

# ESTIMATING THE PURCHASING POWER OF PASS-THROUGH TRAFFIC IN THE CITY OF KINGMAN



L William Seidman Research Institute  
W. P. Carey School of Business  
Arizona State University

FINAL REPORT

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## L. WILLIAM SEIDMAN RESEARCH INSTITUTE

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- Arizona Public Service Corporation (APS)
- Arizona School Boards Association
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- BHP Billiton
- The Boeing Company
- The Boys & Girls Clubs of Metro Phoenix
- The Cactus League Association
- The Central Arizona Project (CAP)
- Chicanos Por La Causa
- City of Phoenix Dept. Economic Development
- City of Phoenix Fire Department
- CopperPoint
- Curis Resources (Arizona)
- The David and Gladys Wright House Foundation
- Dignity Health
- Downtown Tempe Authority
- Environmental Defense Fund
- Epic Rides/The City of Prescott
- EPCOR Water (USA), Inc.
- Excelsior Mining
- Executive Budget Office State of Arizona
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- First Things First
- Freeport McMoRan
- Greater Phoenix Economic Council
- HonorHealth
- Intel Corporation
- ISM Raceway
- The McCain Institute
- Maricopa Integrated Health System
- Navajo Nation Div. Economic Development
- The NCAA
- The NFL
- The Pakis Foundation
- Phoenix Convention Center
- The Phoenix Philanthropy Group
- Phoenix Sky Harbor International Airport
- Pinal County
- Protect the Flows
- Public Service New Mexico (PNM)
- Raytheon
- Republic Services, Inc.
- Rio Tinto
- Rosemont Copper Mine
- Salt River Project (SRP)
- Science Foundation Arizona (SFAZ)
- SuperBowl XLIX
- The Tillman Foundation
- Turf Paradise
- Valley METRO Light Rail
- Tenet Healthcare
- Twisted Adventures Inc.
- Vote Solar Initiative
- Waste Management Inc.
- Wells Fargo
- Yavapai County Jail District

## EXECUTIVE SUMMARY

- The purpose of this study is to estimate the current purchasing power of visitors driving through Kingman along Interstate-40 and US Highway-93.

### Current Retail and Restaurant Landscape

- The City of Kingman has 605.4 residents per retail and grocery establishment, and 195.5 residents per restaurant, bar or fast food establishment.
- Kingman Census County Division (CCD) has 1,364.8 residents per retail and grocery establishment in the city, and 440.8 residents per restaurant, bar or fast food establishment in the city.<sup>1</sup>
- City of Kingman retail establishments generated \$449.2 million gross sales in 2019.
- City of Kingman restaurants and bars generated \$98.8 million gross sales in 2019.

### Current and Projected Traffic

- On average, between 14,000 and 39,000 vehicles travel along the I-40 in Kingman on any given day.
- Also on average, between 9,000 and 26,000 vehicles travel along US-93 in Kingman on any given day.
- Arizona Department of Transportation (ADOT) projects a 37%-43% increase in annual daily traffic along the US-93 mile posts (dependent on location) between 2019 and 2040.
- ADOT also projects up to a 187% increase in annual daily traffic along the I-40 in Kingman between 2019 and 2040.

### Retail Insights

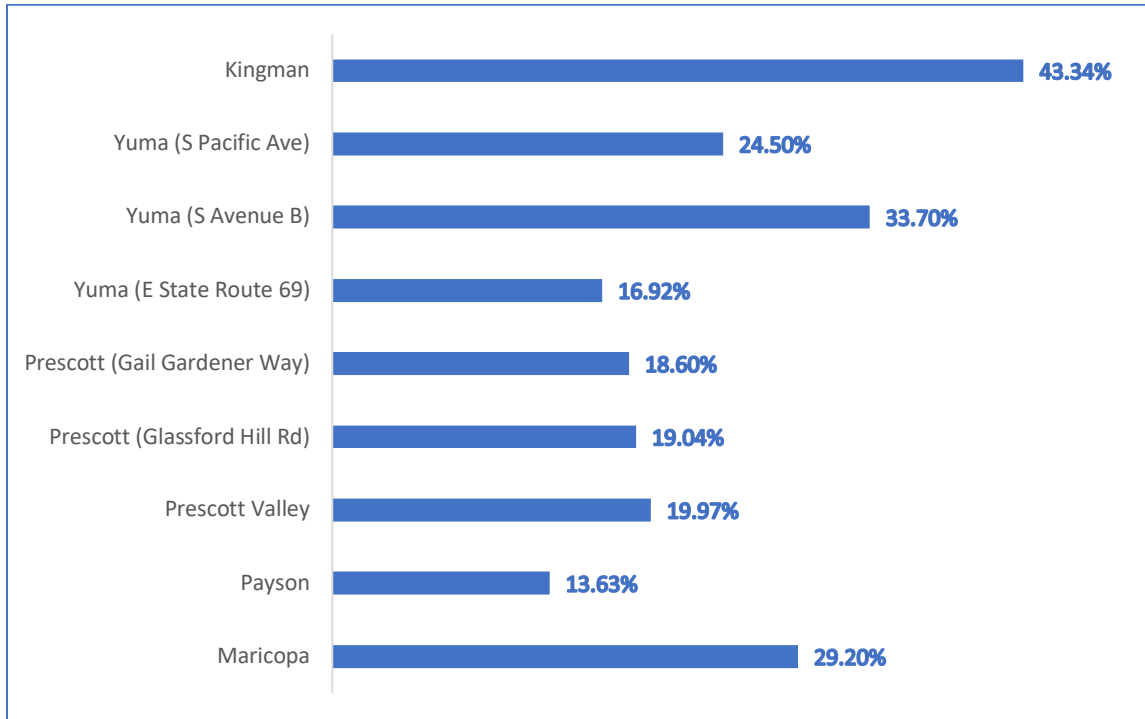
- The study uses Placer.ai cell phone tracking data to estimate the number of visits and customer primary residences for four key retailers in the city, 2017-2019. These are Walmart, Safeway, Ross Dress for Less and Big Lots.
- Extrapolating from these findings, Seidman concludes that it is reasonable to assume that the range of pass-through customers at city retailers is higher than comparable towns and cities in Arizona, such as Marana, Maricopa, Payson, Prescott and Yuma.

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<sup>1</sup> . A CCD is a subdivision of a county delineated cooperatively by the U.S. States Census Bureau and state and local government authorities for the purpose of presenting statistical data.

- For the 2017 through 2019 time horizon, 10.72% to 43.34% of customers had a primary residence at least 250 miles away from the Kingman store visited, dependent on the store chain.
- Kingman’s Walmart store was at the top of this range, and Kingman’s Big Lots at the lower end of this range.
- In 2019 alone, 18.56% to 60.94% of customers traveled at least 100 miles to visit the Kingman store, dependent on the store chain.
- Again, Kingman’s Walmart store was at the top of this range, and Kingman’s Big Lots at the lower end of this range.
- A comparison with five other Arizona cities located adjacent to or dissected by interstates and major highways, appears to support Mohave County’s belief that Kingman’s retailers benefit from the greatest number of pass-through customers.
- For example, the percentage of Kingman Walmart customers living at least 250 miles away is double the *average* of the other eight Walmart stores examined, thereby demonstrating the value (in total customers) of pass-through traffic for this particular store.

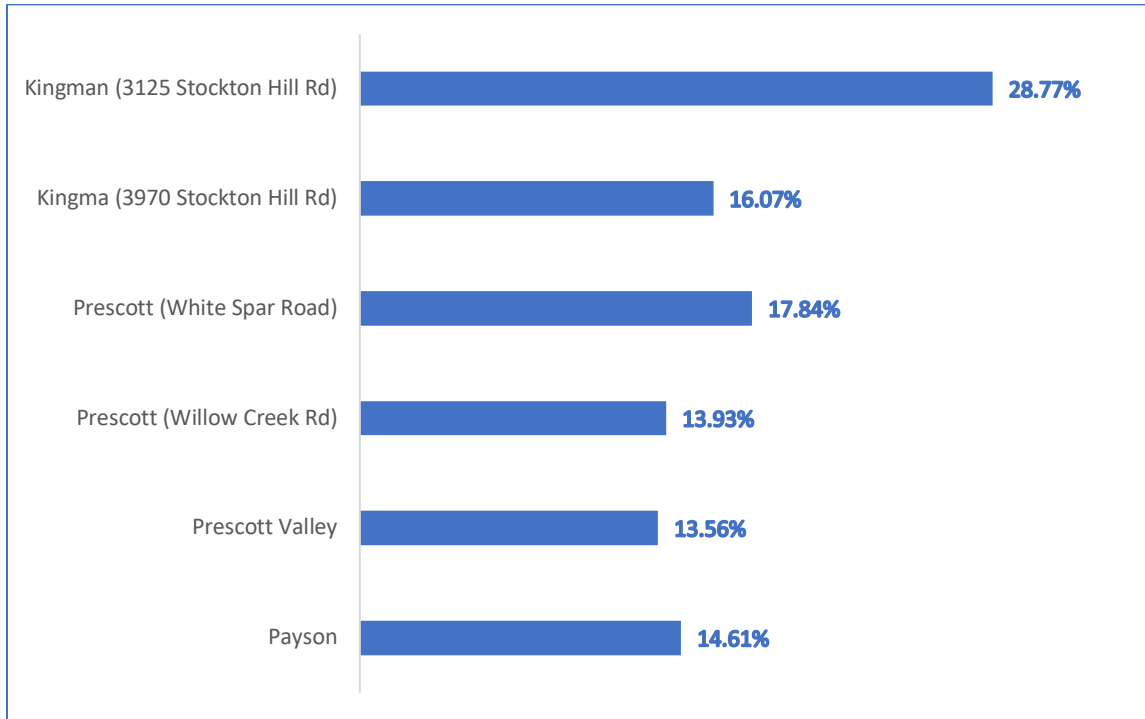
**Percent of Walmart Customers Residing at Least 250 Miles Away from Store, 2017-2019**



Source: Placer.ai

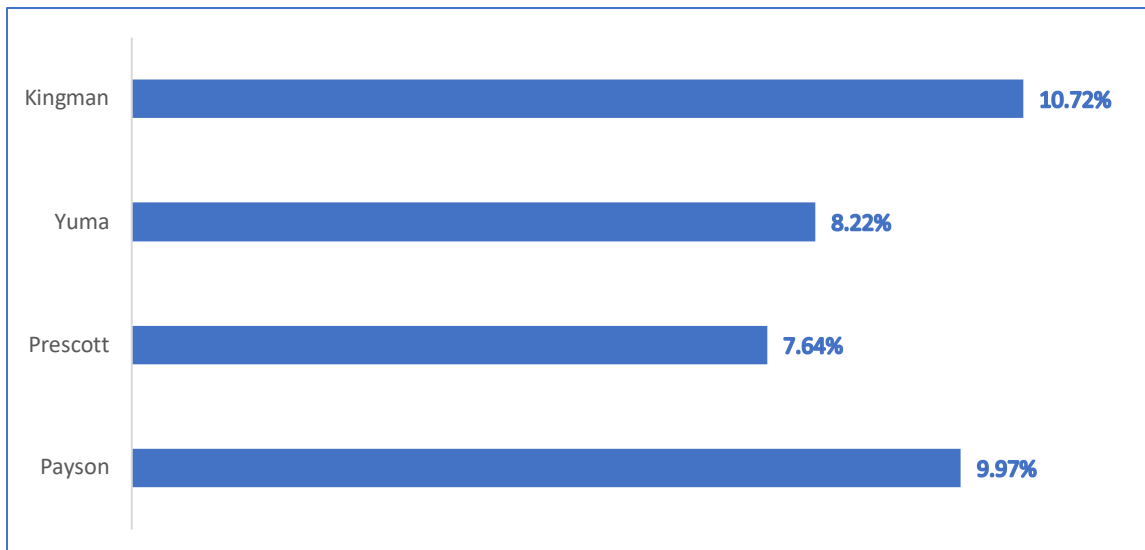
- Kingman’s Safeway and Big Lots stores, also have a higher percentage of total customers traveling at least 250 miles, 2017-2019 than sister chain stores located in five comparators.

**Percent of Safeway Customers Residing at Least 250 Miles Away from Store, 2017-2019**



Source: Placer.ai

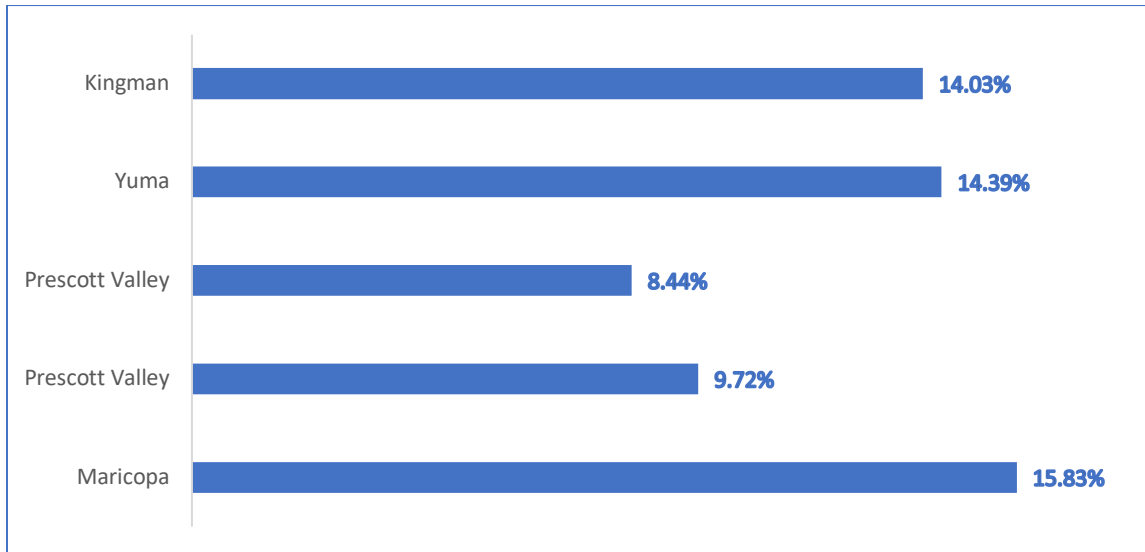
**Percent of Big Lots Customers Residing at Least 250 Miles Away from Store, 2017-2019**



Source: Placer.ai

- Kingman’s Ross Dress for Less store has a lower percentage of total customers traveling at least 250 miles, 2017-2019 than the chain’s stores in Maricopa and Yuma, but the difference is negligible

**Percent of Ross Dress for Less Customers Residing at Least 250 Miles Away from Store, 2017-2019**



Source: Placer.ai

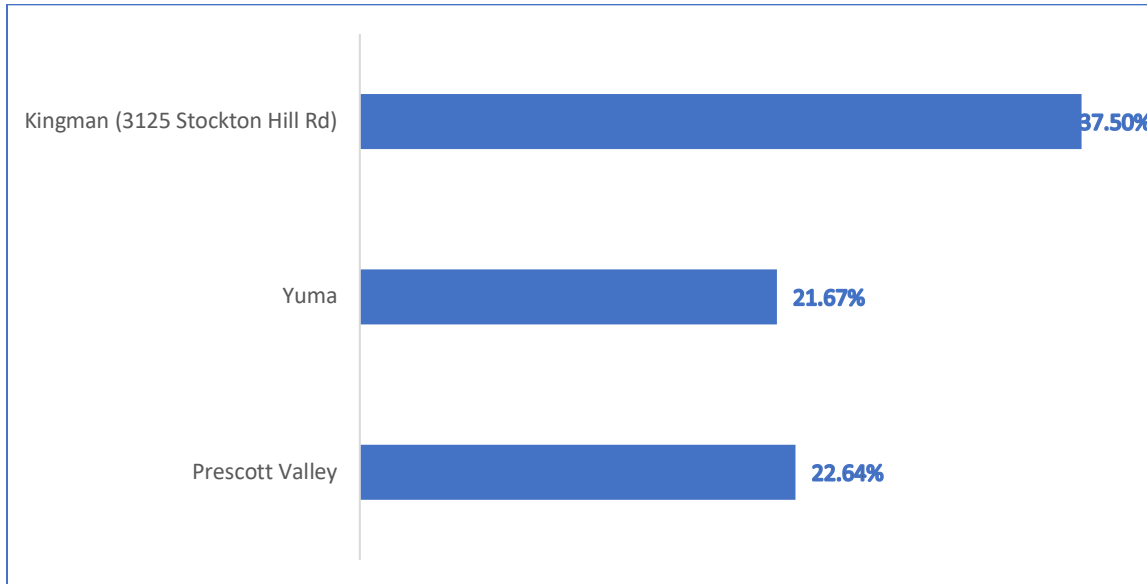
- Approximately one in five customers have traveled at least 100 miles to C-A-L Ranch – a new Kingman store that opened in February 2021, reinforcing the value of pass-through traffic to city retailers.

**Restaurant/Fast Food Insights**

- The study also uses Placer.ai cell phone tracking data to estimate the number of visits and customer primary residences for two food establishments in the city, 2017-2019. These are Cracker Barrel and In N Out Burger.
- Extrapolating from the findings, Seidman concludes that it is reasonable to assume that the range of pass-through customers at food establishments in the city is higher than comparable towns and cities in Arizona, such as Marana, Maricopa, Payson, Prescott and Yuma.
- Both Kingman food establishments have a higher percentage of total customers traveling at least 250 miles, 2017-2019 than sister chain stores located in the Arizona comparators.
- Kingman’s Cracker Barrel is the top performing restaurant within the chain’s 13-strong Arizona presence, 2017 through 2019.

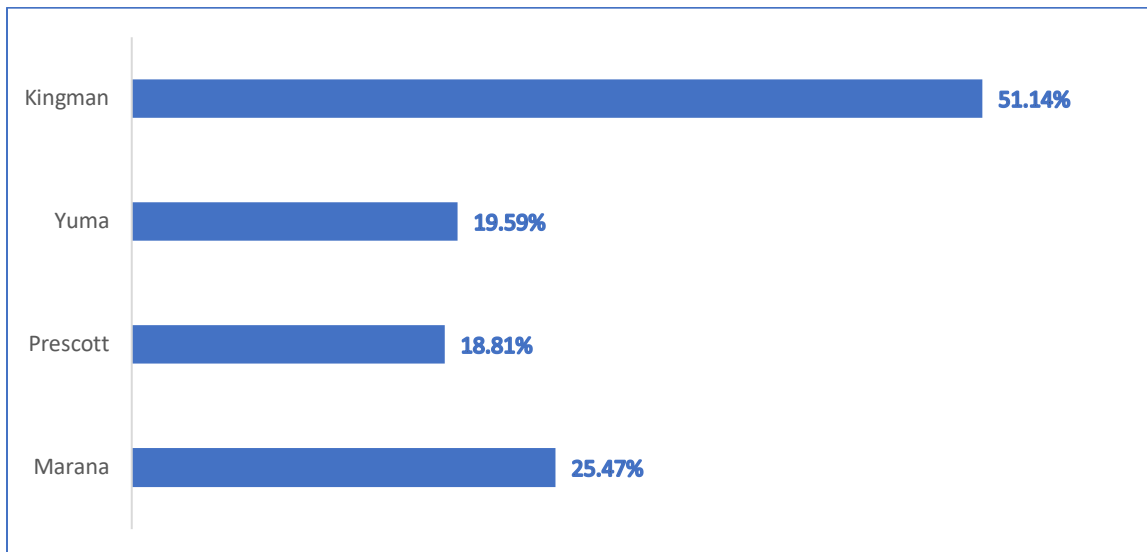
- It also currently ranks number one within the Cracker Barrel chain nationwide for the January 1 – July 31, 2021 time horizon.

**Percent of Cracker Barrel Customers Residing at Least 250 Miles Away from Store, 2017-2019**



Source: Placer.ai

**Percent of In N Out Burger Customers Residing at Least 250 Miles Away from Store, 2017-2019**



Source: Placer.ai

## 1.0 INTRODUCTION

Located approximately 105 miles southeast of Las Vegas, NV, and 165 miles northwest of the state capital Phoenix, the City of Kingman is the county seat of Mohave County, AZ. The U.S. Census Bureau estimated Kingman's population at 31,013 in July 2019,<sup>2</sup> including a civilian labor force of 11,815.<sup>3</sup> The top three types of employment by profession for city residents in 2019 were:

- Education and health care (28.3%)
- Retail trade (12.4%)
- Arts, entertainment, recreation and accommodation (12.3%).<sup>4</sup>

The Arizona Office of Economic Opportunity's (OEO) 2019 population estimate for the City of Kingman is slightly higher at 31,480.

However, there are significant unincorporated areas immediately surrounding Kingman's municipal boundaries whose residents also obtain all of their retail and services in the city. These include Butler-New Kingman, Valle Vista, Golden Valley, Dolan Springs and Peach Springs. As a result, Mohave County District #1 Office suggests that Kingman Census County Division (CDD) is in all probability better suited for an analysis of per capita retail potential and sales tax revenues within the area. A CCD is a subdivision of a county delineated cooperatively by the U.S. States Census Bureau and state and local government authorities for the purpose of presenting statistical data. The 2019 population estimate for Kingman CCD is 70,968. The geographic area of Kingman CCD is shown in Figure 1.

Kingman's retailers and restaurants also serve the residents of Chloride, Hackberry, Seligman and Wickieup; and the City's Economic Development Manager suggests that any store in Kingman without a presence in Bullhead City, Lake Havasu or Laughlin NV will also attract customers from those cities.

The purpose of this study is to estimate the current purchasing power of visitors passing through Kingman along Interstate-40 (I-40) and US Highway-93 (US-93), at local retailers, bars and restaurants.

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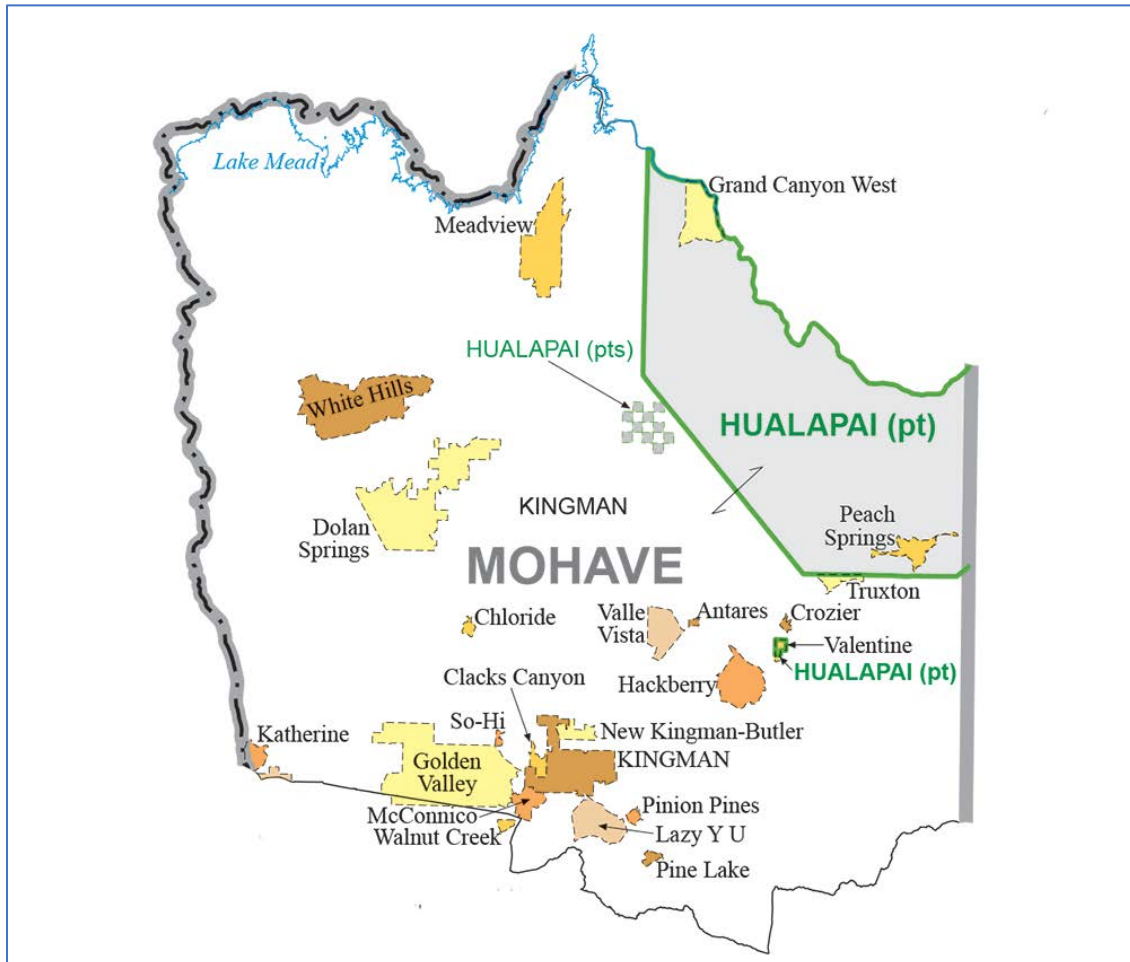
<sup>2</sup> Source: U.S. Census Bureau, Quick Facts, available at <https://www.census.gov/quickfacts/kingmancityarizona>

<sup>3</sup> Source: U.S. Census Bureau, Selected Economic Characteristics, American Community Survey 2019 5-Year Estimates Data Profiles, available at <https://data.census.gov/cedsci/table?q=Kingman%20city%20Employment&tid=ACSDP5Y2019.DP03>

<sup>4</sup> The study exclusively uses 2019 data to avoid any issues or anomalies associated with the Covid-19 pandemic.



**FIGURE 1: KINGMAN CENSUS COUNTY DIVISION (CCD)**



Source: U.S. Census Bureau

Seidman's key findings will be used by community leaders to understand the extent to which the stream of pass-through traffic along the two main highways could help support and sustain an expansion of big box retail in Kingman.

Section 2 describes the current retail and restaurant landscape in the City of Kingman.

Section 3 examines in detail the value of pass-through traffic.

Section 4 investigates the potential for a new large box retailer locating in the City of Kingman.

Conclusions are offered in Section 5.

## 2.0 CURRENT RETAIL AND RESTAURANT LANDSCAPE

### 2.1 Current Establishment Numbers (Absolute and Per Capita)

Seidman estimates that the City of Kingman has 52 retail and grocery establishments, and 161 restaurants, bars and fast food establishments. This is based on a review of current Yellow Pages online listings for the city. The search words used by Seidman for this estimate are: 'Restaurants', 'Bars', 'Pubs', 'Retail Stores' and 'Grocery Stores.' The tallies are based on the inclusion of Kingman in the address. They exclude any '...serving the area' listings on Yellow Pages.

Using the OEO's 2019 population estimate for the city in conjunction with these Yellow Pages listings, Seidman estimates that Kingman has 605.4 residents per retail and grocery establishment, and 195.5 residents per restaurant, bar or fast food establishment.

This means, for example, that the residents of Prescott (462.7) and Lake Havasu City (556.3) are better served by retail and grocery establishments on a per capita basis than Kingman. The residents of Payson (621.8) are almost on a par with Kingman, and the residents of Yuma (666.9) are not as well served as Kingman for retail and grocery establishments on a per capita basis.<sup>5</sup>

It also means that the residents of Prescott (147.3) and Payson (166.7) are better served by restaurants, bars and fast food establishments on a per capita basis, the residents of Lake Havasu City (195.6) are on a par with Kingman, and the residents of Yuma (271.6) are not as well served as Kingman.

Using the Census Bureau's 2019 CCD<sup>6</sup> population estimate in conjunction with these Yellow Pages listings, Seidman alternatively estimates that Kingman has 1,364.8 residents per retail and grocery establishment, and 440.8 residents per restaurant, bar or fast food establishment.

This means, for example, that the CCD residents of Lake Havasu City (580.5), Sierra Vista (875.0), Payson (904.7), Yuma (917.7) and Casa Grande (959.4) are all better served by retail and grocery establishments on a per capita basis than Kingman CCD residents.

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<sup>5</sup> Please see Appendix to view the Tables summarizing the key data used for each town, city or CCD.

<sup>6</sup> A CCD is a subdivision of a county delineated cooperatively by the U.S. States Census Bureau and state and local government authorities for the purpose of presenting statistical data.

It also means that the CCD residents of Lake Havasu City (204.2), Payson (242.5), Sierra Vista (295.2), Prescott (314.2), Yuma (373.7), Casa Grande (412.0) and Bullhead City (418.7) are all better served by restaurants, bars and fast food establishments on a per capita basis than Kingman CCD residents.

It is reasonable to conclude solely on the basis of either per capita measurement that the City of Kingman is currently underserved by retail and grocery stores, restaurants, bars, and fast food establishments compared to some of the other towns and cities in the state.

## **2.2 Road Traffic Flows**

Tables 1 and 2 show the 2019 traffic flows for Kingman along two main arteries that cross the city. These are the I-40 and US Highway 93. The I-40 is a major east-west interstate highway running from Barstow, CA to Wilmington, NC. It runs through or near Albuquerque, Amarillo, Kingman, Little Rock, Memphis, Nashville, Oklahoma City, and Raleigh. US-93 connects Wickenburg to Las Vegas via Kingman. The data is sourced from the Arizona Department of Transportation's 2019 Annual Traffic Counts.

On average, between 14,000 and 39,000 vehicles travel along the I-40 within Kingman on any given day. Also on average, between 9,000 and 26,000 vehicles travel along US-93 within the Kingman area on any given day.

ADOT projects a 36%-72% increase in annual daily traffic along Kingman's I-40 mile posts (dependent on location) between 2019 and 2040.

ADOT projects a 37%-43% increase in annual daily traffic along the US-93 mile posts (dependent on location) between 2019 and 2040.

The tables show that the I-40/US-93 intersection is particularly busy. On average, more than 24,000 cars travel along the I-40, and 22,000 cars along US-93 at this intersection.

ADOT also projects up to a 187% increase in annual daily traffic along Kingman's I-40 interaction with US-93 between 2019 and 2040. ADOT does not offer any explanation for their projected increases in annual daily traffic up to 2040.

**TABLE 1: I-40 ANNUAL TRAFFIC COUNT, 2019**

LOCATION ID	START OF COUNT DESCRIPTION	END OF COUNT DESCRIPTION	MILE POST			AVERAGE ANNUAL DAILY TRAFFIC, 2019	AVERAGE ANNUAL DAILY TRAFFIC PROJECTION, 2040
			START	TRAFFIC COUNT	END		
100507	Exit 28 Old Trails Rd	Exit 37 Griffith Rd	28.75	32.90	37.03	15,670	21,399
100508	Exit 37 Griffith Rd	Exit 44 Shinarump Rd	37.03	43.80	44.32	14,202	23,877
100509	Exit 44 Shinarump Rd	Exit 48 US-93 / SB40 (0) / Beale St - Kingman	44.32	47.13	48.87	15,230	26,265
100510	Exit 48 US-93 / SB40 (0) / Beale St - Kingman	Exit 52 Stockton Hill Rd	48.87	50.50	51.69	39,729	63,085
100511	Exit 52 Stockton Hill Rd	Exit 53 SR 66 / SB 40 (0) - Kingman	51.69	52.30	53.08	28,891	42,520
100512	Exit 53 SR 66 / SB 40 (0) - Kingman	Exit 59 D W Ranch Rd	53.08	55.00	59.65	25,877	43,596
100513	Exit 59 D W Ranch Rd	Exit 66 Blake Ranch Rd	59.65	63.00	66.47	22,571	36,518
100514	Exit 66 Blake Ranch Rd	Exit 71 US-93 - Round Valley	66.47	69.00	71.98	24,451	41,885

Source: Arizona Department of Transportation

**TABLE 2: US-93 ANNUAL TRAFFIC COUNT, 2019**

LOCATION ID	START OF COUNT DESCRIPTION	END OF COUNT DESCRIPTION	MILE POST			AVERAGE ANNUAL DAILY TRAFFIC, 2019	AVERAGE ANNUAL DAILY TRAFFIC PROJECTION, 2040
			START	TRAFFIC COUNT	END		
102090	Chicken Springs Rd - Wickiup	SR 97	123.67	129.99	154.84	8,650	11,990
102089	I-40 (Exit 71) - Round Valley	Chicken Springs Rd - Wickiup	91.73	113.20	123.67	9,582	13,159
102098	I-40 (Exit 48) / SB 40(0)	Grandview Ave	71.04	71.04	71.33	10,052	28,861
102087	Cerbat Rd	SR 68	62.05	64.00	67.03	12,990	18,485
102086	Chloride Rd / Old Highway 62	Cerbat Rd	52.76	57.10	62.05	15,654	22,474
102085	Pierce Ferry Rd	Chloride Rd / Old Highway 62	41.84	47.00	52.76	15,782	22,346
102088	SR 68	I-40 (Exit 5X) / SB 40 (0)	67.03	70.70	71.04	26,228	37,135

Source: Arizona Department of Transportation

### 2.3 Gross Sales and TPT (Sales Tax) Revenues

The current local transaction privilege (sales) tax rate in Kingman is 8.1%. This includes a 5.6% transaction privilege (sales) tax rate for the State of Arizona. The city also imposes an additional 1% sales tax on restaurants and bars within its jurisdiction over and above the 2.5% sales tax. Table 3 summarizes the gross sales and TPT tax revenues for the City of Kingman in 2019. City of Kingman retail establishments generated \$449.2 million gross sales in 2019. City of Kingman restaurants and bars generated \$98.8 million gross sales in 2019.

**TABLE 3: KINGMAN’S GROSS SALES AND TPT (SALES TAX) REVENUES PER CAPITA, 2019**

TYPE	GROSS SALES	CITY TPT RATE	TAX REVENUE	TAXABLE GROSS SALES PER CITY RESIDENT	TAXABLE GROSS SALES PER CCD RESIDENT
Restaurants and Bars	\$98.8 M	2.5%	\$2.5 M	\$3,141	\$1,393
Restaurants and Bars (Additional)	-	1.0%	\$925.5 K		
Retail	\$449.2 M	2.5%	\$11.2 M	\$14,272	\$6,331

Source: Arizona Department of Revenue

Tables 4 and 5 contextualize Kingman’s gross sales and tax revenues via a comparison with five other towns and cities in the state that lie adjacent to, or are dissected by, major interstates and highways. The five towns and cities selected by Seidman for this comparison are Marana, Maricopa, Payson, Prescott/Prescott Valley, and Yuma.

Marana is a town in Pima County, northwest of Tucson, which extends along the I-10 from the line between Pinal and Pima counties to the Tucson city line.

Maricopa is in Pinal County. It is primarily served by State Routes 347 and 238. State Route 347 (John Wayne Parkway) runs for 29 miles from Stanfield to the I-10 south of Chandler. State Route 238 runs from Maricopa to Gila Bend, and is used by as a connection to/from the I-8 by metro Phoenix traffic.

Payson is located in northern Gila County. It is home to State Route 87 (the Beeline Highway) connecting Picacho to Winslow via metro Phoenix; State Route 188 (the Apache Trail), connecting Payson to Globe; and State Route 260, connecting Cottonwood to Eager.

**TABLE 4: RETAIL GROSS SALES AND TPT (SALES TAX) REVENUES PER CAPITA, 2019**

LOCATION	ESTABLISHMENTS	GROSS SALES	CITY TPT RATE	TAX REVENUE	TAXABLE GROSS SALES PER CITY RESIDENT	TAXABLE GROSS SALES PER CCD RESIDENT
Marana	17	\$775.1 M	2.00%	\$15.5 M	\$15,715	\$21,491
Maricopa	20	\$270.8 M	2.00%	\$5.4 M	\$4,943	\$4,670
Payson	26	\$259.6 M	2.88%	\$7.5 M	\$16,055	\$11,036
Prescott/Prescott Valley	134	\$1.6 B	2.75%-2.83%	\$44.3 M	\$17,919	\$12,206
Yuma	158	\$1.5 B	1.70%	\$26.0 M	\$14,511	\$10,545
<b>Kingman</b>	<b>52</b>	<b>\$449.3 M</b>	<b>2.50%</b>	<b>\$11.2 M</b>	<b>\$14,272</b>	<b>\$6,331</b>

Source: Arizona Department of Revenue/Yellow Pages

Prescott and Prescott Valley are part of Prescott CCD in Yavapai County. They have three main State Route thoroughfares: 89A, 89, and 69. State Route 89A connects Sedona and Cottonwood to Prescott. State Route 89 connects Prescott CCD to Chino Valley, Paulden and the I-40 at Ash Fork. State Route 69 connects Prescott CDD to the I-17 65 miles north of downtown Phoenix.

The City of Yuma is in southwest Arizona, near to the California and Mexico borders. The I-8 connecting San Diego, CA, to Casa Grande (Pinal County) runs through Yuma. Yuma is also connected to the San Luis Mexico Port of Entry via Arizona State Route 195 (the Robert A. Vaughan Expressway).

A Cost of Living Index based on median home price, median income and median rent data published by the American Community Survey (2015-2019) ranks Marana the 15<sup>th</sup> cheapest city to live in Arizona in 2019, Kingman the 19<sup>th</sup> cheapest, Yuma the 20<sup>th</sup> cheapest, and Maricopa the 21<sup>st</sup> cheapest. Payson (53<sup>rd</sup> highest) and Prescott (50<sup>th</sup> highest) rank higher. Nevertheless, this suggests that the taxable sales per city resident are not unduly affected by differences in the cost of living among the six locations.<sup>7</sup>

Table 4 suggests that Kingman’s retail gross sales ranks fifth out of the six locations examined per city resident or CCD resident.<sup>8</sup> Maricopa ranks below Kingman on either per capita measure. Note that

<sup>7</sup> Source: The Ten Cheapest Places to Live in Arizona for 2021, available at: <https://www.homesnacks.com/most-affordable-places-in-arizona/>

<sup>8</sup> A CCD is a subdivision of a county delineated cooperatively by the U.S. States Census Bureau and state and local government authorities for the purpose of presenting statistical data.

Kingman’s gross sales per city resident is almost on a par with Yuma (1.6% less), despite the latter having three times as many establishments as Kingman.

**TABLE 5: RESTAURANT/BAR GROSS SALES AND TPT (SALES TAX) REVENUES PER CAPITA, 2019**

LOCATION	ESTABLISHMENTS	GROSS SALES	CITY TPT RATE	TAX REVENUE	TAXABLE SALES PER CITY RESIDENT	TAXABLE SALES PER CCD RESIDENT
Marana	38	\$168.6 M	2.00%	\$3.4 M	\$3,418	\$4,674
Maricopa	84	\$52.4 M	2.00%	\$1.0 M	\$956	\$903
Payson	97	\$47.0 M	2.88%	\$1.4 M	\$2,908	\$1,999
Prescott/Prescott Valley	416	\$213.3 M	2.75% to 2.83%	\$5.9 M	\$2,396	\$1,632
Yuma	388	\$244.1 M	3.70%	\$9.1 M	\$2,317	\$1,684
<b>Kingman</b>	<b>161</b>	<b>\$98.9 M</b>	<b>2.50%</b>	<b>\$3.4 M</b>	<b>\$3,141</b>	<b>\$1,393</b>

Source: Arizona Department of Revenue/Yellow Pages

Table 5 suggests that Kingman’s restaurant/bar gross sales ranks second out of the six locations examined per city resident, but fifth out of the six locations examined per CCD resident.<sup>9</sup> It is reasonable to assume that the high level of gross sales per city resident is down in part to the number of people passing through Kingman on the I-40 or US-93.

Table 6 considers the taxable gross sales per establishment and per capita. The taxable gross sales per City of Kingman retail establishment ranks sixth out of the six locations listed in Table 6. The taxable gross sales per City of Kingman restaurant/bar/fast food establishment ranks third out of the six locations listed in Table 6.

Adjusting for differences in city residents, the taxable gross sales per City of Kingman retail establishment on a per capita basis ranks third out of the six locations listed in Table 6. The taxable gross sales per City of Kingman restaurant/bar/fast food establishment on a per capita basis ranks fourth out of the six locations listed in Table 6.

<sup>9</sup> A CCD is a subdivision of a county delineated cooperatively by the U.S. States Census Bureau and state and local government authorities for the purpose of presenting statistical data.



Adjusting for differences in CCD residents, the taxable gross sales per City of Kingman retail establishment on a per capita basis ranks fourth out of the six locations listed in Table 6. The taxable gross sales per City of Kingman restaurant/bar/fast food establishment on a per capita basis also ranks fourth out of the six locations listed in Table 6.

**TABLE 6: RESTAURANT/BAR GROSS SALES AND TPT (SALES TAX) REVENUES PER ESTABLISHMENT, 2019**

LOCATION	TAXABLE GROSS SALES PER ESTABLISHMENT		TAXABLE GROSS SALES PER ESTABLISHMENT & CITY RESIDENT		TAXABLE GROSS SALES PER ESTABLISHMENT S & CCD RESIDENT	
	RETAIL	R&B	RETAIL	R&B	RETAIL	R&B
Marana	\$45.6 M	\$4.4 M	\$924.41	\$1,264.19	\$89.94	\$123.01
Maricopa	\$13.5 M	\$623.2 K	\$247.13	\$233.48	\$11.38	\$10.75
Payson	\$10.0 M	\$484.7 K	\$617.50	\$424.46	\$29.98	\$20.61
Prescott/Prescott Valley	\$11.9 M	\$512.8 K	\$133.72	\$91.09	\$5.76	\$3.92
Yuma	\$9.7 M	\$629.2 K	\$91.84	\$66.74	\$5.97	\$4.34
<b>Kingman</b>	<b>\$8.6 M</b>	<b>\$614.2 K</b>	<b>\$274.45</b>	<b>\$121.74</b>	<b>\$19.51</b>	<b>\$8.65</b>

Source: Arizona Department of Revenue/Yellow Pages

## 3.0 IMPACT OF PASS-THROUGH TRAFFIC IN THE CITY OF KINGMAN

To estimate the impact of pass-through traffic on gross sales in the City of Kingman, the current Section offers insights about the target areas of six key establishments within the city. These are Walmart, Safeway, Ross Dress for Less, Big Lots, Cracker Barrel, and In-N-Out Burger. The data presented is for 2017 through 2019, thereby avoiding any potential anomalies associated with the Covid-19 pandemic. Comparisons exclusively for 2019 are also made with the five other locations previously examined for gross sales/TPT revenues in Section 2 – that is, Marana, Maricopa, Payson, Prescott, and Yuma. Interviews with the managers of Cracker Barrel and C-A-L Ranch are also included. The latter only opened in Kingman in 2021.

### 3.1 Retail Pass-Through Traffic

#### Walmart

Kingman’s Walmart Supercenter is approximately 0.5 miles north of the I-40 at 3396 Stockton Hill Road. Customer insights for the store, 2017 through 2019, sourced from Placer.ai, are summarized in Table 7.<sup>10</sup>

Table 7 estimates that approximately 36% of the store’s total customers lived more than 250 miles away in 2017 and 2018, increasing to 41.60% in 2019. That is, Placer.ai estimates that approximately 73,900 total customers in 2017, 88,100 total customers in 2018, and 110,300 customers in 2019 lived at least 250 miles away from the store. In total, during the three-year time horizon, an estimated 127,700 customers lived 250 miles away or more from the store. This suggests that pass-through traffic represents a large portion of the Kingman Walmart store’s total annual customer base.

Kingman’s Walmart store was the fifth most visited Walmart in Arizona in 2017, the eighth most visited in 2018, and seventh most visited in 2019.

The average store visit during the three years was 47 minutes.

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<sup>10</sup> Placer.ai provides instant access to location analytics derived from consumer foot traffic, thereby delivering visibility into offline behavior. It collects geolocation and proximity data from mobile devices that are enabled to share that information by their users, and creates anonymized and aggregated consumer profiles. This allows for some distinction to be made between resident and non-resident retail traffic.

**TABLE 7: WALMART (KINGMAN) CUSTOMER INSIGHTS, 2017 - 2019**

	2017	2018	2019	2017-19
Estimated number of customers	202,800	247,600	265,200	294,600
Estimated number of visits	2,680,000	2,800,000	2,960,000	8,450,000
Average visits per customer	13.23	11.32	11.17	28.68
Panel visits	25,700	39,500	56,800	122,000
Average stay	45 minutes	47 minutes	47 minutes	47 minutes
U.S. Chain Ranking	219 <sup>th</sup> (3,861)	159 <sup>th</sup> (3,910)	116 <sup>th</sup> (3,915)	145 <sup>th</sup> (3,839)
AZ Chain Ranking	5 <sup>th</sup> (84)	8 <sup>th</sup> (86)	7 <sup>th</sup> (86)	7 <sup>th</sup> (84)
<b>Trade Area:</b>				
<5 miles	20.61%	23.43%	19.20%	17.01%
<10 miles	23.58%	26.93%	22.16%	19.52%
<30 miles	31.14%	33.94%	28.16%	24.77%
<50 miles	35.99%	39.28%	32.37%	29.53%
<100 miles	44.02%	45.21%	39.06%	36.23%
<250 miles	63.57%	64.43%	58.40%	56.66%
>250 miles	36.43%	35.57%	41.60%	43.34%

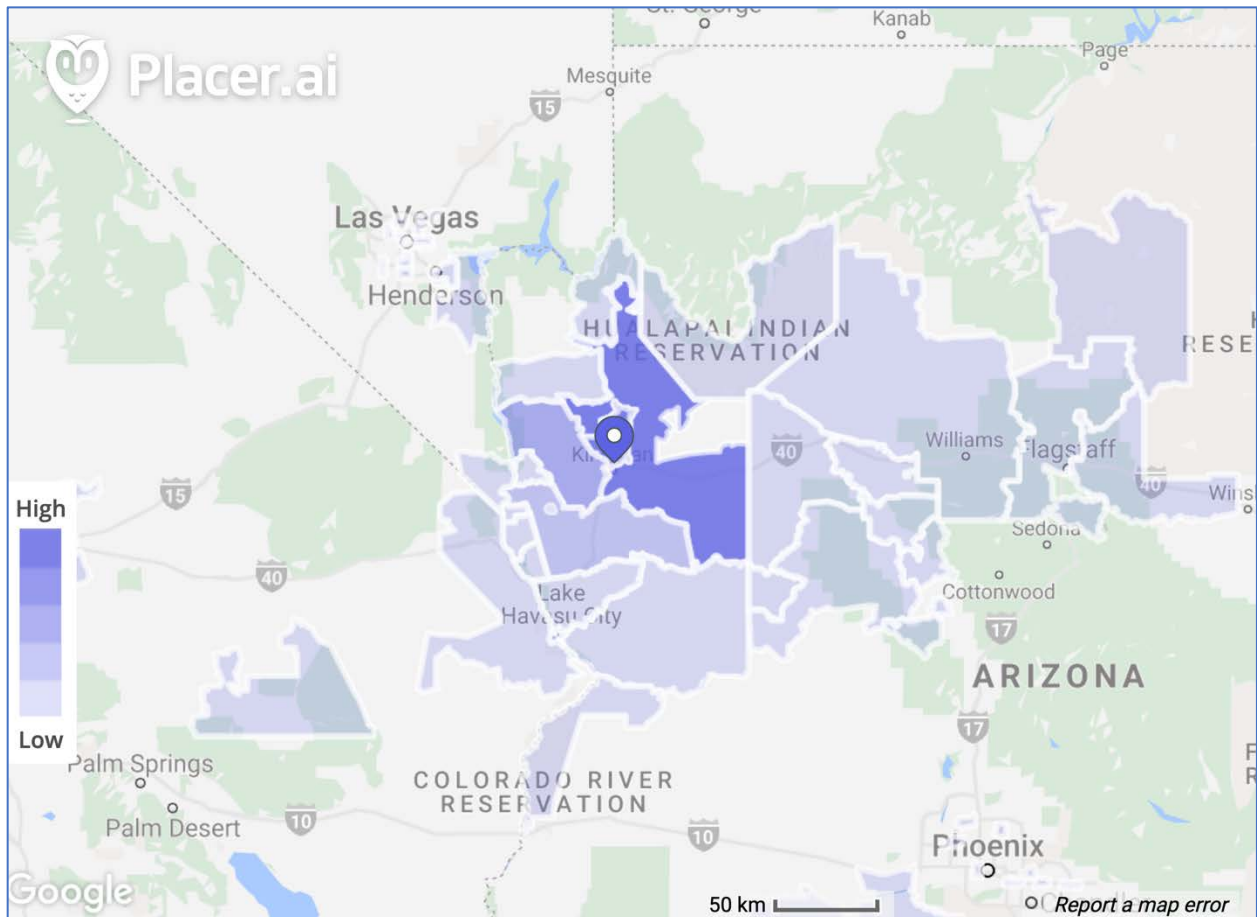
Source: Placer.ai

Note that in 2019 alone, Kingman’s Walmart store was also ranked 116 out of 3,915 stores nationwide for total visits, further demonstrating the retail potential of the city.

Placer.ai also estimates the top 70 home zip codes for customers of individual stores. The top 70 home zip codes for Kingman’s Walmart store account for 39.41% of all customers, 2017 through 2019. These top 70 zip codes include 14 Mohave County zips, collectively accounting for 30.26% of total customers during the three year time horizon. There are 16 traditional zip codes plus 16 PO Box zip codes in Mohave County. A further 30 zip codes are located in other Arizona counties, collectively accounting for 4.93% of total customers. The remaining 26 zip codes are in California, Nevada, and New Mexico, collectively accounting for 4.22% of total customers, 2017 through 2019.

Figure 2 illustrates the geographic distribution of Kingman Walmart’s customer base by place of residence, 2017 through 2019. The map suggests that a large proportion of the store’s customers drive a considerable distance. That is, the catchment area of the store extends way beyond the city or CCD resident population.

**FIGURE 2: KINGMAN WALMART CUSTOMER BY HOME LOCATION, 2017-2019**



Source: Placer.ai

Nine Walmart Supercenters serve the five other locations previously examined for gross sales/TPT revenues in Section 2. These are listed in Tables 8 and 9. Yuma and Prescott/Prescott Valley are both served by three Walmart stores respectively. Maricopa and Payson (like Kingman) are each served by one Walmart store. Marana is served by a Walmart Supercenter in Arizona Pavilions Shopping Center, adjacent to the I-10 approximately 10 miles south of the city center.<sup>11</sup>

Table 8 looks at the trade areas of each store across the three year (2017 through 2019) time horizon using Placer.ai data to shed some light on the volume of pass-through traffic. Table 9 separately reports data for 2019 (the last full pre-pandemic year) for all of these Walmart stores.

<sup>11</sup> Placer.ai provides an estimate for Arizona Pavilions as a whole, but does not report store-specific traffic for the tenants. The Marana percentage figures in Table 8 are therefore for the shopping mall as a whole.

**TABLE 8: TRADE AREAS OF SELECT WALMART SUPERSTORES 2017 - 2019**

LOCATION	TOTAL VISITS WALMART ARIZONA RANKING (n=84)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA PERCENT OF CUSTOMERS				
			<30 MILES	<50 MILES	<100 MILES	<250 MILES	>250 MILES
Arizona Pavilions Center, <b>Marana</b>	NA	75.2	40.05%	43.56%	59.34%	70.00%	30.00%
41650 W Maricopa Casa Grande Hwy, <b>Maricopa</b>	#40	11.58	54.53%	64.52%	68.15%	71.80%	29.20%
300 Beeline Hwy N, <b>Payson</b>	#64	11.32	8.08%	11.26%	76.70%	86.37%	13.63%
3450 Glassford Hill Rd, <b>Prescott Valley</b>	#37	22.36	51.04%	54.50%	70.98%	80.03%	19.97%
1280 Gail Gardner Way, <b>Prescott</b>	#63	38.60	50.62%	54.57%	72.85%	80.96%	19.04%
3050 E State Route 69, <b>Prescott</b>	#65	51.87	47.51%	52.82%	73.06%	81.40%	18.60%
2501 S Avenue B, <b>Yuma</b>	#1	13.57	62.53%	63.76%	67.09%	83.08%	16.92%
8151 E 32nd St, <b>Yuma</b>	#35	21.38	42.92%	43.24%	45.93%	66.30%	33.70%
2900 S Pacific Ave, <b>Yuma</b>	#42	25.63	54.78%	55.60%	60.62%	75.50%	24.50%
<b>3396 Stockton Hill Road, Kingman</b>	<b>#7</b>	<b>24.21</b>	<b>24.77%</b>	<b>29.53%</b>	<b>36.23%</b>	<b>56.66%</b>	<b>43.34%</b>

Source: Place.ai

**TABLE 9: TRADE AREAS OF SELECT WALMART SUPERSTORES, 2019**

LOCATION	TOTAL ANNUAL VISITS ARIZONA RANKING (n=86)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA						
			PERCENT OF VISITS <sup>12</sup>			PERCENT OF CUSTOMERS			
			<30 MILES	<50 MILES	<100 MILES	<30 MILES	<50 MILES	<100 MILES	100+ MILES
Arizona Pavilions Center, <b>Marana</b>	NA	73.72	81.49%	82.90%	87.77%	44.51%	47.85%	62.17%	37.83%
41650 W Maricopa Casa Grande Hwy, <b>Maricopa</b>	#40	11.95	87.24%	90.12%	91.57%	57.46%	67.79%	70.98%	29.02%
300 Beeline Hwy N, <b>Payson</b>	#64	10.46	66.50%	68.53%	91.34%	9.75%	12.63%	76.53%	23.47%
3450 Glassford Hill Rd, <b>Prescott Valley</b>	#38	21.37	88.05%	89.08%	93.17%	54.97%	57.89%	74.26%	25.74%
1280 Gail Gardner Way, <b>Prescott</b>	#67	36.33	84.24%	86.38%	91.54%	54.54%	58.37%	74.72%	25.28%
3050 E State Route 69, <b>Prescott</b>	#71	48.57	81.31%	84.27%	91.22%	51.84%	56.69%	75.69%	24.31%
2501 S Avenue B, <b>Yuma</b>	#1	23.28	92.30%	92.48%	93.05%	66.71%	67.70%	71.17%	28.83%
8151 E 32nd St, <b>Yuma</b>	#36	20.75	78.36%	79.54%	80.93%	46.00%	46.52%	51.18%	48.82%
2900 S Pacific Ave, <b>Yuma</b>	#43	12.82	83.31%	83.95%	85.83%	59.22%	60.11%	65.15%	34.85%
<b>3396 Stockton Hill Road, Kingman</b>	<b>#7</b>	<b>24.74</b>	<b>80.10%</b>	<b>84.81%</b>	<b>86.87%</b>	<b>28.16%</b>	<b>32.37%</b>	<b>39.06%</b>	<b>60.94%</b>

Source: Place.ai

<sup>12</sup> A visit is a single shopping trip to an establishment by a customer. It can therefore include multiple visits by a single customer. The corresponding customer columns are unique customers. That is, each customer is counted only once, irrespective of the number of visits they make to an establishment.

Table 8 suggests that the Kingman store has the highest percentage of customers residing at least 250 miles away among the 10 Walmart stores examined, 2017 through 2019. One of the Yuma stores overall performs better than Kingman for total annual visits, but its customer base is more local.

Table 9 compares the annual visit and annual customer data for all 10 Walmart stores in 2019. A visit is a single shopping trip to an establishment by a customer. It can therefore include multiple visits by a single customer. The corresponding customer columns in Table 9 are unique customers. That is, each customer is counted only once in the table, irrespective of the number of visits they make to an establishment.

Focusing first on percent of visits, the Kingman store has the third highest percent of visits from people living 100+ miles from the store in 2019. The two stores with higher percentage figures than Kingman are both in Yuma. The E32nd Street Yuma store is closest to the I-8, and ranks highest with 19.07% total visits from people living 100+ miles from the store, compared to Kingman's 13.13%.

However, from a unique customer perspective, the Kingman store ranks highest among those examined in 2019. Using Placer.ai data, 60.94% of the Kingman Walmart's total customers in 2019 traveled at least 100 miles to visit the store. The Kingman percentage is double the average of the other eight Walmart stores examined, thereby demonstrating the value (in total customers) of pass-through traffic.<sup>13</sup> Note also that the Yuma store closest to the I-8 also has almost half of its total customers traveling 100+ miles.

To what extent is this Walmart estimate replicated by other Kingman retailers?

## Safeway

A Safeway store is 0.3 miles south of the same I-40 junction close to Kingman's Walmart Supercenter, at 3125 Stockton Hill Road. This is one of two Safeway stores in the city. The other is located at 3970 Stockton Hill Road.

Table 10 estimates that approximately 25% to 29% of the store's total customers lived more than 250 miles away during the three year time horizon, dependent on the year in question. That is, Placer.ai estimates that approximately 28,900 total customers in 2017, 40,400 total customers in 2018, and 47,500

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<sup>13</sup> The Arizona Pavilions store is excluded from this Walmart comparison because Placer.ai only reports a total for the mall as a whole, rather than individual stores.

customers in 2019 lived at least 250 miles away from the store. In total, during the three-year time horizon, an estimated 53,900 customers lived 250 miles away or more from the store. This suggests that pass-through traffic represents a large portion of the Kingman store’s total annual customer base.

This particular store was the 24<sup>th</sup> most visited Safeway in Arizona in 2017, the 25<sup>th</sup> most visited in 2018, and the 27<sup>th</sup> most visited in 2019.

The average store visit during the three years was 33 minutes.

**TABLE 10: SAFEWAY (3125 STOCKTON HILL ROAD, KINGMAN) CUSTOMER INSIGHTS, 2017 - 2019**

	2017	2018	2019	2017-19
Estimated number of customers	117,600	141,300	163,300	187,500
Estimated number of visits	777,900	762,500	773,400	2,310,000
Average visits per customer	6.61	5.4	4.74	12.34
Panel visits	6,400	9,400	12,600	28,400
Average stay	35 minutes	33 minutes	33 minutes	33 minutes
U.S. Chain Ranking	272 <sup>nd</sup> (850)	294 <sup>th</sup> (878)	291 <sup>st</sup> (873)	278 (824)
AZ Chain Ranking	24 <sup>th</sup> (107)	25 <sup>th</sup> (105)	27 <sup>th</sup> (103)	25 (100)
<b>Trade Area:</b>				
<5 miles	31.31%	31.06%	28.26%	28.25%
<10 miles	36.34%	35.96%	33.26%	33.02%
<30 miles	44.96%	43.60%	40.87%	40.16%
<50 miles	48.32%	49.21%	44.64%	44.68%
<100 miles	53.48%	54.56%	50.53%	50.31%
<250 miles	75.37%	71.40%	70.92%	71.23%
>250 miles	24.63%	28.60%	29.08%	28.77%

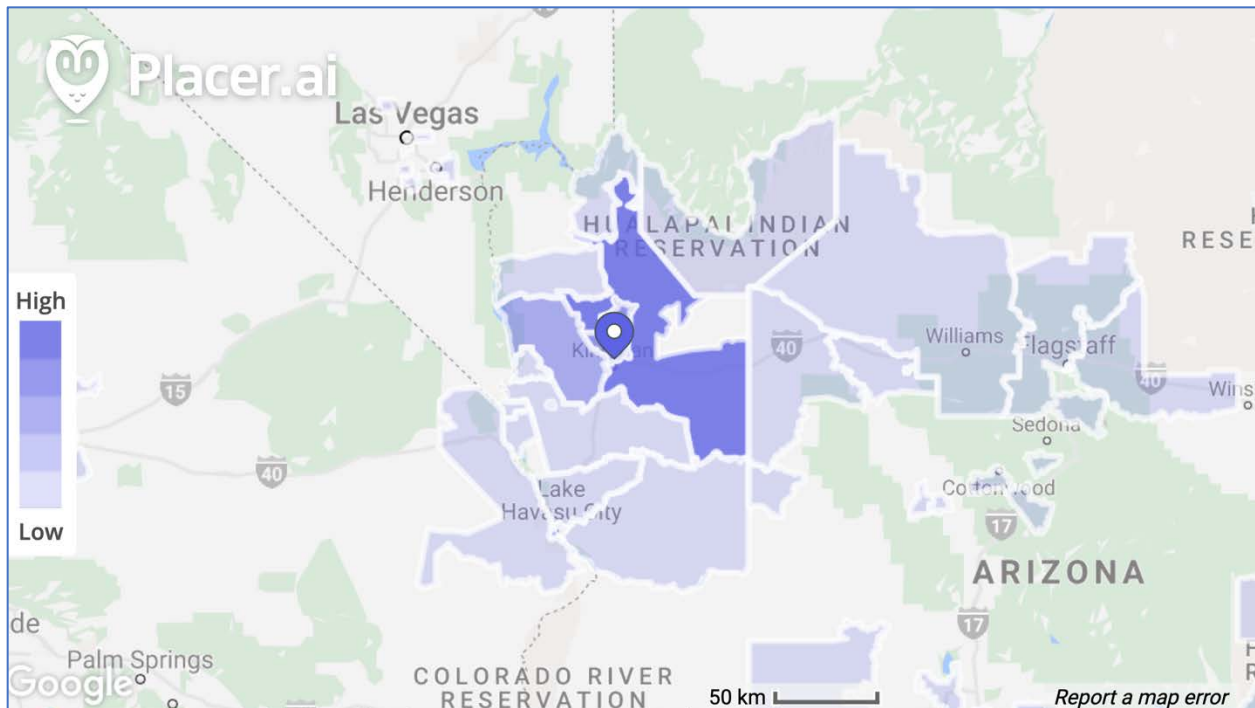
Source: Placer.ai

Placer.ai’s top 70 home zip codes for this Safeway store account for 55.53% of all customers, 2017 through 2019. These top 70 zip codes include 13 Mohave County zips, collectively accounting for 45.17% of total customers during the three year time horizon. A further 37 zip codes are located in other Arizona counties, collectively accounting for 7.22% of total customers. The remaining 20 zip codes are in California, Massachusetts, Montana, Nevada, and New Mexico, collectively accounting for 3.14% of total customers, 2017 through 2019.



Figure 3 illustrates the geographic distribution of this Kingman Safeway store’s customer base by place of residence, 2017 through 2019. The map again shows that a large proportion of the store’s customers drive a considerable distance. The volume of pass-through traffic shopping at this store is less than the Kingman Walmart previously examined. Nevertheless, the figure still shows that the catchment area of the store once again extends beyond the city or CCD resident population.

**FIGURE 3: KINGMAN SAFEWAY (3125 STOCKTON HILL ROAD) CUSTOMER BY HOME LOCATION, 2017-2019**



Source: Placer.ai

Four Safeway stores serve two of the five other locations previously examined for gross sales/TPT revenues in Section 2. These are listed in Tables 11 and 12. Prescott/Prescott Valley are served by three Safeway stores, and Payson by one Safeway store. There is also an additional Safeway store in Kingman, located further north of the I-40 and US-93.

Table 11 looks at the trade areas of all six stores across the three year (2017 through 2019) time horizon using Placer.ai data to shed some light on the volume of pass-through traffic. Table 12 separately reports data for 2019 (the last full pre-pandemic year) for all of these Safeway stores.

Table 11 suggests that the Kingman store closest to the US-93 has the highest percentage of customers residing at least 250 miles away among the 6 Safeway stores examined, 2017 through 2019.

Table 12 compares the annual visit and annual customer data for all six Safeway stores in 2019. Again, a visit is a single shopping trip to an establishment by a customer. It can therefore include multiple visits by a single customer. The corresponding customer columns in Table 12 are unique customers.

Focusing first on percent of visits, the Kingman store closest to US-93 has the highest percent of visits from people living 100+ miles from the store in 2019 (18.02%). It is approximately double the percentage rate of the five other stores examined.

Similarly, from a total unique customer perspective, the Kingman store closest to US-93 also ranks highest among those examined in 2019. Using Placer.ai data, 48.47% of the store's total customers in 2019 traveled at least 100 miles. The Kingman percentage is less than the Walmart store, but a significant proportion of its total annual customers could potentially be attributed to pass-through traffic.

**TABLE 11: TRADE AREAS OF SELECT SAFEWAY SUPERSTORES 2017 - 2019**

LOCATION	TOTAL VISITS SAFEWAY ARIZONA RANKING (n=100)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA PERCENT OF CUSTOMERS				
			<30 MILES	<50 MILES	<100 MILES	<250 MILES	>250 MILES
AZ 260, <b>Payson</b>	#18	11.07	13.41%	17.27%	79.83%	85.39%	14.61%
7720 E Highway 69, <b>Prescott Valley</b>	#38	21.04	59.66%	62.00%	80.85%	86.44%	13.56%
1044 Willow Creek Rd, <b>Prescott</b>	#92	28.51	66.92%	70.32%	82.07%	86.07%	13.93%
450 White Spar Rd, <b>Prescott</b>	#94	8.65	38.71%	41.97%	74.01%	82.16%	17.84%
3970 Stockton Hill Road, <b>Kingman</b>	#10	17.88	65.03%	69.69%	74.36%	83.93%	16.07%
<b>3396 Stockton Hill Road, Kingman</b>	<b>#25</b>	<b>19.06</b>	<b>40.16%</b>	<b>44.68%</b>	<b>50.31%</b>	<b>71.23%</b>	<b>28.77%</b>

Source: Place.ai

**TABLE 12: TRADE AREAS OF SELECT SAFEWAY STORES, 2019**

LOCATION	TOTAL ANNUAL VISITS ARIZONA RANKING (n=103)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA						
			PERCENT OF VISITS			PERCENT OF CUSTOMERS			
			<30 MILES	<50 MILES	<100 MILES	<30 MILES	<50 MILES	<100 MILES	100+ MILES
AZ 260, <b>Payson</b>	#19	11.46	64.36%	66.94%	92.29%	16.08%	19.21%	80.17%	19.83%
7720 E Highway 69, <b>Prescott Valley</b>	#46	21.08	85.74%	86.26%	92.78%	63.05%	64.12%	82.83%	17.17%
1044 Willow Creek Rd, <b>Prescott</b>	#95	26.72	86.10%	87.10%	91.01%	69.08%	71.72%	82.33%	17.67%
450 White Spar Rd, <b>Prescott</b>	#98	7.26	78.76%	79.32%	90.73%	44.33%	45.86%	77.33%	22.32%
<b>3970 Stockton Hill Road, Kingman</b>	<b>#18</b>	<b>17.34</b>	<b>88.27%</b>	<b>90.17%</b>	<b>91.85%</b>	<b>68.27%</b>	<b>72.41%</b>	<b>76.13%</b>	<b>23.87%</b>
<b>3125 Stockton Hill Road, Kingman</b>	<b>#27</b>	<b>19.71</b>	<b>76.23%</b>	<b>79.34%</b>	<b>81.98%</b>	<b>40.87%</b>	<b>44.64%</b>	<b>50.53%</b>	<b>49.47%</b>

Source: Placer.ai

## Ross Dress for Less

Kingman’s Ross – Dress for Less is approximately 0.3 miles north of the I-40, in the same vicinity as Kingman’s Walmart Supercenter at 3260 Stockton Hill Road.

Table 13 estimates that approximately 12% to 13% of the store’s total customers lived more than 250 miles away during the three year time horizon, dependent on the year in question. That is, Placer.ai estimates that approximately 7,400 total customers in 2017, 8,000 total customers in 2018, and 8,500 customers in 2019 lived at least 250 miles away from the store. In total, during the three-year time horizon, an estimated 11,000 customers lived 250 miles away or more from the store.

This particular store was the 50<sup>th</sup> most visited Ross Dress for Less in Arizona in 2017, and the 55<sup>th</sup> most visited in 2018 or 2019.

The average store visit during the three years was 47 minutes.

**TABLE 13: ROSS DRESS FOR LESS KINGMAN CUSTOMER INSIGHTS, 2017 - 2019**

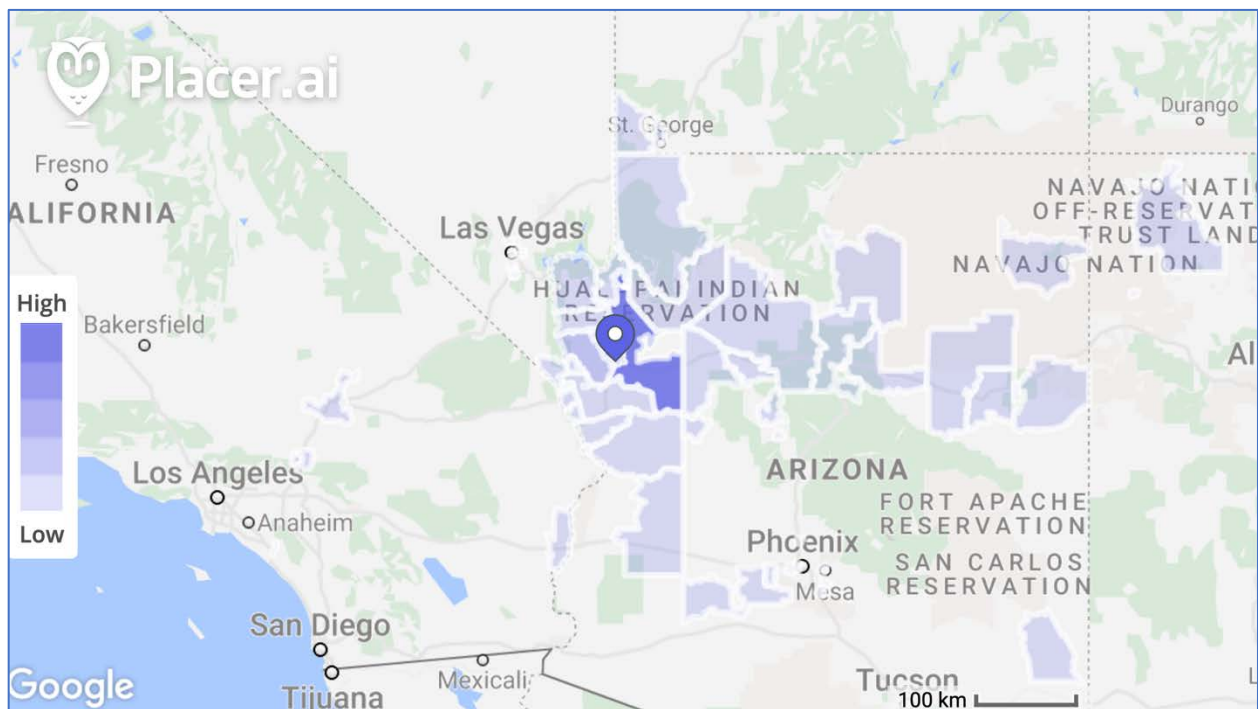
	2017	2018	2019	2017-19
Estimated number of customers	54,700	65,600	63,400	81,100
Estimated number of visits	190,700	185,100	189,000	564,800
Average visits per customer	3.48	2.82	2.98	6.96
Panel visits	2,100	2,700	3,900	8,700
Average stay	50 minutes	48 minutes	44 minutes	47 minutes
U.S. Chain Ranking	1,086 <sup>th</sup> (1,222)	1,181 <sup>st</sup> (1,289)	1,216 <sup>th</sup> (1,351)	1,099 <sup>th</sup> (1,190)
AZ Chain Ranking	50 <sup>th</sup> (59)	55 <sup>th</sup> (61)	55 <sup>th</sup> (62)	52 <sup>nd</sup> (58)
<b>Trade Area:</b>				
<5 miles	45.60%	49.95%	46.27%	47.93%
<10 miles	50.41%	55.05%	52.19%	53.44%
<30 miles	60.89%	64.49%	60.93%	62.53%
<50 miles	70.29%	72.49%	67.86%	69.27%
<100 miles	75.91%	78.24%	72.36%	74.34%
<250 miles	86.52%	87.78%	86.60%	85.97%
>250 miles	13.48%	12.22%	13.40%	14.03%

Source: Placer.ai

Placer.ai only provide a top 69 rather than top 70 home zip codes for this store.<sup>14</sup> These 69 zip codes account for 52.77% of all customers, 2017 through 2019. These top 69 zip codes include 15 Mohave County zips, collectively accounting for 44.35% of total customers during the three year time horizon. A further 26 zip codes are located in other Arizona counties, collectively accounting for 4.59% of total customers. The remaining 28 zip codes are in Alaska, Alabama, California, Colorado, Montana, Nevada, New Mexico, Utah and Washington, collectively accounting for 3.83% of total customers, 2017 through 2019.

Figure 4 illustrates the geographic distribution of Kingman Ross Dress for Less store’s customer base by place of residence, 2017 through 2019. Approximately 14% of the store’s customers during the three year time horizon live 250 miles or more away.

**FIGURE 4: KINGMAN ROSS DRESS FOR LESS CUSTOMER BY HOME LOCATION, 2017-2019**



Source: Placer.ai

<sup>14</sup> The 69<sup>th</sup> zip code is 0.1% of total customers.

Four Ross Dress for Less stores serve three of the five other locations previously examined for gross sales/TPT revenues in Section 2. These are listed in Tables 14 and 15. Prescott/Prescott Valley are served by two Ross stores, while Maricopa and Yuma are both home to one Ross store each.

Table 14 looks at the trade areas of each store across the three year (2017 through 2019) time horizon using Placer.ai data to shed some light on the volume of pass-through traffic. Table 15 separately reports data for 2019 (the last full pre-pandemic year) for all five Ross stores.

Table 14 suggests that the Kingman store at 14.03% ranks third highest among the five Ross stores examined, 2017 through 2019, for the percentage of customers residing at least 250 miles away. However, it is only marginally below the Yuma store, which ranks second (14.39%).

Table 15 compares the annual visit and annual customer data for all five Ross stores in 2019. Again, a visit is a single shopping trip to an establishment by a customer. It can therefore include multiple visits by a single customer. The corresponding customer columns in Table 15 are unique customers.

Table 15 suggests that the Kingman Ross store had the highest percentage of visits (13.31%) and highest percentage of total customers (27.64%) from people living at least 100 miles away.

**TABLE 14: TRADE AREAS OF SELECT ROSS DRESS FOR LESS STORES, 2017 - 2019**

LOCATION	TOTAL VISITS ROSS ARIZONA RANKING (n=58)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA PERCENT OF CUSTOMERS				
			<30 MILES	<50 MILES	<100 MILES	<250 MILES	>250 MILES
Alma Drive, <b>Maricopa</b>	#53	11.68	70.78%	78.99%	81.16%	84.17%	15.83%
5629 E. State Route 69, <b>Prescott Valley</b>	#50	45.05	66.72%	72.18%	85.38%	90.28%	9.72%
1931 E State Route 69, <b>Prescott</b>	#33	49.09	69.20%	75.74%	87.02%	91.56%	8.44%
1430 S Yuma Palms Pkwy, <b>Yuma</b>	#7	24.03	63.44%	64.36%	72.93%	85.61%	14.39%
<b>3396 Stockton Hill Road, Kingman</b>	#52	<b>18.88</b>	<b>62.53%</b>	<b>69.27%</b>	<b>74.34%</b>	<b>85.97%</b>	<b>14.03%</b>

Source: Place.ai



**TABLE 15: TRADE AREAS OF SELECT ROSS DRESS FOR LESS STORES, 2019**

LOCATION	TOTAL ANNUAL VISITS ARIZONA RANKING (n=62)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA						
			PERCENT OF VISITS			PERCENT OF CUSTOMERS			
			<30 MILES	<50 MILES	<100 MILES	<30 MILES	<50 MILES	<100 MILES	100+ MILES
Alma Drive, <b>Maricopa</b>	#28	11.35	85.76%	89.77%	90.84%	69.12%	77.93%	80.25%	19.75%
5629 E. State Route 69, <b>Prescott Valley</b>	#35	38.52	82.83%	86.02%	92.95%	68.15%	73.20%	86.46%	13.54%
1931 E State Route 69, <b>Prescott</b>	#52	40.40	82.79%	86.65%	92.72%	71.02%	76.69%	87.16%	12.84%
1430 S Yuma Palms Pkwy, <b>Yuma</b>	#4	22.73	81.98%	82.50%	87.60%	64.51%	65.55%	74.68%	25.32%
<b>3396 Stockton Hill Road, Kingman</b>	<b>#55</b>	<b>19.71</b>	<b>78.67%</b>	<b>84.64%</b>	<b>86.69%</b>	<b>60.93%</b>	<b>67.86%</b>	<b>72.36%</b>	<b>27.64%</b>

Source: Placer.ai

## Big Lots

Kingman’s Big Lots is approximately 0.3 miles north of the I-40, in the same vicinity as Kingman’s Walmart Supercenter at 3320 Stockton Hill Road.

Table 16 estimates that approximately 1 in 10 of the store’s total customers lived more than 250 miles away during any one year in the three year time horizon. This is the lowest percentage for any of the Kingman retailers examined in this study. Placer.ai estimates that approximately 3,400 total customers in 2017, 5,500 total customers in 2018, and 6,200 customers in 2019 lived at least 250 miles away from the store. In total, during the three-year time horizon, an estimated 7,200 customers lived 250 miles away or more from the store.

This particular store was the lowest visited Big Lots in Arizona in 2017, the 31<sup>st</sup> most visited in 2018, and the 25<sup>th</sup> most visited in 2019.

The average store visit during the three years was 42 minutes.

**TABLE 16: BIG LOTS KINGMAN CUSTOMER INSIGHTS, 2017 - 2019**

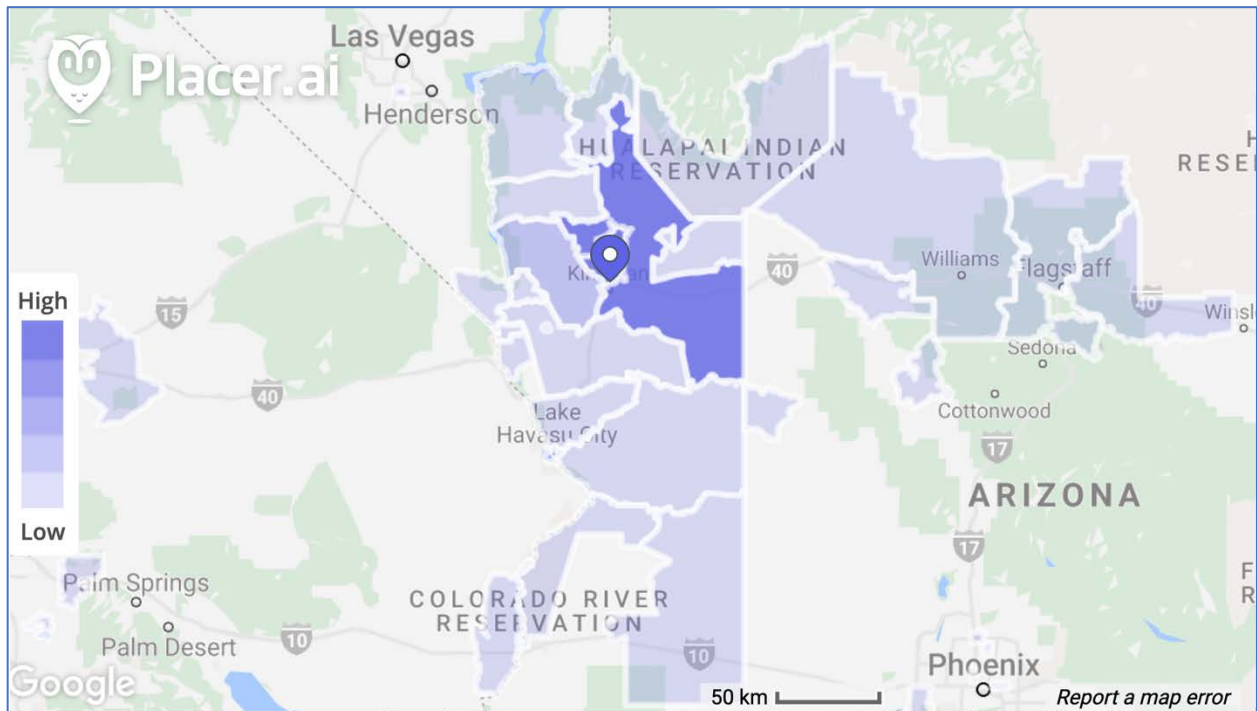
	2017	2018	2019	2017-19
Estimated number of customers	32,900	52,700	59,500	67,300
Estimated number of visits	53,400	90,900	125,200	269,500
Average visits per customer	1.62	1.72	2.11	4.01
Panel visits	493	1,100	2,000	3,600
Average stay	41 minutes	45 minutes	41 minutes	42 minutes
U.S. Chain Ranking	1,311 <sup>th</sup> (1,333)	1,182 <sup>nd</sup> (1,319)	953 <sup>rd</sup> (1,307)	1,116 <sup>th</sup> (1,232)
AZ Chain Ranking	31 <sup>st</sup> (31)	31 <sup>st</sup> (34)	25 <sup>th</sup> (33)	28 (30)
<b>Trade Area:</b>				
<5 miles	54.95%	51.23%	51.21%	52.05%
<10 miles	61.00%	57.90%	58.31%	58.66%
<30 miles	75.29%	69.43%	70.10%	70.92%
<50 miles	81.01%	77.94%	76.82%	78.14%
<100 miles	84.06%	82.85%	81.44%	82.36%
<250 miles	89.82%	89.48%	89.59%	89.28%
>250 miles	10.18%	10.52%	10.41%	10.72%

Source: Placer.ai

Placer.ai's top 70 home zip codes for this Big Lots store account for 88.77% of all customers, 2017 through 2019. These top 70 zip codes include 15 Mohave County zips, collectively accounting for 79.88% of total customers during the three year time horizon. A further 17 zip codes are located in other Arizona counties, collectively accounting for 3.29% of total customers. The remaining 38 zip codes are in Alabama, California, Colorado, Idaho, Iowa, Illinois, Missouri, New Jersey, Nevada, New Mexico, New York, Ohio, Oregon South Dakota, Tennessee and Wyoming collectively accounting for 5.60% of total customers, 2017 through 2019.

Figure 5 illustrates the geographic distribution of Kingman Big Lots store's customer base by place of residence, 2017 through 2019. Around 8 out of every 10 customers reside within Mohave County.

**FIGURE 5: KINGMAN BIG LOTS CUSTOMER BY HOME LOCATION, 2017-2019**



Source: Placer.ai

Big Lots has a presence in three of the five other locations previously examined for gross sales/TPT revenues in Section 2. That is, they have one store per location in Payson, Prescott, and Yuma. Comparisons with the Kingman store are shown in Tables 17 and 18.

Table 17 looks at the trade areas of each store across the three year (2017 through 2019) time horizon using Placer.ai data to shed some light on the volume of pass-through traffic. Table 18 separately reports data for 2019 (the last full pre-pandemic year) for all four Big Lots stores.

Table 17 suggests that the Kingman store at 10.72% ranks highest among the four Big Lots stores examined, 2017 through 2019, for the percentage of customers residing at least 250 miles away.

Table 18 compares the annual visit and annual customer data for all four Big Lots stores in 2019. Again, a visit is a single shopping trip to an establishment by a customer. It can therefore include multiple visits by a single customer. The corresponding customer columns in Table 18 are unique customers.

Table 18 suggests that the Kingman Big Lots store had the highest percentage of visits (11.68%) and highest percentage of total customers (18.56%) from people living at least 100 miles away.

Using the Walmart, Safeway, Ross Dress for Less and Big Lots stores as a proxy for City of Kingman retail, it is reasonable to assume that the range of pass-through customers in the city is higher than comparable towns and cities in Arizona.

For the 2017 through 2019 time horizon, 10.72% to 43.34% of customers primary residence was at least 250 miles away from the store visited, dependent on the store chain. The grocery stores in particular were at the top this range.

In 2019 alone, 18.56% to 60.94% of customers traveled at least 100 miles to visit a store, dependent on the store chain.

Figure 6 illustrates a 100 mile (blue circle) and 250 mile (red circle) potential customer radius around the City of Kingman.

**TABLE 17: TRADE AREAS OF SELECT BIG LOTS STORES, 2017 - 2019**

LOCATION	TOTAL VISITS BIG LOTS ARIZONA RANKING (n=29)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA PERCENT OF CUSTOMERS				
			<30 MILES	<50 MILES	<100 MILES	<250 MILES	>250 MILES
400 E State Highway 260, <b>Payson</b>	#25	9.72	51.63%	54.96%	85.68%	90.03%	9.97%
1260 Gail Gardner Way, <b>Prescott</b>	#23	42.13	78.36%	81.50%	89.49%	92.36%	7.64%
1625, S 4 <sup>th</sup> Avenue, <b>Yuma</b>	#8	23.55	74.00%	76.35%	85.59%	91.78%	8.22%
<b>3320 Stockton Hill Road, Kingman</b>	<b>#28</b>	<b>22.67</b>	<b>70.92%</b>	<b>78.14%</b>	<b>82.36%</b>	<b>89.28%</b>	<b>10.72%</b>

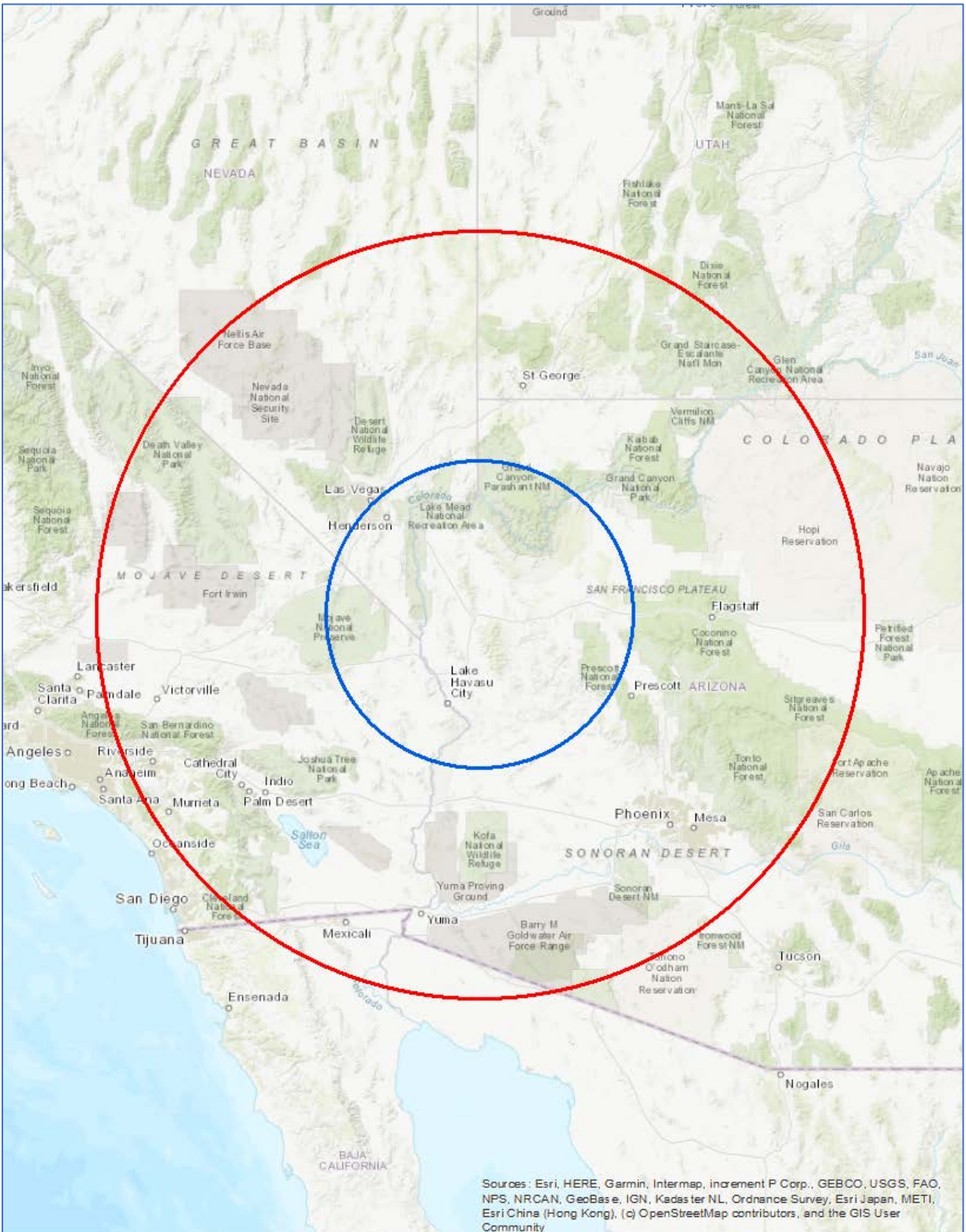
Source: Place.ai

**TABLE 18: TRADE AREAS OF SELECT BIG LOTS STORES, 2019**

LOCATION	TOTAL ANNUAL VISITS ARIZONA RANKING (n=33)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA						
			PERCENT OF VISITS			PERCENT OF CUSTOMERS			
			<30 MILES	<50 MILES	<100 MILES	<30 MILES	<50 MILES	<100 MILES	100+ MILES
400 E State Highway 260, <b>Payson</b>	#26	9.31	74.00%	75.93%	92.30%	51.89%	54.41%	85.25%	14.75%
1260 Gail Gardner Way, <b>Prescott</b>	#30	38.88	83.92%	86.16%	92.66%	79.08%	82.41%	90.09%	9.91%
1625, S 4 <sup>th</sup> Avenue, <b>Yuma</b>	#10	20.34	78.49%	80.13%	90.66%	72.82%	74.51%	87.24%	12.76%
<b>3320 Stockton Hill Road, Kingman</b>	<b>#25</b>	<b>21.87</b>	<b>79.98%</b>	<b>85.62%</b>	<b>88.32%</b>	<b>70.10%</b>	<b>76.82%</b>	<b>81.44%</b>	<b>18.56%</b>

Source: Placer.ai

**FIGURE 6: 100 MILE AND 250 MILE CUSTOMER RADIUS FOR KINGMAN RETAILERS**



## C-A-L Ranch

C-A-L Ranch stores is a regional retailer, offering tillage tools, hardware and apparel. The Kingman store is at 3340 E Andy Devine Road, 0.5 miles NE of the US-66 / I-40 interchange. It opened in February 2021, thereby limiting data analysis to six full months in a pandemic year, rather than 2019.

There are currently 8 C-A-L Ranch stores in Arizona, listed in Table 19. The Kingman store attracted the lowest number of visitors in Arizona, February 1 – July 31, 2021. It also ranks bottom but one out of all 25 C-A-L Ranch stores nationwide during this time horizon.

**TABLE 19: TOTAL ANNUAL VISITS TO, AND RANKING OF C-A-L RANCH IN ARIZONA IN 2021**

LOCATION	AZ RANKING (n=8)	US RANKING (n=25)	TOTAL VISITS (Feb-Jul)
2530 N Fourth St., Flagstaff	#1	#7	148,745
2075 N Pebble Creek Pkwy., Goodyear	#2	#9	146,150
161 E Deuce of Clubs Rd., Show Low	#3	#10	143,931
1116 E Florence Blvd., Casa Grande	#4	#15	112,847
1048 Willow Creek Rd., Prescott	#5	#16	112,432
529 W 32nd St., Yuma	#6	#17	103,513
673 N Highway 90, Sierra Vista	#7	#21	83,603
<b>3340 E Andy Devine Rd., Kingman</b>	<b>#8</b>	<b>#24</b>	<b>78,440</b>

Source: Placer.ai

C-A-L Ranch has a presence in two of the five other locations previously examined for gross sales/TPT revenues in Section 2 – namely Yuma and Prescott. A comparison of the three stores' trade areas, February – July 2021, is shown in Table 20.

Table 20 suggests that 19.44% of the Kingman store's total customers during the first six full months of operations live at least 100 miles away from C-A-L Ranch. This is approximately one percentage point lower than the Yuma store, but almost five percentage points higher than the Prescott store. Given the relatively recent opening of C-A-L Ranch in Kingman, it is difficult to draw any conclusions. Nevertheless, the fact that almost one in five customers in 2021 have traveled at least 100 miles to the store appears to reinforce the value of pass-through traffic to Kingman's retailers.

**TABLE 20: TRADE AREAS OF C-A-L RANCH STORES IN THE SIX CCDS, FEBRUARY – JULY 2021**

LOCATION	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA						
		PERCENT OF VISITS			PERCENT OF CUSTOMERS			
		<30 MILES	<50 MILES	<100 MILES	<30 MILES	<50 MILES	<100 MILES	100+ MILES
1048 Willow Creek Rd., Prescott	41.56	74.75%	80.66%	89.10%	66.53%	72.40%	85.18%	14.82%
529 W 32nd St., Yuma	23.15	76.93%	78.12%	83.13%	72.25%	74.00%	79.19%	20.81%
<b>3340 E Andy Devine Rd., Kingman</b>	<b>25.09</b>	<b>77.91%</b>	<b>84.18%</b>	<b>86.17%</b>	<b>69.90%</b>	<b>77.08%</b>	<b>80.46%</b>	<b>19.54%</b>

Source: Placer.ai

Placer.ai’s top 70 home zip codes for Kingman’s C-A-L Ranch account for 91.76% of all customers, February 1 – July 31, 2021. These top 70 zip codes include 12 Mohave County zips, collectively accounting for 77.44% of total customers during the six month time horizon. A further 13 zip codes are located in other Arizona counties, collectively accounting for 2.81% of total customers. The remaining 45 zip codes are in California, Idaho, Montana, Nevada, New Mexico, New York, North Dakota, Ohio, Oregon, Pennsylvania, Utah, Virginia, and Washington collectively accounting for 11.51% of total customers during the six month time horizon.

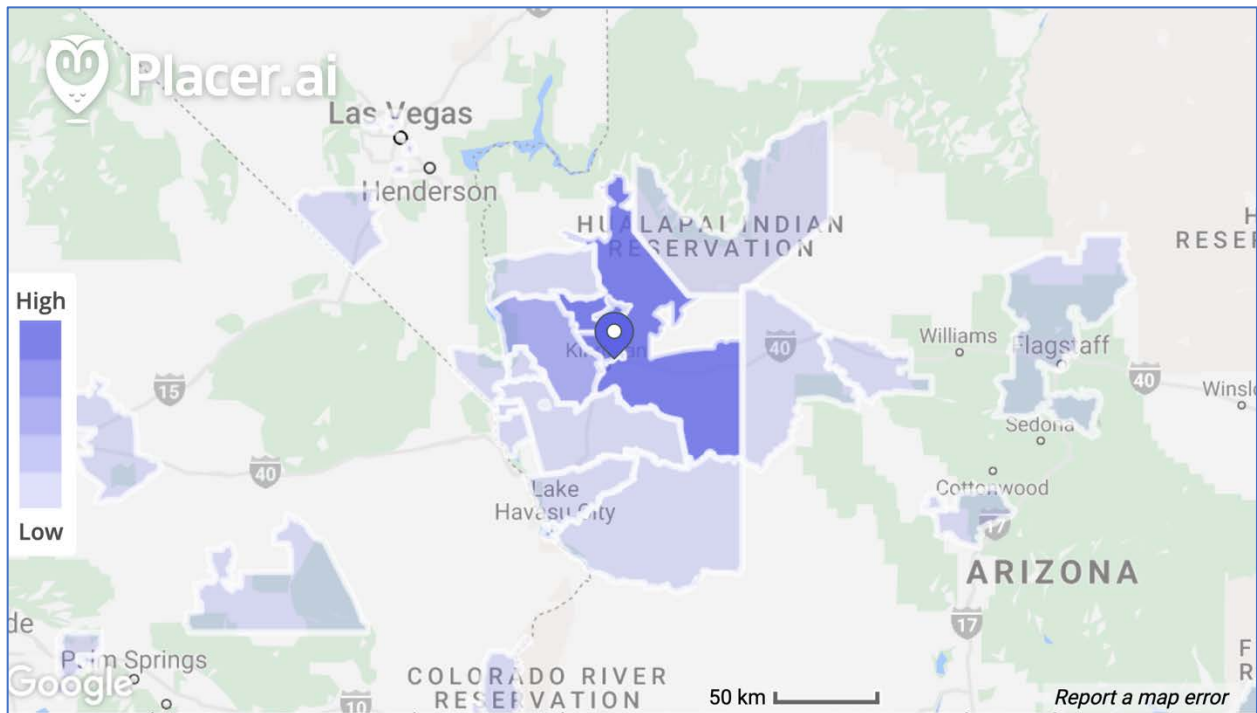
Figure 7 illustrates the geographic distribution of the Kingman C-A-L ranch customer base by place of residence during the six month time horizon in 2021. Almost 4 out of every 5 customers reside within Mohave County. This is perhaps to be expected, given that the store is relatively new to Kingman. The extensive list of non-Mohave County zip codes included within Placer.ai top 70, though, suggests the store is of interest to pass-through traffic.

A telephone interview with the current manager of Kingman’s C-A-L Ranch estimates that up to 30 percent of the store’s business to date has come from pass-through traffic. Several reasons were given for this high level of pass-through business:

- C-A-L Ranch’s close proximity to freeway.
- Freeway signage.



**FIGURE 7: KINGMAN C-A-L RANCH CUSTOMER BY HOME LOCATION, FEBRUARY 1 – JULY 31, 2021**



Source: Placer.ai

- People will often travel from Wikieup, Wickenburg and Yucca to visit a C-A-L Ranch.
- Any pass-through traffic heading to rodeos and similar events frequently “...swing in and buy stuff.” going to rodeos and things like that, they’ll swing in and buy stuff.
- The presence of a Harbor Freight Tools close by has also helped sales. Harbor Freight has greater brand recognition, but is not strictly perceived as a competitor by C-A-L Ranch as the latter offers higher-end items. The Store Manager believes pass-through drivers visiting Harbor Freight this year frequently visit C-A-L Ranch to find out what the latter offers. “Harbor Freight opening next to us has actually helped us because it’s a little more recognizable a name, so they wander into us afterwards. We both sell tools, but we sell higher end ones, so we’re not really competitors.”

From a retail perspective, the manager’s number one wish is for a Costco. His reason for this is simple: people like to buy in bulk, but are forced to travel to Vegas to shop at Costco. (“I’d rather put the \$500 I am going to spend on a Costco run to Vegas today into the local economy, and also only spend \$2 on gas.”). He also believes that a movie theater would appeal to Kingman’s residents and hotel visitors.

### 3.2 Restaurant/Fast Food Pass-Through Traffic

#### Cracker Barrel, Kingman

Cracker Barrel Old Country Store, Inc. is a chain of restaurant and gift stores with a Southern country theme. It's menu is based on traditional Southern cuisine, with appearance and decor designed to resemble an old-fashioned general store.

Kingman's Cracker Barrel is approximately 0.3 miles north of the Walmart Supercenter at 3520 Stockton Hill Road.

In 2019, there were 13 Cracker Barrel stores in Arizona, listed in Table 21. The Kingman restaurant attracted the most visitors among the chain's Arizona footprint in 2019. It also ranks 54<sup>th</sup> out of 652 Cracker Barrel restaurants nationwide. Seven of Arizona's Cracker Barrel restaurants are in the metro Phoenix area, and another in Tucson. Cracker Barrel also has a presence in two of the five other locations previously examined for gross sales/TPT revenues in Section 2 – namely Prescott Valley and Yuma. The Yuma Cracker Barrel is ranked eleventh out of 13 Arizona restaurants for annual visits in 2019; the Prescott Cracker Barrel attracted the least amount of annual visits in the state, ranking 13<sup>th</sup>.

**TABLE 21: TOTAL ANNUAL VISITS TO, AND RANKING OF, CRACKER BARREL IN ARIZONA IN 2019**

LOCATION	AZ RANKING (n=13)	US RANKING (n=652)	TOTAL ANNUAL VISITS
<b>3520 Stockton Hill Rd., Kingman</b>	<b>#1</b>	<b>#54</b>	<b>533,400</b>
1007 N. Dobson Rd., Mesa	#2	#104	497,900
8400 N Cracker Barrel Rd, Tucson	#3	#184	455,300
16845 N. 84th Ave., Peoria	#4	#195	451,200
5022 E. Chandler Blvd., Phoenix	#5	#240	437,100
9312 W. Glendale Ave., Glendale	#6	#253	431,000
2560 E. Lucky Ln., Flagstaff	#7	#360	392,100
21611 N. 26th Ave., Phoenix	#8	#373	386,700
1209 N Litchfield Rd., Goodyear	#9	#406	376,500
2281 E Florence Blvd., Casa Grande	#10	#468	350,000
1780 S Sunridge Dr., Yuma	#11	#477	346,000
606 S. Watson Rd., Buckeye	#12	#584	303,600
5707 E State Route 69, Prescott Valley	#13	#633	258,100

Source: *Placer.ai*

Table 22 estimates that approximately 34% to 39% of the store’s total customers lived more than 250 miles away during the three year time horizon, dependent on the year in question. That is, Placer.ai estimates that approximately 94,500 total customers in 2017, 91,700 total customers in 2018, and 103,500 customers in 2019 lived at least 250 miles away from the store. In total, during the three-year time horizon, an estimated 145,500 customers lived 250 miles away or more from the store. This suggests that pass-through traffic represents a large portion of the Kingman Cracker Barrel’s total annual customer base.

Kingman’s Cracker Barrel ranks number one for visits within the chain in Arizona throughout the three-year time horizon.

The average store visit during the three years was 66 minutes.

It also currently ranks number one within the chain nationwide for the January 1 – July 31, 2021 time horizon.

**TABLE 22: CRACKER BARREL KINGMAN CUSTOMER INSIGHTS, 2017 - 2019**

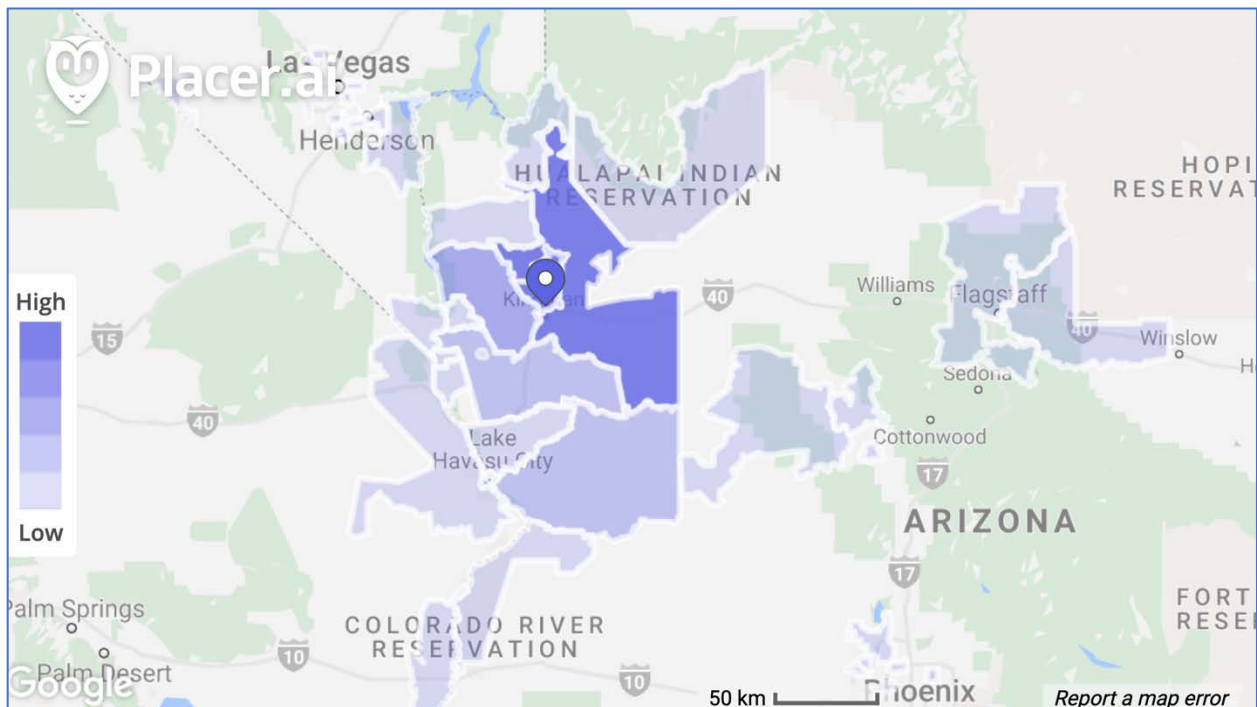
	2017	2018	2019	2017-19
Estimated number of customers	255,000	266,700	265,700	388,000
Estimated number of visits	523,600	553,900	533,400	1,610,000
Average visits per customer	2.05	2.08	2.01	4.14
Panel visits	6,400	9,300	12,100	27,800
Average stay	65 minutes	67 minutes	65 minutes	66 minutes
U.S. Chain Ranking	114 <sup>th</sup> (638)	78 <sup>th</sup> (644)	53 <sup>rd</sup> (654)	77 (637)
AZ Chain Ranking	1 <sup>st</sup> (13)	1 <sup>st</sup> (13)	1 <sup>st</sup> (13)	1 (13)
<b>Trade Area:</b>				
<5 miles	11.78%	13.72%	12.14%	11.90%
<10 miles	13.69%	15.81%	14.04%	13.85%
<30 miles	17.30%	19.28%	17.45%	17.28%
<50 miles	22.61%	26.23%	23.26%	23.35%
<100 miles	34.94%	38.90%	34.69%	35.76%
<250 miles	62.93%	65.63%	61.04%	62.50%
>250 miles	37.07%	34.37%	38.96%	37.50%

Source: Placer.ai

Placer.ai's top 70 home zip codes for Kingman's Cracker Barrel account for 38.39% of all customers, 2017 through 2019. These top 70 zip codes include 13 Mohave County zips, collectively accounting for 25.85% of total customers during the three year time horizon. A further 20 zip codes are located in other Arizona counties, collectively accounting for 4.12% of total customers. The remaining 37 zip codes are in Alabama, California, Nevada, and New Mexico, collectively accounting for 8.42% of total customers, 2017 through 2019.

Figure 8 illustrates the geographic distribution of Kingman Cracker Barrel's customer base by place of residence, 2017 through 2019. Around 1 out of every 4 customers reside within Mohave County.

**FIGURE 8: KINGMAN CRACKER BARREL CUSTOMER BY HOME LOCATION, 2017-2019**



Source: Placer.ai

Comparisons of the Kingman, Prescott Valley and Yuma Cracker Barrels are shown in Tables 23 and 24.

Table 23 looks at the trade areas of each store across the three year (2017 through 2019) time horizon using Placer.ai data to shed some light on the volume of pass-through traffic. Table 24 separately reports data for 2019 (the last full pre-pandemic year) for all three Cracker Barrels.

**TABLE 23: TRADE AREAS OF SELECT CRACKER BARRELS, 2017 - 2019**

LOCATION	TOTAL VISITS CRACKER BARREL ARIZONA RANKING (n=13)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA PERCENT OF CUSTOMERS				
			<30 MILES	<50 MILES	<100 MILES	<250 MILES	>250 MILES
E. State Route 69, <b>Prescott Valley</b>	#13	44.29	45.03%	47.76%	69.51%	77.36%	22.64%
1780, S Sundridge Drive, <b>Yuma</b>	#10	26.44	30.75%	31.71%	37.97%	78.33%	21.67%
<b>3520 Stockton Hill Road, Kingman</b>	<b>#1</b>	<b>30.27</b>	<b>17.28%</b>	<b>23.25%</b>	<b>35.76%</b>	<b>62.50%</b>	<b>37.50%</b>

Source: Place.ai

**TABLE 24: TRADE AREAS OF SELECT CRACKER BARRELS, 2019**

LOCATION	TOTAL ANNUAL VISITS ARIZONA RANKING (n=13)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA						
			PERCENT OF VISITS			PERCENT OF CUSTOMERS			
			<30 MILES	<50 MILES	<100 MILES	<30 MILES	<50 MILES	<100 MILES	100+ MILES
E. State Route 69, <b>Prescott Valley</b>	#13	40.41	65.45%	67.49%	81.37%	47.19%	49.97%	72.35%	27.65%
1780, S Sundridge Drive, <b>Yuma</b>	#10	25.11	45.39%	46.19%	51.46%	31.87%	32.79%	38.92%	61.08%
<b>3520 Stockton Hill Road, Kingman</b>	<b>#1</b>	<b>28.42</b>	<b>41.92%</b>	<b>48.53%</b>	<b>57.29%</b>	<b>17.45%</b>	<b>23.26%</b>	<b>34.69%</b>	<b>65.31%</b>

Source: Placer.ai

Table 23 suggests that 37.50% of customers at the Kingman Cracker Barrel live at least 250 miles away, 2017 through 2019. That's significantly higher than the Prescott Valley and Yuma Cracker Barrels.

Table 24 compares the annual visit and annual customer data for all three Cracker Barrels in 2019. Again, a visit is a single shopping trip to an establishment by a customer. It can therefore include multiple visits by a single customer. The corresponding customer columns in Table 24 are unique customers.

Table 24 suggests that the Cracker Barrel in Yuma had the highest percentage of visits (11.68%) from people living at least 100 miles away. The Kingman restaurant, though, had the highest percentage of total customers (65.31%) living at least 100 miles away.

An interview with the current manager of Kingman's Cracker Barrel corroborated the Placer.ai estimates for the restaurant. He estimated that more than half of his annual business came from pass-through traffic. Several reasons were given for this high level of pass-through business:

- Cracker Barrel's close proximity to the I-40 encourage peoples traveling in either direction to stop at the restaurant if they want to eat (particularly those who stop for gas).
- There's a lack of competition within Kingman for the business. The manager identified two Denny's, an IHOP, and a Black Bear Diner as the only competition.
- Effective use of road signage maximizes awareness of the Kingman restaurant. That is, there are billboards on the way into town. These include a billboard facing incoming traffic from Havasu on the I-40; one from traffic coming from Flagstaff; and also a billboard for traffic coming from Vegas.
- Brand recognition is also key. "People actually look for Cracker Barrel."

From a retail perspective, the manager suggested that Walmart has cornered the local market, on. The grounds that "...it's the only place that you can really get anything from." Looking to the future, he would welcome greater eating and retail options within the city.

### **In N Out Burger, Kingman**

Kingman's In N Out Burger is at 1170 E Beverley Avenue, opposite (southwest of) the Walmart Supercenter and adjacent to/visible from the I-40.

Table 25 estimates that approximately 50% to 53% of the In N Out Burger’s total customers lived more than 250 miles away during the three year time horizon, dependent on the year in question. That is, Placer.ai estimates that approximately 162,100 total customers in 2017, 174,200 total customers in 2018, and 209,900 customers in 2019 lived at least 250 miles away from the store. In total, during the three-year time horizon, an estimated 266,800 customers lived 250 miles away or more from the store. This suggests that pass-through traffic represents a very large portion of the Kingman establishment’s total annual customer base.

The fast food establishment was the 16<sup>th</sup> most visited In N Out Burger in Arizona in 2017, the 17<sup>th</sup> most visited in 2018, and the 14<sup>th</sup> most visited in 2019.

The average visit during the three years was 37 minutes.

**TABLE 25: IN N OUT BURGER KINGMAN CUSTOMER INSIGHTS, 2017 - 2019**

	2017	2018	2019	2017-19
Estimated number of customers	316,500	35,100	395,600	521,700
Estimated number of visits	461,900	498,100	557,400	1,520,000
Average visits per customer	1.46	1.42	1.41	2.91
Panel visits	5,400	8,500	11,800	25,800
Average stay	38 Minutes	37 Minutes	38 Minutes	37 minutes
U.S. Chain Ranking	202 (315)	204 (323)	183 (332)	189 (312)
AZ Chain Ranking	16 (30)	17 (30)	14 (32)	15 (30)
<b>Trade Area:</b>				
<5 miles	8.29%	8.57%	7.78%	8.30%
<10 miles	9.44%	10.00%	8.87%	9.54%
<30 miles	12.11%	12.41%	11.07%	11.87%
<50 miles	15.18%	16.14%	13.64%	15.18%
<100 miles	20.39%	23.07%	20.01%	21.47%
<250 miles	48.78%	50.35%	46.94%	48.86%
>250 miles	51.22%	49.65%	53.06%	51.14%

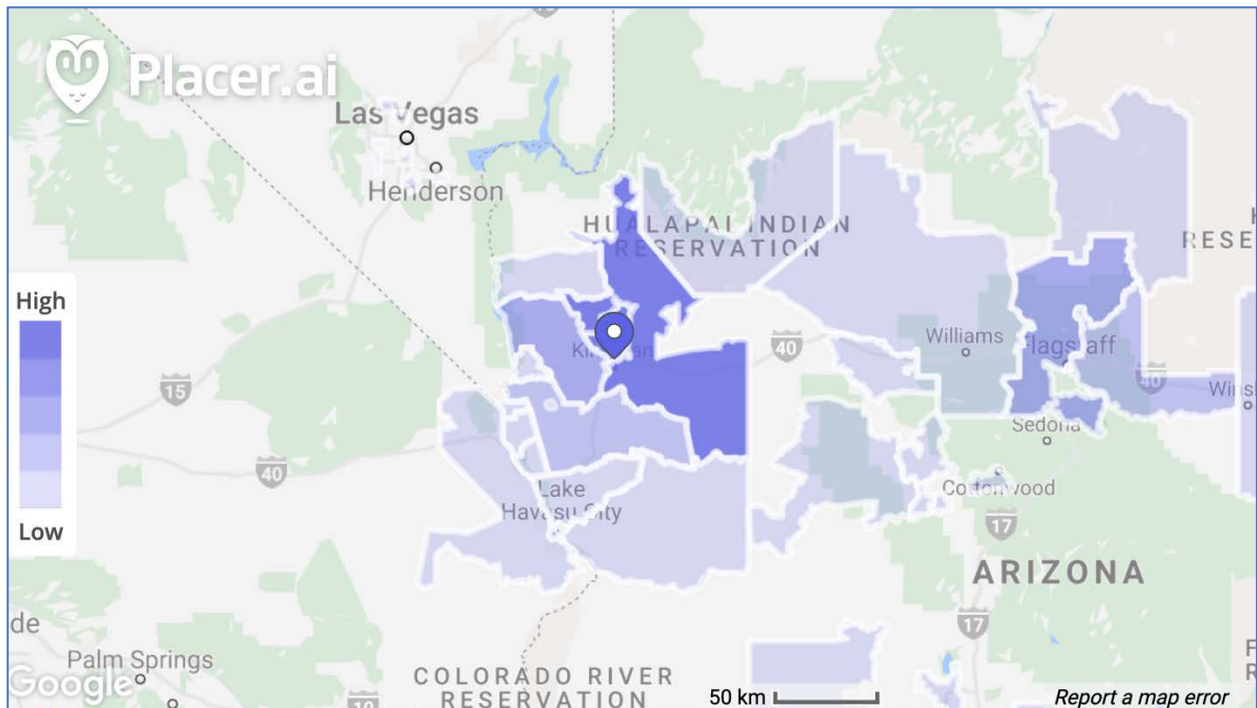
Source: Placer.ai

Placer.ai’s top 70 home zip codes for Kingman’s In N Out Burger account for 36.44% of all customers, 2017 through 2019. These top 70 zip codes include 13 Mohave County zips, collectively accounting for 15.32% of total customers during the three year time horizon. A further 24 zip codes are located in other Arizona

counties, collectively accounting for 8.64% of total customers. The remaining 33 zip codes are in California, Colorado, Nevada, and New Mexico, collectively accounting for 12.48% of total customers, 2017 through 2019.

Figure 9 illustrates the geographic distribution of Kingman In N Out Burger’s customer base by place of residence, 2017 through 2019.

**FIGURE 9: KINGMAN IN N OUT BURGER CUSTOMER BY HOME LOCATION, 2017-2019**



Source: Placer.ai

Comparisons of the Kingman, Marana, Prescott and Yuma In N Out Burger establishments are shown in Tables 26 and 27.

Table 26 looks at the trade areas of each establishment across the three year (2017 through 2019) time horizon using Placer.ai data to shed some light on the volume of pass-through traffic. Table 27 separately reports data for 2019 (the last full pre-pandemic year) for all four In N Out Burger locations.



Table 26 suggests that more than half (51.50%) of total customers at the Kingman In N Out Burger live at least 250 miles away, 2017 through 2019. That's two to three times higher than the corresponding percentage estimates for Marana, Prescott and Yuma.

Table 27 compares the annual visit and annual customer data for all four In N Out Burger establishments in 2019. Again, a visit is a single shopping trip to an establishment by a customer. It can therefore include multiple visits by a single customer. The corresponding customer columns in Table 27 are unique customers.

Table 27 suggests that the In N Out Burger in Kingman had the highest percentage of visits (32.36%) from people living at least 100 miles away, and the highest percentage of customers (79.99%). Approximately 4 out of every 5 customers in 2019 resided at least 100 miles from the Kingman fast food establishment, further emphasizing the significant contribution made by pass-through traffic to sales.

Using Cracker Barrel and In N Out Burger as a guide, it is reasonable to assume that the range of pass-through customers at restaurants/fast food establishments in Kingman is higher than comparable towns and cities in Arizona.

For the 2017 through 2019 time horizon, 37.50% to 51.14% of customers' primary residence was at least 250 miles away from the food establishment that they visited.

In 2019 alone, 65.31% to 79.99% of customers traveled at least 100 miles to visit one of these two food establishments.

**TABLE 26: TRADE AREAS OF SELECT IN N OUT BURGERS, 2017 - 2019**

LOCATION	TOTAL VISITS IN N OUT BURGERS ARIZONA RANKING (n=30)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA PERCENT OF CUSTOMERS				
			<30 MILES	<50 MILES	<100 MILES	<250 MILES	>250 MILES
8180 Cortaro Road, <b>Marana</b>	#28	75.17	51.43%	53.77%	63.99%	74.43%	25.47%
3040 Highway 69, <b>Prescott</b>	#17	54.02	49.30%	53.98%	75.04%	81.19%	18.81%
1940 E. 16 <sup>th</sup> Street, <b>Yuma</b>	#8	26.17	37.41%	37.96%	41.66%	80.41%	19.59%
<b>1770 Beverly Avenue, Kingman</b>	<b>#15</b>	<b>29.14</b>	<b>11.87%</b>	<b>15.18%</b>	<b>21.47%</b>	<b>48.86%</b>	<b>51.14%</b>

Source: Place.ai

**TABLE 27: TRADE AREAS OF SELECT IN N OUT BURGERS, 2019**

LOCATION	TOTAL ANNUAL VISITS ARIZONA RANKING (n=32)	TRADE AREA 70% OF TRAFFIC VOLUME (Square Miles)	TRADE AREA						
			PERCENT OF VISITS			PERCENT OF CUSTOMERS			
			<30 MILES	<50 MILES	<100 MILES	<30 MILES	<50 MILES	<100 MILES	100+ MILES
8180 Cortaro Road, <b>Marana</b>	#31	70.54	60.64%	62.49%	72.57%	49.12%	50.99%	63.53%	36.47%
3040 Highway 69, <b>Prescott</b>	#17	48.59	69.05%	72.47%	84.72%	50.92%	55.21%	75.70%	24.30%
1940 E. 16 <sup>th</sup> Street, <b>Yuma</b>	#9	24.4	58.71%	59.11%	62.36%	35.67%	36.18%	40.48%	59.52%
<b>1770 Beverly Avenue, Kingman</b>	<b>#14</b>	<b>25.83</b>	<b>22.58%</b>	<b>26.06%</b>	<b>32.36%</b>	<b>11.07%</b>	<b>13.64%</b>	<b>20.01%</b>	<b>79.99%</b>

Source: Placer.ai

## 4.0 KINGMAN’S POTENTIAL FOR A NEW BIG BOX RETAILER

Section 3 suggests that retail and food establishments in the City of Kingman rely to a considerable extent on pass-through traffic for their sales.

One key motivation behind the current study is to explore Kingman’s market potential for a new big box retailer. To that end, Section 4 presents a big box retailer case study. The focus of the case study is Kingman’s potential for a new Costco Wholesale store. Please note: this does not mean that City or County government officials are specifically targeting Costco. The multinational corporation has simply been chosen by Seidman as an example of a big box retailer.

There are currently 18 Costco Wholesale stores in the State of Arizona. Fourteen are located in metro Phoenix, and three in metro Tucson – the two most populous areas in the state. The other Costco Wholesale store is in Prescott. Figure 10 shows the locations of each Costco store within the state, and 5 additional stores in Clark County, Nevada (Las Vegas and Henderson stores). The Nevada stores shown on the map could potentially attract some custom from the Kingman area, as they range from 97 to 124 miles by road from the city center. The closest Arizona store (Prescott) is 147 miles by road from the center of Kingman. The closest Phoenix Costco is at North 27<sup>th</sup> Avenue.

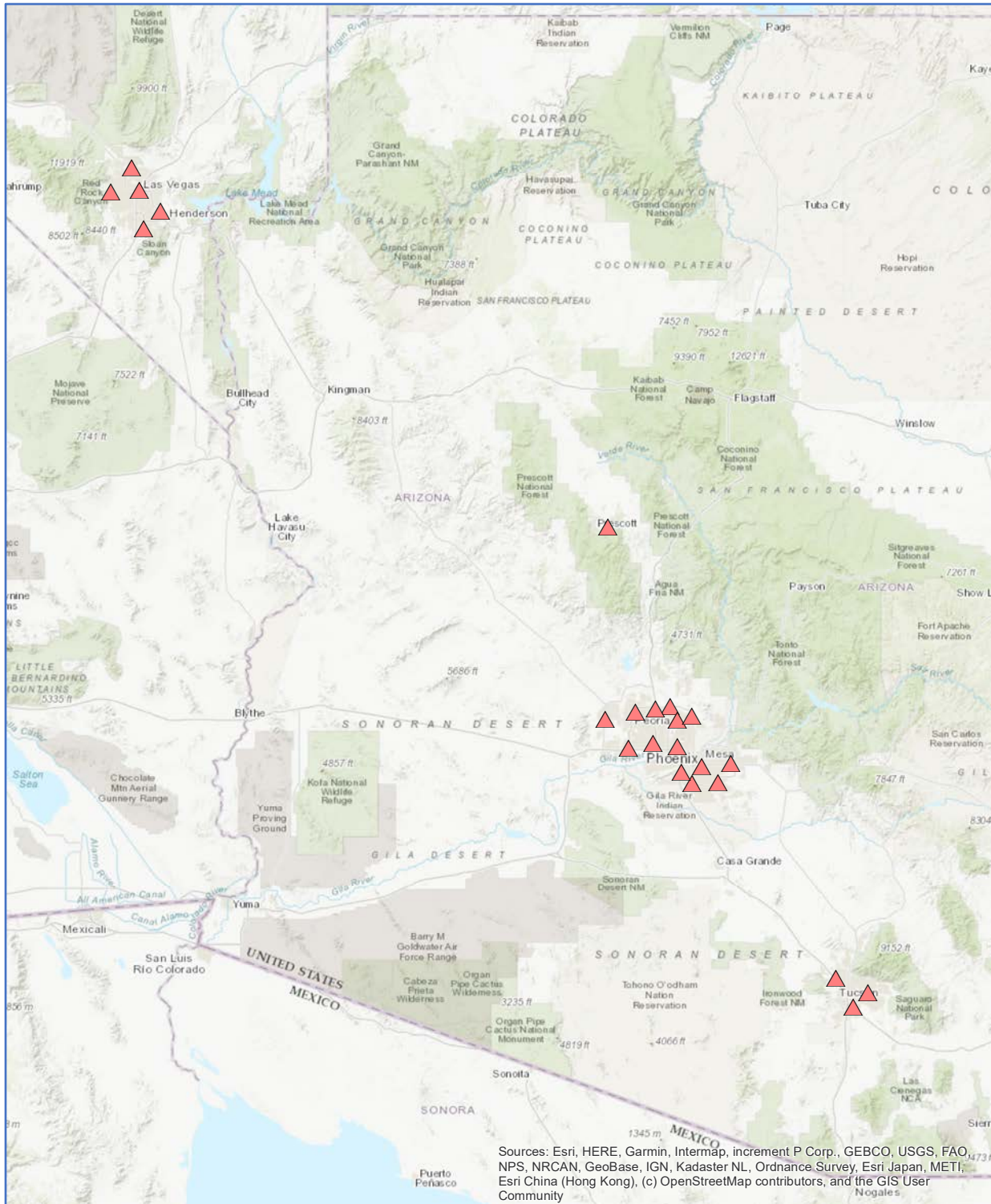
Table 28 summarizes the 2019 visitor footprint for each Costco store. The CCD resident populations for all 23 stores are significantly bigger than Kingman CCD.<sup>15</sup> The Prescott Costco has the smallest CCD (130,695), but that is still 84% greater than the resident population of Kingman CCD. Placer.ai data suggests that the Prescott Costco attracted in excess of 2 million visits, positioning it 334<sup>th</sup> out of 522 Costco Wholesale stores nationwide in 2019. Approximately 70% of the Prescott store’s annual traffic is drawn from a radius of 61 miles housing 81,353 residents.

To what extent are the seven closest Costco Wholesale stores in Arizona and Nevada currently frequented by Kingman or Mohave County residents?

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<sup>15</sup> A CCD is a subdivision of a county delineated cooperatively by the U.S. States Census Bureau and state and local government authorities for the purpose of presenting statistical data.

**FIGURE 10: LOCATIONS OF SELECT COSTCO WAREHOUSE STORES**



**TABLE 28: COSTCO WAREHOUSE ANNUAL TRAFFIC, 2019 (ARIZONA AND CLARK COUNTY, NEVADA)**

US RANK	LOCATION	2019 ANNUAL VISITORS	2019 CCD POPULATION	CUSTOMER BASE				POPULATION FOR 70% OF TRAFFIC
				<10 MILES	<30 MILES	<50 MILES	<100 MILES	
#57	Tucson (E Tucson Marketplace)	3,520,877	893,304	60.97%	81.67%	84.82%	92.84%	324,286
#68	Mesa	3,360,109	3,347,177	72.31%	85.02%	86.77%	88.76%	289,995
#79	Avondale	3,276,007	3,347,177	70.90%	91.21%	92.26%	93.10%	564,419
#87	Glendale	3,217,640	3,347,177	78.46%	89.20%	90.13%	91.32%	446,701
#90	Tucson (E Grant Rd)	3,185,076	893,304	77.54%	86.95%	88.60%	93.28%	252,375
#110	Gilbert (S Market St)	3,019,823	3,347,177	70.70%	88.48%	89.61%	90.73%	364,885
#142	Tucson (W Costco Dr.)	2,800,174	893,304	65.65%	86.29%	88.41%	93.13%	206,180
#166	Gilbert (N Arizona Ave)	2,707,259	3,347,177	82.39%	91.19%	92.19%	93.60%	379,415
#169	Scottsdale	2,699,514	3,347,177	68.19%	86.80%	87.59%	88.96%	231,667
#176	Phoenix (N 27th Ave)	2,653,702	3,347,177	70.36%	90.39%	90.99%	92.78%	369,131
#209	Chandler	2,490,327	456,843	72.81%	90.25%	92.18%	93.21%	293,332
#249	Tempe	2,325,684	3,347,177	73.49%	88.35%	91.55%	92.65%	370,063
#268	Phoenix (E Cactus Rd)	2,270,575	3,347,177	85.45%	93.30%	93.52%	94.55%	183,287
#279	Phoenix (E Oak St)	2,232,789	3,347,177	81.42%	91.75%	92.35%	93.44%	272,812
#334	Phoenix (W Montebello Ave)	2,080,732	3,347,177	86.78%	93.52%	93.92%	94.41%	353,032
#344	Prescott	2,047,209	130,695	57.51%	81.65%	86.83%	92.13%	81,353
#363	Phoenix (E Beardsley Rd)	1,995,179	3,347,177	74.51%	90.43%	91.01%	93.08%	249,202
#520	Phoenix (N 33 <sup>rd</sup> )	704,216	3,347,177	64.89%	91.10%	92.36%	96.00%	744,484
#74	Henderson (Marks Street)	3,306,897	1,953,370	76.92%	86.26%	86.49%	88.16%	457,604
#144	Las Vegas (S Pavilion Center)	2,785,703	1,953,370	80.73%	89.21%	90.79%	91.03%	400,974
#145	Las Vegas (N Decatur Blvd)	2,782,259	1,953,370	85.70%	89.48%	90.80%	91.27%	325,337
#245	Henderson (St Rose Parkway)	2,332,587	1,953,370	78.64%	86.00%	86.52%	87.10%	232,491
#511	Las Vegas (S Martin L King Blvd)	984,451	1,953,370	75.74%	85.28%	86.10%	86.68%	626,581

Sources: Placer.ai and U.S. Census Bureau

**TABLE 29: TOTAL PERCENTAGE OF CUSTOMERS FROM MOHAVE COUNTY, 2017-2019**

	COSTCO WHOLESALE STORE PERCENT OF CUSTOMERS		
	HENDERSON (St Rose Parkway)	HENDERSON (Marks Street)	PRESCOTT
<b>City of Kingman</b>	0.11%	1.01%	0.56%
<b>Bullhead City</b>		0.36%	
<b>Lake Havasu City</b>	0.28%	1.16%	0.33%
<b>Other Mohave County</b>		0.58%	
<b>Other Arizona</b>			68.67%
<b>Non-Arizona</b>	69.52%	63.80%	0.16%
<b>Total</b>	<b>69.91%</b>	<b>66.91%</b>	<b>69.72%</b>

Sources: Placer.ai

Drawing from Placer.ai's top 70 zip codes for the five Nevada, one Prescott, and one Phoenix Costco Wholesale stores for 2017 through 2019, the numbers are surprisingly not that high.

There is no Mohave County zip code included in the top 70 zips for the three Las Vegas stores, or the closest Phoenix store at North 27<sup>th</sup> Avenue. Only three stores include Mohave County zips within their top 70 customer residences, 2017 through 2019. These are the two Henderson stores and the Prescott Costco.

City of Kingman residents appear to favor the Marks Street Costco in Henderson, but only account for one percent of total annual customers.

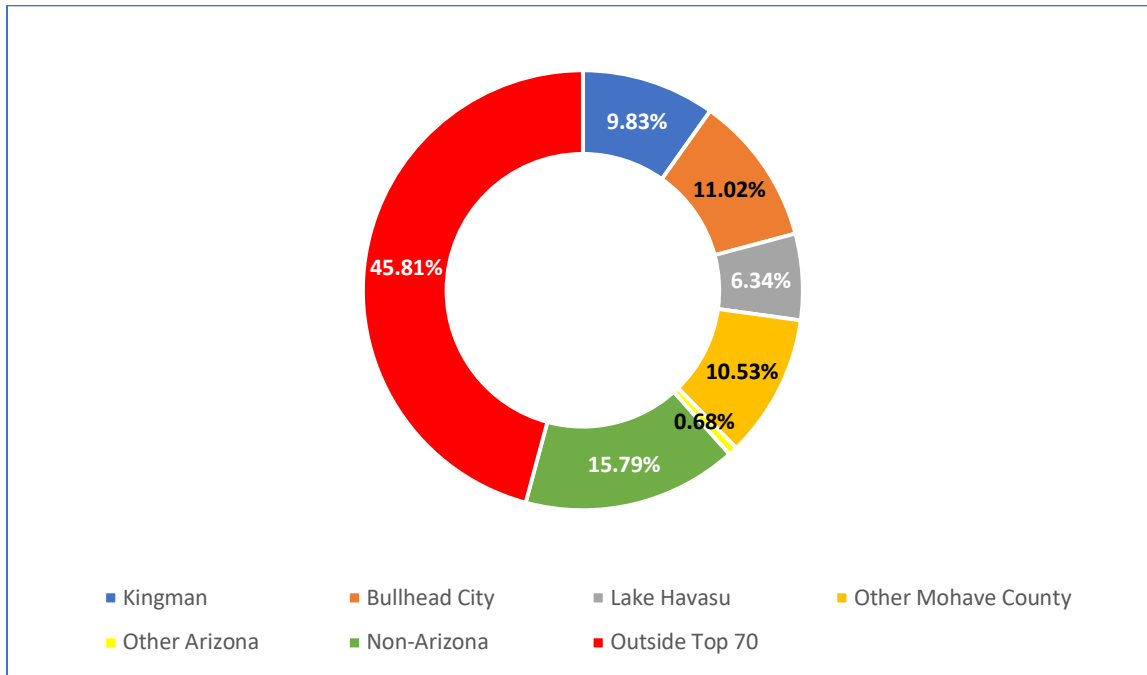
Mohave County residents as a whole also favor the Marks Street Costco in Henderson, but only account for 3% of total annual customers, 2017 through 2019.

City of Kingman and Lake Havasu residents account for 0.59% of total customers at the St Rose Parkway store in Henderson, 2017 through 2019, and 0.89% of total customers at Prescott.

One reason for this low patronage could be the presence of a Sam's Club in Bullhead City. Residents from two Kingman zip codes (86401 and 86409) accounted for approximately 10% of that store's total customers, 2017 through 2019. Mohave County residents as a whole accounted for 13 of the top 70 customer zip codes. That is, 37.72% of the store's total customers.

Figure 11 illustrates the breakdown of Bullhead City customers by place of residence, 2017-2019. Note that the top 70 zip codes accounted for 54.19% of total customers. The zip code ranked 70<sup>th</sup> accounted for 0.18% of customers. At best, Mohave County residents therefore can only account for 41.14% of Sam’s Club customers in Bullhead City.<sup>16</sup>

**FIGURE 11: BULLHEAD CITY SAM’S CLUB IN N OUT BURGER CUSTOMER BY HOME LOCATION, 2017-2019**



However, Section 3 has highlighted the importance of pass-through traffic in addition to local population figures. Table 30 therefore offers catchment area statistics for the lowest performing Costco Wholesale stores (in terms of foot traffic) in 2019. All 13 stores listed in Table 30 had annual footfall of less than one million customers in 2019.

Two of the stores listed (Juneau, AK and Gypsum, CO) attracted 70% of their annual foot traffic from populations significantly smaller than Kingman CCD. These are the only two stores in the bottom 13 that attracted 70% or more of their annual visits from a resident population smaller than the Prescott store. These statistics illustrate the size of the challenge faced by local government in trying to attract a big box retailer like Costco to locate within Mohave County. That is, the population data alone is insufficient.

<sup>16</sup> That is, 3 additional Mohave zip codes and 16 Mohave PO Box zip codes multiplied by 0.18%, added to the 37.72% for 13 Mohave zip codes already listed in Placer.ai’s Top 70. The actual percentage figure is likely to be smaller.

**TABLE 30: COSTCO WAREHOUSE ANNUAL TRAFFIC, 2019 (LESS THAN 1 MILLION ANNUAL VISITS)**

US RANK	LOCATION	2019 ANNUAL VISITORS	2019 CCD POPULATION	CUSTOMER BASE				POPULATION FOR 70% OF TRAFFIC
				<10 MILES	<30 MILES	<50 MILES	<100 MILES	
#510	Stafford Township, NJ	987,097	27,347	50.46%	77.62%	82.25%	94.43%	122,198
#511	Las Vegas, NV (S MLK Blvd)	984,451	1,953,370	75.74%	85.28%	86.10%	86.68%	626,581
#512	Wheaton, MD	977,623	129,117	90.60%	96.51%	97.09%	97.37%	493,133
#513	Rochester, MN (Commerce Dr. NW)	973,762	115,557	54.53%	73.44%	86.88%	93.88%	151,472
#514	San Francisco, CA (Dubuque Ave S)	957,237	874,961	77.70%	92.84%	95.65%	97.78%	796,661
#515	North Hollywood, CA	952,590	1,861,629	82.49%	95.51%	97.57%	98.35%	661,570
#516	Westminster, CA	925,566	91,137	75.08%	93.36%	95.74%	96.59%	892,552
#517	Lynnwood, WA (Highway 99)	904,247	38,143	74.37%	93.84%	96.17%	97.00%	391,276
#518	Juneau, AK	892,182	32,227	85.52%	88.02%	89.54%	91.45%	17,887
#519	Gypsum, CO	867,095	20,102	39.27%	69.56%	78.94%	84.85%	37,976
#520	Phoenix (N 33 <sup>rd</sup> ), AZ	704,216	3,347,177	64.89%	91.10%	92.36%	96.00%	744,484
#521	Fife, WA	688,990	459,539	60.45%	90.68%	94.50%	96.64%	497,062
#522	Chicago, IL (S Cicero Ave)	625,448	2,709,534	87.34%	96.75%	97.37%	97.67%	506,924

Sources: Placer.ai and U.S. Census Bureau

**Note:**

2019 population figures in red are for the city, rather than the Census County Division (CCD)



Nevertheless, there are other locations with small populations in Table 30 that appear to rely on pass-through traffic for a significant part of their sales.

One example is Stafford Township, NJ, has a resident population of 27,347. This town serves as a gateway via Route 72 to the resort communities on Long Beach Island. The Garden State Parkway and U.S. Route 9 also pass-through the township and provide access to Route 72. Given that 70% of its annual traffic was drawn from an area housing 122,198, this store clearly benefits from pass-through traffic.

In 2019, 46.5% of Stafford Costco's total customers made only one visit, which also suggests a high percentage of pass-through traffic.

Placer.ai's top 70 home zip codes for the Stafford Costco account for 62.47% of all customers in 2019. These top 70 zip codes include 63 New Jersey zips, collectively accounting for 60.70% of total customers during the three year time horizon. The remaining 7 zip codes are in Florida, New York, and Pennsylvania, collectively accounting for 1.77% of total customers in 2019. Only 1 in 5 customers reside within the 4 zip codes for Stafford (8005, 8008, 8050 and 8092). This again suggests significant pass-through customers.

A second example is Lynnwood, WA, which has a fairly comparable city population (38,143) to Kingman.<sup>17</sup> Part of the metro Seattle area, located close to the I-5 and I-405, Lynnwood attracts over 96% of its annual customers from a 50 mile radius.

In 2019, 42.6% of Lynnwood Costco's total customers made only one visit, which also suggests a high percentage of pass-through traffic.

Placer.ai's top 69 home zip codes for the Lynnwood Costco account for 87.85% of all customers in 2019. These top 69 zip codes are all located in the State of Washington. The three Lynnwood zip codes (98036, 98037, and 98087) account for approximately 1 in 6 customers (17.05%). This again suggests significant pass-through customers.

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<sup>17</sup> Please note: there are two Costco Wholesale stores in Lynnwood, WA. The example quoted in the text is at 19105, Highway 99. The other (18109 33<sup>rd</sup> Ave West) performs far better, ranking #141 out of 522 Costco Wholesale stores nationwide in 2019.

Any discussions held by the City of Kingman or Mohave County with a big box retailer should use these two stores to justify greater emphasis on pass-through traffic than local population.

## 5.0 CONCLUSIONS

The purpose of this study has been to estimate the current purchasing power of visitors driving through Kingman along Interstate-40 and US Highway-93.

Seidman estimates that the City of Kingman has 52 retail and grocery establishments, and 161 restaurants, bars and fast food establishments, based on a review of current Yellow Pages online listings for the city.

Using the OEO's 2019 population estimate for the city in conjunction with these Yellow Pages listings, Seidman estimates that Kingman has 605.4 residents per retail and grocery establishment, and 195.5 residents per restaurant, bar or fast food establishment. This means, for example, that the residents of Prescott and Lake Havasu City are better served by retail and grocery establishments on a per capita basis than Kingman, but the residents of Yuma are not as well served. It also means that the residents of Prescott and Payson are better served by restaurants, bars and fast food establishments on a per capita basis than Kingman, but the residents of Yuma are not as well served.

Using the Census Bureau's 2019 CCD population estimates, Seidman alternatively estimates that Kingman has 1,364.8 residents per retail and grocery establishment, and 440.8 residents per restaurant, bar or fast food establishment. This means, for example, that the CCD residents of Lake Havasu City, Sierra Vista, Payson, Yuma, and Casa Grande are all better served on a per capita basis than Kingman CCD for retail, grocery stores, restaurants and bars.

It is reasonable to conclude solely on the basis of either per capita measurement that the City of Kingman is currently underserved by retail and grocery stores, restaurants, bars, and fast food establishments compared to some of the other towns and cities in the state.

This is important as the City is heavily reliant on sales tax revenues. In 2019, City of Kingman retail establishments generated \$449.2 million gross sales, and restaurants and bars generated \$98.8 million.

An analysis of four retailers (Walmart, Safeway, Ross Dress for Less and Big Lots), a restaurant (Cracker Barrel), and a fast food establishment (In N Out Burger) located within Kingman suggests a significant reliance on pass-through traffic for their sales.

For the 2017 through 2019 time horizon, Placer.ai cell phone tracking data estimates 10.72% to 43.34% of customers had a primary residence at least 250 miles away from the Kingman store visited, dependent on the store chain. Kingman's Walmart store is at the top of this range, and Kingman's Big Lots at the lower end of this range.

In 2019 alone, 18.56% to 60.94% of customers traveled at least 100 miles to visit one of the four Kingman retailers studied. Again, Kingman's Walmart store is at the top of this range, and Kingman's Big Lots at the lower end of this range.

A comparison with five other Arizona cities located adjacent to or dissected by interstates and major highways, appears to support Mohave County's belief that Kingman's retailers benefit from the greatest number of pass-through customers. For example, the percentage of Kingman Walmart customers living at least 250 miles away is double the *average* of the other eight Walmart stores examined, thereby demonstrating the value (in total customers) of pass-through traffic for this particular store.

Both Kingman food establishments examined also have a higher percentage of total customers traveling at least 250 miles, 2017-2019 than sister chain establishments located in one or more of the Arizona comparators.

Kingman's Cracker Barrel is the top performing restaurant within the chain's 13-strong Arizona presence, 2017 through 2019; and is currently number 1 nationwide during the first six months of 2021.

Big box retailers frequently emphasize population considerations when they consider the potential of a new store location. However, Seidman's Costco Wholesale case study suggests that other considerations, such as the business generated by pass-through traffic, can also motivate retailers.

Two prime examples are the Costco Wholesale stores in Stafford Township, NJ, and Lynnwood, WA.

Placer.ai estimates only 1 in 5 customers at the Stafford Costco in 2019, and 1 in 6 customers at the Lynnwood Costco reside within their respective zip codes. 46.5% of the Stafford store's total customers and 42.6% of the Lynnwood store's made only one visit in 2019, which also suggests a high percentage of pass-through traffic.

It is impossible to arrive at a specific dollar value for the pass-through traffic purchases made each year in the City of Kingman.

A 2010 study implemented by NAU on behalf of the Arizona Office of Tourism (AOT) classified approximately 34% of respondents as pass-through traffic,<sup>18</sup> which is within the range of retail traffic estimates available from the Placer.ai data. The 2010 study estimated that pass-through vehicles on average will spend \$38 at restaurants and grocery stores, \$34 on transportation (including gas) and \$13 on shopping souvenirs. Adjusting for differences in the purchasing power of the dollar, this could be equivalent to \$45 at restaurants and grocery stores, \$40 on transportation (including gas) and \$15 on souvenirs (all 2020 dollars).<sup>19</sup> Josh Noble, Tourism Services Manager at the Kingman Office of Tourism, in a private conversation with Seidman estimates that at least one million people currently drive through Kingman each year without staying overnight.<sup>20</sup> These pass-through visitors are a key potential source for one-off retail and restaurant purchases in the City of Kingman.

Between 2019 and 2040, ADOT also projects a 37%-43% increase in annual daily traffic along the US-93 and a 187% increase in annual daily traffic along the I-40 within Kingman. If those projections hold true, the potential for pass-through traffic sales could be even higher.

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<sup>18</sup> NAU (2011). Kingman Area and Grand Canyon West/Hualapai Tourism Study, 2010. Available at: [https://tourism.az.gov/wp-content/uploads/2019/06/3.4\\_CommunityStudiesAndAssessments\\_Kingman\\_GCW\\_Tourism\\_Study-Final\\_4-5-11.pdf](https://tourism.az.gov/wp-content/uploads/2019/06/3.4_CommunityStudiesAndAssessments_Kingman_GCW_Tourism_Study-Final_4-5-11.pdf)

<sup>19</sup> This uses the federal Bureau of Economic Analysis' Implicit Price Deflators for Gross Domestic Product (Table 1.1.9), available at [bea.gov](https://www.bea.gov/).

<sup>20</sup> This is an estimate from the Office of Tourism's SeeSource mobile phone data, for pass through traffic for Kingman only, not the entire county. The Office of Tourism no longer subscribes to this data.

## APPENDIX

**TABLE A1: CITY AND CENSUS COUNTY DIVISION POPULATION BASE DATA, 2019**

	OEO CITY POPULATION	CCD POPULATION
Bullhead City	41,193	61,125
Casa Grande	56,962	67,159
Eloy	19,438	37,825
Florence	27,980	41,101
<b>Kingman</b>	<b>31,480</b>	<b>70,968</b>
Lake Havasu City	56,738	59,215
Marana	49,323	36,066
Maricopa	54,791	57,992
Payson	16,168	23,521
Prescott	42,566	130,695
Prescott Valley	46,458	130,695
Sierra Vista <sup>21</sup>	45,065	49,001
Yuma	105,365	144,991

Sources: Arizona Office of Economic Opportunity and U.S. Census Bureau

**TABLE A2: CURRENT NUMBER OF RETAIL/GROCERY AND RESTAURANT/BAR/FAST FOOD YELLOW PAGES LISTINGS PER LOCATION**

	RETAIL AND GROCERY ESTABLISHMENTS	RESTAURANTS, BARS AND FAST FOOD ESTABLISHMENTS
Bullhead City	20	146
Casa Grande	70	163
Eloy	9	32
Florence	8	27
<b>Kingman</b>	<b>52</b>	<b>161</b>
Lake Havasu City	102	290
Marana	17	38
Maricopa	20	84
Payson	26	97
Prescott	92	289
Prescott Valley	42	127
Sierra Vista	56	166
Yuma	158	388

Source: Yellow Pages

<sup>21</sup> This is a revised 2019 OEO Population estimate for Sierra Vista, based on a City challenge that was resolved on March 10, 2020.

**TABLE A3: NUMBER OF CITY RESIDENTS PER YELLOW PAGES LISTING ESTABLISHMENT**

	RETAIL AND GROCERY ESTABLISHMENTS	RESTAURANTS, BARS AND FAST FOOD ESTABLISHMENTS
Bullhead City	2,059.7	282.1
Casa Grande	813.7	349.5
Eloy	2,159.8	607.4
Florence	3,497.5	1,036.3
<b>Kingman</b>	<b>605.4</b>	<b>195.5</b>
Lake Havasu City	556.3	195.6
Marana	2,901.4	1,298.0
Maricopa	2,739.6	652.3
Payson	621.8	166.7
Prescott	462.7	147.3
Prescott Valley	1,106.1	365.8
Sierra Vista	804.7	271.5
Yuma	666.9	271.6

Sources: Arizona Office of Economic Opportunity and Yellow Pages

**TABLE A4: NUMBER OF CCD RESIDENTS PER YELLOW PAGES LISTING ESTABLISHMENT**

	RETAIL AND GROCERY ESTABLISHMENTS	RESTAURANTS, BARS AND FAST FOOD ESTABLISHMENTS
Bullhead City	3,056.3	418.7
Casa Grande	959.4	412.0
Eloy	4,202.8	1,182.0
Florence	5,137.6	1,522.3
<b>Kingman</b>	<b>1,364.8</b>	<b>440.8</b>
Lake Havasu City	580.5	204.2
Marana	2,121.5	949.1
Maricopa	2,899.6	690.4
Payson	904.7	242.5
Prescott	3,734.1	314.2
Sierra Vista	875.0	295.2
Yuma	917.7	373.7

Sources: U.S. Census Bureau and Yellow Pages





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