

Hunkering Down: Immigration Enforcement and Cross-Community Customer Flows in Cook County, Illinois

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Abstract

Federal immigration enforcement is widely expected to depress commercial activity in immigrant neighborhoods as residents withdraw from public life. Using weekly origin-destination foot-traffic data covering commercial points of interest in Cook County, Illinois, we show that this prediction captures only the smaller part of the story. Aggregate foot traffic at high Latin America–born area businesses declined only modestly after the January 2025 onset of intensified enforcement. Decomposing customer flows by origin and destination reveals why: within-community commerce held steady, while cross-community flows from high Latin America–born neighborhoods to low Latin America–born area business districts contracted by approximately 9 percent for retail and 10 percent for restaurants at the average high Latin America–born Census Block Group, with declines of comparable magnitude for discretionary and essential consumption. The contraction emerged within weeks and persisted with no detectable attenuation through nearly a year of observation. For retail, the contraction was roughly 2.1 times larger in suburban Cook County than in Chicago. The measurable visitor losses were concentrated less at high Latin America–born area destinations than in low Latin America–born commercial corridors — disproportionately suburban — that had previously drawn customers from high Latin America–born neighborhoods.

1. Introduction

Federal immigration enforcement entered a more visible phase after the presidential inauguration of Donald Trump on January 20, 2025. Trump had vowed to launch the largest deportation operation in U.S. history (Lamche, 2025) and within a week of his second term in office, the Department of Homeland Security and other federal agencies conducted "enhanced targeted operations" in Chicago (Schuba et al., 2025). Televised media ride-alongs placed Immigration and Customs Enforcement (ICE) operations on cable news for the first time in years (Stelloh, 2025), broadcasting the administration's enforcement posture far beyond the blocks where agents physically appeared. The behavioral response in immigrant neighborhoods in Chicago and its home county of Cook County was apparent almost immediately. Community organizations reported quieter commercial streets in Chicago's Pilsen and Little Village Latino communities within days (Singh & Campos, 2025) and school absences rose across the city (Karp & Qin, 2025). Federal enforcement continued through the intervening months without interruption. Sustained arrests, ICE presence across the metropolitan area, and ongoing federal-court litigation kept the regime continuously in the foreground of immigrant-community life. By June, ICE activity in Pilsen drew protests and renewed national attention (ABC7 Chicago Digital Team, 2025). By September, a fatal shooting in Franklin Park, IL (Sherry et al., 2025), a working-class majority Latino suburb with a substantial Latin American immigrant population in Cook County, made it clear that enforcement had moved well beyond Chicago's historic immigrant corridors.

The expected consequence is familiar. Immigration enforcement, intensified at the federal level, produces fear in immigrant communities, including among legal residents and citizens in mixed-status families, which translates into withdrawal from public and commercial life. A

substantial literature documents these "chilling effects" of enforcement (Watson, 2014) across healthcare utilization (Herring & Barnow, 2025), labor supply (Cox & East, 2026), household consumption (García-Jimeno & Ciancio, 2026), and everyday mobility (Asad, 2023). For local economies, the implied prediction is that immigrant-serving businesses such as restaurants, retailers, and service providers located in immigrant neighborhoods suffer a substantial demand shock as their customers stay home. In Cook County, this prediction proves to be the smaller part of the story. The dominant economic response operates not within immigrant neighborhoods but across the boundaries between them.

In the four months following January 20, foot traffic at businesses in high Latin America–born areas of Cook County declined by approximately 1 percent at the average high Latin America–born Census Block Group ($p \approx 0.08$). Taken at face value, this aggregate measure suggests a modest effect on Cook County's commercial life, yet the community organizations and journalists reporting from the ground were not imagining the changes they observed.

Decomposing customer flows across neighborhood lines reveals what the aggregate obscures. Using weekly origin-destination foot-traffic data that cover every commercial point of interest in Cook County and trace visitor origins across the entire state, we find a sharp divergence. Within-community commerce, measured as residents of high Latin America–born neighborhoods visiting businesses in areas with high Latin America–born residents, held essentially steady. Simultaneously, cross-community commerce, measured as high Latin America–born area residents visiting low Latin America–born area business districts, declined by approximately 9 percent for retail and 10 percent for restaurants at the average high Latin America–born CBG ($p < 10^{-8}$), with comparable declines across discretionary and essential categories. The effect emerged within two to three weeks of inauguration and persisted through

46 weeks of observation with no detectable attenuation. Foot traffic at high Latin America–born–area destinations registers only a mild aggregate decline because within-community patronage held steady. The sharp contraction lies in a decline in cross-community trips from high Latin America–born neighborhoods to low Latin America–born business districts, which the destination-side aggregate does not see. The resulting economic loss accordingly does not land where the chilling-effects prediction would place it, at immigrant businesses themselves, but at the low Latin America–born commercial corridors that had previously drawn high Latin America–born area customers. The customer traffic that previously crossed community lines does not reappear in compensatory channels elsewhere in the data; it was largely foregone rather than redirected, and the foregone customer traffic concentrated in low Latin America–born commercial corridors — disproportionately in suburban Cook County — that had drawn high Latin America–born area customers before January 2025.

This paper makes three contributions. First, we identify the spatial reallocation of cross-community flows as a central channel through which immigration enforcement reshapes metropolitan economies, distinct from the aggregate decline within targeted communities that prior work has emphasized. Second, we demonstrate the analytical value of high-frequency origin-destination decomposition in studying place-based shocks, showing that conventional CBG-level outcomes can mask substantial reorganization across spatial channels. Third, we identify a constituency rarely centered in debates over immigration enforcement: the businesses in low Latin America–born commercial corridors, the workers they employ, and the municipalities whose commercial bases depend on cross-community customer flows. The 2.1-fold concentration of effects on retail traffic contraction in suburban Cook County relative to the City of Chicago suggests that this constituency is disproportionately suburban, a fact with

implications for both economic development practice and the political economy of enforcement reform.

The remainder of the paper proceeds as follows. Section 2 situates our analysis within the chilling-effects literature and urban research on cross-community commercial geography. Section 3 describes the Cook County context and the enforcement timeline. Section 4 presents data and identification strategy. Section 5 reports findings. Section 6 discusses mechanisms, implications, and limitations. Section 7 concludes.

2. Literature and Framework

2.1 Chilling effects and community-wide spillovers

A substantial literature establishes that immigration enforcement reshapes economic behavior far beyond the population it directly apprehends. Watson (2014) introduced the term "chilling effects" to describe the systematic withdrawal of immigrant households, including U.S. citizens in mixed-status families, from beneficial programs when enforcement intensity rises. Watson (2014) demonstrates that a substantial share of Medicaid disenrollment among children of non-citizens around the 1996 welfare reform is attributable to the contemporaneous enforcement spike. Subsequent work documents parallel chilling effects across the safety net (Alsan & Yang, 2024) and in healthcare utilization. Herring & Barnow (2025) find a 16.9 percent decline in healthcare office visits among likely authorized Hispanic immigrants following the Secure Communities rollout, concentrated among those with chronic conditions. The unifying insight is that enforcement deters participation in beneficial activities among populations perceiving themselves to be at risk, even when participation requires no direct contact with federal authorities.

A second body of work examines enforcement's effects on labor markets. Amuedo-Dorantes and Antman (2022) find that increased ICE removals reduce labor force participation and employment among likely undocumented immigrants relative to comparable naturalized citizens, with effects concentrated among women and in industries that employ high shares of undocumented workers. East et al. (2023) similarly document negative labor-market effects of interior immigration enforcement. Most directly relevant to the present setting, Cox and East (2026) provide the first causal national analysis of the labor-market effects of the second Trump administration's heightened enforcement. Exploiting uneven geographic increases in arrests, they find reduced work among likely undocumented immigrants and harm to U.S.-born workers in immigrant-heavy sectors, with no positive spillovers to U.S.-born workers.

A third strand examines enforcement's effects on businesses and local economies. Shrestha and Kostandini (2024) studying county-level 287(g) agreements — formal partnerships under which ICE deputizes local law-enforcement officers to perform specified federal immigration-enforcement functions — find that enforcement reduced the total number of businesses by approximately 6 percent per 1,000 population, with larger effects among businesses employing more workers (see also Kostandini et al., 2014). Nguyen and Gill (2016), examining 287(g) implementation in two North Carolina jurisdictions, document how expanded local enforcement authority generates fear and distrust that reshape immigrant residents' engagement with public institutions and public space.

The work closest to ours examines how enforcement risk shapes consumption directly. García-Jimeno and Ciancio (2026), combining daily bank-account transaction data with arrest-level ICE records, show that consumption among Hispanic foreign-born households responds to *beliefs* about enforcement risk rather than to realized enforcement alone. They find a 10

percentage point increase in perceived enforcement probability reduces their consumption by approximately 5 percent. Their structural analysis finds that roughly half of the immediate decline is recovered through subsequent rebound while the remainder is permanently foregone, and that consumption recovers only slowly once enforcement ceases. Using survey-experimental methods, Wong and Shklyan (2024) find that undocumented immigrants told that local law enforcement cooperates with ICE report being significantly less likely to conduct business requiring disclosure of personal information, use public services, or attend public events. Asad (2023) provides ethnographic depth, documenting how immigrant families restructure mobility and avoid public space as routine adaptations to surveillance.

These literatures establish that enforcement induces behavioral withdrawal across healthcare, the safety net, labor supply, business activity, and consumption. What they have not done is locate that withdrawal in the spatial structure of metropolitan commerce. Existing studies measure withdrawal at the level of the affected individual or household including consumption levels, employment, program participation; or the affected jurisdiction with business counts or county economic outcomes. None traces the specific geographic channels through which enforcement's economic effects propagate across a metropolitan area including which neighborhoods residents stop traveling to, and which businesses consequently lose customers. That is the gap our analysis addresses.

3. Cook County, IL in Context

Cook County, Illinois, contains the City of Chicago and 133 suburban municipalities, with a 2024 population of approximately 5.2 million. The county is among the most diverse in the United States: 21.7 percent of residents were foreign-born, and 27.3 percent identified as

Hispanic or Latino in 2024. The geography of immigrant settlement combines historic neighborhood concentrations with more recent settlement in working-class suburbs to the west and northwest. Substantial spatial variation in immigrant concentration is preserved across both city and suburban geographies, providing the cross-sectional variation our identification strategy relies on. Figure 1 maps this geography: panel A shows the Latin America–born population decile by CBG, panel B the high/low Latin America–born classification used throughout the analysis, and panel C the Chicago–suburban regional division.

[Figure 1 near here]

Cook County and Chicago operate under sanctuary ordinances that limit cooperation between county law enforcement and federal immigration authorities (Economic Policy Institute, 2025). This policy context made the county a recurring focus of the incoming administration's rhetoric about enforcement in sanctuary jurisdictions and increased the political salience of the January 2025 enforcement actions described below.

We study two enforcement episodes in 2025. Event 1 begins with the inauguration of President Trump on January 20, 2025, accompanied by public statements promising the largest mass deportation operation in U.S. history. Within a week, the Department of Homeland Security launched "Enhanced Targeted Operations" in Chicago, with media ride-alongs publicizing arrests across the metropolitan area; approximately 122 immigration-related arrests were recorded in Illinois during the operation's first ten days, including 53 in Chicago (NBC Chicago Staff, 2025). Federal enforcement continued at a lower visible intensity through the spring. In June, a sequence of high-profile incidents including neighborhood arrests in Pilsen, and the use of routine Intensive Supervision Appearance Program (ISAP) check-ins as detention opportunities at the South Loop and suburban Broadview offices reignited fear well beyond the directly

affected addresses (Cardona-Maguigad, 2025; Hernandez, 2025; Spinelli, 2025). The June incidents marked a turning point in community perception, as ISAP weaponization meant that even routine compliance interactions with federal authorities had become unsafe.

Event 2 begins with visible pre-buildup. By early September 2025, anticipation of a federal enforcement surge generated observable behavioral withdrawal in advance of any operation: the El Grito Festival in Grant Park, with approximately 24,000 anticipated attendees, was postponed due to enforcement fears, and Mexican Independence celebrations across the region were cancelled or scaled back (Mathew, 2025). On September 8, the Department of Homeland Security formally launched Operation Midway Blitz, a multi-agency surge across Cook County and the broader region; approximately 550 arrests were recorded statewide within 13 days (Santana, 2025). On September 12, an ICE agent fatally shot Silverio Villegas-González during a traffic stop in Franklin Park; the killing generated mass protests and became a galvanizing event for regional resistance (Issa, 2025). Enforcement activity escalated through October before federal and county courts began constraining specific tactics. An important analytical caveat applies to Event 2: positive level effects observed around the September event are confounded by strong summer-to-fall seasonality. These level effects do not survive year-over-year differencing against the same calendar weeks of 2024 (Appendix Table A5; Figure A2), and a placebo test placing a pseudo-event on those 2024 weeks reproduces the apparent pattern (Figure A3). We therefore use Event 2 to examine the persistence of Event 1 effects rather than as an independent source of causal variation.

We study Cook County because it was a focal point of the 2025 enforcement regime. Chicago was named among the first priorities for interior enforcement under the new administration, and both the January "Enhanced Targeted Operations" and the September

"Operation Midway Blitz" were deliberately concentrated on the Chicago metropolitan area as high-visibility demonstrations of enforcement in a large sanctuary jurisdiction. This warrants an interpretive caution. Cook County is not a representative metropolitan area, and findings from it should be read as evidence from a place the administration chose for a visible enforcement campaign. That same prominence, however, makes the enforcement shock large, salient, and well documented, and Cook County independently offers features that make the analysis tractable: substantial spatial variation in immigrant concentration, ample scale for statistical power, a combined urban and suburban geography, and a commercial ecosystem well captured by the high-frequency foot-traffic data. How far these findings generalize beyond Cook County is a question we take up in Section 6.3.

4. Data and Empirical Strategy

4.1 Data

Our analysis combines weekly high-frequency foot-traffic data with neighborhood demographic characteristics, covering Cook County and the broader Illinois commercial economy from January 2024 through December 2025. Foot traffic mobility data are drawn from the Advan Foot Traffic Plus dataset, accessed via Dewey Data, which records weekly visits to every point of interest (POI) in Illinois. Two fields are central to our analysis. *VISIT_COUNTS* reports the total number of visits each POI received in a given week. These counts aggregated to the CBG-level provides our destination-side foot-traffic outcome for the approximately 3,900 commercial CBGs in Cook County. *VISITOR_HOME_CBGs* reports the home residence (at CBG resolution) of devices observed at each POI, allowing us to construct origin-destination flow pairs between residential CBGs and commercial CBGs. Home CBG assignment is based on

the modal nighttime location of each device over an extended observation window, following standard practice in mobility research. Because the device panel is opt-in and concentrated among smartphone users with active location services, foot-traffic counts represent a sample rather than the universe of visits. Our identification strategy relies on within-CBG comparisons over time, however, so time-invariant differences in panel coverage across neighborhoods are absorbed by fixed effects.

Neighborhood demographic characteristics are drawn from the American Community Survey (ACS) 2019–2023 five-year estimates. Our primary treatment variable is the share of the resident population born in Latin America (ACS table B05006) and is available at the census tract level. We assign tract-level values to constituent CBGs and use this measure to construct both continuous and decile-based exposure variables. Auxiliary demographic measures (share Hispanic, share foreign-born, share non-citizen, median household income, educational attainment) are used in robustness specifications. CBG and tract boundaries are TIGER/Line shapefiles for vintage year 2022, matching the ACS five-year geography.

Table 1 summarizes the analytic sample. Cook County comprises 4,002 census block groups, the geographic unit at which we assign treatment. Of those CBGs, 2,162 (54 percent) lie within the City of Chicago and 1,840 (46 percent) in suburban Cook County. The Latin America–born (LA-born) population share, our primary treatment variable, averages 9.2 percent across block groups but is highly right-skewed with a standard deviation 10.8 percentage points. This skew motivates both the continuous dose-response specification and the decile-based high/low classification. The 1,598 block groups in the top four deciles, those above a 6.8 percent LA-born share, are classified high Latin America–born. Panel B reports the auxiliary ACS demographic measures used in the robustness specifications. Panel C describes the mobility data: the Advan

panel records weekly foot traffic at 72,622 commercial points of interest across 3,911 Cook County block groups over the 102-week observation window (January 2024–December 2025), and the origin-destination flow panel built from visitor home block groups comprises approximately 146 million origin–destination–industry–week records.

[Table 1 near here]

4.2 The origin-destination flow panel

Constructing origin-destination flows is central to our approach. For each POI-week observation, we parse a visitor home CBG field to recover the count of visitors from each origin CBG. We then aggregate to a panel structured as origin CBG $\times$ destination CBG $\times$ North American Industry Classification System (NAICS)-broad category $\times$ week, classifying each POI as retail (NAICS 44–45), restaurants (NAICS 722), or other (all remaining NAICS codes). To enhance readability, we use "Restaurants" as shorthand for the full NAICS-722 category, *food services and drinking places* which includes full- and limited-service restaurants, cafeterias, caterers, and bars. We extract origin information for all Illinois CBGs, enabling us to track visits to Cook County destinations from both within-Cook and external (non-Cook) Illinois origins; flows in which both origin and destination lie outside Cook County are excluded as not relevant to our research questions. The resulting panel covers approximately 146 million origin-destination-NAICS-week observations across the 23-month panel window.

To compare flows across neighborhood types, we classify each Cook County CBG as "high Latin America–born" (H) if its Latin America–born population share sits in the top four deciles of the Cook County distribution, and "low Latin America–born" (L) otherwise. This produces an eight-cell typology of flows (Table 2). We use “within-community” as shorthand for

same-type flows, especially H-to-H flows, rather than as a claim that trips remain within the same CBG, census tract, or named neighborhood. Within-community flows (HH and LL) move customers among CBGs of similar demographic composition. Cross-community flows (HL and LH) move customers across the immigrant-concentration gradient and are, in our framework, the channels that most depend on cross-community trust. External flows include trips by Cook County residents to destinations outside the county (HX, LX) and inbound trips by non-Cook residents to Cook County destinations (EH, EL). The typology allows us to test the central prediction of our framework: that enforcement-induced fear contracts flows across community lines while leaving within-community flows intact. Results are robust to alternative thresholds for the H/L boundary, as documented in Section 5.

[Table 2 near here]

A secondary classification distinguishes among types of consumer activity rather than spatial channels. Drawing on the NAICS code of each POI, we classify each destination as *discretionary* (full- and limited-service restaurants, drinking places, entertainment, apparel, sporting goods, personal care, jewelry), *essential* (grocery stores, pharmacies and personal-care retail, gas stations, banking, healthcare), or *other* (everything else). This classification cross-cuts the NAICS-broad categories: discretionary includes both retail and restaurant components, while essential is predominantly retail-sector. We use this classification to test whether the cross-community withdrawal documented in our flow analysis is concentrated in elastic (discretionary) consumption or extends to essential consumption.

4.3 Identification

All Cook County residents experienced the 2025 enforcement regime simultaneously; there is no geographically untreated control area within the county. Identification therefore comes not from spatial variation in enforcement itself, but from variation across neighborhoods in the share of residents born in Latin America. Our identifying assumption is that this share proxies for the degree to which the enforcement regime is personally salient to a neighborhood's residents with a higher share meaning a larger fraction of residents are themselves at risk of enforcement or are connected through family, household, or social ties to others who are. We do not observe perceived enforcement risk directly; the demographic share is its observable proxy. Under this assumption, a neighborhood that is 20 percent Latin America-born is one in which enforcement is personally salient to a larger share of residents than a neighborhood that is 2 percent Latin America-born, even though both face the identical federal regime. Concretely, we estimate dose-response difference-in-differences (DiD) specifications with continuous treatment intensity.

A clarification of the estimand follows from the institutional setting described in Section 3. The January 2025 inauguration did not initiate a single discrete enforcement action followed by a return to baseline. It initiated a sustained enforcement regime in the form of a continuous sequence of operations, arrests, litigation, and media coverage that persisted throughout our observation period. The post-period indicator in our specifications marks the onset of this regime, and our estimand is accordingly the cumulative effect of the 2025 enforcement regime as a whole: the operations themselves together with the climate of perceived risk they jointly produced.

For each origin-destination flow type and NAICS category, our primary estimating equation is:

$$\log V_{it} = \alpha_i + \lambda_t + \beta \cdot (\text{Post}_t \times T_i) + \varepsilon_{it}$$

where V_{it} is the number of visitors from origin CBG i in week t aggregated to the relevant flow type and NAICS category. We model $\log(1 + V_{it})$ rather than $\log(V_{it})$ so that origin-destination-week cells with zero observed flow are retained in the estimating sample. α_i is an origin-CBG fixed effect, λ_t is a week fixed effect, Post_t is an indicator for the post-onset period (weeks from January 20, 2025 onward, and T_i is the continuous treatment intensity for the LA-born population share of origin CBG i . The coefficient β measures the change in log visitors per unit change in treatment intensity, comparing the post-enforcement period to the pre-enforcement period. Standard errors are clustered at the origin CBG-level. For flow types where the relevant variation in immigrant concentration is on the destination side rather than the origin side, specifically LH and LL flows (Cook L-area origins to Cook destinations) and EH and EL flows (non-Cook origins to Cook destinations), we apply an analogous specification with destination-CBG fixed effects, destination-CBG treatment intensity, and clustering at the destination CBG. The choice of perspective for each flow type is dictated by which side of the flow carries the identifying variation in immigrant concentration. For the aggregate destination-side analysis of foot traffic at the CBG-week level (visits to a destination CBG regardless of customer origin), we apply an analogous specification with destination-CBG fixed effects and a 0.5-mile population-weighted trade-area LA-born share as treatment intensity. A single destination CBG is a small area whose businesses draw customers from a surrounding catchment; the trade-area share therefore proxies the immigrant concentration of the customer base a destination is exposed to more accurately than the destination CBG's own share would.

Because treatment intensity is a continuous share (ranging from 0 to 1), the raw coefficient is awkward to interpret directly. To put coefficients on a more accessible scale, we

report effects evaluated at the mean treatment intensity among high Latin America–born (H) CBGs ($\bar{T}_H \approx 0.19$): a "9 percent decline at the average high Latin America–born CBG" corresponds to $\beta = -0.483$ evaluated at $\bar{T}_H$. The interquartile-range effect, comparing a 75th-percentile CBG to a 25th-percentile CBG in treatment intensity, provides a parallel interpretive scale, which we report alongside the mean-H-area number where relevant.

This specification is well-suited to our setting because enforcement timing is not staggered across CBGs. All units are treated simultaneously at each event, eliminating the negative-weighting problems that arise in two-way fixed effects estimation under staggered treatment timing. Identification rests on the parallel-trends assumption: in the absence of enforcement, weekly variation in flow volumes would have proceeded at the same rate across CBGs of different demographic intensities. We assess this assumption directly through event-study specifications and joint Wald F-tests on the pre-period coefficients: a specification passes if those coefficients are jointly indistinguishable from zero ($p > 0.05$).

The same enforcement shock can be examined at different units of aggregation including destination CBGs (aggregate foot traffic), origin CBGs (total outbound flows from each residential CBG), or origin-destination flow types. Each absorbs different pre-treatment heterogeneity through its fixed effects. The appropriateness of each for identification is an empirical question, and the pre-trend test itself supplies the criterion. The pattern across our more than 70 tested specifications is informative (Appendix Table A4). It shows that aggregate origin-side specifications fail systematically, with p-values often below 10^{-5} ; origin-destination flow-type specifications, which decompose this same activity by destination type, pass in most cases, including the central HL retail specification ($p = 0.256$); destination-side aggregates fall between the two, passing with short pre-periods and failing with long ones. We read this pattern as

evidence that the origin-destination flow type is the appropriate unit of aggregation for studying enforcement spillovers in metropolitan commerce. It appears that origin-CBG aggregates absorb too much pre-existing trend heterogeneity in residents' overall commercial mobility, while the spatial decomposition isolates the channel where enforcement effects are identifiable. Section 5 reports results primarily for specifications that pass the joint Wald test, with directionally consistent failing specifications noted in the relevant subsections.

5. Findings

5.1 Baseline: local economies are not local

Before turning to enforcement effects, we document a baseline feature of Cook County's commercial economy that is fundamental to interpreting them: Most customers of a neighborhood's businesses live elsewhere. In the pre-enforcement period, only 14 to 20 percent of customer visits to commercial establishments in high Latin America-born areas of Cook County originate in the same CBG as the business, with an additional 5 to 6 percentage points originating in the same census tract. The remaining three-quarters of visits come from elsewhere in the metropolitan area or beyond. Customers of high Latin America-born area businesses draw from more than 8,000 distinct origin CBGs across Illinois (Table 3, Panel A).

Cross-community flows constitute a substantial share of this customer base. Approximately 27 percent of visits to high Latin America-born area businesses originate in low Latin America-born Cook County CBGs, and another 7 to 8 percent originate outside Cook County entirely. The mirror-image pattern holds for where high Latin America-born neighborhood residents themselves shop: only 11 to 17 percent of their visits stay within their home block group, while 29 to 44 percent cross into low Latin America-born Cook County

destinations (Table 3, Panel B). The pattern differs sharply between Chicago and suburban high Latin America–born areas. Chicago high Latin America–born area businesses draw 22.8 percent of their inbound visitor flows from low Latin America–born Cook origins and only 2.5 percent from non-Cook origins. Suburban high Latin America–born area businesses, by contrast, draw 32.3 percent from low Latin America–born Cook origins and 12.2 percent from non-Cook origins, reflecting both car-dependent suburban mobility and the broader metropolitan integration of suburban commercial corridors.

This baseline structure establishes why a behavioral response to enforcement among high Latin America–born area residents could propagate broadly through the metropolitan commercial economy. The customers of businesses in high Latin America–born neighborhoods come from many places, and the residents of high Latin America–born neighborhoods travel to many destinations. When enforcement disrupts these cross-community flows, the economic consequences fall not only within immigrant neighborhoods but across the network of commercial ties that connects them to the rest of Cook County.

[Table 3 near here]

5.2 The core finding: cross-community withdrawal

Following the January 20 inauguration, customer flows from high Latin America–born Cook County CBGs to low Latin America–born business districts contracted sharply across both major sectors of consumer commerce. For HL retail flows, estimated over our primary 14-week pre-enforcement / 19-week post-event window, the dose-response coefficient is $\beta = -0.483$ (SE 0.083, $p < 10^{-8}$; Table 4, Panel A). Evaluated at the mean treatment intensity among high Latin America–born CBGs ($\bar{T}_H \approx 0.19$), this corresponds to approximately a 9 percent reduction in

cross-community retail visits at the average high Latin America–born CBG; the interquartile-range effect — comparing the 75th- to the 25th-percentile high Latin America–born CBG — is a 5.2 percentage point gap in visit growth. HL restaurant flows contracted by a comparable magnitude: $\beta = -0.539$ (SE 0.119, $p < 10^{-5}$; Table 4, Panel B), corresponding to roughly a 10 percent decline at the average high Latin America–born CBG. Both specifications pass the joint Wald pre-trend test ($p = 0.256$ and $p = 0.505$, respectively), indicating that pre-event-1 coefficients are jointly indistinguishable from zero.

[Table 4 near here]

The event-study trajectory is consistent with a sharp behavioral response to a salient policy shock. Pre-period coefficients fluctuate around zero with no detectable trend (Figure 2). Post-Event 1 coefficients become negative within two weeks of inauguration and remain persistently negative through the end of the 19-week post-event window.

[Figure 2 near here]

Within-community flows tell a strikingly different story. HH restaurant flows, visits from high Latin America–born origin CBGs to high Latin America–born destination businesses, register essentially zero change after January 20 ($\beta = +0.024$, SE 0.074, $p = 0.741$), corresponding to an interquartile-range effect of +0.3 percent. The corresponding business-type specification for discretionary HH flows yields a similarly null estimate ($\beta = -0.028$, $p = 0.690$), also passing the Wald pre-trend test. Within-community patronage of high Latin America–born area businesses held essentially steady through the enforcement period.

We document below that this concentration of harm is particularly pronounced in suburban Cook County (Section 5.4) and that it persists through approximately one year of post-event observation with no detectable attenuation (Section 5.6).

5.3 Discretionary versus essential consumption

The cross-community withdrawal documented above could in principle reflect either of two distinct behavioral mechanisms. The first is income-driven: enforcement reduces the household resources available for non-essential purchases, producing concentrated declines in discretionary categories (dining, apparel, entertainment) while essential consumption (groceries, gas, pharmacy, banking, healthcare) remains relatively inelastic. The second is fear-driven: enforcement raises the perceived risk of being present in unfamiliar low Latin America-born territory regardless of what is purchased there, producing comparable withdrawals across consumption categories.

The business-type decomposition supports the second mechanism. HL discretionary flows fell by $\beta = -0.495$ (SE 0.110, $p < 10^{-4}$; Wald $p = 0.054$), corresponding to approximately a 9 percent decline at the average high Latin America-born CBG. HL essential flows fell by $\beta = -0.413$ (SE 0.095, $p < 10^{-4}$; Wald $p = 0.680$), corresponding to approximately an 8 percent decline at the average high Latin America-born CBG (Table 5). Essential is somewhat smaller in magnitude than discretionary, but not by the margin that would distinguish a budget-constraint mechanism from a fear-of-place mechanism: the contraction in essential cross-community trips for visits such as to grocery stores, gas stations, pharmacies, banks, and healthcare providers in low Latin America-born neighborhoods indicates that the behavioral response extends to consumption categories that households cannot easily forgo without substituting closer to home.

These results are stable across bandwidth choices. Across six pre-event window lengths (8 to 29 weeks), all 6 estimated HL retail coefficients are statistically significant at $p < 10^{-5}$ (Section 5.5).

[Table 5 near here]

5.4 Geographic heterogeneity: the suburban concentration

The cross-community withdrawal documented in Section 5.2 is not uniform across Cook County's geography. We re-estimate the HL flow specification separately for two groupings of high Latin America–born origin CBGs: those located within the City of Chicago, and those located in suburban Cook County (Table 6).

For HL retail flows, Chicago high Latin America–born area residents reduced visits to low Latin America–born business districts by $\beta = -0.329$ ($p = 0.002$), corresponding to approximately a 6 percent decline at the average high Latin America–born CBG. Suburban high Latin America–born residents reduced HL retail visits by $\beta = -0.712$ ($p < 10^{-6}$), approximately a 13 percent decline. The suburban retail coefficient is 2.1 times the magnitude of the Chicago coefficient, and both specifications pass the joint Wald pre-trend test ($p = 0.174$ and 0.512 respectively; Table 6, with suburban pre-trends shown in Figure A4). The suburban concentration, however, is specific to retail. For HL restaurant flows, the Chicago and suburban contractions have just a small gap, $\beta = -0.540$ ($p < 0.01$; a 10 percent decline) for Chicago high Latin America–born origins and $\beta = -0.425$ ($p = 0.013$; an 8 percent decline) for suburban origins. Both pass the joint Wald pre-trend test ($p = 0.489$ and 0.968). The 2.1-fold suburban concentration is thus a feature of cross-community retail trips; restaurant trips contracted broadly across both the city and the suburbs.

[Table 6 near here]

Two non-exclusive mechanisms may explain the suburban concentration. Among the possibilities, suburban high Latin America–born areas contain fewer within-community business alternatives than iconic urban immigrant neighborhoods such as Little Village or Pilsen, so pre-enforcement HL trips were more necessary for routine commercial activities and the foregone trips are correspondingly larger. As documented in Section 5.1, suburban high Latin America–born area businesses additionally draw 12.2 percent of their inbound visitors from outside Cook County compared with 2.5 percent for Chicago high Latin America–born area businesses, suggesting that suburban high Latin America–born areas operate within a more spatially diffuse commercial economy whose flow patterns are more disruptable.

This pattern originates with people, not places. The contraction in suburban cross-community flows reflects the decisions of Latin America–born residents and their families including U.S. citizens and legal residents in mixed-status households who restructured their daily movement in response to the enforcement regime. The economic consequence, however, is distinctive: because these residents withdrew, the measurable costs fall most heavily on suburban Cook County's low Latin America–born commercial corridors, not on the iconic urban immigrant neighborhoods that most often feature in public discussion of enforcement impacts. We return to the policy significance of this concentration in Section 6.

5.5 Robustness

The core HL flow findings are robust to several alternative specification choices. We test different pre-period bandwidths by re-estimating the HL retail specifications across six pre-event windows ranging from 8 to 29 weeks before January 20, 2025 (Appendix Table A1). All eighteen estimated coefficients are statistically significant at $p < 10^{-4}$, with magnitudes varying modestly around the preferred 14-week estimates. The coefficients range from $\beta = -0.509$ at the 8-week

window to $\beta = -0.421$ at the 29-week window. We also vary the threshold separating high- from low Latin America–born CBGs. Our primary specification classifies high Latin America–born CBGs as those in the top four deciles of Cook County CBGs ranked by LA-born share (decile ≥ 7 , the top 40 percent). Alternative thresholds yield comparable HL retail estimates (Appendix Table A3, Figure A1): $\beta = -0.612$ ($p < 10^{-13}$) at the top 50 percent, $\beta = -0.483$ ($p < 10^{-8}$) at the top 40 percent, and $\beta = -0.429$ ($p < 10^{-4}$) at the top 30 percent. HL restaurant coefficients are likewise negative and significant at every threshold, and pass the joint Wald pre-trend test at the top-40 percent (primary) and top-30 percent thresholds, failing only at the top-50 percent threshold (Appendix Table A3). To test sensitivity to the demographic measure, we re-estimate the HL retail flow substituting share Latino, share foreign-born, or share non-citizen for the LA-born share as the continuous treatment (Appendix Table A2). All four definitions produce negative and significant contractions, confirming that the direction of the result is not specific to the LA-born measure. The LA-born and Latino specifications also pass the joint Wald pre-trend test, while the foreign-born and non-citizen specifications do not; we therefore retain the LA-born share as the primary treatment because it most closely tracks the population for whom the 2025 enforcement regime is personally salient. Additionally, the joint Wald F-test on pre-period coefficients ($p = 0.256$ for HL retail) functions as a within-sample placebo, confirming that the post-period treatment effect is not a continuation of pre-existing differential trends across CBGs of different demographic intensities.

Finally, we verify that the contraction is not an artifact of changing data coverage. If Advan's coverage of high Latin America–born CBGs had declined around January 2025, a coverage artifact could masquerade as a behavioral contraction. We regress three measures of POI coverage including the count of POIs in the panel, the count with observed data, and the

share observed on the post-period indicator interacted with treatment intensity. All three coefficients are small and statistically indistinguishable from zero (Appendix Table A6), indicating that panel coverage did not shift differentially across the immigrant-concentration gradient at the enforcement onset.

5.6 Persistence

The HL flow contractions documented in the previous sections persist substantially beyond the immediate post-event window. We estimate an extended event study spanning weeks -14 to $+46$ relative to the January 20 inauguration, capturing the full post-Event 1 observation period through early December 2025 (Figure 3). Pre-period coefficients fluctuate around zero (joint Wald $p = 0.272$ for HL retail). Post-Event 1 coefficients become statistically negative at week 2 and remain persistently negative through week 46, with no detectable attenuation in magnitude over the eleven months that follow.

[Figure 3 near here]

The extended trajectory speaks directly to the behavioral interpretation. The absence of mean reversion across nearly a year of post-event observation indicates that the cross-community withdrawal is not a transient panic response to an acute event but a sustained shift in how high Latin America-born area residents navigate the metropolitan commercial landscape.

Some post-Event 2 coefficients show further deepening of the HL contraction. We do not interpret this deepening as a clean second causal shock, as the September 2025 events are partially confounded by summer-to-fall seasonality in some outcomes (Section 3). What the extended event study does support cleanly is the more conservative finding that the contraction first observed in February 2025 had not attenuated eleven months later.

5.7 Where the visits went

The HL contraction documented in Sections 5.2 through 5.6 represents a substantial volume of foregone commercial activity from high Latin America–born area Cook County residents. A natural question is whether this activity reappears elsewhere in the panel such as within-community substitution (HH), substitution to non-Cook destinations (HX), or replacement by other customer flows (LH, EH), or whether it is largely foregone.

We examine each candidate offset. HH flows held essentially steady, as documented in Section 5.2; high Latin America–born area businesses did not absorb the cross-community withdrawal. HX flows (Cook County high Latin America–born area residents visiting non-Cook destinations) show no significant change in the retail or restaurant categories and a significant decline in the residual 'other' category ($\beta = -0.427$, $p < 0.01$); high Latin America–born area residents did not substitute toward shopping or dining beyond county lines, and if anything reduced such trips. One non-H-origin flow also shows a significant decline: LX retail flows, from low Latin America–born areas to non-Cook destinations, fell sharply ($\beta = -1.303$, $p = 0.019$). The estimate is imprecise, and because it concerns low Latin America–born residents rather than the Latin America–born population central to our argument, we do not interpret it further. Two remaining flow types show significant positive coefficients: EH restaurant flows, capturing non-Cook visitors to high Latin America–born area Cook County restaurants, rose by $\beta = +0.385$ ($p = 0.029$), and LH 'other' flows by $\beta = +0.171$ ($p < 0.05$). LH retail also carries a positive coefficient ($\beta = +0.296$) but fails the joint pre-trend test (Wald $p = 0.035$) and is not interpreted as a treatment effect. Critically, none of these flows represents the withdrawn high Latin America–born consumption reappearing: they concern visits *to* high Latin America–born destinations or visits *by* low Latin America–born residents, not the high Latin America–born

residents whose HL trips contracted. LL and EL flows show no statistically significant changes (Table 4).

The accounting accordingly suggests that the bulk of the HL contraction reflects foregone commercial trips rather than spatial reallocation within the observed commercial economy. The visits that previously crossed community lines from high Latin America–born neighborhoods to low Latin America–born business districts do not reappear in any other channel of metropolitan commerce we observe. We return to the implications of this accounting for the metropolitan-level economic impact of enforcement in Section 6.

6. Discussion

6.1 Hunkering down as a behavioral pattern

The empirical pattern documented in Section 5 with substantial contraction in cross-community trips paired with steady within-community patronage fits what we term *hunkering down*: a selective behavioral withdrawal in which residents of high Latin America–born neighborhoods restrict their movement to familiar territory while continuing routine commercial activity within their immediate community. This selective pattern is not what enforcement's most direct effects would produce. Deportation-induced population loss would contract all outbound flows roughly proportionally, yet HH flows held steady while HL flows fell sharply (Section 5.2). It appears that high Latin America–born area residents did not simply make fewer trips of every kind. Nor is the pattern income-driven: a budget-constraint mechanism predicts a pronounced discretionary–essential gap, but essential cross-community trips fell to roughly 85 percent of the discretionary magnitude (Section 5.3), far closer to parity than a pure income effect would generate.

The hunkering-down interpretation aligns instead with the chilling-effects literature, extended to spatial commercial mobility. Watson (2014) and subsequent work establish that enforcement deters participation in beneficial activities among populations who perceive themselves at risk, even absent any direct contact with federal authorities; our results show the same mechanism operating on routine consumer mobility, where trips into unfamiliar neighborhoods carry more perceived risk than trips within familiar ones.

The eleven-month persistence documented in Section 5.6 reinforces this interpretation. The chilling-effects literature has documented that enforcement-induced withdrawal from beneficial activity can long outlast the proximate threat: Watson (2014) finds Medicaid disenrollment effects persisting years after the 1996 welfare reform, and Asad (2023) describes how families' adaptations to surveillance settle into routine. The Cook County data show the same dynamic operating on commercial mobility: by the end of the eleven-month observation window the contraction had not attenuated, and for restaurants had grown deeper, suggesting that the behavioral patterns established in early 2025 have settled into a sustained state with implications for the expected duration of the resulting economic damage.

6.2 The suburban concentration

The roughly 2.1 times larger HL contraction in suburban Cook County than in Chicago is more than an empirical curiosity; it recasts the question of who bears the economic costs of immigration enforcement. The conventional framing assumes enforcement harms high Latin America-born area businesses most directly, with broader spillovers small or diffuse. Our results point to a different geography of harm: the costs concentrate in low Latin America-born business districts whose pre-enforcement activity depended on cross-community customer flows from high Latin America-born neighborhoods, and they do so most heavily in the suburbs. The

candidate mechanisms behind that concentration (Section 5.4) include car-dependent travel, the location of high-salience enforcement incidents, the scarcity of within-community alternatives, and the spatial diffuseness of suburban commercial geography. These are not mutually exclusive and each plausibly compounds rather than offsets enforcement's effects.

This recasting widens the constituency with a material stake in immigration enforcement. Retail business owners and their employees in low Latin America–born suburban corridors, whose customer flows from high Latin America–born neighborhoods contracted sharply during 2025, bear the costs alongside the immigrant-community stakeholders more commonly named in enforcement debates. So do suburban municipal governments: their budgets depend on sales-tax receipts generated in exactly the low Latin America–born commercial districts that drew high Latin America–born area suburban customers, an exposure that appears in neither immigration-policy nor economic-development analyses. Suburban municipalities with substantial high Latin America–born residential populations thus face a disproportionate, and largely unrecognized, fiscal exposure to enforcement-induced behavioral change, and are rarely part of the immigration-policy coalitions that might represent that interest.

Two implications follow for economic-development scholarship. First, the spatial structure of enforcement's economic effects in twenty-first-century metropolitan America likely tracks the suburbanization of immigrant settlement: the Latino populations of suburban Cook County municipalities such as Cicero, Berwyn, Melrose Park, and Franklin Park have demographic parallels in gateway suburbs around Atlanta, Houston, Phoenix, and Washington, DC, where enforcement's economic effects would be expected to concentrate in similarly suburban geographies rather than in iconic urban immigrant neighborhoods. Second, the literature's customary focus on immigrant entrepreneurs and immigrant-serving commercial

corridors misses the channel documented here: the disruption of commerce among businesses in low Latin America–born neighborhoods that nevertheless serve customers from high Latin America–born neighborhoods. Scholarship on immigrant economic integration would benefit from analytic attention to these cross-community ties and to the conditions that sustain or erode them.

6.3 Limitations

Several limitations qualify our findings. First, the Advan foot-traffic panel does not capture informal or unlisted commercial activity such as street vending, home-based businesses, and other commerce without a registered point of interest which is disproportionately present in immigrant neighborhoods; to the extent that affected residents rely on these channels, our estimates function as conservative lower bounds. Second, we observe aggregated flows rather than individual behavior and cannot distinguish between fewer people making the same trips and the same people making fewer trips. Third, our design cannot isolate the effect of ICE enforcement *per se* from the effect of general media-driven anxiety about immigration policy; the chilling-effects literature treats these as a unified perceived-threat mechanism (Section 2.1), but finer decomposition would require variation we do not exploit. Fourth, Cook County may not generalize to metropolitan areas with substantially different immigrant settlement patterns, enforcement intensity, or transit infrastructure.

7. Conclusion

Federal immigration enforcement beginning in January 2025 reshaped the commercial geography of Cook County, Illinois but not in the way conventional accounts predict. Aggregate measures at high Latin America–born business districts show only modest declines. Origin-

destination flow decomposition reveals what these aggregates obscure: a substantial contraction of cross-community customer flows from high Latin America–born neighborhoods to low Latin America–born business districts, paired with stable within-community patronage. The economic harm concentrated not at businesses in areas with high Latin America–born populations, but at low Latin America–born area commercial corridors that previously drew high Latin America–born area customers. The contraction was approximately 2.1 times larger in suburban Cook County than in Chicago, and persisted with no detectable attenuation through nearly a year of post-event observation.

Several lines of future research follow naturally from this work. Replication across other metropolitan areas such as those with substantial suburban Latino settlement, including the Atlanta, Houston, Phoenix, and Washington, DC regions would establish whether the suburban concentration we document is a Cook County peculiarity or a more general pattern. Longer observation windows would clarify the dynamics of behavioral recovery once enforcement intensity declines. Research designs that separate ICE-specific effects from broader media-driven anxiety about immigration policy could refine our understanding of the channels through which fear translates into spatial commercial withdrawal.

The economic costs documented here are not only counted in foregone visits. They include a sustained reshaping of how residents of high Latin America–born neighborhoods navigate Cook County's commercial geography, a pattern the chilling-effects literature suggests will be slow to reverse. This is a less tangible cost than those traditionally enumerated in immigration policy debate, but it is no less durable, and it falls on a wider population than enforcement's direct targets.

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Tables

Table 1. Descriptive Statistics

Characteristic	Value
Panel A. Cook County census block groups	
Cook County census block groups	4,002
In City of Chicago	2,162 (54.0%)
In suburban Cook County	1,840 (46.0%)
High Latin America–born block groups (LA-born decile ≥ 7)	1,598
Low Latin America–born block groups (LA-born decile ≤ 6)	2,400
High/low classification threshold (LA-born share)	6.80%
Panel B. Block group demographics, mean (standard deviation)	
Latin America–born population share	9.2% (10.8%)
Hispanic/Latino population share	25.3% (27.5%)
Foreign-born population share	20.0% (14.0%)
Noncitizen population share	9.3% (8.2%)
Median household income	\$93,132 (\$48,129)
Total population	1,296 (618)
Commercial POIs per block group	18.1 (31.1)
Panel C. Foot-traffic and origin-destination panels	
Commercial points of interest (POIs)	72,622
Restaurant POIs (NAICS 722)	16,842
Retail POIs (NAICS 44–45)	24,723
Block groups with ≥ 1 POI	3,911
Observation period	Jan 2024 – Dec 2025
Panel length (weeks)	102
Mean weekly visits per block group	35,211
Origin–destination flow records	146,224,814
Unique origin block groups	10,636
Unique destination block groups	9,710

Note: Panel A: the census block group is the unit of treatment. Block groups are classified high Latin America–born if their Latin America-born population share falls in the top four deciles (decile ≥ 7) of the Cook County distribution; the dose-response specifications instead use the continuous LA-born share. Chicago versus suburban is assigned by block group centroid. Panel B reports the mean and, in parentheses, the standard deviation across block groups; demographic shares are from the 2019-2023 American Community Survey (nativity measures apportioned from tract level). Panel C describes the Advan Foot Traffic panel: commercial POI visits aggregated to the block group week, and the origin-destination flow panel built from visitor home block groups. Origin block groups include external (non-Cook County) origins; destination block groups are commercial block groups within Cook County.

Table 2. Origin-Destination Flow Typology

Origin region	Destination region		
	Cook County, high Latin America–born (H)	Cook County, low Latin America–born (L)	Non-Cook Illinois (external, E)
Cook County, high Latin America–born (H)	HH	HL	HX
Cook County, low Latin America–born (L)	LH	LL	LX
Non-Cook Illinois (external, E)	EH	EL	EX (excluded)

Note: Each origin-destination visitor flow is classified by the immigrant concentration of its origin and destination Census Block Group. High Latin America–born (H) = top four deciles of CBGs in Cook County by share of Latin America-born population; low Latin America–born (L) = all other Cook County CBGs; external (E/X) = non-Cook Illinois. EX flows (non-Cook origin to non-Cook destination) are excluded as irrelevant to the Cook County analysis.

Table 3. Baseline Flow Composition (Pre-Event 1)

Business Type	Same CBG	Same Tract	High Latin America– born	Low Latin America– born	External (non- Cook)	Total	Unique Connections
Panel A. Customer origins for high Latin America–born destinations							
Retail	14.2%	20.1%	65.4%	26.8%	7.8%	100.0%	8,355
Restaurant	19.0%	24.8%	67.3%	26.1%	6.6%	100.0%	7,720
Other	13.4%	18.4%	62.7%	29.3%	8.0%	100.0%	8,893
Panel B. Destinations for high Latin America–born residents							
Retail	14.4%	20.4%	66.4%	29.0%	4.6%	100.0%	6,129
Restaurant	17.2%	22.5%	61.0%	35.7%	3.3%	100.0%	4,285
Other	11.1%	15.2%	52.0%	43.7%	4.3%	100.0%	6,713

Note: Cells report the share of visitor-trips by origin (Panel A) or destination (Panel B) type, averaged over the full pre-enforcement period (January 2024–January 2025). High Latin America–born, Low Latin America–born, and External partition all visitor-trips and sum to 100 percent (components may not sum exactly due to rounding). Same CBG and Same Tract are nested subsets of the High Latin America–born column, not separate categories. Unique Connections = count of distinct partner CBGs. Restaurant = NAICS 722

Table 4. Flow-Type Difference-in-Differences Coefficients

Flow Type	Coefficient	Effect, mean-H	Effect, IQR	Baseline Visitors	N	Pre-trend (Wald)
Panel A. Retail (NAICS 44-45)						
HH	0.005 (0.053)	0.1%	0.1%	6,194	52,690	FAIL (0.003)
HL	-0.483*** (0.083)	-8.9%	-5.2%	2,743	52,450	PASS (0.256)
LH	0.296*** (0.100)	5.9%	3.3%	3,768	35,845	FAIL (0.035)
LL	-0.344 (0.285)	-6.4%	-3.7%	6,985	63,089	PASS (0.070)
HX	-0.029 (0.119)	-0.6%	-0.3%	618	36,462	PASS (0.752)
LX	-1.303** (0.555)	-22.3%	-13.4%	661	46,890	PASS (0.309)
EH	0.223* (0.128)	4.4%	2.5%	1,769	22,000	PASS (0.580)
EL	-0.244 (0.617)	-4.6%	-2.6%	1,472	31,415	PASS (0.567)
Panel B. Restaurants (NAICS 722)						
HH	0.024 (0.074)	0.5%	0.3%	1,518	51,667	PASS (0.590)
HL	-0.539*** (0.119)	-9.9%	-5.8%	940	49,014	PASS (0.505)
LH	0.029 (0.104)	0.6%	0.3%	1,148	26,858	PASS (0.203)
LL	-0.008 (0.313)	-0.2%	-0.1%	3,213	45,963	PASS (0.594)
HX	0.141 (0.198)	2.8%	1.6%	220	18,694	PASS (0.598)
LX	-1.118 (0.785)	-19.4%	-11.6%	249	25,492	PASS (0.732)
EH	0.385** (0.176)	7.7%	4.3%	551	13,323	PASS (0.118)
EL	-0.973 (0.794)	-17.1%	-10.2%	758	20,486	PASS (0.221)
Panel C. Other (all remaining NAICS)						
HH	-0.033 (0.048)	-0.6%	-0.4%	6,971	52,684	FAIL (0.003)
HL	-0.072 (0.076)	-1.4%	-0.8%	5,752	52,705	FAIL (0.004)
LH	0.171** (0.087)	3.4%	1.9%	4,510	37,929	PASS (0.412)

LL	-0.375 (0.274)	-7.0%	-4.0%	12,275	66,230	PASS (0.459)
HX	-0.427*** (0.135)	-7.9%	-4.6%	701	42,426	PASS (0.849)
LX	-0.485 (0.565)	-8.9%	-5.2%	746	57,283	PASS (0.642)
EH	0.014 (0.114)	0.3%	0.2%	1,795	25,635	PASS (0.185)
EL	-0.678 (0.566)	-12.3%	-7.2%	3,458	36,949	PASS (0.402)

Note: Significance: *** $p < 0.01$, ** $p < 0.05$, * $p < 0.10$. Standard errors clustered on the unit fixed effect in parentheses. HH/HL/HX/LX use the origin perspective (treatment = origin LA-born share, origin-CBG fixed effects); LH/LL/EH/EL use the destination perspective (treatment = destination LA-born share, destination-CBG fixed effects). E = external (non-Cook Illinois) origin; X = non-Cook destination. Effect, mean-H = implied percentage change at the average high Latin America-born CBG (treatment intensity = 0.19). Effect, IQR = implied percentage change across the interquartile range of treatment (~0.11). Baseline Visitors = pre-period mean weekly visitors per unit. Pre-trend (Wald) reports the joint Wald F-test on pre-period event-study coefficients; PASS = $p > 0.05$. Estimated over the 14-week pre / 19-week post Event 1 window.

Table 5. HL Flows by Business Type

Business Type	Coefficient	Effect, mean-H	Effect, IQR	Baseline Visitors	N	Pre-trend (Wald)
Discretionary	-0.495*** (0.110)	-9.1%	-5.3%	1,641	51,381	PASS (0.054)
Essential	-0.413*** (0.095)	-7.7%	-4.4%	1,211	51,299	PASS (0.680)
Other	-0.116 (0.072)	-2.2%	-1.3%	6,571	52,714	FAIL (0.001)

Note: Significance: *** $p < 0.01$. Standard errors clustered on the origin CBG in parentheses. HL flows (high Latin America-born origin to low Latin America-born destination) classified by business type. Effect, mean-H = implied percentage change at the average high Latin America-born CBG; Effect, IQR = implied change across the interquartile range of treatment. Discretionary and essential pass the joint Wald pre-trend test; 'other' fails and is reported for completeness only.

Table 6. HL Flows by Geographic Region

Region	NAICS	Coefficient	Effect, mean-H	Effect, IQR	Baseline Visitors	N CBGs	Pre- trend (Wald)
Chicago	Retail	-0.329*** (0.107)	-6.2%	-3.6%	2,739	925	PASS (0.174)
Chicago	Restaurant	-0.540*** (0.158)	-9.9%	-5.8%	1,087	925	PASS (0.489)
Suburban	Retail	-0.712*** (0.135)	-12.8%	-7.5%	2,750	673	PASS (0.512)
Suburban	Restaurant	-0.425** (0.171)	-7.9%	-4.6%	735	673	PASS (0.968)

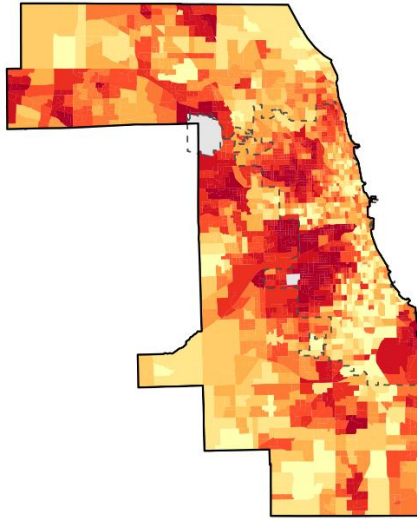
*Note: Significance: *** $p < 0.01$, ** $p < 0.05$. Standard errors clustered on the origin CBG in parentheses. HL flows estimated separately for high Latin America-born origins in the City of Chicago versus suburban Cook County. Effect, mean-H = implied percentage change at the average high Latin America-born CBG; Effect, IQR = implied change across the interquartile range of treatment. Restaurant = NAICS 722*

Figures

Figure 1. Study Areas in Cook County, IL

A. LA-Born Population Decile

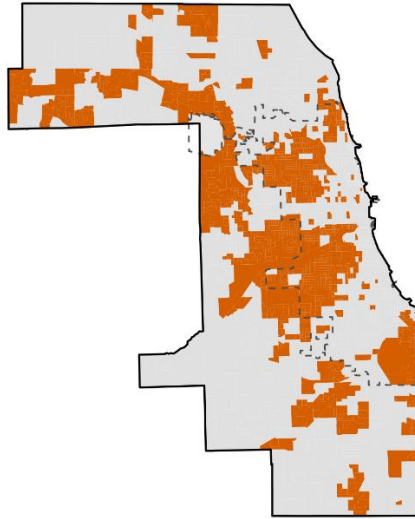
Tract-level, assigned to CBGs



Decile
1 5 10

B. H/L Classification

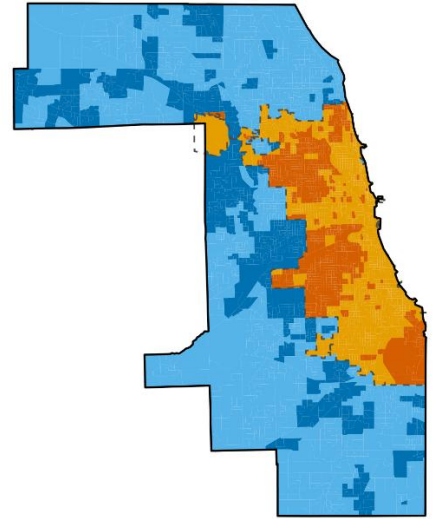
H = decile ≥ 7 (top 40%)



Level High (H) Low (L) NA

C. Geographic Regions

Chicago/Suburban $\times$ H/L classification



Region Chicago H Chicago L Suburban H Suburban L

Figure 1. Study area: Cook County, Illinois. Panel A, Latin America–born population decile by Census Block Group (tract values assigned to CBGs). Panel B, the high Latin America–born (H, decile ≥ 7) and low Latin America–born (L) classification used throughout the analysis. Panel C, the Chicago–suburban regional division.

Figure 2. HL Flow Event Study: High Latin America–born Origin to Low Latin America–born Destinations

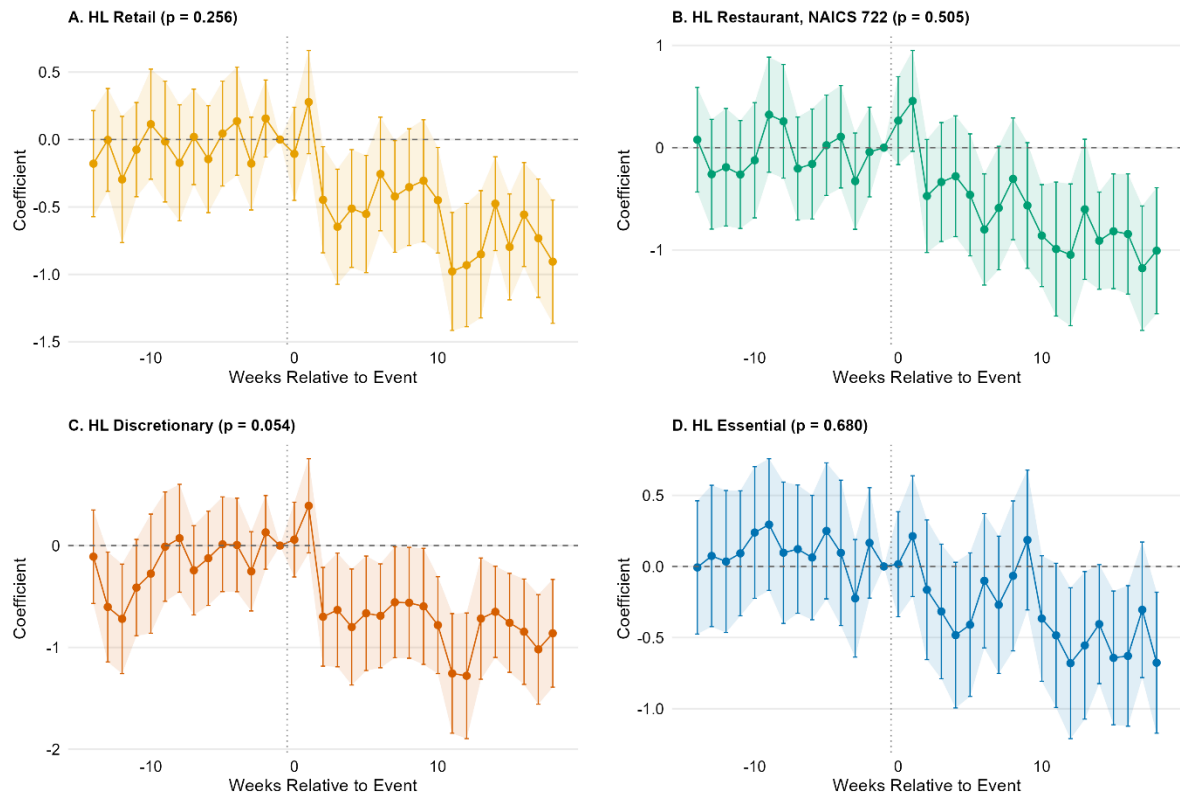


Figure 2. HL flow event study: high Latin America–born origin visits to low Latin America–born destinations. Each panel plots week-specific dose-response coefficients relative to the week before Event 1, with 95 percent confidence intervals; the vertical line marks the January 20 inauguration. All four specifications pass the joint Wald pre-trend test.

Figure 3. Extended Event Study: Full Trajectory Across Both Events

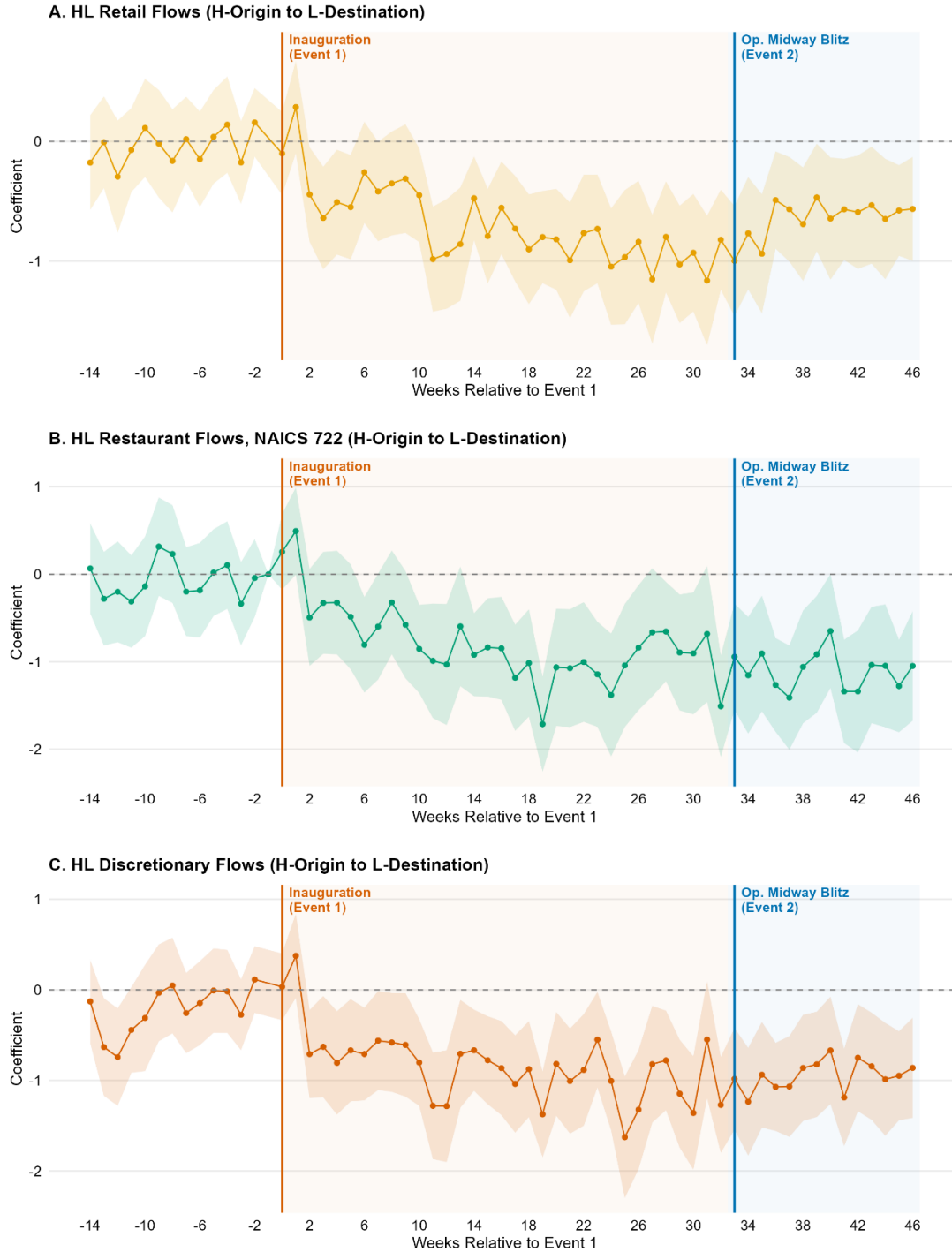


Figure 3. Extended event study: HL flow trajectory across both enforcement episodes. Week-specific coefficients from week -14 (relative to Event 1) through week $+46$, spanning Operation Midway Blitz (Event 2, approximately week 33). Reference period: the week before Event 1.

Appendix A. Additional Data

Table A1. HL Retail Flow: Pre-Period Bandwidth Sensitivity

Pre-period	HL Retail Coefficient	N	Pre-trend (Wald)
8w	-0.509*** (0.092)	42,914	PASS (0.257)
10w	-0.522*** (0.089)	46,097	PASS (0.351)
12w	-0.492*** (0.086)	49,267	PASS (0.181)
14w	-0.483*** (0.083)	52,450	PASS (0.256)
20w	-0.451*** (0.081)	62,004	PASS (0.209)
29w	-0.421*** (0.077)	76,282	PASS (0.109)

*Note: Significance: *** $p < 0.01$. Standard errors clustered on the origin CBG in parentheses. Each row re-estimates the HL retail flow DiD with the indicated pre-period length; the post-period (Event 1) is held fixed. Pre-trend (Wald): joint F-test on pre-period coefficients, PASS = $p > 0.05$.*

Table A2. HL Retail Flow: Alternative Demographic Treatments

Treatment Variable	HL Retail Coefficient	N	Pre-trend (Wald)
LA-born share	-0.483*** (0.083)	52,450	PASS (0.256)
Latino share	-0.178*** (0.030)	52,395	PASS (0.712)
Foreign-born share	-0.320*** (0.069)	52,450	FAIL (0.029)
Non-citizen share	-0.451*** (0.102)	52,450	FAIL (0.016)

*Note: Significance: *** $p < 0.01$. Standard errors clustered on the origin CBG in parentheses. Each row re-estimates the HL retail flow DiD substituting the indicated continuous demographic share for the Latin America-born share as the treatment variable. The contraction is negative and significant under all four definitions; the LA-born and Latino treatments pass the joint Wald pre-trend test, while the foreign-born and non-citizen treatments do not.*

Table A3. HL Flow: Decile-Threshold Sensitivity

H/L Threshold	NAICS	Coefficient	N	Pre- trend (Wald)
>=6 (top 50%)	Retail	-0.612*** (0.081)	65,183	PASS (0.135)
>=6 (top 50%)	Restaurant	-0.641*** (0.111)	59,087	FAIL (0.010)
>=7 (top 40%)	Retail	-0.483*** (0.083)	52,450	PASS (0.256)
>=7 (top 40%)	Restaurant	-0.539*** (0.119)	49,014	PASS (0.505)
>=8 (top 30%)	Retail	-0.429*** (0.100)	39,386	PASS (0.450)
>=8 (top 30%)	Restaurant	-0.572*** (0.144)	37,149	PASS (0.145)

*Note: Significance: *** $p < 0.01$. Standard errors clustered on the origin CBG in parentheses. Each row re-estimates the HL flow DiD defining high Latin America-born CBGs at the indicated decile threshold of the LA-born population distribution.*

Table A4. Joint Wald Pre-Trend Diagnostics, by Specification Family

Specification family	What the family comprises	Specifications tested	Pass pre-trend test ($p > 0.05$)	Joint p-value (range)
Origin-side aggregate (total outbound flows)	Total weekly outbound visitor volume from each origin CBG, not decomposed by destination; re-estimated across alternative event windows and continuous- and decile-based treatment definitions.	15	1 of 15	<0.001 – 0.097
Destination-side aggregate (CBG foot traffic)	Weekly foot traffic at each destination CBG, pooled across all customer origins; re-estimated across event windows, pre-period lengths, and propensity-score-matched samples.	9	7 of 9	<0.001 – 0.679
Origin-destination flow type	Visitor flows decomposed into the eight origin-destination types (HH, HL, ... EL) by NAICS category, with City-of-Chicago and suburban variants.	27	21 of 27	<0.001 – 0.968
Business-type flow	Flows classified by consumer-activity type — discretionary, essential, or other — for HL and related flow types.	12	10 of 12	<0.001 – 0.746
Placebo / pseudo-event	The same outcomes re-estimated against a non-enforcement pseudo-event or a year-over-year (seasonal) comparison.	9	2 of 9	<0.001 – 0.491
All specifications	—	72	41 of 72	—

Note: Each event-study specification is tested for pre-trends with a joint Wald F-test of the null that all pre-period coefficients equal zero; a specification passes if the joint p-value exceeds 0.05. Origin-side aggregates fail systematically, while origin-destination flow-type specifications — which decompose the same activity by destination — pass in the large majority of cases.

Table A5. Event 2 Seasonal-Confounding Diagnosis

Window	Panel	Outcome	Spec	Coefficient	N
±6 weeks	Destination	Visits	Level	0.075* (0.040)	46,872
±6 weeks	Destination	Visits	Year-over-year	-0.045 (0.066)	46,872
±6 weeks	Origin	Outbound (total)	Level	0.029 (0.035)	47,827
±6 weeks	Origin	Outbound (discretionary)	Level	0.123** (0.060)	47,827
±6 weeks	Origin	Outbound (essential)	Level	-0.005 (0.051)	47,827
±6 weeks	Origin	Outbound (total)	Year-over-year	-0.004 (0.044)	47,821
±6 weeks	Origin	Outbound (discretionary)	Year-over-year	0.063 (0.073)	47,821
±6 weeks	Origin	Outbound (essential)	Year-over-year	0.006 (0.064)	47,821
±4 weeks	Destination	Visits	Level	0.081** (0.038)	31,248
±4 weeks	Destination	Visits	Year-over-year	-0.005 (0.055)	31,248
±4 weeks	Origin	Outbound (total)	Level	0.006 (0.037)	31,974
±4 weeks	Origin	Outbound (discretionary)	Level	0.138** (0.066)	31,974
±4 weeks	Origin	Outbound (essential)	Level	-0.010 (0.056)	31,974
±4 weeks	Origin	Outbound (total)	Year-over-year	0.008 (0.047)	31,969
±4 weeks	Origin	Outbound (discretionary)	Year-over-year	0.168** (0.085)	31,969
±4 weeks	Origin	Outbound (essential)	Year-over-year	0.040 (0.072)	31,969

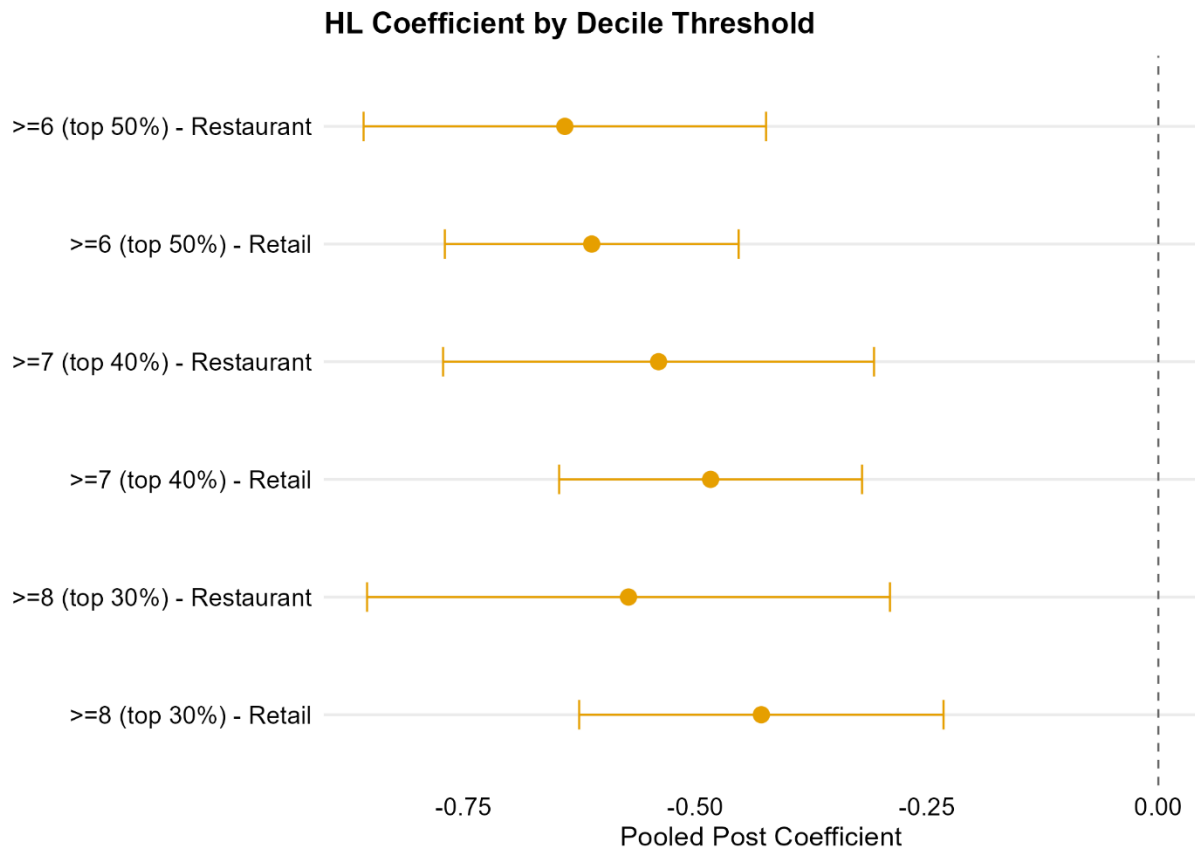
*Note: Significance: ** $p < 0.05$, * $p < 0.10$. Standard errors in parentheses. Estimates around the September 2025 Event 2 window. Positive level effects on destination visits do not survive year-over-year differencing, indicating that the apparent Event 2 effect reflects summer-to-fall seasonality rather than enforcement.*

**Table A6. Panel-Composition Check: Effect of the Enforcement Onset on Advan
POI Coverage**

outcome	Coefficient	Std. error	p-value	N
log(1 + n_pois_total)	-0.0003	0.0007	0.6825	128898
log(1 + n_pois_observed)	0.0032	0.0093	0.7339	128898
pct_pois_observed	0.0007	0.0102	0.9472	128898

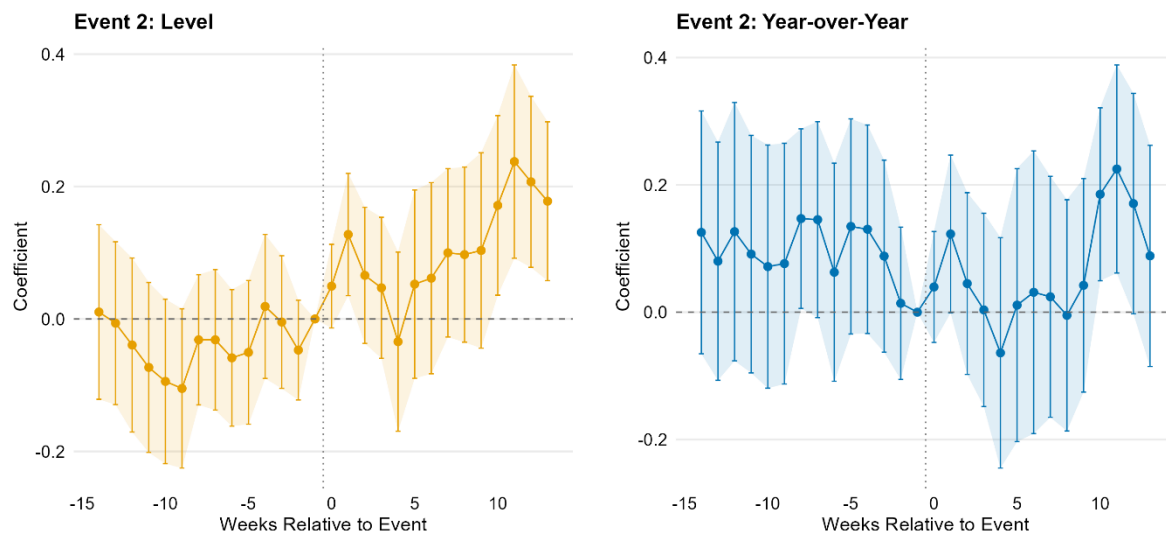
Note: Each row reports a difference-in-differences regression of the indicated Advan panel-coverage measure on the post-Event-1 indicator interacted with treatment intensity (Latin America–born share), with CBG and week fixed effects, over the 14-week pre / 19-week post Event 1 window. n_pois_total is the count of POIs in the panel; n_pois_observed is the count with directly observed (non-imputed) visit data; pct_pois_observed is the share observed. All three coefficients are small and statistically indistinguishable from zero, indicating that Advan panel coverage did not shift differentially across the immigrant-concentration gradient at the enforcement onset. Standard errors clustered on the CBG.

Figure A1. HL Coefficient by Decile Threshold



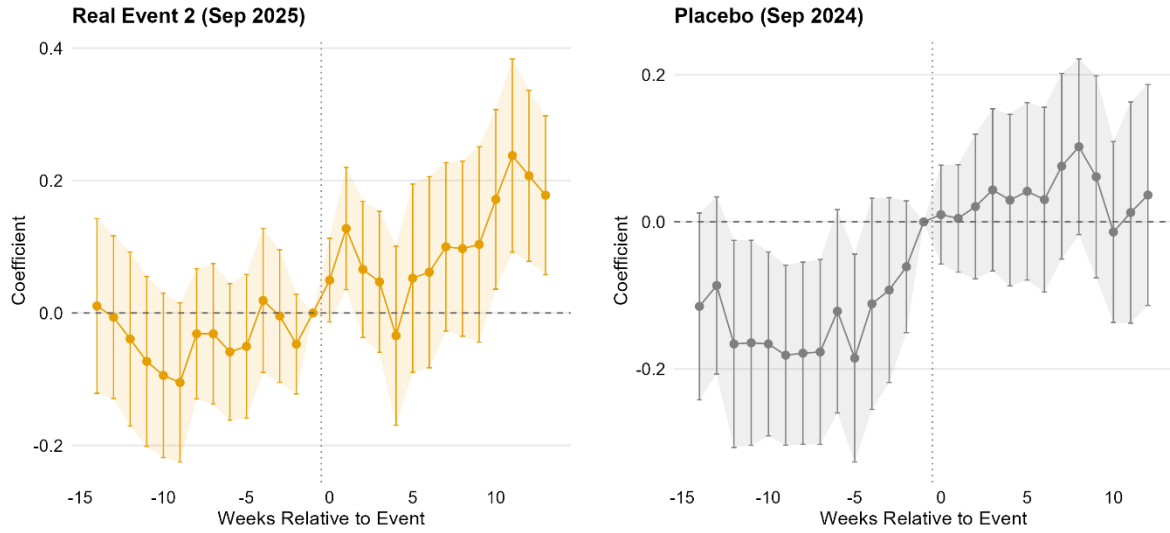
Note: HL flow dose-response coefficients by high/low decile threshold. Each point plots the HL retail and HL restaurant coefficients, with 95 percent confidence intervals, estimated with the high–Latin America–born cutoff set at the top 50 percent (decile ≥ 6), top 40 percent (decile ≥ 7 , the primary specification), and top 30 percent (decile ≥ 8) of Cook County block groups by Latin America–born share. The contraction is negative and significant at every threshold.

Figure A2. Event 2 Seasonal Confounding: Level vs Year-over-Year



Note: Event 2 seasonal confounding: level versus year-over-year estimates. Difference-in-differences coefficients estimated around the September 2025 enforcement surge (Event 2), comparing a level specification with a year-over-year specification that differences each week against the same calendar week of 2024. The positive level estimates for destination visits and origin outbound flows do not survive year-over-year differencing, indicating that the apparent Event 2 effect reflects summer-to-fall seasonality rather than enforcement. Corresponds to Table A5.

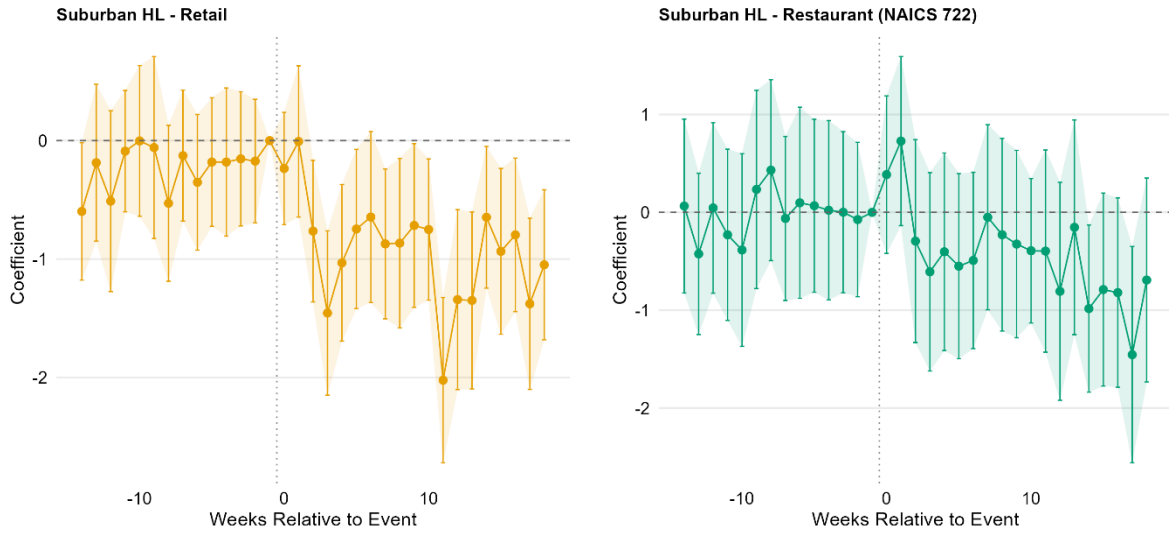
Figure A3. Destination Visits: Real vs Placebo Event 2



Note: Destination visits around the real and placebo Event 2. Event-study coefficients for foot traffic at high Latin America–born destinations, estimated around the actual September 2025 enforcement surge and around a placebo event placed on the same calendar weeks of September 2024. The placebo reproduces the apparent post-event pattern, confirming that the Event 2 movement in destination visits is seasonal rather than enforcement-driven. Reference period: the week before the real or placebo event.

Figure A4. Suburban HL Pre-Trends Validation

Suburban HL Pre-Trends Validation



Note: Suburban HL retail pre-trends. Week-specific dose-response coefficients for the HL retail flow estimated on suburban high Latin America-born origin CBGs, relative to the week before Event 1, with 95 percent confidence intervals. The vertical line marks the January 20 inauguration. Pre-period coefficients fluctuate around zero, supporting the parallel-trends assumption for the suburban specification reported in Table 6 (joint Wald $p = 0.512$).

Appendix B. Data Construction

The foot-traffic data underlying our analysis are licensed from Advan (accessed through Dewey Data). This appendix documents the panel-construction decisions. Analysis code is available from the authors on request.

B.1 Foot-traffic panel. We process the Advan Foot Traffic Plus dataset, a weekly record of visits to points of interest (POIs). Weeks are defined by the visit period's start date floored to the preceding Monday. From the Illinois files we retain POIs whose coordinates fall within Cook County. For each POI we construct a balanced weekly panel spanning its active period from the later of its recorded open date or first observed week to the earlier of its close date or last observed week and treat weeks with no record as zero-visit observations. To limit the influence of POIs observed too sparsely to support a within-unit comparison, we retain only POIs observed in more than 30 percent of their expected weeks and with at least ten expected weeks; POIs lacking a valid twelve-digit block-group identifier are dropped. POIs are de-duplicated on Advan's persistent store identifier, with time-invariant attributes taken from the first non-missing record. The destination-side foot-traffic outcome is the visit count summed to the block-group-week level, entering the models as $\log(1 + \text{visits})$.

B.2 Origin-destination flow panel. The origin-destination panel is built directly from the weekly POI files. For each POI-week we parse the VISITOR_HOME_CBGS field, a JSON record mapping each visitor's home block group to a visitor count, to recover for every destination POI, the volume of visits originating in each home block group. Home block groups are assigned by Advan from each device's modal nighttime location, and the visitor counts are reported by Advan as estimates (the values are non-integer); we use them as provided. We retain destination POIs and origin block groups anywhere in Illinois; visitor records with missing or empty origin fields, and origins without a valid twelve-digit identifier, are dropped. Visitor counts are summed across POIs sharing a destination block group, producing a panel indexed by origin block group $\times$ destination block group $\times$ industry category $\times$ week. Flows are classified by the immigrant concentration of origin and destination (Section 4.2); flows with both an origin and a destination outside Cook County are excluded. The realized panel contains approximately 146 million origin-destination-industry-week observations. Flow-volume outcomes enter the models as $\log(1 + \text{visitors})$.

B.3 Industry and business-type classification. Each POI is assigned a NAICS-broad category from its primary NAICS code: Retail (NAICS 44–45), Food Services and Drinking Places (NAICS 722), or other. The secondary business-type classification (Section 4.2) is assigned from finer NAICS codes: *discretionary* comprises food service and drinking places (NAICS 7221–7225), amusement and recreation (713), clothing (448), sporting-goods, hobby, and book stores (451), personal-care services (8121), and jewelry and luggage (4483); *essential* comprises grocery (4451) and health-and-personal-care stores (4461), gasoline stations (447), banking (522), and ambulatory and hospital health care (621–622); all remaining POIs are "other."

B.4 Treatment variables. Neighborhood demographics are drawn from the American Community Survey 2019–2023 five-year estimates. The primary treatment, the Latin-America-born population share, is constructed at the census-tract level as ACS variable B05006_139 (foreign-born population from Latin America) divided by total population (B05002_001); auxiliary measures including foreign-born share (B05002_013), non-citizen share (B05002_021), and Latino share (B03003) are constructed analogously. Because the place-of-birth detail in table B05006 is not published below the tract level, tract values are assigned uniformly to all constituent block groups (matched on the eleven-digit tract identifier); the treatment therefore varies at the tract level. We rank Cook County block groups into deciles of the Latin-America-born share and classify those in the top four deciles as high Latin America–born. For the aggregate destination-side specification, treatment intensity is a population-weighted average of the Latin-America-born share across block groups within a 0.5-mile radius of the destination.