,563 | \$34,404,033 | \$1,033,062 | \$15,468,469 | \$13,119,363 |

Source: Applied Development Economics, Inc.

The City of Brawley is experiencing roughly \$2.9 million in leakage in services, particularly in dental services, certain entertainment services, and package delivery services (see Table 2-3). However, close inspection of this figure indicates that the leakage would not support that much new store development or new square footage; rather, existing stores might best take advantage of this leakage. The \$1 million in leakage for movies is not enough to attract a new cinema, and the \$387,000 in leakage in dental services is not enough to attract one new dental office, as these offices generate on average \$800,000 in receipts in Brawley. A movie theater in California on average generates \$4 million a year and has, on

average, ten screens, which suggests that \$1 million supports roughly two to three screens, i.e. not enough leakage to entice most new movie theater developers. There is \$380,000 in leakage in video rental, although this store type is fast disappearing with the on-set of on-demand videos via the Internet through media such as NetFlix. However, existing very small mom-and-pop videos stores might use this information to improve their niche market. However, dental practices operating in the city can use the \$387,000 leakage information.

**TABLE: 2-3
SERVICES SUPPLY AND DEMAND IN THE CITY OF BRAWLEY MARKET AREA**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|--|-----------------------------|--|-------------------------------------|---------------------------------------|-------------------------------------|----------------------|
| Total (Select Svcs Only) | \$50,246,156 | \$11,135,156 | \$8,093,281 | \$257,558 | \$2,784,318 | \$2,913,323 |
| Professional Svcs Group | \$3,473,001 | \$186,150 | \$135,526 | \$5,995 | \$44,630 | \$0 |
| Legal Services | \$2,052,481 | \$74,608 | \$70,276 | \$4,331 | \$0 | \$0 |
| Accounting Services | \$1,420,520 | \$111,543 | \$65,250 | \$1,663 | \$44,630 | \$0 |
| Medical Services Group | \$34,957,906 | \$2,993,541 | \$2,323,335 | \$77,405 | \$592,800 | \$386,988 |
| Physician Services | \$33,452,612 | \$1,444,130 | \$1,143,509 | \$43,334 | \$257,287 | \$0 |
| Dental Services | \$700,769 | \$1,087,757 | \$815,979 | \$20,814 | \$250,965 | \$386,988 |
| Eyecare/Other Medical Svcs | \$804,525 | \$461,654 | \$363,848 | \$13,258 | \$84,548 | \$0 |
| Personal Services Group | \$5,195,445 | \$1,735,096 | \$1,441,273 | \$41,550 | \$252,273 | \$0 |
| Personal Care Services | \$3,419,803 | \$1,288,828 | \$1,009,414 | \$28,691 | \$250,724 | \$0 |
| Dry Cleaning\Coin Laundry | \$1,353,945 | \$128,686 | \$125,408 | \$3,278 | \$0 | \$0 |
| Pet Care | \$421,698 | \$317,583 | \$306,452 | \$9,581 | \$1,549 | \$0 |
| Select Entertainment and Recreation | \$1,688,400 | \$1,985,034 | \$1,431,469 | \$40,600 | \$512,966 | \$1,509,466 |
| Recreational\Exercise | \$1,634,800 | \$421,968 | \$303,688 | \$8,725 | \$109,556 | \$0 |
| Video Rental | \$0 | \$380,120 | \$272,187 | \$6,688 | \$101,245 | \$380,120 |
| Movie\Live Arts | \$0 | \$1,007,345 | \$694,639 | \$18,909 | \$293,797 | \$1,007,345 |
| Sporting Events | \$53,600 | \$175,600 | \$160,954 | \$6,278 | \$8,368 | \$122,000 |
| Mail and Package Delivery | \$0 | \$1,016,870 | \$776,123 | \$29,210 | \$211,536 | \$1,016,870 |
| Select Repair Services | \$4,931,405 | \$3,218,465 | \$1,985,554 | \$62,797 | \$1,170,114 | \$0 |
| Auto Repair\Auto Body | \$4,648,645 | \$2,952,207 | \$1,768,268 | \$54,266 | \$1,129,673 | \$0 |
| Appliance \ Electric Repair | \$282,760 | \$266,258 | \$217,286 | \$8,531 | \$40,440 | \$0 |

Source: Applied Development Economics, Inc.

The anticipated increase of 2,726 households in Brawley between 2011 and 2020 will increase consumer demand and, holding constant retail and services sales, will increase the amount of leakage for store types experiencing leakage currently estimated.⁵ By 2020, overall leakage will grow to \$94.6 million from the \$59.3 million in leakage right now. By 2020, there will be approximately \$27.8 million in grocery store leakage, which is enough to support a new supermarket that is slightly smaller than standard-size, which typically generate from a low of \$25 million in sales to a high of \$40 million (see Table 2-4).

⁵ Southern California Association of Governments

**TABLE: 2-4
PROJECTED FUTURE RETAIL DEMAND AND LEAKAGE IN THE CITY OF BRAWLEY**

| | Supply: Est. Receipts/Sales | Future Demand: Current and Incremental (A+B+C) | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage (current and incremental) |
|----------------------------|-----------------------------|--|-------------------------------------|---------------------------------------|-------------------------------------|--|
| Total (Retail Only) | \$152,665,121 | \$235,088,981 | \$178,037,707 | \$4,190,053 | \$52,861,222 | \$94,563,195 |
| Auto Dealers and Supplies | \$7,895,000 | \$43,704,580 | \$34,545,319 | \$913,416 | \$8,245,845 | \$35,809,580 |
| Building Materials | \$20,403,203 | \$8,563,725 | \$7,040,271 | \$168,601 | \$1,354,853 | \$0 |
| Eating and Drinking Places | \$23,350,556 | \$23,947,042 | \$18,225,689 | \$416,030 | \$5,305,323 | \$596,487 |
| Food Stores | \$24,412,056 | \$52,197,949 | \$38,104,480 | \$867,985 | \$13,225,484 | \$27,785,893 |
| Furniture and Appliances | \$3,233,367 | \$7,470,649 | \$6,163,604 | \$143,969 | \$1,163,077 | \$4,237,282 |
| Services Stations | \$35,584,740 | \$35,284,883 | \$26,539,723 | \$646,989 | \$8,098,171 | \$0 |
| Other Retail Stores | \$37,786,200 | \$63,920,153 | \$47,418,622 | \$1,033,062 | \$15,468,469 | \$26,133,953 |

Source: Applied Development Economics, Inc.

The City of Brawley will experience roughly \$4.0 million in leakage in services (Table 2-5) by 2020. Similar to the situation right now, the leakage by 2020 is not enough to support new services, such as a new cinema, although existing providers such as dental office could use the information to plan for the future.

**TABLE: 2-5
PROJECTED FUTURE SERVICES DEMAND AND LEAKAGE IN THE CITY OF BRAWLEY**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|--|-----------------------------|--|-------------------------------------|---------------------------------------|-------------------------------------|----------------------|
| Total (Select Svcs Only) | \$50,246,156 | \$16,906,474 | \$11,155,083 | \$257,558 | \$2,784,318 | \$4,019,805 |
| Professional Svcs Group | \$3,473,001 | \$237,237 | \$186,612 | \$5,995 | \$44,630 | \$0 |
| Legal Services | \$2,052,481 | \$100,995 | \$96,664 | \$4,331 | \$0 | \$0 |
| Accounting Services | \$1,420,520 | \$136,242 | \$89,948 | \$1,663 | \$44,630 | \$0 |
| Medical Services Group | \$34,957,906 | \$4,568,226 | \$3,202,180 | \$77,405 | \$592,800 | \$695,842 |
| Physician Services | \$33,452,612 | \$1,876,599 | \$1,575,978 | \$43,334 | \$257,287 | \$0 |
| Dental Services | \$700,769 | \$1,396,611 | \$1,124,833 | \$20,814 | \$250,965 | \$695,842 |
| Eyecare/Other Medical Svcs | \$804,525 | \$599,175 | \$501,369 | \$13,258 | \$84,548 | \$0 |
| Personal Services Group | \$5,195,445 | \$2,291,851 | \$1,986,401 | \$41,550 | \$252,273 | \$11,627 |
| Personal Care Services | \$3,419,803 | \$1,670,921 | \$1,391,507 | \$28,691 | \$250,724 | \$0 |
| Dry Cleaning\Coin Laundry | \$1,353,945 | \$175,978 | \$172,700 | \$3,278 | \$0 | \$0 |
| Pet Care | \$421,698 | \$433,325 | \$422,195 | \$9,581 | \$1,549 | \$11,627 |
| Select Entertainment & Rec. | \$1,688,400 | \$4,463,545 | \$1,973,485 | \$40,600 | \$512,966 | \$1,936,494 |
| Recreational\Exercise | \$1,634,800 | \$536,956 | \$418,675 | \$8,725 | \$109,556 | \$0 |
| Video Rental | \$0 | \$483,166 | \$375,233 | \$6,688 | \$101,245 | \$483,166 |
| Movie\Live Arts | \$0 | \$1,270,445 | \$957,739 | \$18,909 | \$293,797 | \$1,270,445 |
| Sporting Events | \$53,600 | \$236,483 | \$221,837 | \$6,278 | \$8,368 | \$182,883 |
| Mail and Package Delivery | \$0 | \$1,310,289 | \$1,069,543 | \$29,210 | \$211,536 | \$1,310,289 |
| Select Repair Services | \$4,931,405 | \$4,035,326 | \$2,736,863 | \$62,797 | \$1,170,114 | \$65,552 |
| Auto Repair\Auto Body | \$4,648,645 | \$3,621,462 | \$2,437,522 | \$54,266 | \$1,129,673 | \$0 |
| Appliance \ Electric Repair | \$282,760 | \$348,312 | \$299,341 | \$8,531 | \$40,440 | \$65,552 |

Source: Applied Development Economics, Inc.

2.3 RETAIL AND SERVICES LEAKAGE ANALYSIS

The current retail leakage of \$59.3 million supports an estimated 78,286 square feet of retail (see Table 2-6). At 35,621 square feet, slightly under half are in the “Other Retail Stores” category, and 32,014 square feet are in Food Stores. Holding constant retail development in Brawley, between 2011 and 2020, the amount of supportable square footage within “Other Retail Stores” will grow by another 35,300 square feet, for a total of 70,958 square feet. Likewise, the current leakage in the Furniture and Appliances category supports an estimated 10,700 square feet, which could grow by another 7,000 square feet between 2011 and 2020, for a total of 17,700 square feet in 2020. It is important to note that some portion of the current and incremental leakage and their corresponding supportable square footage within the “Other Retail Stores” category may be consumed by the relatively new Wal-Mart Supercenter, although precisely how much is difficult to ascertain given the way local data are organized within the “Other Retail Stores” category.

| TABLE: 2-6 DEVELOPMENT POTENTIAL IN THE CITY OF BRAWLEY FROM CURRENT AND PROJECTED RETAIL LEAKAGE | | | | |
|---|-----------------------------------|---------------------------------------|---|-------------------|
| | Area Supported By Current Leakage | Area Supported By Incremental Leakage | Total Supportable Area: Current and Incremental Leakage | |
| Supportable Retail (excl. auto) | 78,286 | 63,614 | 141,901 | sq. ft. |
| Auto Dealers and Supplies | 0.5 | 0.2 | 0.7 | standard auto lot |
| Building Materials | 0 | 0 | 0 | sq. ft. |
| Eating and Drinking Places | 0 | 1,879 | 1,879 | sq. ft. |
| Food Stores | 32,014 | 19,320 | 51,334 | sq. ft. |
| Furniture and Appliances | 10,651 | 7,079 | 17,729 | sq. ft. |
| Services Stations | 0 | 0 | 0 | sq. ft. |
| Other Retail Stores | 35,621 | 35,337 | 70,958 | sq. ft. |

Source: Applied Development Economics, Inc.

The current services leakage of \$2.9 million supports an estimated 9,800 square feet of services (see Table 2-7). Of this amount, slightly more than half is for dental services (4,800 square feet), with another 3,900 square feet for mail and package delivery service. A standard-size FedEx/Kinkos generates roughly \$1.1 million in annual sales, meaning that the \$1 million in leakage (and corresponding 3,900 square) in the Mail and Package Delivery Category could support a store such as FedEx/Kinkos, although it is important to note the one already operates in the City of Imperial. In any event, there is enough leakage to support a smaller-size store in the Mail and Package Delivery Category, perhaps such as Mail Box Etc.

| Table: 2-7: DEVELOPMENT POTENTIAL IN THE CITY OF BRAWLEY From Current and Projected Services Leakage | | | |
|---|--|--|--|
| | Square Footage Supported By Current Leakage | Square Footage Supported By Incremental Leakage | Square Footage Supported By Total Leakage |
| Total (Select Services Only) | 9,806 | 5,945 | 15,751 |
| Professional Services Group | 0 | 0 | 0 |
| Legal Services | 0 | 0 | 0 sq. ft. |
| Accounting Services | 0 | 0 | 0 sq. ft. |
| Medical Services Group | 4,798 | 3,829 | 8,627 |
| Physician Services | 0 | 0 | 0 sq. ft. |
| Dental Services | 4,798 | 3,829 | 8,627 sq. ft. |
| Eyecare & Other Medical Services | 0 | 0 | 0 sq. ft. |
| Personal Services Group | 0 | 171 | 171 |
| Personal Care Services | 0 | 0 | 0 sq. ft. |
| Dry Cleaning\Coin-Op Laundry | 0 | 0 | 0 sq. ft. |
| Pet Care | 0 | 171 | 171 sq. ft. |
| Select Entertainment & Rec. | 1,143 | 310 | 1,453 |
| Recreational\Exercise\Membership | 0 | 0 | 0 sq. ft. |
| Video Rental | 1,143 | 310 | 1,453 sq. ft. |
| Movie\Live Arts | 2.5 | 0.7 | 3.2 screens |
| Sporting Events | 0 | 0 | 0 sq. ft. |
| Mail and Package Delivery | 3,864 | 1,115 | 4,979 sq. ft. |
| Select Repair Services | 0 | 520 | 520 |
| Auto Repair\Auto Body Repair | 0 | 0 | 0 sq. ft. |
| Appliance \ Electric Repair | 0 | 520 | 520 sq. ft. |

Source: Applied Development Economics, Inc.

2.4 KEY RETAIL OPPORTUNITY SITES

The City of Brawley shared information on eight particular key opportunity sites in the downtown area. For most of these sites, the city also shared information on lot size (see Table 2-8). Using data from the city and Google Earth, we estimate that seven of the eight sites represent 45,300 square feet of building space, with the eighth site (an empty lot) representing an additional 5,000 to 6,000 square feet of building space. At 78,300 square feet of supportable retail space and another 9,800 in supportable space for services, there is enough spending from households and persons in the primary and secondary markets to fill the 45,300 key opportunity site square footage with new retail (e.g., apparel, specialty retail and small-sized food store) and services (e.g., mail and package delivery).

**TABLE: 2-8:
KEY OPPORTUNITY SITES IN THE CITY OF BRAWLEY'S DOWNTOWN AREA**

| APN | Site Address | Owner of Record | Land Use | Zoning | Lot Size | Est. Building Coverage | Est. Bldg SqFt |
|--------------|---------------------|--|-----------------|---------------------------|-----------------|-------------------------------|-----------------------|
| 047-342-018 | 501 Main St. | BRAWLEY SUPERIOR FURNITURE COMPANY INC | Mixed Used | Civic Center Main St. | 6,701 | 85% | 5,697 |
| 047-342-017 | 505 Main St. | SONORA PROPERTIES LLC | Mixed Used | Civic Center Main St. | 2,347 | 100% | 2,347 |
| 049-021-007 | 542 Main St. | 542 MAIN STREET LLC | Mixed Used | Civic Center Main St. | 7,378 | 100% | 7,379 |
| 049-021-008 | 542 Main St. | 542 MAIN STREET LLC | Mixed Used | Civic Center Main St. | 7,453 | 100% | 7,453 |
| 049-023-007 | 129 S. 8th St. | EZQUERRO HECTOR & MARY JT | Mixed Used | Civic Center Neighborhood | 12,795 | 100% | 12,796 |
| 047-345-016 | 601 Main St. | CHAI HENRY & CHHAY KIM Y & LIU THAI CHEN & LAI LUO | Mixed Used | Civic Center Main St. | 7,041 | 0% | 0 |
| 047-345-015 | 619 Main St. | CHAI HENRY & CHHAY KIM Y & LIU THAI CHEN & LAI LUO | Mixed Used | Civic Center Main St. | 4,694 | 80% | 3,755 |
| 047-345-003 | 620 E St. | PALM INVESTMENT GROUP LLC | Mixed Used | Civic Center Neighborhood | 11,735 | 50% | 5,868 |
| TOTAL | | | | | 60,147 | | 45,295 |

3. CITY OF IMPERIAL

3.1 DEMOGRAPHIC TRENDS

There are 6,200 consumer units⁶ from which retailers and service businesses currently in the City of Imperial can potentially draw as a source of demand for their respective goods and services. Of the 6,200, 4,406 are households residing within the boundaries of the City of Imperial. In addition to the 6,200, there is another 340 households residing in the secondary market surrounding Brawley. There are actually 9,310 households in the secondary market but, based on the gravity model employed for purposes of estimating the percentage of households in the secondary market likely to shop in Imperial given other shopping areas such as those in El Centro, 340 households (or four percent) are a likely source of demand for Imperial retailers, meaning only these households' expenditures should count toward estimating spending available to local shops. Of the 6,200 consumer units, another 1,454 are persons whose primary source of income is obtained from a job they have in the City of Imperial. The 1,454 employed persons do not include persons residing in Imperial or in the secondary market surrounding Imperial, to avoid double-counting these persons and their respective households.

The City of Imperial is expected to grow by roughly 3 percent a year between 2011 and 2020, meaning over that time horizon an additional 1,393 households will be added to the current number of 4,406. For purposes of a conservative analysis, we assume that the households will be distributed in the way that current households are distributed by age and broad ethnicity status. Of the 4,406 households in Imperial right now, 2,957 are Latino households, with an average household income of \$59,166, and 1,449 are Not Latino households, with an average income of \$83,620. The average household income for all 4,406 households is \$61,300.

TABLE: 3-1
DEMOGRAPHIC CHARACTERISTICS OF THE CITY OF IMPERIAL MARKET AREA

| City of Imperial Market Areas | Current Consumer Units | Average Household Income | Incremental Consumer Units 2011-2020 Based on Brawley's SCAG Growth Rates** |
|-------------------------------|------------------------|--------------------------|---|
| PRIMARY MARKET | | | |
| Latino Households | | | |
| Householder under 25 | 100 | \$30,449 | 33 |
| Householder between 25-34 | 727 | \$70,697 | 231 |
| Householder between 35-64 | 1,849 | \$60,527 | 583 |
| Householder 65 and over | 281 | \$30,604 | 89 |
| Not Latino Households | | | |
| Householder under 25 | 30 | \$46,750 | 9 |
| Householder between 25-34 | 288 | \$90,399 | 91 |
| Householder between 35-64 | 904 | \$86,700 | 285 |
| Householder 65 and over | 227 | \$67,632 | 72 |

⁶ Consumer units include households living in the primary and secondary market areas as well as in-commuters who live outside of either market area.

| TABLE: 3-1 DEMOGRAPHIC CHARACTERISTICS OF THE CITY OF IMPERIAL MARKET AREA | | | |
|--|------------------------|--------------------------|---|
| City of Imperial Market Areas | Current Consumer Units | Average Household Income | Incremental Consumer Units 2011-2020 Based on Brawley's SCAG Growth Rates** |
| SECONDARY MARKET | | | |
| Latino Households | | | |
| Householder under 25 | 7 | \$31,785 | |
| Householder between 25-34 | 47 | \$65,744 | |
| Householder between 35-64 | 135 | \$58,314 | |
| Householder 65 and over | 32 | \$35,390 | |
| Not Latino Households | | | |
| Householder under 25 | 2 | \$43,750 | |
| Householder between 25-34 | 22 | \$90,227 | |
| Householder between 35-64 | 74 | \$84,222 | |
| Householder 65 and over | 21 | \$62,261 | |
| DAY-TIME WORKERS* | | | |
| Employed Persons | 1,454 | \$42,500 | |
| TOTAL CONSUMER UNITS FROM WHICH CURRENT AND INCREMENTAL DEMAND IS ESTIMATED | 6,200 | \$61,266 | 1,393 |
| CONSUMER UNITS IMPERIAL ONLY: HOUSEHOLDS | 4,406 | \$67,208 | |

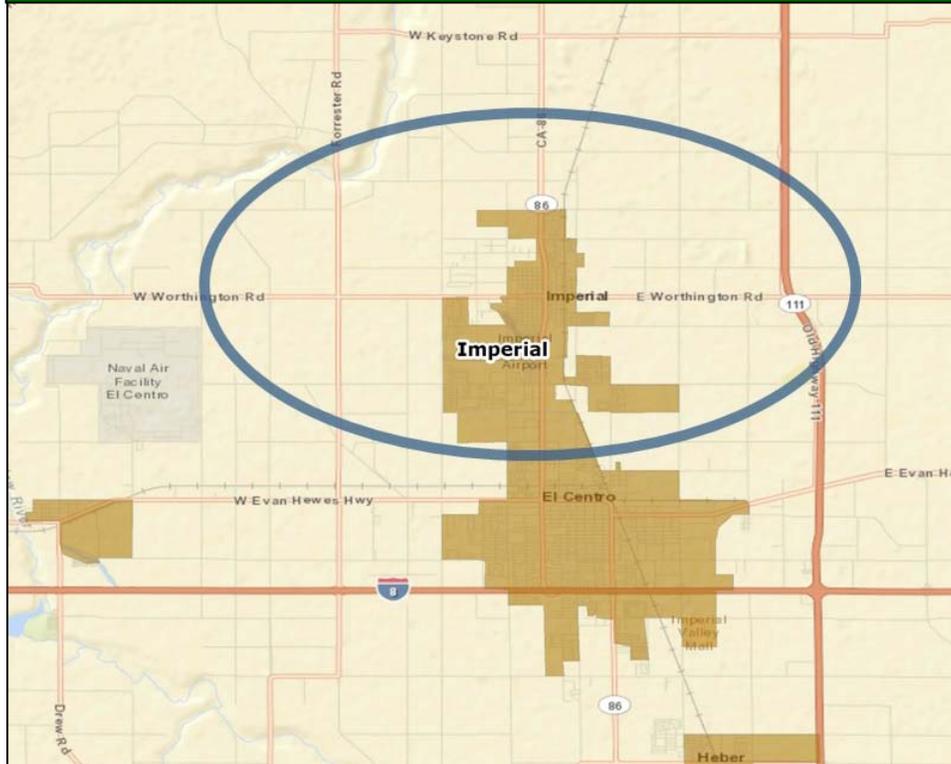
Source: Applied Development Economics, Inc.

* Daytime workers refers to individual persons whose primary source of income is derived from employment in Imperial, and these persons either do not reside in Imperial or the secondary market surrounding Imperial. Also: these workers' income refers to earnings from employment in Imperial, not household income.

** Incremental growth between 2011 and 2020 calculated only for Imperial for purposes of a conservative analysis -- analysis assumes same number of workers from outside of the Imperial market areas and same number of households in secondary market in 2020 as there are in 2011.

The primary market for the City of Imperial consists of all areas within the boundaries of the city, whereas the secondary market consists of the census tracts contiguous to and surrounding the City of Imperial. These tracts Census Tract 110, Census Tract 111, Census Tract 112.01, and Census Tract 113. The market areas are depicted below in Figure 3-1, with the primary market area as the City of Imperial and the secondary market area all the areas within the blue boundary line excluding Imperial.

**FIGURE 3-1:
CITY OF IMPERIAL MARKET AREAS: PRIMARY MARKET (CITY OF
IMPERIAL) AND SECONDARY MARKET AREA (AREA WITHIN BLUE
BOUNDARY, EXCLUDING IMPERIAL)**



3.2 RETAIL AND SERVICES LEAKAGE ANALYSIS

The 6,200 consumer units in Imperial's primary and secondary markets annually spend \$121.1 million at a variety of types of retail stores (see Table 3-2), and another \$9.8 million at a variety of services (see Table 3-3). Of the \$121.1 million in retail spending, \$91.2 million comes from households in the City of Imperial and \$6.8 million from those in the secondary market. Workers in the City of Imperial are a potential source of demand for \$23.1 million of retail.

In comparison, retailers in the City of Imperial annually generate an estimated \$80.6 million in taxable and non-taxable sales. Sales data come from the City of Imperial, except for New/Used Autos and Specialty Retail categories, which were estimated. Of the \$80.6 million, \$8.8 million (or 11 percent) come from retailers in the Health/Personal Care/Pharmacies category (see Table 3-2). New car dealers generate an estimated \$24.0 million in annual sales, or almost 30 percent of the estimated \$80.6 million in estimated retail sales. Food stores generate \$2.2 million in sales.

Based on a comparison of estimated sales activity versus potential demand, we estimate a total retail leakage of \$54.4 million. There is an estimated \$16.8 million in leakage in the General Merchandise Group, which is not enough to support a particular national chain retailer such as a standard-size Wal-Mart (average annual sales: \$42 million) but can possibly be of interest to other discount stores, such as

smaller format operations such as Big Lots. There is also approximately \$22.3 million in leakage in supermarket/grocery stores, which might be enough to attract a national retailer willing to provide a smaller-format of its standard-size model, as new supermarkets typically are looking at minimum store sales ranging from \$25 million to \$40 million in annual sales. At \$995,700, there is also enough leakage in the home furnishings category for locally owned independent store, although not enough for national retailers which are typically looking for \$8 million in sales. However, the leakage amounts might be enough to assist existing stores to expand.

**TABLE: 3-2
RETAIL SUPPLY AND DEMAND IN THE CITY OF IMPERIAL MARKET AREA**

| | Supply: Est. Receipts/Sales | Current Demand (A+B+C) | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Current Leakage |
|------------------------------|------------------------------------|-------------------------------|--|--|--|------------------------|
| Total (Retail Only) | \$80,609,054 | \$121,064,782 | \$91,169,966 | \$6,798,377 | \$23,096,440 | \$54,389,335 |
| Clothing | \$716,455 | \$7,190,365 | \$5,217,573 | \$386,125 | \$1,586,667 | \$6,473,910 |
| General Merchandise | \$0 | \$16,880,389 | \$12,382,853 | \$923,116 | \$3,574,420 | \$16,880,389 |
| Specialty Retail | \$1,647,038 | \$4,594,928 | \$3,475,607 | \$257,038 | \$862,283 | \$2,947,890 |
| Sporting Goods | \$1,251,800 | \$753,325 | \$546,764 | \$39,922 | \$166,639 | \$0 |
| Health/Pers. Care/Pharm | \$8,846,113 | \$3,634,541 | \$2,766,618 | \$213,246 | \$654,677 | \$0 |
| Food and Beverage | \$2,204,306 | \$24,482,223 | \$18,209,050 | \$1,367,950 | \$4,905,223 | \$22,277,917 |
| Furniture/Home Furnishings | \$1,852,477 | \$2,848,198 | \$2,232,452 | \$163,713 | \$452,033 | \$995,721 |
| Consumer Electronics | \$896,195 | \$1,418,863 | \$1,036,249 | \$76,436 | \$306,177 | \$522,668 |
| Building Materials | \$9,508,420 | \$4,433,969 | \$3,403,534 | \$260,479 | \$769,956 | \$0 |
| Full-Service Eating Places | \$2,627,521 | \$6,856,217 | \$5,168,856 | \$378,135 | \$1,309,226 | \$4,228,696 |
| Limited-Service/Fast Food | \$7,270,289 | \$6,491,366 | \$4,858,455 | \$351,067 | \$1,281,843 | \$0 |
| New/Used Cars/Other Vehicles | \$23,997,059 | \$21,929,118 | \$17,403,163 | \$1,293,074 | \$3,232,882 | \$0 |
| Automotive Parts | \$1,727,264 | \$1,425,018 | \$973,554 | \$69,754 | \$381,710 | \$0 |
| Gas/Service Stations | \$18,064,118 | \$18,126,263 | \$13,495,236 | \$1,018,322 | \$3,612,704 | \$62,145 |

Source: Applied Development Economics, Inc.

The City of Imperial is experiencing roughly \$3.7 million in leakage in services (Table 3-3). In the Mail and Package Delivery category, there is enough leakage to support a store such as Mail Box Etc. At \$1.5 million, there is also enough leakage to support up to three auto repair shops, which average \$450,000 to \$500,000 in sales in Imperial County. There is not much additional new store potential, but existing services in categories other than package delivery and auto repair might use the leakage information to help expand their operations.

**TABLE: 3-3
SERVICES SUPPLY AND DEMAND IN THE CITY OF IMPERIAL MARKET AREA**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|--|------------------------------------|--|--|--|--|-----------------------------|
| Total (Select Svcs Only) | \$17,207,754 | \$9,781,994 | \$6,885,902 | \$337,905 | \$2,558,187 | \$3,683,908 |
| Professional Svcs Group | \$757,071 | \$124,372 | \$101,041 | \$7,735 | \$15,596 | \$0 |
| Legal Services | \$492,595 | \$61,542 | \$57,079 | \$4,462 | \$0 | \$0 |
| Accounting Services | \$264,476 | \$62,830 | \$43,962 | \$3,272 | \$15,596 | \$0 |
| Medical Services Group | \$13,679,408 | \$2,247,720 | \$1,621,450 | \$123,961 | \$502,309 | \$206,877 |
| Physician Services | \$11,771,637 | \$1,063,497 | \$713,402 | \$57,236 | \$292,859 | \$0 |
| Dental Services | \$1,728,988 | \$798,563 | \$589,223 | \$43,409 | \$165,931 | \$0 |
| Eyecare/Other Medical Svcs | \$178,783 | \$385,660 | \$318,825 | \$23,316 | \$43,519 | \$206,877 |
| Personal Services Group | \$1,679,706 | \$1,189,533 | \$970,265 | \$73,601 | \$145,667 | \$192,128 |
| Personal Care Services | \$1,585,995 | \$903,695 | \$752,483 | \$56,937 | \$94,275 | \$0 |
| Dry Cleaning\Coin Laundry | \$0 | \$38,812 | \$35,672 | \$3,140 | \$0 | \$38,812 |
| Pet Care | \$93,711 | \$247,026 | \$182,110 | \$13,524 | \$51,392 | \$153,315 |
| Select Entertainment and Recreation | \$509,200 | \$1,985,034 | \$1,431,469 | \$40,600 | \$512,966 | \$1,007,231 |
| Recreational\Exercise | \$509,200 | \$421,968 | \$303,688 | \$8,725 | \$109,556 | \$0 |
| Video Rental | \$0 | \$380,120 | \$272,187 | \$6,688 | \$101,245 | \$279,054 |
| Movie\Live Arts | \$0 | \$1,007,345 | \$694,639 | \$18,909 | \$293,797 | \$569,439 |
| Sporting Events | \$0 | \$175,600 | \$160,954 | \$6,278 | \$8,368 | \$158,738 |
| Mail and Package Delivery | \$0 | \$1,016,870 | \$776,123 | \$29,210 | \$211,536 | \$745,064 |
| Select Repair Services | \$582,369 | \$3,218,465 | \$1,985,554 | \$62,797 | \$1,170,114 | \$1,532,609 |
| Auto Repair\Auto Body | \$299,609 | \$2,952,207 | \$1,768,268 | \$54,266 | \$1,129,673 | \$1,532,609 |
| Appliance \ Electric Repair | \$282,760 | \$266,258 | \$217,286 | \$8,531 | \$40,440 | \$0 |

Source: Applied Development Economics, Inc.

The anticipated increase of 1,393 households in Imperial between 2011 and 2020 will increase consumer demand and, holding retail sales constant, will increase the amount of leakage for store types experiencing leakage right now. By 2020, overall retail leakage will grow to \$77.9 million from the \$54.4 million in leakage right now. By 2020, there will be approximately \$28.0 million in grocery stores, and this should be enough to support a new full-size supermarket, albeit a smaller version of the standard full-size prototype (see Table 3-4).

**TABLE: 3-4
PROJECTED FUTURE RETAIL DEMAND AND LEAKAGE IN THE CITY OF IMPERIAL**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|-------------------------------|-----------------------------|--|-------------------------------------|---------------------------------------|-------------------------------------|----------------------|
| Total (Retail Only) | \$80,609,054 | \$149,874,433 | \$119,979,616 | \$6,798,377 | \$23,096,440 | \$77,927,813 |
| Clothing | \$716,455 | \$8,839,302 | \$6,866,510 | \$386,125 | \$1,586,667 | \$8,122,847 |
| General Merchandise | \$0 | \$20,793,621 | \$16,296,085 | \$923,116 | \$3,574,420 | \$20,793,621 |
| Specialty Retail | \$1,647,038 | \$5,693,019 | \$4,573,698 | \$257,038 | \$862,283 | \$4,045,981 |
| Sporting Goods | \$1,251,800 | \$926,150 | \$719,588 | \$39,922 | \$166,639 | \$0 |
| Health/Personal Care/Pharmacy | \$8,846,113 | \$4,508,367 | \$3,640,444 | \$213,246 | \$654,677 | \$0 |
| Food and Beverage | \$2,204,306 | \$30,237,121 | \$23,963,949 | \$1,367,950 | \$4,905,223 | \$28,032,815 |
| Furniture/Home Furnishings | \$1,852,477 | \$3,553,385 | \$2,937,639 | \$163,713 | \$452,033 | \$1,700,908 |
| Consumer Electronics | \$896,195 | \$1,746,300 | \$1,363,687 | \$76,436 | \$306,177 | \$850,105 |
| Building Materials | \$9,508,420 | \$5,509,382 | \$4,478,947 | \$260,479 | \$769,956 | \$0 |
| Full-Service Eating Places | \$2,627,521 | \$8,488,770 | \$6,801,409 | \$378,135 | \$1,309,226 | \$5,861,249 |
| Limited-Service/Fast Food | \$7,270,289 | \$8,027,314 | \$6,394,404 | \$351,067 | \$1,281,843 | \$757,025 |
| New/Used Cars/Other Vehicles | \$23,997,059 | \$27,427,123 | \$22,901,167 | \$1,293,074 | \$3,232,882 | \$3,430,064 |
| Automotive Parts | \$1,727,264 | \$1,733,020 | \$1,281,556 | \$69,754 | \$381,710 | \$5,756 |
| Gas/Service Stations | \$18,064,118 | \$22,391,560 | \$17,760,533 | \$1,018,322 | \$3,612,704 | \$4,327,442 |

Source: Applied Development Economics, Inc.

The City of Imperial will experience roughly \$4.7 million in leakage in services (Table 3-5) by 2020. Similar to the situation right now, the leakage by 2020 is not enough to support new service providers, such as a new cinema, although existing providers such as optometrists could use the information to plan for the future.

**TABLE: 3-5
PROJECTED FUTURE SERVICES DEMAND AND LEAKAGE IN THE CITY OF IMPERIAL**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|--|-----------------------------|--|-------------------------------------|---------------------------------------|-------------------------------------|----------------------|
| Total (Select Svcs Only) | \$17,207,754 | \$9,349,548 | \$7,189,287 | \$684,269 | \$1,475,992 | \$4,691,507 |
| Professional Svcs Group | \$757,071 | \$156,247 | \$132,916 | \$7,735 | \$15,596 | \$0 |
| Legal Services | \$492,595 | \$79,527 | \$75,064 | \$4,462 | \$0 | \$0 |
| Accounting Services | \$264,476 | \$76,720 | \$57,852 | \$3,272 | \$15,596 | \$0 |
| Medical Services Group | \$13,679,408 | \$2,760,241 | \$2,133,972 | \$123,961 | \$502,309 | \$307,503 |
| Physician Services | \$11,771,637 | \$1,289,035 | \$938,940 | \$57,236 | \$292,859 | \$0 |
| Dental Services | \$1,728,988 | \$984,920 | \$775,580 | \$43,409 | \$165,931 | \$0 |
| Eyecare/Other Medical Svcs | \$178,783 | \$486,287 | \$419,451 | \$23,316 | \$43,519 | \$307,503 |
| Personal Services Group | \$1,679,706 | \$1,496,024 | \$1,276,756 | \$73,601 | \$145,667 | \$261,036 |
| Personal Care Services | \$1,585,995 | \$1,141,277 | \$990,066 | \$56,937 | \$94,275 | \$0 |
| Dry Cleaning\Coin Laundry | \$0 | \$50,108 | \$46,968 | \$3,140 | \$0 | \$50,108 |
| Pet Care | \$93,711 | \$304,639 | \$239,723 | \$13,524 | \$51,392 | \$210,928 |
| Select Entertainment and Recreation | \$509,200 | \$1,616,700 | \$1,085,407 | \$336,846 | \$194,447 | \$1,265,402 |
| Recreational\Exercise | \$509,200 | \$351,297 | \$232,448 | \$73,434 | \$45,416 | \$0 |
| Video Rental | \$0 | \$344,929 | \$221,414 | \$63,250 | \$60,265 | \$344,929 |
| Movie\Live Arts | \$0 | \$716,889 | \$490,989 | \$147,551 | \$78,349 | \$716,889 |
| Sporting Events | \$0 | \$203,585 | \$140,556 | \$52,612 | \$10,417 | \$203,585 |
| Mail and Package Delivery | \$0 | \$910,466 | \$688,719 | \$39,845 | \$181,902 | \$910,466 |
| Select Repair Services | \$582,369 | \$2,409,869 | \$1,871,517 | \$102,280 | \$436,072 | \$1,947,099 |
| Auto Repair\Auto Body | \$299,609 | \$2,246,708 | \$1,727,262 | \$93,351 | \$426,094 | \$1,947,099 |
| Appliance \ Electric Repair | \$282,760 | \$163,161 | \$144,255 | \$8,929 | \$9,977 | \$0 |

Source: Applied Development Economics, Inc.

3.3 RETAIL AND SERVICES LEAKAGE ANALYSIS

The current leakage of \$54.3 million supports 156,300 square feet of retail. Of the 156,300 supportable square feet, 45,000 square feet is for Food and Beverage category and 74,700 square feet is for the General Merchandise category (see Table 3-6). It is important to note that the 74,700 general merchandise leakage must be evaluated against the backdrop of a Target and a Wal-Mart Supercenter located next door in El Centro. In addition, there is 23,500 supportable square feet in the Clothing category. Factoring anticipated growth in households between 2011 and 2020, supportable square footage could grow to 202,700 square feet by 2020 from the current 156,300 square feet.

**TABLE: 3-6
DEVELOPMENT POTENTIAL IN THE CITY OF IMPERIAL
FROM CURRENT AND PROJECTED RETAIL LEAKAGE**

| | Area Supported By Current Leakage | Area Supported By Incremental Leakage | Total Supportable Area: Current and Incremental Leakage | |
|---|-----------------------------------|---------------------------------------|---|---------------|
| Total Supportable Area (Excludes Auto Dealers) | 156,292 | 46,392 | 202,684 | sq. ft |
| Clothing | 23,491 | 5,983 | 29,475 | sq. ft |
| General Merchandise | 73,658 | 17,075 | 90,733 | sq. ft |
| Specialty Retail | 0 | 0 | 0 | sq. ft |
| Sporting Goods | 0 | 0 | 0 | sq. ft |
| Health/Personal Care/ Pharmacy | 0 | 0 | 0 | sq. ft |
| Food and Beverage | 44,989 | 11,622 | 56,611 | sq. ft |
| Furniture/Home Furnishings | 3,469 | 2,457 | 5,926 | sq. ft |
| Consumer Electronics | 1,225 | 767 | 1,992 | sq. ft |
| Building Materials | 0 | 0 | 0 | sq. ft |
| Full-Service Eating Places | 9,422 | 3,637 | 13,059 | sq. ft |
| Limited-Service/Fast Food | 0 | 2,191 | 2,191 | sq. ft |
| New/Used Cars/Other Vehicles | 0.0 | 0.1 | 0.1 | standard lot |
| Automotive Parts | 0 | 27 | 27 | sq. ft |
| Gas/Service Stations | 38 | 2,631 | 2,669 | sq. ft |

Source: Applied Development Economics, Inc.

The current leakage in services of \$3.7 million supports 40,600 square feet of space. Of the 40,600 supportable square feet, 2,000 square feet is for eye care/optometry, and another 32,400 for auto repair. There is enough leakage to support only the addition of 1.4 more movie screens, which is not enough to attract a new movie theater, which tend to have at least 10 screens.

**TABLE: 3-7:
DEVELOPMENT POTENTIAL IN THE CITY OF IMPERIAL
FROM CURRENT AND PROJECTED SERVICE LEAKAGE**

| | Square Footage Supported By Current Leakage | Square Footage Supported By Incremental Leakage | Square Footage Supported By Total Leakage (Current and Incremental) |
|--|---|---|---|
| Total (Select Services Only) | 40,625 | 11,502 | 52,127 |
| Professional Services Group | 0 | 0 | 0 |
| Legal Services | 0 | 0 | 0 sq. ft. |
| Accounting Services | 0 | 0 | 0 sq. ft. |
| Medical Services Group | 2,023 | 984 | 3,006 |
| Physician Services | 0 | 0 | 0 sq. ft. |
| Dental Services | 0 | 0 | 0 sq. ft. |
| Eyecare and Other Medical Services | 2,023 | 984 | 3,006 sq. ft. |
| Personal Services Group | 2,538 | 930 | 3,468 |
| Personal Care Services | 0 | 0 | 0 sq. ft. |
| Dry Cleaning\Coin-Op Laundry | 276 | 80 | 357 sq. ft. |
| Pet Care | 2,261 | 850 | 3,111 sq. ft. |
| Select Entertainment and Recreation | 839 | 198 | 1,038 |
| Recreational\Exercise\Memberships | 0 | 0 | 0 sq. ft. |
| Video Rental | 839 | 198 | 1,038 sq. ft. |
| Movie\Live Arts | 1.4 | 0.4 | 1.8 screens |
| Sporting Events | 0 | 0 | 0 sq. ft. |
| Mail and Package Delivery | 2,831 | 629 | 3,460 sq. ft. |
| Select Repair Services | 32,394 | 8,761 | 41,155 |
| Auto Repair\Auto Body Repair | 32,394 | 8,761 | 41,155 sq. ft. |
| Appliance \ Electric Repair | 0 | 0 | 0 sq. ft. |

Source: Applied Development Economics, Inc.

4. CITY OF CALIPATRIA

4.1 DEMOGRAPHIC TRENDS

There are 3,268 consumer units⁷ from which retailers and service businesses providers currently in the City of Calipatria can potentially draw as a source of demand for their respective goods and services. Of the 3,268, 1,479 are households residing within the boundaries of the City of Calipatria. Included in the 3,268, there are 219 households residing in the secondary market surrounding Brawley. There are actually 2,108 households in the secondary market but, based on the gravity model employed for purposes of estimating the percentage of households in the secondary market likely to shop in Calipatria given other shopping areas such as those in El Centro, 219 households (or ten percent) are a likely source of demand for Calipatria retailers, meaning only these households' expenditures should count toward estimating spending available to local shops. Of the 3,268 consumer units, another 1,570 are persons whose primary source of income is obtained from a job they have in the City of Calipatria. The 1,570 employed persons do not include persons residing in Calipatria or in the secondary market surrounding Calipatria, to avoid double-counting these persons and their respective households.

The City of Calipatria is expected to grow by roughly one percent a year between 2011 and 2020, meaning over that time horizon an additional 217 households will be added to the current number of 3,268. For purposes of a conservative analysis, we assume that the households will be distributed in the way that current households are distributed by age and broad ethnicity status. Of the 3,268 households in Calipatria right now, 1,132 are Latino households, with an average household income of \$49,900, and 347 are Not Latino households, with an average income of \$61,100. The average household income for all 3,268 households and persons is \$59,400.

TABLE: 4-1
DEMOGRAPHIC CHARACTERISTICS OF THE CITY OF CALIPATRIA MARKET AREA

| City of Calipatria Market Areas | Current Consumer Units | Average Household Income | Incremental Consumer Units 2011-2020 Based on Brawley's SCAG Growth Rates** |
|---------------------------------|------------------------|--------------------------|---|
| PRIMARY MARKET | | | |
| Latino Households | | | |
| Householder under 25 | 58 | \$35,000 | 8 |
| Householder between 25-34 | 146 | \$42,739 | 22 |
| Householder between 35-64 | 762 | \$55,190 | 113 |
| Householder 65 and over | 166 | \$37,424 | 24 |
| Not Latino Households | | | |
| Householder under 25 | 0 | \$0 | 0 |
| Householder between 25-34 | 19 | \$23,026 | 3 |
| Householder between 35-64 | 202 | \$80,482 | 29 |
| Householder 65 and over | 126 | \$35,912 | 18 |

⁷ Consumer units include households living in the primary and secondary market areas as well as in-commuters who live outside of either market area.

| SECONDARY MARKET | | | |
|--|--------------|-----------------|------------|
| Latino Households | | | |
| Householder under 25 | 6 | 35,000 | |
| Householder between 25-34 | 24 | 41,249 | |
| Householder between 35-64 | 98 | 52,933 | |
| Householder 65 and over | 33 | 29,772 | |
| Not Latino Households | | | |
| Householder under 25 | 1 | 9,999 | |
| Householder between 25-34 | 3 | 36,666 | |
| Householder between 35-64 | 29 | 78,448 | |
| Householder 65 and over | 25 | 29,399 | |
| DAY-TIME WORKERS* | | | |
| Employed Persons | 1,570 | \$67,499 | |
| TOTAL CONSUMER UNITS FROM WHICH CURRENT DEMAND AND INCREMENTAL IS ESTIMATED | 3,268 | \$59,434 | 217 |
| CONSUMER UNITS IN CALIPATRIA ONLY: HOUSEHOLDS | 1,479 | 219 | |

Source: Applied Development Economics, Inc.

* Daytime workers refers to individual persons whose primary source of income is derived from employment in Imperial, and these persons either do not reside in Imperial or the secondary market surrounding Imperial. Also: these workers' income refers to earnings from employment in Imperial, not household income.

** Incremental growth between 2011 and 2020 calculated only for Imperial for purposes of a conservative analysis -- analysis assumes same number of workers from outside of the Imperial market areas and same number of households in secondary market in 2020 as there are in 2011.

The primary market for Calipatria consists of all areas within the boundaries of the city, whereas the secondary market consists of the two census tracts contiguous to and surrounding the Calipatria. These tracts are Census Tract 101.01 and Tract 101.02. The market areas are depicted below in Figure 4-1, with the primary market area as the City of Calipatria and the secondary market area all the areas within the blue boundary line excluding Calipatria.



4.2 RETAIL AND SERVICES LEAKAGE ANALYSIS

The 3,268 consumer units in Calipatria’s primary and secondary markets annually spend \$58.9 million at a variety of types of retail stores (Table 4-2) and another \$8.1 million at a variety of services (Table 4-3). Of the \$58.9 million in retail spending, \$25.9 million comes from households in the City of Calipatria and \$3.5 million from those in the secondary market. Workers in the City of Calipatria are a potential source of demand for \$29.6 million of retail.

In comparison, retailers in the City of Calipatria generate an estimated \$9.9 million in annual sales. Of the \$9.9 million, an estimated \$4.1 million (or 42 percent) come from retailers in the Food and Eating Group. Within the Home Furnishing/Building Materials Group, lumber and building materials generate an estimated \$2.4 million in annual sales, or almost 24 percent of the estimated \$9.9 million in estimated retail sales.

Based on a comparison of estimated sales activity versus potential demand, we estimate a total retail leakage of \$46.2 million. There is an estimated \$8.6 million in leakage in the General Merchandise Group, which is not enough to support a particular national chain retailer such as a Wal-Mart (average annual store sales: \$42 million) but can possibly be of interest to other discount stores, especially smaller-sized stores. There is also approximately \$6.2 million in leakage in supermarket/grocery stores, which again is not enough to attract a national retailer but existing stores in this line of business can use the leakage information to expand operations. There is also ample leakage in the Full-Service restaurant and Limited-Service restaurant categories, enough to attract new business and/or support existing businesses expand operations.

**TABLE: 4-2
RETAIL SUPPLY AND DEMAND IN THE CITY OF CALIPATRIA MARKET AREA**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|---|-----------------------------|--|-------------------------------------|---------------------------------------|-------------------------------------|----------------------|
| Total (Retail Only) | \$9,912,335 | \$58,918,791 | \$25,857,514 | \$3,483,004 | \$29,578,272 | \$46,153,641 |
| Apparel Store Group | \$165,152 | \$3,010,956 | \$1,474,948 | \$195,296 | \$1,340,712 | \$2,845,804 |
| General Merch. Group | \$382,304 | \$10,613,005 | \$4,438,234 | \$602,919 | \$5,571,852 | \$8,554,369 |
| Dept Stores/General Merch. | \$382,304 | \$7,301,396 | \$3,565,394 | \$481,947 | \$3,254,056 | \$6,919,092 |
| Drug & Proprietary Stores | \$0 | \$1,635,276 | \$872,840 | \$120,972 | \$641,464 | \$1,635,276 |
| Specialty Retail Group | \$942,503 | \$2,407,986 | \$1,029,887 | \$138,227 | \$1,239,872 | \$2,316,191 |
| Gifts & Novelties | \$0 | \$205,433 | \$94,998 | \$12,714 | \$97,721 | \$205,433 |
| Sporting Goods | \$0 | \$321,901 | \$144,288 | \$19,071 | \$158,542 | \$321,901 |
| Florists | \$0 | \$51,677 | \$25,432 | \$3,351 | \$22,893 | \$51,677 |
| Photographic Equipment | \$0 | \$31,293 | \$13,686 | \$1,741 | \$15,866 | \$31,293 |
| Records & Music | \$0 | \$181,490 | \$90,069 | \$11,933 | \$79,488 | \$181,490 |
| Books & Stationery | \$0 | \$253,167 | \$122,519 | \$16,253 | \$114,395 | \$253,167 |
| Office Supplies/Computer | \$0 | \$291,443 | \$110,005 | \$14,810 | \$166,628 | \$234,789 |
| Jewelry | \$0 | \$328,835 | \$138,722 | \$18,578 | \$171,535 | \$328,835 |
| Misc. Specialty Retail | \$942,503 | \$1,034,190 | \$400,172 | \$54,586 | \$579,432 | \$707,607 |
| Food, Eating, Drinking Group | \$5,611,794 | \$20,558,210 | \$8,153,212 | \$1,108,122 | \$11,296,876 | \$11,860,416 |
| Grocery Stores | \$4,119,044 | \$12,558,695 | \$5,275,942 | \$728,041 | \$6,554,713 | \$6,211,049 |
| Specialty Food Stores | \$0 | \$373,902 | \$157,907 | \$21,779 | \$194,217 | \$307,869 |
| Liquor Stores | \$1,006,843 | \$302,811 | \$134,543 | \$18,545 | \$149,724 | \$0 |
| Eating Places | \$485,907 | \$7,322,801 | \$2,584,821 | \$339,758 | \$4,398,223 | \$5,341,498 |
| Full-Service Restaurants | \$82,799 | \$2,903,860 | \$1,293,129 | \$168,672 | \$1,442,059 | \$2,821,060 |
| Other Eating Places | \$403,108 | \$2,774,058 | \$1,221,695 | \$161,821 | \$1,390,543 | \$2,370,951 |
| Drinking Places | \$0 | \$149,487 | \$69,997 | \$9,264 | \$70,225 | \$149,487 |
| Bldg Materials & Furnishings Group | \$2,353,495 | \$4,192,330 | \$1,874,783 | \$251,738 | \$2,065,809 | \$2,897,645 |
| Furniture & Furnishings | \$0 | \$1,592,991 | \$516,950 | \$68,433 | \$1,007,609 | \$1,250,404 |
| Hhd Appliance & Electronics | \$0 | \$602,768 | \$284,382 | \$38,298 | \$280,089 | \$602,768 |
| Used Merchandise | \$0 | \$110,421 | \$50,880 | \$6,752 | \$52,788 | \$110,421 |
| Nursery/Garden Supplies | \$0 | \$338,869 | \$171,878 | \$23,003 | \$143,988 | \$338,869 |
| Lumber/Other Bldg Mat'ls | \$2,353,495 | \$952,098 | \$516,353 | \$71,144 | \$364,602 | \$0 |
| Home Centers, Hardware | \$0 | \$497,857 | \$272,656 | \$36,222 | \$188,979 | \$497,857 |
| Paint & Wallpaper | \$0 | \$97,326 | \$61,685 | \$7,886 | \$27,755 | \$97,326 |
| Automotive Group | \$457,087 | \$18,136,303 | \$8,886,451 | \$1,186,702 | \$8,063,151 | \$17,679,216 |
| New Cars & RVs | \$0 | \$8,739,269 | \$4,306,602 | \$568,630 | \$3,864,037 | \$8,739,269 |
| Used Car Dealers | \$0 | \$639,959 | \$315,852 | \$41,626 | \$282,481 | \$639,959 |
| Gasoline Service Stations | \$0 | \$7,826,185 | \$3,839,659 | \$516,804 | \$3,469,722 | \$7,826,185 |
| Mobile Homes & Trailers | \$0 | \$4,866 | \$2,566 | \$352 | \$1,948 | \$4,866 |
| Auto Parts & Accessories | \$457,087 | \$682,402 | \$311,784 | \$44,805 | \$325,813 | \$225,315 |
| Other Vehicles | \$0 | \$243,622 | \$109,988 | \$14,485 | \$119,150 | \$243,622 |

Source: Applied Development Economics, Inc.

The City of Calipatria is experiencing roughly \$2.2 million in leakage in services (Table 4-3). However, close inspection of this figure indicate that the leakage would not support that much new store development. Existing services, particularly auto repair shops, might use the information to expand their operations.

**TABLE: 4-3
SERVICES SUPPLY AND DEMAND IN THE CITY OF CALIPATRIA MARKET AREA**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|--|-----------------------------|---|-------------------------------------|---------------------------------------|-------------------------------------|----------------------|
| Total (Select Svcs Only) | \$4,340,374 | \$7,823,917 | \$4,922,875 | \$307,203 | \$2,593,838 | \$2,200,019 |
| Professional Svcs Group | \$1,319,647 | \$50,071 | \$31,026 | \$4,011 | \$15,033 | \$0 |
| Legal Services | \$1,231,489 | \$22,404 | \$17,176 | \$2,138 | \$3,091 | \$0 |
| Accounting Services | \$88,159 | \$27,666 | \$13,850 | \$1,874 | \$11,942 | \$0 |
| Medical Services Group | \$2,282,364 | \$1,004,402 | \$480,708 | \$69,191 | \$454,504 | \$196,093 |
| Physician Services | \$1,706,034 | \$478,215 | \$243,177 | \$36,984 | \$198,054 | \$0 |
| Dental Services | \$576,329 | \$330,094 | \$170,302 | \$23,030 | \$136,762 | \$0 |
| Eyecare/Other Medical Svcs | \$0 | \$196,093 | \$67,229 | \$9,177 | \$119,688 | \$196,093 |
| Personal Services Group | \$297,374 | \$549,075 | \$217,996 | \$101,393 | \$229,686 | \$251,701 |
| Personal Care Services | \$297,374 | \$428,491 | \$164,750 | \$74,928 | \$188,812 | \$131,116 |
| Dry Cleaning\Coin Laundry | \$0 | \$25,175 | \$14,965 | \$10,211 | \$0 | \$25,175 |
| Pet Care | \$0 | \$95,409 | \$38,281 | \$16,255 | \$40,874 | \$95,409 |
| Select Entertainment and Recreation | \$0 | \$1,985,034 | \$1,431,469 | \$40,600 | \$512,966 | \$600,114 |
| Recreational\Exercise | \$0 | \$421,968 | \$303,688 | \$8,725 | \$109,556 | \$139,871 |
| Video Rental | \$0 | \$380,120 | \$272,187 | \$6,688 | \$101,245 | \$120,442 |
| Movie\Live Arts | \$0 | \$1,007,345 | \$694,639 | \$18,909 | \$293,797 | \$305,854 |
| Sporting Events | \$0 | \$175,600 | \$160,954 | \$6,278 | \$8,368 | \$33,947 |
| Mail and Package Delivery | \$0 | \$1,016,870 | \$776,123 | \$29,210 | \$211,536 | \$366,443 |
| Select Repair Services | \$440,989 | \$3,218,465 | \$1,985,554 | \$62,797 | \$1,170,114 | \$785,668 |
| Auto Repair\Auto Body | \$299,609 | \$2,952,207 | \$1,768,268 | \$54,266 | \$1,129,673 | \$785,668 |
| Appliance \ Electric Repair | \$141,380 | \$266,258 | \$217,286 | \$8,531 | \$40,440 | \$0 |

Source: Applied Development Economics, Inc.

The anticipated increase of 217 households in Calipatria between 2011 and 2020 will increase consumer demand only somewhat and, holding constant retail and services sales, will increase the amount of leakage for store types experiencing leakage right now. By 2020, overall retail leakage will grow to \$49.8 million from \$46.2 million in leakage right now (see Table 4-4).

**TABLE: 4-4
PROJECTED FUTURE RETAIL DEMAND AND LEAKAGE IN THE CITY OF CALIPATRIA**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|--|--------------------------------|---|--|--|---|-------------------------|
| Total (Retail Only) | \$9,912,335 | \$56,896,046 | \$29,715,942 | \$3,497,814 | \$23,682,289 | \$49,798,518 |
| Apparel Store Group | \$165,152 | \$3,224,921 | \$1,688,912 | \$195,296 | \$1,340,712 | \$3,059,768 |
| General Merch. Group | \$382,304 | \$9,579,366 | \$5,080,927 | \$602,919 | \$3,895,520 | \$9,197,062 |
| Dept Stores/General Merch. | \$382,304 | \$7,817,854 | \$4,081,852 | \$481,947 | \$3,254,056 | \$7,435,550 |
| Drug & Proprietary Stores | \$0 | \$1,761,512 | \$999,075 | \$120,972 | \$641,464 | \$1,761,512 |
| Specialty Retail Group | \$942,503 | \$2,610,241 | \$1,304,365 | \$153,038 | \$1,152,839 | \$2,471,782 |
| Gifts & Novelties | \$0 | \$219,111 | \$108,675 | \$12,714 | \$97,721 | \$219,111 |
| Sporting Goods | \$0 | \$342,814 | \$165,202 | \$19,071 | \$158,542 | \$342,814 |
| Florists | \$0 | \$55,313 | \$29,068 | \$3,351 | \$22,893 | \$55,313 |
| Photographic Equip. | \$0 | \$33,284 | \$15,677 | \$1,741 | \$15,866 | \$33,284 |
| Records & Music | \$0 | \$194,532 | \$103,112 | \$11,933 | \$79,488 | \$194,532 |
| Books & Stationery | \$0 | \$270,720 | \$140,072 | \$16,253 | \$114,395 | \$270,720 |
| Office Supplies/Computer | \$0 | \$250,521 | \$125,736 | \$14,810 | \$109,974 | \$250,521 |
| Jewelry | \$0 | \$349,043 | \$158,930 | \$18,578 | \$171,535 | \$349,043 |
| Misc. Specialty Retail | \$942,503 | \$894,904 | \$457,892 | \$54,586 | \$382,425 | \$756,445 |
| Food, Eating, Drinking Group | \$5,611,794 | \$17,951,107 | \$9,336,140 | \$1,108,122 | \$7,506,845 | \$13,023,794 |
| Grocery Stores | \$4,119,044 | \$11,097,067 | \$6,042,916 | \$728,041 | \$4,326,111 | \$6,978,024 |
| Specialty Food Stores | \$0 | \$330,847 | \$180,885 | \$21,779 | \$128,183 | \$330,847 |
| Liquor Stores | \$1,006,843 | \$322,362 | \$154,093 | \$18,545 | \$149,724 | \$0 |
| Eating Places | \$485,907 | \$6,200,830 | \$2,958,246 | \$339,758 | \$2,902,827 | \$5,714,923 |
| Full-Service Restaurants | \$82,799 | \$3,090,785 | \$1,480,054 | \$168,672 | \$1,442,059 | \$3,007,986 |
| Other Eating Places | \$403,108 | \$2,950,488 | \$1,398,124 | \$161,821 | \$1,390,543 | \$2,547,380 |
| Drinking Places | \$0 | \$159,557 | \$80,068 | \$9,264 | \$70,225 | \$159,557 |
| Building Materials & Home Furnishings Grp | \$2,353,495 | \$4,120,503 | \$2,145,543 | \$251,738 | \$1,723,222 | \$3,093,291 |
| Furniture & Furnishings | \$0 | \$1,324,554 | \$591,100 | \$68,433 | \$665,022 | \$1,324,554 |
| Hhd Appliance & Electronics | \$0 | \$643,874 | \$325,488 | \$38,298 | \$280,089 | \$643,874 |
| Used Merchandise | \$0 | \$117,763 | \$58,223 | \$6,752 | \$52,788 | \$117,763 |
| Nursery/Garden Supply | \$0 | \$363,572 | \$196,581 | \$23,003 | \$143,988 | \$363,572 |
| Lumber/Other Bldg Mat'ls | \$2,353,495 | \$1,027,212 | \$591,466 | \$71,144 | \$364,602 | \$0 |
| Home Centers, Hardware | \$0 | \$537,283 | \$312,083 | \$36,222 | \$188,979 | \$537,283 |
| Paint & Wallpaper | \$0 | \$106,244 | \$70,603 | \$7,886 | \$27,755 | \$106,244 |
| Automotive Group | \$457,087 | \$19,409,908 | \$10,160,055 | \$1,186,702 | \$8,063,151 | \$18,952,821 |
| New Cars & RVs | \$0 | \$9,354,409 | \$4,921,741 | \$568,630 | \$3,864,037 | \$9,354,409 |
| Used Car Dealers | \$0 | \$685,059 | \$360,952 | \$41,626 | \$282,481 | \$685,059 |
| Gasoline Svce Station | \$0 | \$8,378,052 | \$4,391,527 | \$516,804 | \$3,469,722 | \$8,378,052 |
| Mobile Home & Trailers | \$0 | \$5,238 | \$2,938 | \$352 | \$1,948 | \$5,238 |
| Auto Part & Accessories | \$457,087 | \$727,726 | \$357,108 | \$44,805 | \$325,813 | \$270,639 |
| Other Vehicles | \$0 | \$259,424 | \$125,789 | \$14,485 | \$119,150 | \$259,424 |

Source: Applied Development Economics, Inc.

The City of Calipatria will experience roughly \$2.4 million in leakage in services (Table 4-5) by 2020. Similar to the situation right now, the leakage by 2020 is not enough to support new service providers, such as a new cinema, although existing providers such as optometrists could use the information to plan for the future.

**TABLE: 4-5
PROJECTED FUTURE SERVICES DEMAND AND LEAKAGE IN THE CITY OF CALIPATRIA**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|--|-----------------------------|---|-------------------------------------|---------------------------------------|-------------------------------------|----------------------|
| Total (Select Svcs Only) | \$4,340,374 | \$3,969,397 | \$1,817,447 | \$289,226 | \$1,862,724 | \$2,366,791 |
| Professional Svcs Group | \$1,319,647 | \$54,522 | \$35,478 | \$4,011 | \$15,033 | \$0 |
| Legal Services | \$1,231,489 | \$24,817 | \$19,588 | \$2,138 | \$3,091 | \$0 |
| Accounting Services | \$88,159 | \$29,706 | \$15,890 | \$1,874 | \$11,942 | \$0 |
| Medical Services Group | \$2,282,364 | \$1,073,679 | \$549,985 | \$69,191 | \$454,504 | \$205,593 |
| Physician Services | \$1,706,034 | \$513,452 | \$278,414 | \$36,984 | \$198,054 | \$0 |
| Dental Services | \$576,329 | \$354,634 | \$194,842 | \$23,030 | \$136,762 | \$0 |
| Eyecare/Other Medical Svcs | \$0 | \$205,593 | \$76,729 | \$9,177 | \$119,688 | \$205,593 |
| Personal Services Group | \$297,374 | \$590,657 | \$259,578 | \$101,393 | \$229,686 | \$293,283 |
| Personal Care Services | \$297,374 | \$459,788 | \$196,047 | \$74,928 | \$188,812 | \$162,414 |
| Dry Cleaning\Coin Laundry | \$0 | \$28,376 | \$18,165 | \$10,211 | \$0 | \$28,376 |
| Pet Care | \$0 | \$102,494 | \$45,365 | \$16,255 | \$40,874 | \$102,494 |
| Select Entertainment and Recreation | \$0 | \$641,114 | \$323,969 | \$36,639 | \$280,507 | \$641,114 |
| Recreational\Exercise | \$0 | \$148,574 | \$68,880 | \$7,622 | \$72,072 | \$148,574 |
| Video Rental | \$0 | \$128,361 | \$62,691 | \$7,014 | \$58,656 | \$128,361 |
| Movie\Live Arts | \$0 | \$326,745 | \$163,661 | \$18,781 | \$144,303 | \$326,745 |
| Sporting Events | \$0 | \$37,434 | \$28,736 | \$3,222 | \$5,476 | \$37,434 |
| Mail and Package Delivery | \$0 | \$390,087 | \$187,163 | \$22,693 | \$180,231 | \$390,087 |
| Select Repair Services | \$440,989 | \$1,219,337 | \$461,275 | \$55,299 | \$702,764 | \$836,714 |
| Auto Repair\Auto Body | \$299,609 | \$1,136,322 | \$403,759 | \$47,671 | \$684,893 | \$836,714 |
| Appliance \ Electric Repair | \$141,380 | \$83,015 | \$57,516 | \$7,628 | \$17,871 | \$0 |

Source: Applied Development Economics, Inc.

4.3 RETAIL AND SERVICES LEAKAGE ANALYSIS

The current leakage of \$46.2 million supports 84,200 square feet of retail and services. There appears to be enough leakage to create a program, perhaps locally-owned businesses covering small footprints. Of the 84,200 supportable square feet, 21,000 square feet is for general merchandise, 11,200 square feet is for apparel, and 8,400 square feet for specialty retail. Included in the 84,000 square feet is enough space for new full- (6,300 sq. ft.) or limited-service (6,900 square feet) restaurants. The existing supermarket can possibly use the 12,800 leakage-supported square footage to expand operations.

**TABLE: 4-6
DEVELOPMENT POTENTIAL IN THE CITY OF CALIPATRIA FROM
CURRENT AND PROJECTED RETAIL LEAKAGE**

| | Current Leakage | Increment | Total Supportable: Current and Incremental Growth |
|--|----------------------------|------------------|--|
| Total Supportable Retail in Sq. Ft. (excluding auto lot) | 84,177 | 4,263 | 88,440 |
| Apparel Store Group | 11,173 | 777 | 11,950 |
| General Merchandise Group | 21,007 | 1,462 | 22,469 |
| Department Stores/Other General Merch. | 17,663 | 1,204 | 18,867 |
| Drug & Proprietary Stores | 3,344 | 258 | 3,602 |
| Specialty Retail Group | 8,371 | 565 | 8,936 |
| Gifts & Novelties | 1,090 | 73 | 1,163 |
| Sporting Goods | 1,136 | 74 | 1,210 |
| Florists | 155 | 11 | 166 |
| Photographic Equipment | 74 | 5 | 79 |
| Records & Music | 682 | 49 | 731 |
| Books & Stationery | 1,792 | 124 | 1,916 |
| Office Supplies/Computer Equipment | 719 | 48 | 767 |
| Jewelry | 544 | 33 | 578 |
| Misc. Specialty Retail | 2,177 | 148 | 2,325 |
| Food, Eating and Drinking Group | 27,066 | 389 | 423 |
| Grocery Stores | 12,778 | 74 | 12,852 |
| Specialty Food Stores | 817 | 61 | 878 |
| Liquor Stores | 0 | 0 | 0 |
| Eating Places | 13,470 | 254 | 13,724 |
| Full-Service Restaurants | 6,286 | 232 | 6,518 |
| Other Eating Places | 6,863 | 0 | 6,863 |
| Drinking Places | 322 | 22 | 344 |
| Building Materials And Home Furnishings Group | 10,675 | 730 | 11,405 |
| Furniture & Home Furnishings | 4,400 | 261 | 4,661 |
| Household Appliances & Electronics | 1,413 | 96 | 1,509 |
| Used Merchandise | 656 | 44 | 700 |
| Nurseries & Garden Supply Stores | 1,526 | 111 | 1,637 |
| Lumber & Other Building Materials | 0 | 0 | 0 |
| Home Centers and Hardware Stores | 2,241 | 178 | 2,419 |
| Paint & Wallpaper | 438 | 40 | 478 |
| Automotive Group (excluding new/used auto) | 5,885 | 340 | 6,226 |
| New Cars & RVs (auto lot) | 0.2 | 0.0 | 0.2 |
| Used Car Dealers (auto lot) | 0.0 | 0.0 | 0.0 |
| Gasoline Service Stations | 4,828 | 340 | 5,168 |
| Mobile Homes & Trailers | 0 | 0 | 0 |
| Auto Parts & Accessories | 1,057 | 0 | 1,057 |
| Other Vehicles | 0 | 0 | 0 |

Source: Applied Development Economics, Inc.

There is enough leakage right now to support up to 27,000 square feet in services. Of this amount, 16,600 square feet is available to entrepreneurs in auto repair, and another 4,400 square feet for personal care entrepreneurs.

| TABLE: 4-7: DEVELOPMENT POTENTIAL IN THE CITY OF CALIPATRIA FROM CURRENT AND PROJECTED RETAIL LEAKAGE | | | |
|--|--|--|--|
| | Square Footage Supported By Current Leakage | Square Footage Supported By Incremental Leakage | Square Footage Supported By Total Leakage (Current and Incremental) |
| Total (Select Services Only) | 26,934 | 2,224 | 29,157 |
| Professional Services Group | 0 | 0 | 0 |
| Legal Services | 0 | 0 | 0 sq. ft. |
| Accounting Services | 0 | 0 | 0 sq. ft. |
| Medical Services Group | 1,917 | 93 | 2,010 |
| Physician Services | 0 | 0 | 0 sq. ft. |
| Dental Services | 0 | 0 | 0 sq. ft. |
| Eyecare and Other Medical Services | 1,917 | 93 | 2,010 sq. ft. |
| Personal Services Group | 4,393 | 797 | 5,191 |
| Personal Care Services | 2,807 | 670 | 3,477 sq. ft. |
| Dry Cleaning\Coin-Op Laundry | 179 | 23 | 202 sq. ft. |
| Pet Care | 1,407 | 104 | 1,512 sq. ft. |
| Select Entertainment and | 2,624 | 165 | 2,789 |
| Recreational\Exercise\Memberships | 2,262 | 141 | 2,403 sq. ft. |
| Video Rental | 362 | 24 | 386 sq. ft. |
| Movie\Live Arts | 0.8 | 0.1 | 0.8 movie screens |
| Sporting Events | 0 | 0 | 0 sq. ft. |
| Mail and Package Delivery | 1,392 | 90 | 1,482 sq. ft. |
| Select Repair Services | 16,606 | 1,079 | 17,685 |
| Auto Repair\Auto Body Repair | 16,606 | 1,079 | 17,685 sq. ft. |
| Appliance\Electric Repair | 0 | 0 | 0 sq. ft. |

Source: Applied Development Economics, Inc.

5. CITY OF WESTMORLAND

5.1 DEMOGRAPHIC TRENDS

There are 886 consumer units⁸ from which retailers and service businesses currently in the City of Westmorland can potentially draw as a source of demand for their respective goods and services. Of the 886, 593 are households residing within the boundaries of the City of Westmorland. Included in the 886 are 43 households residing in the secondary market surrounding Westmorland. There are actually 760 households in the secondary market but, based on the gravity model employed for purposes of estimating the percentage of households in the secondary market likely to shop in Westmorland given other shopping areas such as those in El Centro, 43 households (or six percent) are a likely source of demand for Westmorland retailers, meaning only these households' expenditures should count toward estimating spending available to local shops. Of the 886 consumer units, 250 are persons whose primary source of income is obtained from a job they have in Westmorland. The 250 employed persons do not include persons residing in Westmorland or in the secondary market surrounding Westmorland, to avoid double-counting these persons and their respective households.

The City of Westmorland is expected to grow by roughly one percent a year between 2011 and 2020, meaning over that time horizon an additional 205 households will be added to the current number of 3,268. For purposes of a conservative analysis, we assume that the households will be distributed in the way that current households are distributed by age and broad ethnicity status. Of the 593 households in Westmorland right now, 481 are Latino households, with an average household income of \$34,500, and 112 are Not Latino households, with an average income of \$42,800. The average household income for all 886 households and persons is \$33,900.

TABLE: 5-1
DEMOGRAPHIC CHARACTERISTICS OF THE CITY OF WESTMORLAND MARKET AREA

| City of Westmorland Market Areas | Current Consumer Units | Average Household Income | Incremental Consumer Units 2011-2020 Based on Brawley's SCAG Growth Rates** |
|----------------------------------|------------------------|--------------------------|---|
| PRIMARY MARKET | | | |
| Latino Households | | | |
| Householder under 25 | 12 | 26,249 | 4 |
| Householder between 25-34 | 90 | 42,444 | 29 |
| Householder between 35-64 | 252 | 40,743 | 88 |
| Householder 65 and over | 127 | 17,421 | 44 |
| Not Latino Households | | | |
| Householder under 25 | 0 | 0 | 0 |
| Householder between 25-34 | 4 | 37,500 | 1 |
| Householder between 35-64 | 46 | 39,456 | 17 |
| Householder 65 and over | 62 | 45,645 | 22 |

⁸ Consumer units include households living in the primary and secondary market areas as well as in-commuters who live outside of either market area.

| TABLE: 5-1 DEMOGRAPHIC CHARACTERISTICS OF THE CITY OF WESTMORLAND MARKET AREA | | | |
|--|------------------------|--------------------------|---|
| City of Westmorland Market Areas | Current Consumer Units | Average Household Income | Incremental Consumer Units 2011-2020 Based on Brawley's SCAG Growth Rates** |
| SECONDARY MARKET | | | |
| Latino Households | | | |
| Householder under 25 | 1 | 12,500 | |
| Householder between 25-34 | 4 | 38,749 | |
| Householder between 35-64 | 20 | 47,874 | |
| Householder 65 and over | 7 | 16,428 | |
| Not Latino Households | | | |
| Householder under 25 | 0 | 0 | |
| Householder between 25-34 | 0 | 0 | |
| Householder between 35-64 | 7 | 51,785 | |
| Householder 65 and over | 4 | 49,999 | |
| DAY-TIME WORKERS* | | | |
| Employed Persons | 250 | \$27,500 | |
| TOTAL CONSUMER UNITS FROM WHICH CURRENT AND INCREMENTAL DEMAND IS ESTIMATED | 886 | \$33,958 | 205 |
| CONSUMER UNITS IN WESTMORLAND ONLY: HOUSEHOLDS | 593 | | |

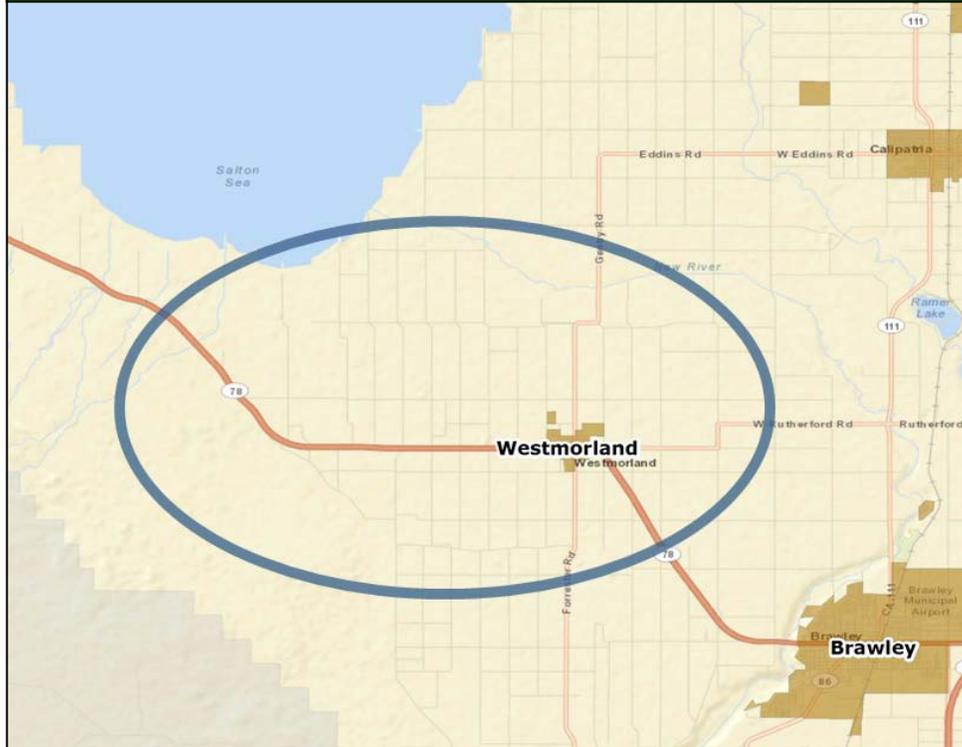
Source: Applied Development Economics, Inc.

* Daytime workers refers to individual persons whose primary source of income is derived from employment in Imperial, and these persons either do not reside in Imperial or the secondary market surrounding Imperial. Also: these workers' income refers to earnings from employment in Imperial, not household income.

** Incremental growth between 2011 and 2020 calculated only for Imperial for purposes of a conservative analysis -- analysis assumes same number of workers from outside of the Imperial market areas and same number of households in secondary market in 2020 as there are in 2011.

The primary market for Westmorland consists of all areas within the boundaries of the city, whereas the secondary market consists of the census tracts contiguous to and surrounding the Westmorland. This tract is Census Tract 110. The market areas are depicted below in Figure 5-1, with the primary market area as the City of Westmorland and the secondary market area all the areas within the blue boundary line excluding Westmorland.

FIGURE 5-1:
CITY OF WESTMORLAND MARKET AREAS: PRIMARY MARKET AREA (CITY OF WESTMORLAND) AND SECONDARY MARKET AREA (AREA WITHIN BLUE BOUNDARY, EXCLUDING WESTMORLAND)



5.2 RETAIL AND SERVICES LEAKAGE ANALYSIS

The 886 consumer units in Westmorland's primary and secondary markets annually spend \$12.8 million at a variety of types of retail stores (Table 2-2), and another \$6.6 million at a variety of services (Table 2-3). Of the \$12.8 million in retail spending, \$8.6 million comes from households in the City of Westmorland and \$606,000 from those in the secondary market. Workers in the City of Westmorland are a potential source of demand for \$3.5 million of retail.

In comparison, retailers in the City of Westmorland generate an estimated \$29.7 million in annual sales. Of the \$29.7 million, an estimated \$17.0 million come from gas stations. Another \$8.9 million is generated by retailers in the Food and Eating Group. Westmorland has very limited types of retail and services operating in the City.

Based on a comparison of estimated sales activity versus potential demand, we estimate a total retail leakage of \$6.9 million. There is an estimated \$2.1 million in leakage in the General Merchandise Group, which is not enough to support a particular national chain retailer such as a Wal-Mart but can possibly be of interest to other discount stores, especially smaller-sized stores.

**TABLE: 5-2
RETAIL SUPPLY AND DEMAND IN THE CITY OF WESTMORLAND MARKET AREA**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|---|--|--|--|--|--|---------------------------------|
| Total (Retail Only) | \$29,722,820 | \$12,758,716 | \$8,620,627 | \$606,522 | \$3,531,566 | \$6,899,481 |
| Apparel Store Group | \$0 | \$680,854 | \$470,676 | \$33,903 | \$176,275 | \$680,854 |
| General Merch. Group | \$0 | \$2,347,661 | \$1,533,550 | \$107,222 | \$706,889 | \$2,139,928 |
| Dept Stores/General Merch. | \$0 | \$1,718,143 | \$1,218,492 | \$85,430 | \$414,221 | \$1,718,143 |
| Drug & Proprietary Stores | \$0 | \$421,785 | \$315,058 | \$21,791 | \$84,935 | \$421,785 |
| Specialty Retail Group | \$0 | \$501,586 | \$338,848 | \$23,952 | \$138,785 | \$523,788 |
| Gifts & Novelties | \$0 | \$43,264 | \$31,521 | \$2,205 | \$9,537 | \$43,264 |
| Sporting Goods | \$0 | \$67,592 | \$48,179 | \$3,458 | \$15,955 | \$67,592 |
| Florists | \$0 | \$10,301 | \$8,343 | \$546 | \$1,412 | \$10,301 |
| Photographic Equipment | \$0 | \$5,036 | \$3,834 | \$231 | \$971 | \$5,036 |
| Records & Music | \$0 | \$38,570 | \$27,100 | \$2,178 | \$9,292 | \$38,570 |
| Books & Stationery | \$0 | \$59,212 | \$37,516 | \$2,569 | \$19,127 | \$59,212 |
| Office Supplies/Computer | \$0 | \$51,293 | \$35,773 | \$2,456 | \$13,063 | \$46,930 |
| Jewelry | \$0 | \$53,386 | \$41,970 | \$2,959 | \$8,458 | \$53,386 |
| Misc. Specialty Retail | \$0 | \$224,225 | \$140,384 | \$9,807 | \$74,034 | \$199,497 |
| Food, Eating, Drinking | \$8,450,747 | \$4,484,353 | \$2,836,084 | \$198,763 | \$1,449,506 | \$1,011,100 |
| Grocery Stores | \$2,929,063 | \$3,028,923 | \$1,920,574 | \$134,579 | \$973,770 | \$683,059 |
| Specialty Food Stores | \$3,929,021 | \$91,500 | \$57,400 | \$4,045 | \$30,055 | \$56,366 |
| Liquor Stores | \$575,339 | \$69,899 | \$50,019 | \$3,447 | \$16,434 | \$0 |
| Eating Places | \$1,017,323 | \$1,294,031 | \$808,091 | \$56,693 | \$429,247 | \$271,676 |
| Full-Service Restaurants | \$620,996 | \$535,957 | \$389,587 | \$27,840 | \$118,531 | \$0 |
| Other Eating Places | \$313,528 | \$585,204 | \$396,856 | \$27,301 | \$161,047 | \$271,676 |
| Drinking Places | \$82,799 | \$29,502 | \$21,649 | \$1,552 | \$6,301 | \$0 |
| Bldg Materials & Furn. Group | \$313,799 | \$850,826 | \$629,869 | \$46,583 | \$174,374 | \$591,694 |
| Furniture & Furnishings | \$0 | \$243,862 | \$168,485 | \$12,842 | \$62,536 | \$222,975 |
| Hhd Appliance & Electronics | \$0 | \$135,571 | \$96,922 | \$7,214 | \$31,435 | \$135,571 |
| Used Merchandise | \$0 | \$22,980 | \$16,356 | \$1,171 | \$5,453 | \$22,980 |
| Nursery/Garden Supplies | \$0 | \$74,040 | \$58,853 | \$3,919 | \$11,268 | \$74,040 |
| Lumber/Other Bldg Mat'ls | \$313,799 | \$238,245 | \$185,778 | \$13,797 | \$38,669 | \$0 |
| Home Centers, Hardware | \$0 | \$112,348 | \$86,620 | \$6,403 | \$19,324 | \$112,348 |
| Paint & Wallpaper | \$0 | \$23,780 | \$16,854 | \$1,237 | \$5,689 | \$23,780 |
| Automotive Group | \$20,958,274 | \$3,893,437 | \$2,811,600 | \$196,099 | \$885,737 | \$1,952,116 |
| New Cars & RVs | \$0 | \$1,773,726 | \$1,301,546 | \$90,468 | \$381,712 | \$1,773,726 |
| Used Car Dealers | \$0 | \$129,418 | \$95,103 | \$6,622 | \$27,693 | \$129,418 |
| Gasoline Service Stations | \$17,073,036 | \$1,780,182 | \$1,267,962 | \$89,240 | \$422,979 | \$0 |
| Mobile Homes & Trailers | \$0 | \$1,207 | \$918 | \$65 | \$225 | \$1,207 |
| Auto Parts & Accessories | \$3,885,238 | \$161,139 | \$110,808 | \$7,222 | \$43,109 | \$0 |
| Other Vehicles | \$0 | \$47,766 | \$35,264 | \$2,482 | \$10,020 | \$47,766 |

Source: Applied Development Economics, Inc.

The City of Westmorland is experiencing roughly \$690,000 million in leakage in services (Table 5-3). However, close inspection of this figure indicate that figure does not support that much new store development. Existing services, particularly auto repair shops, might use the information to expand their operations.

**TABLE: 5-3
SERVICES SUPPLY AND DEMAND IN THE CITY OF WESTMORLAND MARKET AREA**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|--|-----------------------------|--|-------------------------------------|---------------------------------------|-------------------------------------|----------------------|
| Total (Select Svcs Only) | \$308,555 | \$6,555,747 | \$4,486,333 | \$152,664 | \$1,916,750 | \$689,277 |
| Professional Svcs Group | \$308,555 | \$11,361 | \$9,095 | \$1,009 | \$1,257 | \$4,786 |
| Legal Services | \$0 | \$4,786 | \$4,140 | \$645 | \$0 | \$4,786 |
| Accounting Services | \$308,555 | \$6,575 | \$4,954 | \$364 | \$1,257 | \$0 |
| Medical Services Group | \$0 | \$231,413 | \$201,651 | \$12,831 | \$16,931 | \$231,413 |
| Physician Services | \$0 | \$126,662 | \$114,473 | \$7,028 | \$5,162 | \$126,662 |
| Dental Services | \$0 | \$71,836 | \$58,011 | \$3,684 | \$10,141 | \$71,836 |
| Eyecare/Other Medical Svcs | \$0 | \$32,915 | \$29,168 | \$2,119 | \$1,628 | \$32,915 |
| Personal Services Group | \$0 | \$92,604 | \$82,441 | \$6,216 | \$3,947 | \$92,604 |
| Personal Care Services | \$0 | \$61,697 | \$53,605 | \$4,189 | \$3,903 | \$61,697 |
| Dry Cleaning\Coin Laundry | \$0 | \$12,466 | \$11,802 | \$664 | \$0 | \$12,466 |
| Pet Care | \$0 | \$18,441 | \$17,034 | \$1,364 | \$44 | \$18,441 |
| Select Entertainment and Recreation | \$0 | \$1,985,034 | \$1,431,469 | \$40,600 | \$512,966 | \$110,322 |
| Recreational\Exercise | \$0 | \$421,968 | \$303,688 | \$8,725 | \$109,556 | \$22,808 |
| Video Rental | \$0 | \$380,120 | \$272,187 | \$6,688 | \$101,245 | \$20,033 |
| Movie\Live Arts | \$0 | \$1,007,345 | \$694,639 | \$18,909 | \$293,797 | \$61,675 |
| Sporting Events | \$0 | \$175,600 | \$160,954 | \$6,278 | \$8,368 | \$5,806 |
| Mail and Package Delivery | \$0 | \$1,016,870 | \$776,123 | \$29,210 | \$211,536 | \$65,065 |
| Select Repair Services | \$0 | \$3,218,465 | \$1,985,554 | \$62,797 | \$1,170,114 | \$185,087 |
| Auto Repair\Auto Body | \$0 | \$2,952,207 | \$1,768,268 | \$54,266 | \$1,129,673 | \$165,564 |
| Appliance \ Electric Repair | \$0 | \$266,258 | \$217,286 | \$8,531 | \$40,440 | \$19,523 |

Source: Applied Development Economics, Inc.

The anticipated increase of 217 households in Westmorland between 2011 and 2020 will increase consumer demand only somewhat and, holding constant retail and services sales, will increase the amount of leakage for store types experiencing leakage right now. By 2020, overall retail leakage will grow to \$9.7 million from \$6.9 million in leakage right now (see Table 5-4).

**TABLE: 5-4
PROJECTED FUTURE RETAIL DEMAND AND LEAKAGE IN THE CITY OF WESTMORLAND**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|--|--------------------------------|---|--|--|--|-------------------------|
| Total (Retail Only) | \$29,722,820 | \$15,705,889 | \$12,288,638 | \$608,978 | \$2,808,273 | \$9,734,297 |
| Apparel Store Group | \$0 | \$887,512 | \$677,334 | \$33,903 | \$176,275 | \$887,512 |
| General Merch. Group | \$0 | \$2,762,888 | \$2,156,510 | \$107,222 | \$499,156 | \$2,762,888 |
| Dept Stores/General Merch. | \$0 | \$2,218,121 | \$1,718,470 | \$85,430 | \$414,221 | \$2,218,121 |
| Drug & Proprietary Stores | \$0 | \$544,767 | \$438,041 | \$21,791 | \$84,935 | \$544,767 |
| Specialty Retail Group | \$0 | \$683,757 | \$534,590 | \$26,408 | \$122,758 | \$683,757 |
| Gifts & Novelties | \$0 | \$56,527 | \$44,784 | \$2,205 | \$9,537 | \$56,527 |
| Sporting Goods | \$0 | \$88,042 | \$68,629 | \$3,458 | \$15,955 | \$88,042 |
| Florists | \$0 | \$13,899 | \$11,941 | \$546 | \$1,412 | \$13,899 |
| Photographic Equipment | \$0 | \$7,008 | \$5,807 | \$231 | \$971 | \$7,008 |
| Records & Music | \$0 | \$51,246 | \$39,777 | \$2,178 | \$9,292 | \$51,246 |
| Books & Stationery | \$0 | \$76,315 | \$54,619 | \$2,569 | \$19,127 | \$76,315 |
| Office Supplies/Computer | \$0 | \$61,846 | \$50,690 | \$2,456 | \$8,700 | \$61,846 |
| Jewelry | \$0 | \$73,215 | \$61,798 | \$2,959 | \$8,458 | \$73,215 |
| Misc. Specialty Retail | \$0 | \$255,657 | \$196,544 | \$9,807 | \$49,307 | \$255,657 |
| Food, Eating, Drinking Group | \$8,450,747 | \$5,148,271 | \$3,978,648 | \$198,763 | \$970,860 | \$2,006,160 |
| Grocery Stores | \$2,929,063 | \$3,447,381 | \$2,664,271 | \$134,579 | \$648,531 | \$1,399,616 |
| Specialty Food Stores | \$3,929,021 | \$103,715 | \$79,654 | \$4,045 | \$20,017 | \$71,752 |
| Liquor Stores | \$575,339 | \$88,803 | \$68,923 | \$3,447 | \$16,434 | \$0 |
| Eating Places | \$1,017,323 | \$1,508,371 | \$1,165,800 | \$56,693 | \$285,878 | \$534,793 |
| Full-Service Restaurants | \$620,996 | \$714,842 | \$568,471 | \$27,840 | \$118,531 | \$93,846 |
| Other Eating Places | \$313,528 | \$754,475 | \$566,128 | \$27,301 | \$161,047 | \$440,947 |
| Drinking Places | \$82,799 | \$39,054 | \$31,201 | \$1,552 | \$6,301 | \$0 |
| Building Materials And Home Furnishings Group | \$313,799 | \$1,093,633 | \$893,562 | \$46,583 | \$153,487 | \$782,238 |
| Furniture & Furnishings | \$0 | \$295,153 | \$240,662 | \$12,842 | \$41,649 | \$295,153 |
| Hhd Appliance & Electronics | \$0 | \$175,065 | \$136,416 | \$7,214 | \$31,435 | \$175,065 |
| Used Merchandise | \$0 | \$30,092 | \$23,468 | \$1,171 | \$5,453 | \$30,092 |
| Nursery/Garden Supplies | \$0 | \$98,393 | \$83,206 | \$3,919 | \$11,268 | \$98,393 |
| Lumber/Other Bldg Mat'ls | \$313,799 | \$311,394 | \$258,928 | \$13,797 | \$38,669 | \$0 |
| Home Centers, Hardware | \$0 | \$150,920 | \$125,193 | \$6,403 | \$19,324 | \$150,920 |
| Paint & Wallpaper | \$0 | \$32,615 | \$25,689 | \$1,237 | \$5,689 | \$32,615 |
| Automotive Group | \$20,958,274 | \$5,129,829 | \$4,047,993 | \$196,099 | \$885,737 | \$2,611,741 |
| New Cars & RVs | \$0 | \$2,373,506 | \$1,901,326 | \$90,468 | \$381,712 | \$2,373,506 |
| Used Car Dealers | \$0 | \$173,383 | \$139,068 | \$6,622 | \$27,693 | \$173,383 |
| Gasoline Service Stations | \$17,073,036 | \$2,312,326 | \$1,800,107 | \$89,240 | \$422,979 | \$0 |
| Mobile Homes & Trailers | \$0 | \$1,567 | \$1,278 | \$65 | \$225 | \$1,567 |
| Auto Parts & Accessories | \$3,885,238 | \$205,761 | \$155,430 | \$7,222 | \$43,109 | \$0 |
| Other Vehicles | \$0 | \$63,285 | \$50,783 | \$2,482 | \$10,020 | \$63,285 |

Source: Applied Development Economics, Inc.

The City of Westmorland will experience roughly \$917,000 in leakage in services (Table 5-5) by 2020. Similar to the situation right now, the leakage by 2020 is not enough to support new service businesses, such as a new cinema, although existing services such as optometrists could use the information to plan for the future.

**TABLE: 5-5
PROJECTED FUTURE SERVICES DEMAND AND LEAKAGE IN THE CITY OF WESTMORLAND**

| | Supply: Est. Receipts/Sales | Total Future Demand (Current plus Increment) [A + B + C] | A. Primary Market: Household Demand | B. Secondary Market: Household Demand | C. Day-Time Worker Potential Demand | Total Future Leakage |
|--|-----------------------------|---|-------------------------------------|---------------------------------------|-------------------------------------|----------------------|
| Total (Select Svcs Only) | \$308,555 | \$925,279 | \$806,192 | \$40,205 | \$78,882 | \$916,664 |
| Professional Svcs Group | \$308,555 | \$15,813 | \$13,546 | \$1,009 | \$1,257 | \$7,198 |
| Legal Services | \$0 | \$7,198 | \$6,552 | \$645 | \$0 | \$7,198 |
| Accounting Services | \$308,555 | \$8,615 | \$6,994 | \$364 | \$1,257 | \$0 |
| Medical Services Group | \$0 | \$299,227 | \$269,465 | \$12,831 | \$16,931 | \$299,227 |
| Physician Services | \$0 | \$161,355 | \$149,165 | \$7,028 | \$5,162 | \$161,355 |
| Dental Services | \$0 | \$95,495 | \$81,670 | \$3,684 | \$10,141 | \$95,495 |
| Eyecare/Other Medical Svcs | \$0 | \$42,377 | \$38,630 | \$2,119 | \$1,628 | \$42,377 |
| Personal Services Group | \$0 | \$131,768 | \$121,605 | \$6,216 | \$3,947 | \$131,768 |
| Personal Care Services | \$0 | \$92,748 | \$84,656 | \$4,189 | \$3,903 | \$92,748 |
| Dry Cleaning\Coin Laundry | \$0 | \$14,661 | \$13,997 | \$664 | \$0 | \$14,661 |
| Pet Care | \$0 | \$24,359 | \$22,952 | \$1,364 | \$44 | \$24,359 |
| Select Entertainment and Recreation | \$0 | \$149,852 | \$128,540 | \$6,417 | \$14,896 | \$149,852 |
| Recreational\Exercise | \$0 | \$31,180 | \$26,470 | \$1,318 | \$3,392 | \$31,180 |
| Video Rental | \$0 | \$27,321 | \$22,787 | \$1,130 | \$3,404 | \$27,321 |
| Movie\Live Arts | \$0 | \$82,058 | \$70,623 | \$3,638 | \$7,797 | \$82,058 |
| Sporting Events | \$0 | \$9,293 | \$8,660 | \$331 | \$303 | \$9,293 |
| Mail and Package Delivery | \$0 | \$88,379 | \$79,734 | \$3,929 | \$4,716 | \$88,379 |
| Select Repair Services | \$0 | \$240,240 | \$193,301 | \$9,802 | \$37,136 | \$240,240 |
| Auto Repair\Auto Body | \$0 | \$213,535 | \$168,691 | \$8,585 | \$36,260 | \$213,535 |
| Appliance \ Electric Repair | \$0 | \$26,705 | \$24,611 | \$1,218 | \$876 | \$26,705 |

Source: Applied Development Economics, Inc.

5.3 RETAIL AND SERVICES LEAKAGE ANALYSIS

The current leakage of \$6.9 million supports 14,300 square feet of retail and services. However, this potential is scattered among many stores types and would best be addressed through expansion of existing stores.

| TABLE: 5-6 DEVELOPMENT POTENTIAL IN CITY OF THE CITY OF WESTMORLAND FROM CURRENT AND PROJECTED RETAIL LEAKAGE | | | |
|---|--------------------|--------------|---|
| | Current Leakage | Increment | Total Supportable: Current and Incremental Growth |
| Total Supportable Retail in Sq. Ft. (excluding auto lot) | 14,304 | 3,671 | 17,975 |
| Apparel Store Group | 2,671 | 810 | 3,482 |
| General Merchandise Group | 5,166 | 1,517 | 6,683 |
| Department Stores/Other General Merch. | 4,304 | 1,266 | 5,569 |
| Drug & Proprietary Stores | 863 | 252 | 1,114 |
| Specialty Retail Group | 1,993 | 599 | 2,592 |
| Gifts & Novelties | 230 | 70 | 300 |
| Sporting Goods | 239 | 72 | 311 |
| Florists | 31 | 11 | 42 |
| Photographic Equipment | 12 | 5 | 17 |
| Records & Music | 145 | 48 | 193 |
| Books & Stationery | 419 | 121 | 540 |
| Office Supplies/Computer Equipment | 144 | 46 | 189 |
| Jewelry | 88 | 33 | 121 |
| Misc. Specialty Retail | 686 | 193 | 879 |
| Food, Eating and Drinking Group | 2,286 | 33 | 423 |
| Grocery Stores | 1,379 | 0 | 1,379 |
| Specialty Food Stores | 121 | 33 | 154 |
| Liquor Stores | 0 | 0 | 0 |
| Eating Places | 786 | 0 | 786 |
| Full-Service Restaurants | 0 | 0 | 0 |
| Other Eating Places | 786 | 0 | 786 |
| Drinking Places | 0 | 0 | 0 |
| Building Material/Home Furn. Group | 2,187 | 712 | 2,899 |
| Furniture & Home Furnishings | 786 | 254 | 1,041 |
| Household Appliances & Electronics | 318 | 93 | 410 |
| Used Merchandise | 137 | 42 | 179 |
| Nurseries & Garden Supply Stores | 333 | 110 | 443 |
| Lumber & Other Building Materials | 0 | 0 | 0 |
| Home Centers and Hardware Stores | 506 | 174 | 679 |
| Paint & Wallpaper | 107 | 40 | 147 |
| Automotive Group | 0 | 0 | 0 |
| New Cars & RVs (auto lot) | 0.0 | 0.0 | 0.0 |
| Used Car Dealers (auto lot) | 0.0 | 0.0 | 0.0 |
| Gasoline Service Stations | 0 | 0 | 0 |
| Mobile Homes & Trailers | 0 | 0 | 0 |
| Auto Parts & Accessories | 0 | 0 | 0 |
| Other Vehicles | 0 | 0 | 0 |

Source: Applied Development Economics, Inc.

**TABLE: 5-7:
DEVELOPMENT POTENTIAL IN CITY OF THE CITY OF WESTMORLAND
FROM CURRENT AND PROJECTED SERVICES LEAKAGE**

| | Square Footage Supported By Current Leakage | Square Footage Supported By Incremental Leakage | Square Footage Supported By Total Leakage (Current and Incremental) |
|--|---|---|---|
| Total (Select Services Only) | 7,954 | 2,685 | 10,640 |
| Professional Services Group | 67 | 34 | 100 |
| Legal Services | 67 | 34 | 100 sq. ft. |
| Accounting Services | 0 | 0 | 0 sq. ft. |
| Medical Services Group | 1,876 | 567 | 2,443 |
| Physician Services | 663 | 182 | 845 sq. ft. |
| Dental Services | 891 | 293 | 1,184 sq. ft. |
| Eyecare and Other Medical Services | 322 | 93 | 414 sq. ft. |
| Personal Services Group | 1,682 | 768 | 2,449 |
| Personal Care Services | 1,321 | 665 | 1,986 sq. ft. |
| Dry Cleaning\Coin-Op Laundry | 89 | 16 | 104 sq. ft. |
| Pet Care | 272 | 87 | 359 sq. ft. |
| Select Entertainment and Recreation | 429 | 157 | 586 |
| Recreational\Exercise\Memberships | 369 | 135 | 504 sq. ft. |
| Video Rental | 60 | 22 | 82 sq. ft. |
| Movie\Live Arts | 0.15 | 0.05 | 0.20 screens |
| Sporting Events | 0 | 0 | 0 sq. ft. |
| Mail and Package Delivery | 247 | 89 | 336 sq. ft. |
| Select Repair Services | 3,654 | 1,071 | 4,725 |
| Auto Repair\Auto Body Repair | 3,499 | 1,014 | 4,513 sq. ft. |
| Appliance\Electric Repair | 155 | 57 | 212 sq. ft. |

Source: Applied Development Economics, Inc.

There is enough leakage right now to support up to 7,900 square feet in services (see Table 5-7 above). There is not enough leakage to attract new services, although existing businesses in lines of services for which leakage exists can use the information below to possibly expand operations.

APPENDIX A: LIST OF RETAILERS AND SERVICES IN FOUR CITIES

The list of businesses below comes from the California EDD/InfoUSA database. Only businesses in retail industries and certain select service industries are included below.

APPENDIX A TABLE 1:
LIST OF RETAILERS AND SERVICES IN SELECT INDUSTRIES CITIES OF BRAWLEY, CALIPATRIA, IMPERIAL, AND WESTMORLAND CALIFORNIA EDD INFO USA DATABASE

| NAICS | INDUSTRY | NAME OF BUSINESS | BUSINESS TYPE |
|----------------|---------------------------------|-------------------------------|--|
| BRAWLEY | | | |
| 4412 | Other Motor Vehicle | Brawley Trailer Supply | Recreational Vehicle Dealers |
| 4412 | Other Motor Vehicle | Clark's Motorcycle Ctr | Motorcycle and other motor vehicle dealers |
| 4412 | Other Motor Vehicle | Desert RV | Recreational Vehicle Dealers |
| 4412 | Other Motor Vehicle | Ken Bemis Aircraft | Motorcycle and other motor vehicle dealers |
| 4413 | Auto Parts, Accessories | All Valley Battery | Automotive Parts and Accessories Stores |
| 4413 | Auto Parts, Accessories | Autozone | Automotive Parts and Accessories Stores |
| 4413 | Auto Parts, Accessories | Daniels Tire Svc | Tire Dealers |
| 4413 | Auto Parts, Accessories | Northend Auto Parts | Automotive Parts and Accessories Stores |
| 4413 | Auto Parts, Accessories | O K Rubber Tire Co | Tire Dealers |
| 4413 | Auto Parts, Accessories | O'Reilly Auto Parts | Automotive Parts and Accessories Stores |
| 4413 | Auto Parts, Accessories | Walmart Tire & Lube Express | Tire Dealers |
| 4421 | Furniture stores | Brawley Superior Furniture Co | Furniture Stores |
| 4421 | Furniture stores | Expo Furniture | Furniture Stores |
| 4421 | Furniture stores | San Sebastian Rustic | Furniture Stores |
| 4431 | Electronics and Appliances | C Share Computers-Pacifica | Electronics Stores |
| 4431 | Electronics and Appliances | Cellular Connection | Electronics Stores |
| 4431 | Electronics and Appliances | Clartalk | Electronics Stores |
| 4431 | Electronics and Appliances | Imperial Appliance Repair | Household Appliance Stores |
| 4431 | Electronics and Appliances | Radioshack | Electronics Stores |
| 4431 | Electronics and Appliances | Walmart Connection Ctr | Electronics Stores |
| 4441 | Building materials and supplies | Brawley Glass | Other Building Material Dealers |
| 4441 | Building materials and supplies | Campeinos Unidos Inc Energy | Other Building Material Dealers |
| 4441 | Building materials and supplies | Central Allied Glass | Other Building Material Dealers |
| 4441 | Building materials and supplies | Imperial Compost | Other Building Material Dealers |
| 4441 | Building materials and supplies | Imperial DO It Ctr | Hardware Stores |
| 4442 | Lawn and Garden Supplies | Gowen Seed | Nursery, garden, and farm supply stores |
| 4442 | Lawn and Garden Supplies | Green Patch Nursery | Nursery, garden, and farm supply stores |
| 4442 | Lawn and Garden Supplies | Small Equipment Ctr | Outdoor Power Equipment Stores |
| 4442 | Lawn and Garden Supplies | South West Microbials | Nursery, garden, and farm supply stores |
| 4451 | Grocery stores | 7-ELEVEN | Convenience Stores |
| 4451 | Grocery stores | Ampm | Convenience Stores |
| 4451 | Grocery stores | Brawley Gas | Convenience Stores |
| 4451 | Grocery stores | Circle A Food Store | Supermarkets and Other Grocery Stores |
| 4451 | Grocery stores | El Sol Market | Supermarkets and Other Grocery Stores |
| 4451 | Grocery stores | Glamis Beach Store | Supermarkets and Other Grocery Stores |

| NAICS | INDUSTRY | NAME OF BUSINESS | BUSINESS TYPE |
|--------------|-----------------------------------|--------------------------------|---|
| 4451 | Grocery stores | La Colmena Market | Supermarkets and Other Grocery Stores |
| 4451 | Grocery stores | New College View Market | Supermarkets and Other Grocery Stores |
| 4451 | Grocery stores | Save-A-Lot Food Stores | Supermarkets and Other Grocery Stores |
| 4451 | Grocery stores | Vons | Supermarkets and Other Grocery Stores |
| 4452 | Specialty foods | D & M Water Co | All Other Specialty Food Stores |
| 4452 | Specialty foods | Kudu Inc | Fruit and Vegetable Markets |
| 4452 | Specialty foods | Ramey's Meats | Meat Markets |
| 4452 | Specialty foods | Sparkletts Water | All Other Specialty Food Stores |
| 4452 | Specialty foods | Sunterra Produce | Fruit and Vegetable Markets |
| 4453 | Beer, Wine, and Liquor Stores | La Providencia Central Liquors | Beer, Wine, and Liquor Stores |
| 4453 | Beer, Wine, and Liquor Stores | Western Liquor | Beer, Wine, and Liquor Stores |
| 4453 | Beer, Wine, and Liquor Stores | Whitted's Liquor | Beer, Wine, and Liquor Stores |
| 4461 | Health and personal care | Anita of Denmark Daydew | Cosmetic and Beauty Supply Stores |
| 4461 | Health and personal care | Better Hearing Systems | All other health and personal care stores |
| 4461 | Health and personal care | Brawley Pharmacy | Pharmacies and Drug Stores |
| 4461 | Health and personal care | Farmacia Del Pueblo | Pharmacies and Drug Stores |
| 4461 | Health and personal care | Imperimed | Food, health, supplement stores |
| 4461 | Health and personal care | Mary Kay Cosmetics | Cosmetic and Beauty Supply Stores |
| 4461 | Health and personal care | Rite Aid | Pharmacies and Drug Stores |
| 4461 | Health and personal care | Valley Medical Pharmacy | Pharmacies and Drug Stores |
| 4461 | Health and personal care | Vons Pharmacy | Pharmacies and Drug Stores |
| 4461 | Health and personal care | Walmart Pharmacy | Pharmacies and Drug Stores |
| 4461 | Health and personal care | White Cross Pharmacy | Pharmacies and Drug Stores |
| 4471 | Gasoline stations | C & C Gas | Other Gasoline Stations |
| 4471 | Gasoline stations | Shell Gas Station | Other Gasoline Stations |
| 4471 | Gasoline stations | Texaco Brawley | Other Gasoline Stations |
| 4481 | Clothing stores | Ellis's | Men's Clothing Stores |
| 4481 | Clothing stores | Phoebe's Sportswear | Other Clothing Stores |
| 4481 | Clothing stores | Rock A Baby Boutique | Children's and Infants' Clothing Stores |
| 4521 | Department stores | Alamorio Store | Discount Department Stores |
| 4521 | Department stores | Factory 2-U | Department stores, except discount |
| 4521 | Department stores | Family Dollar Store | Department stores, except discount |
| 4521 | Department stores | Garcia Market | Discount Department Stores |
| 4521 | Department stores | La Bonita Supermercado | Discount Department Stores |
| 4521 | Department stores | Walmart Supercenter | Department stores, except discount |
| 4522 | Other merchandise stores | Dollar Tree | All Other General Merchandise Stores |
| 4522 | Other gen. merchandise stores | Family Dollar Store | All Other General Merchandise Stores |
| 4522 | Other gen. merchandise stores | Valley Supply & Svc | All Other General Merchandise Stores |
| 4531 | Florists | Brawley Floral Co | Florists |
| 4531 | Florists | Brawley Florist & More | Florists |
| 4531 | Florists | Lewman's Floral | Florists |
| 4532 | Officesupplies, stationery, etc. | Party Land | Gift, Novelty, and Souvenir Stores |
| 4532 | Office supplies, stationery. Etc. | Rosalia Morales Tax Svc | Gift, Novelty, and Souvenir Stores |
| 4533 | Used merchandise | Church Mouse Thrift Shop | Used Merchandise Stores |
| 4533 | Used merchandise | Salvation Army Thrift Store | Used Merchandise Stores |
| 4539 | Other misc. stpres | Desert Valley Monument | Store Retailers Not Specified Elsewhere |
| 4539 | Other misc. stpres | El Redentor Mens Home | Store Retailers Not Specified Elsewhere |
| 4539 | Other misc. stpres | IV Tobacco Shop | Tobacco Stores |
| 4539 | Other misc. stpres | Poulsen Galleries Inc | Art Dealers |

| NAICS | INDUSTRY | NAME OF BUSINESS | BUSINESS TYPE |
|-------|----------------------|--------------------------------|--|
| 4539 | Other misc. stpres | Salton Sea Intl Bird Festival | Pet and Pet Supplies Stores |
| 4539 | Other misc. stpres | Silver Brothers Wood Product | Store Retailers Not Specified Elsewhere |
| 4539 | Other misc. stpres | Timco Christmas Tree | Store Retailers Not Specified Elsewhere |
| 4539 | Other misc. stpres | Weather Toppers | Store Retailers Not Specified Elsewhere |
| 5242 | Insurance Agents | Aflac | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Allstate | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Coni S Stokely Insurance | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Discount Insurance & Income Tx | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Exacto Insurance Svc | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Farmers Insurance | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Flying E Investments | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Fred Eady Insurance | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Hart Insurance Ctr | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Imperial Valley Life & Health | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Klicka Parker Ins Brokers | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Larry R Bennett Insurance | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Linda Shank Insurance Agcy Inc | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Occupational Health Ctr | All Other Insurance Related Activities |
| 5242 | Insurance Agents | Payless Auto Insurance | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Rodriguez Financial Svc Pro | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | Smith-Kandal Insurance | Insurance Agencies and Brokerages |
| 5242 | Insurance Agents | State Farm Insurance | Insurance Agencies and Brokerages |
| 5411 | Legal services | Comite Civico Del Valle Inc | Offices of Lawyers |
| 5411 | Legal services | Csw Notary Seminars | Offices of Notaries |
| 5411 | Legal services | Horton Knox Carter & Foote Llp | Offices of Lawyers |
| 5411 | Legal services | Krutzsch Andrew S | Offices of Lawyers |
| 5411 | Legal services | Real Estate Ask Realty Inc | Offices of Lawyers |
| 5411 | Legal services | Walker & Driskill Atty At Law | Offices of Lawyers |
| 5412 | Accounting | A1 Pop Out Window Tint Shop | Payroll Services |
| 5412 | Accounting | Advanced Medical Billing | Other Accounting Services |
| 5412 | Accounting | Arthur D Lohr An Accntncy Corp | Offices of Certified Public Accountants |
| 5412 | Accounting | Garcia & Preece | Offices of Certified Public Accountants |
| 5412 | Accounting | H&r Block | Tax Preparation Services |
| 5412 | Accounting | Jackson Hewitt Tax Svc | Tax Preparation Services |
| 5412 | Accounting | Pricola Nick C, CPA | Offices of Certified Public Accountants |
| 5412 | Accounting | Sharon's Bookkeeping Svc | Other Accounting Services |
| 5412 | Accounting | Thomas Trimm & Harvie | Offices of Certified Public Accountants |
| 6211 | Office of Physicians | Admani Baig & Kapoor | Offices of physicians except mental health |
| 6211 | Office of Physicians | Alboiny Safwan MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Baron Norman E MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Buenafior Jay K MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Cabrera Ernest MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Chiu Vincent W S MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Creighton W Dodson MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Deacon John Mark MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Donald M Ehman Inc | Offices of physicians except mental health |
| 6211 | Office of Physicians | El Centro Dermatology | Offices of physicians except mental health |
| 6211 | Office of Physicians | Fareed George C MD | Offices of physicians except mental health |

| NAICS | INDUSTRY | NAME OF BUSINESS | BUSINESS TYPE |
|-------|---------------------------------|--------------------------------|--|
| 6211 | Office of Physicians | Hahm Susan MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Imperial Valley Fam Care Med | Offices of physicians except mental health |
| 6211 | Office of Physicians | Imperial Valley Family Med Grp | Offices of physicians except mental health |
| 6211 | Office of Physicians | Imperial Valley Neurology | Offices of physicians except mental health |
| 6211 | Office of Physicians | Institute For Aesthetic | Offices of physicians except mental health |
| 6211 | Office of Physicians | Jay Kenneth Buenaflor Med | Offices of physicians except mental health |
| 6211 | Office of Physicians | Kestutis V Kuraitis Inc | Offices of physicians except mental health |
| 6211 | Office of Physicians | Krutzik Michael MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Kuraitis Kestutis V MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Lai Christopher MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Malekshamran Keyvan MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Sanico John MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Schaaf Bernard MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Total Women's Health | Offices of physicians except mental health |
| 6211 | Office of Physicians | Tripp Courtney T DO | Offices of physicians except mental health |
| 6211 | Office of Physicians | Valley Eye Care Medical Group | Offices of physicians except mental health |
| 6211 | Office of Physicians | Vemulapalli Jaganmohan MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Whyte Mark MD | Offices of physicians except mental health |
| 6212 | Office of Dentists | Leon Parrilla Inc | Offices of Dentists |
| 6212 | Office of Dentists | Lugo Amadis J DDS | Offices of Dentists |
| 6212 | Office of Dentists | Shannon J Daughtry Inc | Offices of Dentists |
| 6212 | Office of Dentists | Stillman Ronald C DDS | Offices of Dentists |
| 6213 | Other hlth practitioners: chiro | David W Gayle Optometrist | Offices of Optometrists |
| 6213 | Other hlth practitioners: chiro | Vision Care Ctr | Offices of Optometrists |
| 7111 | Performing arts company | Brawley Cattle Call Rodeo | Other Performing Arts Companies |
| 7139 | Other amusement & recreation | Boys & Gils Club Df Imperial | Fitness and Recreational Sports Centers |
| 7139 | Other amusement & recreation | Brawley Fitness | Fitness and Recreational Sports Centers |
| 7139 | Other amusement & recreation | Brawley Parks & Recreation | Fitness and Recreational Sports Centers |
| 7139 | Other amusement & recreation | Brawley Swimming Pool | Fitness and Recreational Sports Centers |
| 7139 | Other amusement & recreation | Del Rio Country Club | Golf Courses and Country Clubs |
| 7139 | Other amusement & recreation | Lions Recreation Ctr | Fitness and Recreational Sports Centers |
| 7139 | Other amusement & recreation | Spear's Hawaiian Shaved Ice | All other amusement and recreation |
| 7139 | Other amusement & recreation | US Fitness | Fitness and Recreational Sports Centers |
| 7224 | Drinking places | Toni's Place | Drinking places, alcoholic beverages |
| 7225 | Restaurants | A Thing Called Cake | Limited-service restaurants |
| 7225 | Restaurants | Aspen In the Desert Restaurant | Full-service restaurants |
| 7225 | Restaurants | Assaggio Italian Restaurant | Full-service restaurants |
| 7225 | Restaurants | Brownie's Diner | Limited-service restaurants |
| 7225 | Restaurants | Carl's Jr | Limited-service restaurants |
| 7225 | Restaurants | China Inn Restaurant | Full-service restaurants |
| 7225 | Restaurants | Christine's Restaurant | Limited-service restaurants |
| 7225 | Restaurants | Del Taco | Limited-service restaurants |
| 7225 | Restaurants | Domino's Pizza | Full-service restaurants |
| 7225 | Restaurants | Donut Avenue | Snack and nonalcoholic beverage bars |
| 7225 | Restaurants | Donuts Plus | Snack and nonalcoholic beverage bars |
| 7225 | Restaurants | Fosters Freeze | Full-service restaurants |
| 7225 | Restaurants | Hacienda Market & Snack Bar | Full-service restaurants |
| 7225 | Restaurants | Hamburger Stop | Limited-service restaurants |

| NAICS | INDUSTRY | NAME OF BUSINESS | BUSINESS TYPE |
|-------|-----------------------------|------------------------------|---|
| 7225 | Restaurants | Hoffman Enterprises Inc | Limited-service restaurants |
| 7225 | Restaurants | I V Chinese Restaurant | Full-service restaurants |
| 7225 | Restaurants | Jack In the Box | Limited-service restaurants |
| 7225 | Restaurants | Jalapenos | Full-service restaurants |
| 7225 | Restaurants | Johnny's Burritos | Full-service restaurants |
| 7225 | Restaurants | Kfc | Limited-service restaurants |
| 7225 | Restaurants | Kotori Wok | Full-service restaurants |
| 7225 | Restaurants | La Chavelas Restaurant | Limited-service restaurants |
| 7225 | Restaurants | Little Caesars Pizza | Full-service restaurants |
| 7225 | Restaurants | Mc Donald's | Limited-service restaurants |
| 7225 | Restaurants | Nana Dora's Restaurant | Full-service restaurants |
| 7225 | Restaurants | Pizza Hut | Full-service restaurants |
| 7225 | Restaurants | Rally's Hamburgers | Limited-service restaurants |
| 7225 | Restaurants | Raspados Cuchis | Snack and nonalcoholic beverage bars |
| 7225 | Restaurants | Rock Coffee Shop & Cafe | Snack and nonalcoholic beverage bars |
| 7225 | Restaurants | Starbucks | Snack and nonalcoholic beverage bars |
| 7225 | Restaurants | Subway | Limited-service restaurants |
| 7225 | Restaurants | Tai San Chinese Restaurant | Full-service restaurants |
| 7225 | Restaurants | Tasty Donuts | Snack and nonalcoholic beverage bars |
| 7225 | Restaurants | Tcby | Snack and nonalcoholic beverage bars |
| 7225 | Restaurants | Tropical Delights | Limited-service restaurants |
| 7225 | Restaurants | Waves Restaurant & Saloon | Limited-service restaurants |
| 8111 | Auto repair & maintenance | Brawley Auto Body | Automotive Body and Interior Repair |
| 8111 | Auto repair & maintenance | Brawley Plaza Auto & Acces | Car Washes |
| 8111 | Auto repair & maintenance | Brawley Radiator Shop | General Automotive Repair |
| 8111 | Auto repair & maintenance | Changing Times Express Lube | Automotive oil change and lubrication shops |
| 8111 | Auto repair & maintenance | D & H Body Shop Inc | Automotive Body and Interior Repair |
| 8111 | Auto repair & maintenance | David & Son's Truck Repair | General Automotive Repair |
| 8111 | Auto repair & maintenance | Delnor X-Auto Repair | General Automotive Repair |
| 8111 | Auto repair & maintenance | Desert Tint Shop | Automotive Glass Replacement Shops |
| 8111 | Auto repair & maintenance | Gonzalez Welding Auto Repair | General Automotive Repair |
| 8111 | Auto repair & maintenance | J & M Auto Repair | General Automotive Repair |
| 8111 | Auto repair & maintenance | M & S Auto Electrician | Other automotive mechanical and elec. |
| 8111 | Auto repair & maintenance | Machweld Shop Svc | General Automotive Repair |
| 8111 | Auto repair & maintenance | Martin's Auto Svc | General Automotive Repair |
| 8111 | Auto repair & maintenance | Mike's Automotive Mobile Rpr | General Automotive Repair |
| 8111 | Auto repair & maintenance | Perfect Car Wash | Car Washes |
| 8111 | Auto repair & maintenance | Pete's Auto Parts & Garage | General Automotive Repair |
| 8111 | Auto repair & maintenance | Plummer Upholstery Shop | Automotive Body and Interior Repair |
| 8111 | Auto repair & maintenance | Schoonover Enterprises | General Automotive Repair |
| 8111 | Auto repair & maintenance | Soapy's Car Wash | Car Washes |
| 8111 | Auto repair & maintenance | Twisted Industries | General Automotive Repair |
| 8111 | Auto repair & maintenance | Valley Transmission Svc | Automotive Transmission Repair |
| 8111 | Auto repair & maintenance | Wright & Knight Svc Ctr Inc | General Automotive Repair |
| 8112 | Electronic equipment repair | P C Partners Llc | Computer and Office Machine Repair |
| 8114 | Household goods repair | J C Ornamental Iron & Fence | Other household goods repair and |
| 8114 | Household goods repair | R C Appliance | Appliance Repair and Maintenance |
| 8114 | Household goods repair | Screen Masters | Other household goods repair and |
| 8114 | Household goods repair | Simbol Mining Corp | Reupholstery and Furniture Repair |

| NAICS | INDUSTRY | NAME OF BUSINESS | BUSINESS TYPE |
|-------------------|---------------------------------|--------------------------------|---|
| 8121 | Personal care services | Best Nails & Spa | Nail Salons |
| 8121 | Personal care services | Brawley Barber Shop | Barber Shops |
| 8121 | Personal care services | Consumer Credit Counseling Svc | Other Personal Care Services |
| 8121 | Personal care services | Curl Up & Dye | Beauty Salons |
| 8121 | Personal care services | Des Cheveuxe Boutique | Beauty Salons |
| 8121 | Personal care services | Enders Debra | Beauty Salons |
| 8121 | Personal care services | Essential Touch | Other Personal Care Services |
| 8121 | Personal care services | Fantastic Sams | Beauty Salons |
| 8121 | Personal care services | Hair Etc | Beauty Salons |
| 8121 | Personal care services | Krutzsch Andrew S | Other Personal Care Services |
| 8121 | Personal care services | Linda's Nails & Spa | Nail Salons |
| 8121 | Personal care services | Maily's Nails | Nail Salons |
| 8121 | Personal care services | Main St Salon | Beauty Salons |
| 8121 | Personal care services | Michele's Salon | Beauty Salons |
| 8121 | Personal care services | Monica's Hair Salon | Beauty Salons |
| 8121 | Personal care services | Off the Top Hair Salon | Beauty Salons |
| 8121 | Personal care services | Perfect Touch 2 Beauty Salon | Beauty Salons |
| 8121 | Personal care services | Prestige Family Hair Salon | Beauty Salons |
| 8121 | Personal care services | Rories Hair Studio | Beauty Salons |
| 8121 | Personal care services | Sergio's Barber Shop | Barber Shops |
| 8121 | Personal care services | Silver Scissors Saloon | Nail Salons |
| 8121 | Personal care services | Smart Style Family Hair Salon | Beauty Salons |
| 8121 | Personal care services | Studio 428 | Beauty Salons |
| 8121 | Personal care services | Tina's Beauty Salon | Beauty Salons |
| 8121 | Personal care services | Vallarta Barber Shop | Barber Shops |
| 8121 | Personal care services | Work of Art | Barber Shops |
| 8123 | Drycleaning & laundry services | Aramark Uniform Svc | Linen Supply |
| 8123 | Drycleaning & laundry services | Brawley Laundry | Coin-Operated Laundries and Drycleaners |
| 8129 | Other personal services | James R Howard Animal Hospital | Pet care except veterinary services |
| 8129 | Other personal services | Puppy Palace | Pet care except veterinary services |
| 8129 | Other personal services | Walmart One Hour Photo | Photofinishing laboratories except one-hour |
| CALIPATRIA | | | |
| 4413 | Auto Parts, Accessories | Napa Auto Parts | Automotive Parts and Accessories Stores |
| 4441 | Building materials and supplies | Zendejas True Value Hardware | Hardware Stores |
| 4451 | Grocery stores | Market Square | Supermarkets and Other Grocery Stores |
| 4453 | Beer, Wine, and Liquor Stores | Calipatria Queen Market | Beer, Wine, and Liquor Stores |
| 4481 | Clothing stores | Fair Store Uniforms | Men's Clothing Stores |
| 4522 | Other gen. merchandise stores | Economy Store | All Other General Merchandise Stores |
| 4539 | Other misc. stpres | Dune Co of Imperial Valley | Store Retailers Not Specified Elsewhere |
| 4539 | Other misc. stpres | Earthrise Nutritionals | Pet and Pet Supplies Stores |
| 4539 | Other misc. stpres | Got Ice | Store Retailers Not Specified Elsewhere |
| 5411 | Legal services | Immigration Customs Enfrcmnt | Offices of Lawyers |
| 5412 | Accounting | Sampson Glenn B, CPA | Other Accounting Services |
| 6211 | Office of Physicians | Colombini Rose-Marie DO | Offices of physicians except mental health |
| 6211 | Office of Physicians | Estock Erika S MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Haessler Walter T MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Hjerpe David E MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Levin Martin E MD | Offices of physicians except mental health |
| 6212 | Office of Dentists | Cheatwood Gayle A DDS | Offices of Dentists |

| NAICS | INDUSTRY | NAME OF BUSINESS | BUSINESS TYPE |
|-----------------|---------------------------------|--------------------------------|---|
| 6212 | Office of Dentists | Green Robert DDS | Offices of Dentists |
| 6212 | Office of Dentists | Lee Ian-Jay Rob DDS | Offices of Dentists |
| 6212 | Office of Dentists | Santoyo Paul R DDS | Offices of Dentists |
| 7225 | Restaurants | Aguayos Restaurant | Full-service restaurants |
| 7225 | Restaurants | Archie's Place | Limited-service restaurants |
| 7225 | Restaurants | Donut Avenue | Limited-service restaurants |
| 8111 | Auto repair and maintenance | M & M Auto | General Automotive Repair |
| 8111 | Auto repair and maintenance | Pacific Ethanol Inc | Other automotive mechanical and elec. |
| 8114 | Household goods repair | Rudys Air Conditing | Appliance Repair and Maintenance |
| 8121 | Personal care services | Concha's Beauty Salon | Beauty Salons |
| 8121 | Personal care services | Consumer Credit Counseling Svc | Other Personal Care Services |
| 8121 | Personal care services | Dream Massage | Other Personal Care Services |
| IMPERIAL | | | |
| 4411 | Auto Dealers | Rogers & Rogers Chrysler Jeep | New Car Dealers |
| 4411 | Auto Dealers | Rogers & Rogers Nissan | New Car Dealers |
| 4411 | Auto Dealers | Rogers & Rogers Toyota | New Car Dealers |
| 4413 | Auto Parts, Accessories | Butler Auto Repair | Automotive Parts and Accessories Stores |
| 4413 | Auto Parts, Accessories | Edge Enterprises | Automotive Parts and Accessories Stores |
| 4413 | Auto Parts, Accessories | Northend Auto Parts | Automotive Parts and Accessories Stores |
| 4421 | Furniture stores | Desert Discount Furniture | Furniture Stores |
| 4422 | Home furnishing stores | Derma's Floor Covering | Floor Covering Stores |
| 4422 | Home furnishing stores | Imperial Valley Floor Cvrngs | Floor Covering Stores |
| 4422 | Home furnishing stores | Mad Graphix Inc | Floor Covering Stores |
| 4431 | Electronics and Appliances | Dune Co of Imperial Vly | Electronics Stores |
| 4431 | Electronics and Appliances | Video 2000 | Electronics Stores |
| 4441 | Building materials and supplies | All Valley Powder Coating | Paint and Wallpaper Stores |
| 4441 | Building materials and supplies | Auroras Jewelry | Other Building Material Dealers |
| 4441 | Building materials and supplies | D & R Supply Inc | Home Centers |
| 4441 | Building materials and supplies | Hofer Redi-Mix | Other Building Material Dealers |
| 4441 | Building materials and supplies | Imperial Roof Truss | Other Building Material Dealers |
| 4441 | Building materials and supplies | Imperial Truss & Lumber Co | Other Building Material Dealers |
| 4441 | Building materials and supplies | Sherwin-Williams | Paint and Wallpaper Stores |
| 4442 | Lawn and Garden Supplies | West Main Pump Sales & Svc | Nursery, garden, and farm supply stores |
| 4451 | Grocery stores | Circle K | Convenience Stores |
| 4451 | Grocery stores | El Sol Market | Supermarkets and Other Grocery Stores |
| 4452 | Books and videos | Imperial Valley College Campus | Book Stores |
| 4461 | Health and personal care | Community Health Ctr Inc | Food, health, supplement stores |
| 4461 | Health and personal care | Community Pharmacy | Pharmacies and Drug Stores |
| 4471 | Gasoline stations | Aten Express | Other Gasoline Stations |
| 4522 | Other gen. merchandise stores | Def Products Llc | All Other General Merchandise Stores |
| 4522 | Other gen. merchandise stores | Seaport Pots | All Other General Merchandise Stores |
| 4539 | Other misc. stpres | Gold Canyon Candles | Store Retailers Not Specified Elsewhere |
| 5411 | Legal services | Bacalski Ottoson & Dube Llp | Offices of Lawyers |
| 5411 | Legal services | Melendrez Mobile Notary | Offices of Notaries |
| 5411 | Legal services | Philip J Krum Jr Law Offices | Offices of Lawyers |
| 5411 | Legal services | Steve Escalera Law Office | Offices of Lawyers |
| 5412 | Accounting | Fairchild Financial Svc | Tax Preparation Services |
| 5412 | Accounting | Mendez Billing Svc | Other Accounting Services |
| 5412 | Accounting | Velazquez Irene, CPA | Offices of Certified Public Accountants |

| NAICS | INDUSTRY | NAME OF BUSINESS | BUSINESS TYPE |
|--------------|---------------------------------|--------------------------------|---|
| 6211 | Office of Physicians | Arab Mohammad K MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Burn Institute | Offices of physicians except mental health |
| 6211 | Office of Physicians | Galindo Judy MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Humphrey Charles R MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Imperial Radiology | Offices of physicians except mental health |
| 6211 | Office of Physicians | Imperial Valley Family | Offices of physicians except mental health |
| 6211 | Office of Physicians | Imperial Valley Medical Group | Offices of physicians except mental health |
| 6211 | Office of Physicians | Kelada Minerva MD | Offices of physicians except mental health |
| 6211 | Office of Physicians | Sun Valley Behavioral Medical | Offices of physicians except mental health |
| 6211 | Office of Physicians | Sun Valley Research Ctr | Offices of physicians except mental health |
| 6212 | Office of Dentists | Clay M Nichols Inc | Offices of Dentists |
| 6212 | Office of Dentists | Kupiec Karson A DDS | Offices of Dentists |
| 6212 | Office of Dentists | Lee Chang DDS | Offices of Dentists |
| 6212 | Office of Dentists | Miles Randal W DDS | Offices of Dentists |
| 6212 | Office of Dentists | Smyle Shop Family Dentistry | Offices of Dentists |
| 6212 | Office of Dentists | Sorensen Howard J DDS | Offices of Dentists |
| 6212 | Office of Dentists | Tadeo Enmer I DDS | Offices of Dentists |
| 6213 | Other hlth practitioners: chiro | Imperial Valley Chiropractic | Offices of Chiropractors |
| 7121 | Museums, parks | Imperial Parks & Recreation | Nature parks and other similar institutions |
| 7121 | Museums, parks | Pioneers Museum | Museums |
| 7139 | Other amusement & rec. | Cross Fit Amundson | Fitness and Recreational Sports Centers |
| 7139 | Other amusement & rec. | Cross Fit Imperial Valley | Fitness and Recreational Sports Centers |
| 7139 | Other amusement & rec. | Fitness Oasis Health Club & Sp | Fitness and Recreational Sports Centers |
| 7139 | Other amusement & rec. | Seanez Sports Academy | All other amusement & recreation industries |
| 7224 | Drinking places | Kashmir Nightclub | Drinking places, alcoholic beverages |
| 7225 | Restaurants | BBQ Guy | Full-service restaurants |
| 7225 | Restaurants | Chips & Salsa | Limited-service restaurants |
| 7225 | Restaurants | Donut Avenue | Snack and nonalcoholic beverage bars |
| 7225 | Restaurants | El Zarape | Full-service restaurants |
| 7225 | Restaurants | Hot Dogs El Unico | Full-service restaurants |
| 7225 | Restaurants | Imperial Burger & Chicken | Limited-service restaurants |
| 7225 | Restaurants | Johnny's Burritos of Imperial | Full-service restaurants |
| 7225 | Restaurants | Kotori Japanese Food | Full-service restaurants |
| 7225 | Restaurants | La Hacienda | Limited-service restaurants |
| 7225 | Restaurants | La Hacienda Cafe | Full-service restaurants |
| 7225 | Restaurants | Ma Lupe's Restaurant | Limited-service restaurants |
| 7225 | Restaurants | Onion Shed | Limited-service restaurants |
| 7225 | Restaurants | Paradiso Sales | Limited-service restaurants |
| 7225 | Restaurants | Raspados Cuchis Imperial | Snack and nonalcoholic beverage bars |
| 7225 | Restaurants | Roberto's Mexican Food | Full-service restaurants |
| 7225 | Restaurants | Subway | Limited-service restaurants |
| 7225 | Restaurants | Taqueria Tia Juana | Full-service restaurants |
| 7225 | Restaurants | Town's Pump | Limited-service restaurants |
| 8111 | Auto. repair & maintenance | Cavlr's Auto Body Ctr | Automotive Body and Interior Repair |
| 8111 | Auto. repair & maintenance | Tucker Recycling | General Automotive Repair |
| 8112 | Electronic equipment repair | Hostetler Scales-Indl Controls | Other Electronic Equipment Repair |
| 8112 | Electronic equipment repair | Rebasar Systems Inc | Computer and Office Machine Repair |
| 8121 | Personal care services | Details Haircut & More | Beauty Salons |
| 8121 | Personal care services | Details Salon Total Body Spa | Beauty Salons |

| NAICS | INDUSTRY | NAME OF BUSINESS | BUSINESS TYPE |
|--------------------|---------------------------------|--------------------------------|---|
| 8121 | Personal care services | Hair Port Llc | Beauty Salons |
| 8121 | Personal care services | Jill Deen Barber Shop | Barber Shops |
| 8121 | Personal care services | Mayra's Beauty Salon | Beauty Salons |
| 8121 | Personal care services | Melissa Michael Salon & Spa | Beauty Salons |
| 8121 | Personal care services | Simply the Salon | Beauty Salons |
| 8129 | Other personal services | Cheval Farm | All Other Personal Services |
| 8129 | Other personal services | Laura Lee's Dog Grooming | Pet care except veterinary services |
| WESTMORLAND | | | |
| 4413 | Auto Parts, Accessories | J & J Tire Co | Tire Dealers |
| 4413 | Auto Parts, Accessories | Napa Auto Parts | Automotive Parts and Accessories Stores |
| 4441 | Building materials and supplies | Westmorland True Value | Hardware Stores |
| 4451 | Grocery stores | Circle K | Convenience Stores |
| 4451 | Grocery stores | El Sol Market | Supermarkets and Other Grocery Stores |
| 4452 | Specialty foods | Watermill Express | All Other Specialty Food Stores |
| 4453 | Beer, Wine, and Liquor Stores | Johnny's Liquor Store | Beer, Wine, and Liquor Stores |
| 4453 | Beer, Wine, and Liquor Stores | Westmorland Market | Beer, Wine, and Liquor Stores |
| 4471 | Gasoline stations | Imperial Valley | Other Gasoline Stations |
| 5412 | Accounting | Gatewood Dorothy J Quality Bus | Other Accounting Services |
| 7225 | Restaurants | Mike Tastey Donuts & Spicy Pzz | Snack and nonalcoholic beverage bars |
| 7225 | Restaurants | Original Town Pump | Limited-service restaurants |
| 7225 | Restaurants | Town Pump Steak House | Full-service restaurants |

APPENDIX B: U.S. CENSUS ACS DEMOGRAPHIC DATA FOR FOUR CITIES AND SECONDARY MARKETS

Below is key demographic data from the US Census American Community Survey (ACS) pertaining to number of households in Brawley, Imperial, Calipatria and Westmorland, as well as the four secondary markets surrounding each of these cities, organized by broad ethnic categories, age of householder, and household income.

**APPENDIX B TABLE 1:
HOUSEHOLDS BY AGE OF HOUSEHOLDER, BROAD RACE\ETHNICITY CATEGORIES, AND INCOME:
CITY OF BRAWLEY
US CENSUS AMERICAN COMMUNITY SURVEY 5-YEAR 2006-2011 SAMPLE**

| | LATINO | | | | NOT LATINO | | | | TOTAL |
|---------------------------|-----------------|-----------------|-----------------|--------------------|-----------------|------------------|-----------------|--------------------|-----------------|
| | Under 25 years: | 25 to 34 years: | 35 to 64 years: | 65 years and over: | under 25 years: | 25 to 34 years: | 35 to 64 years: | 65 years and over: | All Ages |
| | 470 | 888 | 3,178 | 973 | 98 | 160 | 1,001 | 437 | 7,205 |
| 01 Less than \$10,000 | 120 | 65 | 256 | 157 | 85 | 13 | 76 | 26 | 798 |
| 02 \$10,000 to \$14,999 | 108 | 35 | 206 | 177 | 0 | 2 | 33 | 38 | 599 |
| 03 \$15,000 to \$19,999 | 58 | 109 | 309 | 252 | 0 | 0 | 40 | 71 | 839 |
| 04 \$20,000 to \$24,999 | 26 | 47 | 178 | 138 | 0 | 0 | 27 | 16 | 432 |
| 05 \$25,000 to \$29,999 | 40 | 37 | 275 | 9 | 0 | 2 | 4 | 16 | 383 |
| 06 \$30,000 to \$34,999 | 24 | 111 | 267 | 42 | 7 | 0 | 47 | 15 | 513 |
| 07 \$35,000 to \$39,999 | 0 | 23 | 71 | 32 | 6 | 4 | 15 | 26 | 177 |
| 08 \$40,000 to \$44,999 | 21 | 39 | 102 | 35 | 0 | 0 | 40 | 34 | 271 |
| 09 \$45,000 to \$49,999 | 0 | 61 | 194 | 20 | 0 | 0 | 0 | 29 | 304 |
| 10 \$50,000 to \$59,999 | 0 | 73 | 192 | 0 | 0 | 7 | 110 | 91 | 473 |
| 11 \$60,000 to \$74,999 | 43 | 119 | 327 | 54 | 0 | 8 | 59 | 19 | 629 |
| 12 \$75,000 to \$99,999 | 30 | 75 | 387 | 29 | 0 | 10 | 120 | 27 | 678 |
| 13 \$100,000 to \$124,999 | 0 | 72 | 267 | 28 | 0 | 46 | 108 | 7 | 528 |
| 14 \$125,000 to \$149,999 | 0 | 8 | 68 | 0 | 0 | 34 | 116 | 0 | 226 |
| 15 \$150,000 to \$199,999 | 0 | 14 | 40 | 0 | 0 | 31 | 92 | 3 | 180 |
| 16 \$200,000 or more | 0 | 0 | 39 | 0 | 0 | 3 | 114 | 19 | 175 |
| median | \$15,459 | \$42,875 | \$40,690 | \$16,603 | \$5,765 | \$108,695 | \$83,231 | \$40,629 | \$36,233 |

Source: Applied Development Economics, based on US Census ACS 5-Year 2006-2011 Sample

APPENDIX B TABCENLE 2:
HOUSEHOLDS BY AGE OF HOUSEHOLDER, BROAD RACE\ETHNICITY CATEGORIES, AND INCOME:
CITY OF IMPERIAL
US CENSUS AMERICAN COMMUNITY SURVEY 5-YEAR 2006-2011 SAMPLE

| | LATINO | | | | NOT LATINO | | | | TOTAL |
|---------------------------|-----------------|-----------------|-----------------|--------------------|-----------------|-----------------|-----------------|--------------------|-----------------|
| | Under 25 years: | 25 to 34 years: | 35 to 64 years: | 65 years and over: | under 25 years: | 25 to 34 years: | 35 to 64 years: | 65 years and over: | All Ages |
| | 100 | 727 | 1,849 | 281 | 30 | 288 | 904 | 227 | 4,406 |
| 01 Less than \$10,000 | 0 | 29 | 101 | 43 | 0 | 6 | 21 | 15 | 215 |
| 02 \$10,000 to \$14,999 | 25 | 19 | 86 | 154 | 0 | 7 | 23 | 10 | 324 |
| 03 \$15,000 to \$19,999 | 18 | 5 | 57 | 0 | 0 | 0 | 0 | 16 | 96 |
| 04 \$20,000 to \$24,999 | 43 | 26 | 153 | 0 | 0 | 6 | 6 | 18 | 252 |
| 05 \$25,000 to \$29,999 | 0 | 22 | 71 | 13 | 0 | 10 | 10 | 26 | 152 |
| 06 \$30,000 to \$34,999 | 0 | 20 | 117 | 0 | 11 | 10 | 37 | 32 | 227 |
| 07 \$35,000 to \$39,999 | 0 | 21 | 31 | 0 | 0 | 16 | 28 | 0 | 96 |
| 08 \$40,000 to \$44,999 | 0 | 57 | 162 | 0 | 0 | 0 | 33 | 12 | 264 |
| 09 \$45,000 to \$49,999 | 0 | 46 | 114 | 0 | 0 | 5 | 88 | 15 | 268 |
| 10 \$50,000 to \$59,999 | 0 | 85 | 235 | 10 | 19 | 11 | 54 | 20 | 434 |
| 11 \$60,000 to \$74,999 | 0 | 122 | 245 | 0 | 0 | 62 | 172 | 0 | 601 |
| 12 \$75,000 to \$99,999 | 5 | 125 | 179 | 61 | 0 | 28 | 80 | 22 | 500 |
| 13 \$100,000 to \$124,999 | 9 | 94 | 172 | 0 | 0 | 50 | 129 | 0 | 454 |
| 14 \$125,000 to \$149,999 | 0 | 18 | 31 | 0 | 0 | 54 | 169 | 0 | 272 |
| 15 \$150,000 to \$199,999 | 0 | 38 | 77 | 0 | 0 | 23 | 35 | 14 | 187 |
| 16 \$200,000 or more | 0 | 0 | 18 | 0 | 0 | 0 | 19 | 27 | 64 |
| median | \$23,255 | \$66,090 | \$51,821 | \$10,697 | \$68,180 | \$81,202 | \$71,821 | \$38,802 | \$57,152 |

Source: Applied Development Economics, based on US Census ACS 5-Year 2006-2011 Sample

**APPENDIX B TABLE 3:
HOUSEHOLDS BY AGE OF HOUSEHOLDER, BROAD RACE\ETHNICITY CATEGORIES, AND INCOME:
CITY OF CALIPATRIA
US CENSUS AMERICAN COMMUNITY SURVEY 5-YEAR 2006-2011 SAMPLE**

| | LATINO | | | | NOT LATINO | | | | TOTAL |
|---------------------------|-----------------|-----------------|-----------------|--------------------|-----------------|-----------------|-----------------|--------------------|-----------------|
| | Under 25 years: | 25 to 34 years: | 35 to 64 years: | 65 years and over: | under 25 years: | 25 to 34 years: | 35 to 64 years: | 65 years and over: | All Ages |
| | 58 | 146 | 762 | 166 | 0 | 19 | 202 | 126 | 1,479 |
| 01 Less than \$10,000 | 0 | 8 | 41 | 13 | 0 | 8 | 26 | 0 | 96 |
| 02 \$10,000 to \$14,999 | 0 | 18 | 46 | 0 | 0 | 0 | 0 | 0 | 64 |
| 03 \$15,000 to \$19,999 | 0 | 21 | 52 | 23 | 0 | 0 | 24 | 55 | 175 |
| 04 \$20,000 to \$24,999 | 0 | 0 | 68 | 58 | 0 | 0 | 16 | 30 | 172 |
| 05 \$25,000 to \$29,999 | 29 | 18 | 99 | 26 | 0 | 0 | 0 | 0 | 172 |
| 06 \$30,000 to \$34,999 | 0 | 11 | 22 | 0 | 0 | 11 | 19 | 0 | 63 |
| 07 \$35,000 to \$39,999 | 0 | 10 | 81 | 11 | 0 | 0 | 0 | 14 | 116 |
| 08 \$40,000 to \$44,999 | 29 | 0 | 25 | 0 | 0 | 0 | 0 | 0 | 54 |
| 09 \$45,000 to \$49,999 | 0 | 11 | 47 | 0 | 0 | 0 | 0 | 0 | 58 |
| 10 \$50,000 to \$59,999 | 0 | 18 | 66 | 12 | 0 | 0 | 10 | 0 | 106 |
| 11 \$60,000 to \$74,999 | 0 | 3 | 6 | 0 | 0 | 0 | 0 | 0 | 9 |
| 12 \$75,000 to \$99,999 | 0 | 21 | 105 | 0 | 0 | 0 | 44 | 27 | 197 |
| 13 \$100,000 to \$124,999 | 0 | 7 | 41 | 23 | 0 | 0 | 0 | 0 | 71 |
| 14 \$125,000 to \$149,999 | 0 | 0 | 0 | 0 | 0 | 0 | 22 | 0 | 22 |
| 15 \$150,000 to \$199,999 | 0 | 0 | 63 | 0 | 0 | 0 | 41 | 0 | 104 |
| 16 \$200,000 or more | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| median | \$39,999 | \$33,617 | \$37,261 | \$22,074 | | \$35,624 | \$79,736 | \$22,908 | \$35,030 |

Source: Applied Development Economics, based on US Census ACS 5-Year 2006-2011 Sample

**APPENDIX B TABLE 4:
HOUSEHOLDS BY AGE OF HOUSEHOLDER, BROAD RACE\ETHNICITY CATEGORIES, AND INCOME:
CITY OF WESTMORLAND
US CENSUS AMERICAN COMMUNITY SURVEY 5-YEAR 2006-2011 SAMPLE**

| | LATINO | | | | NOT LATINO | | | | TOTAL |
|---------------------------|-----------------|-----------------|-----------------|--------------------|-----------------|-----------------|-----------------|--------------------|-----------------|
| | under 25 years: | 25 to 34 years: | 35 to 64 years: | 65 years and over: | under 25 years: | 25 to 34 years: | 35 to 64 years: | 65 years and over: | All Ages |
| | 12 | 90 | 252 | 127 | 0 | 4 | 46 | 62 | 593 |
| 01 Less than \$10,000 | 0 | 4 | 34 | 14 | 0 | 0 | 10 | 0 | 62 |
| 02 \$10,000 to \$14,999 | 9 | 15 | 32 | 35 | 0 | 0 | 0 | 10 | 101 |
| 03 \$15,000 to \$19,999 | 0 | 7 | 15 | 37 | 0 | 0 | 9 | 8 | 76 |
| 04 \$20,000 to \$24,999 | 0 | 0 | 3 | 31 | 0 | 0 | 8 | 0 | 42 |
| 05 \$25,000 to \$29,999 | 0 | 7 | 8 | 7 | 0 | 0 | 0 | 0 | 22 |
| 06 \$30,000 to \$34,999 | 0 | 12 | 26 | 3 | 0 | 0 | 0 | 16 | 57 |
| 07 \$35,000 to \$39,999 | 0 | 0 | 7 | 0 | 0 | 4 | 5 | 8 | 24 |
| 08 \$40,000 to \$44,999 | 0 | 16 | 29 | 0 | 0 | 0 | 0 | 0 | 45 |
| 09 \$45,000 to \$49,999 | 0 | 7 | 14 | 0 | 0 | 0 | 0 | 0 | 21 |
| 10 \$50,000 to \$59,999 | 0 | 1 | 24 | 0 | 0 | 0 | 2 | 0 | 27 |
| 11 \$60,000 to \$74,999 | 3 | 14 | 43 | 0 | 0 | 0 | 6 | 9 | 75 |
| 12 \$75,000 to \$99,999 | 0 | 4 | 14 | 0 | 0 | 0 | 0 | 4 | 22 |
| 13 \$100,000 to \$124,999 | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 7 | 13 |
| 14 \$125,000 to \$149,999 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 15 \$150,000 to \$199,999 | 0 | 3 | 3 | 0 | 0 | 0 | 0 | 0 | 6 |
| 16 \$200,000 or more | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| median | \$39,999 | \$39,999 | \$40,319 | \$19,437 | | \$37,500 | \$43,124 | \$34,443 | \$28,375 |

Source: Applied Development Economics, based on US Census ACS 5-Year 2006-2011 Sample

**APPENDIX B TABLE 5:
HOUSEHOLDS BY AGE OF HOUSEHOLDER, BROAD RACE\ETHNICITY CATEGORIES,
AND INCOME: SECONDARY MARKETS
US CENSUS AMERICAN COMMUNITY SURVEY 5-YEAR 2006-2011 SAMPLE**

| | Secondary Markets | | | | All Secondary Market |
|---------------------------|-------------------|-----------------|-----------------|-------------------|----------------------------|
| | Brawley | Imperial | Calipatria | Westmore- land | |
| | 216 | 340 | 219 | 43 | 818 |
| 01 Less than \$10,000 | 8 | 19 | 21 | 4 | 52 |
| 02 \$10,000 to \$14,999 | 20 | 26 | 23 | 8 | 77 |
| 03 \$15,000 to \$19,999 | 2 | 9 | 21 | 5 | 37 |
| 04 \$20,000 to \$24,999 | 13 | 19 | 24 | 3 | 59 |
| 05 \$25,000 to \$29,999 | 4 | 25 | 20 | 1 | 50 |
| 06 \$30,000 to \$34,999 | 14 | 17 | 10 | 3 | 44 |
| 07 \$35,000 to \$39,999 | 10 | 8 | 16 | 0 | 34 |
| 08 \$40,000 to \$44,999 | 9 | 17 | 8 | 4 | 38 |
| 09 \$45,000 to \$49,999 | 1 | 20 | 9 | 1 | 31 |
| 10 \$50,000 to \$59,999 | 27 | 36 | 13 | 3 | 79 |
| 11 \$60,000 to \$74,999 | 41 | 34 | 5 | 6 | 86 |
| 12 \$75,000 to \$99,999 | 24 | 32 | 24 | 3 | 83 |
| 13 \$100,000 to \$124,999 | 12 | 37 | 9 | 1 | 59 |
| 14 \$125,000 to \$149,999 | 11 | 26 | 3 | 0 | 40 |
| 15 \$150,000 to \$199,999 | 14 | 11 | 13 | 0 | 38 |
| 16 \$200,000 or more | 6 | 4 | 0 | 1 | 11 |
| median | \$59,999 | \$53,124 | \$30,137 | \$30,713 | \$48,459 |

APPENDIX C: U.S. ECONOMIC CENSUS 2007, INCLUDING ESTIMATES

The US Economics Census gathers and disseminates detailed industry-level data for a variety of geographic areas, including cities. Below are data for specific retail and services industries at the three-digit NAICS code level for the cities of Brawley, Calipatria, Imperial, and Westmorland.

| APPENDIX C TABLE 1: INDUSTRY TRENDS AT THREE-DIGIT NAICS FOR BRAWLEY, CALIPATRIA, IMPERIAL, AND WESTMORLAND US ECONOMIC CENSUS 2007 | | | | | |
|---|-------|---|---------------------|---------------------------|--------------------|
| ID | NAICS | INDUSTRY | ESTABLISH- MENTS | EMPLOY- MENT (est.) | RECEIPTS (est.) |
| Brawley | | | | | |
| 2 | 441 | Motor vehicle and parts dealers | 8 | 175 | \$50,524,730 |
| 3 | 442 | Furniture and home furnishings stores | 2 | 10 | \$1,270,342 |
| 4 | 443 | Electronics and appliance stores | 2 | 10 | \$1,240,940 |
| 6 | 444 | Building material and garden equipment and supplies dealers | 6 | 54 | \$7,603,000 |
| 7 | 445 | Food and beverage stores | 9 | 177 | \$33,943,000 |
| 9 | 446 | Health and personal care stores | 4 | 60 | \$17,060,656 |
| 13 | 447 | Gasoline stations | 10 | 88 | \$38,469,000 |
| 17 | 448 | Clothing and clothing accessories stores | 2 | 10 | \$971,182 |
| 18 | 452 | General merchandise stores | 3 | 60 | \$13,860,197 |
| 19 | 453 | Miscellaneous store retailers | 5 | 60 | \$8,014,085 |
| 22 | 454 | Nonstore retailers | 4 | 54 | \$4,619,000 |
| 224 | 531 | Real estate | 13 | 23 | \$2,034,000 |
| 225 | 532 | Rental and leasing services | 6 | 38 | \$4,340,000 |
| 251 | 541 | Professional, scientific, and technical services | 16 | 134 | \$6,306,000 |
| 252 | 541 | Professional, scientific, and technical services | 16 | 134 | \$6,306,000 |
| 325 | 621 | Ambulatory health care services | 38 | 368 | \$52,250,000 |
| 326 | 621 | Ambulatory health care services | 35 | 375 | \$46,384,331 |
| 327 | 621 | Ambulatory health care services | 3 | 60 | \$7,421,493 |
| 344 | 622 | Hospitals | 1 | 750 | \$0 |
| 345 | 622 | Hospitals | 1 | 750 | \$0 |
| 346 | 623 | Nursing and residential care facilities | 3 | 60 | \$0 |
| 347 | 623 | Nursing and residential care facilities | 3 | 60 | \$0 |
| 348 | 624 | Social assistance | 6 | 375 | \$13,745,339 |
| 349 | 624 | Social assistance | 3 | 175 | \$6,414,492 |
| 350 | 624 | Social assistance | 3 | 175 | \$6,414,492 |
| 477 | 721 | Accommodation | 4 | 60 | \$2,977,821 |
| 480 | 722 | Food services and drinking places | 35 | 375 | \$16,676,253 |
| 517 | 811 | Repair and maintenance | 21 | 175 | \$13,849,745 |
| 518 | 811 | Repair and maintenance | 21 | 175 | \$13,849,745 |

| ID | NAICS | INDUSTRY | ESTABLISH- MENTS | EMPLOY- MENT (est.) | RECEIPTS (est.) |
|-------------------|-------|--|---------------------|---------------------------|--------------------|
| 525 | 812 | Personal and laundry services | 4 | 175 | \$14,470,849 |
| 526 | 812 | Personal and laundry services | 4 | 175 | \$14,470,849 |
| 531 | 813 | Religious, grantmaking, civic, professional, and similar organizations | 9 | 60 | \$4,447,579 |
| 532 | 813 | Religious, grantmaking, civic, professional, and similar organizations | 9 | 60 | \$4,447,579 |
| CALIPATRIA | | | | | |
| 88 | 441 | Motor vehicle and parts dealers | 2 | 10 | \$2,887,127 |
| 89 | 444 | Building material and garden equipment and supplies dealers | 1 | 10 | \$2,073,757 |
| 90 | 445 | Food and beverage stores | 2 | 60 | \$10,914,068 |
| 91 | 447 | Gasoline stations | 1 | 10 | \$4,538,849 |
| 93 | 454 | Nonstore retailers | 1 | 10 | \$876,460 |
| 231 | 531 | Real estate | 2 | 10 | \$1,083,225 |
| 490 | 722 | Food services and drinking places | 3 | 10 | \$444,700 |
| IMPERIAL | | | | | |
| 190 | 441 | Motor vehicle and parts dealers | 2 | 175 | \$50,524,730 |
| 191 | 442 | Furniture and home furnishings stores | 2 | 60 | \$7,622,051 |
| 193 | 444 | Building material and garden equipment and supplies dealers | 1 | 10 | \$2,073,757 |
| 194 | 445 | Food and beverage stores | 2 | 60 | \$10,914,068 |
| 195 | 446 | Health and personal care stores | 1 | 10 | \$2,843,443 |
| 197 | 447 | Gasoline stations | 2 | 10 | \$4,538,849 |
| 199 | 448 | Clothing and clothing accessories stores | 1 | 10 | \$971,182 |
| 200 | 452 | General merchandise stores | 1 | 175 | \$40,425,573 |
| 201 | 453 | Miscellaneous store retailers | 1 | 10 | \$1,335,681 |
| 202 | 454 | Nonstore retailers | 3 | 10 | \$876,460 |
| 244 | 531 | Real estate | 6 | 11 | \$1,193,000 |
| 245 | 532 | Rental and leasing services | 5 | 47 | \$10,945,000 |
| 315 | 541 | Professional, scientific, and technical services | 6 | 27 | \$1,761,000 |
| 316 | 541 | Professional, scientific, and technical services | 6 | 27 | \$1,761,000 |
| 421 | 621 | Ambulatory health care services | 7 | 60 | \$7,421,493 |
| 422 | 621 | Ambulatory health care services | 7 | 60 | \$7,421,493 |
| 433 | 624 | Social assistance | 3 | 60 | \$2,199,254 |
| 434 | 624 | Social assistance | 3 | 60 | \$2,199,254 |
| 503 | 721 | Accommodation | 1 | 10 | \$496,303 |
| 504 | 722 | Food services and drinking places | 10 | 175 | \$7,782,252 |
| 593 | 811 | Repair and maintenance | 7 | 49 | \$5,855,000 |
| 594 | 811 | Repair and maintenance | 7 | 49 | \$5,855,000 |
| 601 | 813 | Religious, grantmaking, civic, professional, and similar organizations | 2 | 10 | \$741,263 |
| 602 | 813 | Religious, grantmaking, civic, professional, and similar organizations | 2 | 10 | \$741,263 |

Source: Applied Development Economics, based on US Census 200