

Economic Update Study

Task 5: Economic Impact Assessment 2019

prepared for

San Diego Unified Port District

prepared by

Cambridge Systematics, Inc.

Economic Update Study

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Technical Memorandum

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List of Acronyms

CalPERS	California Public Employees' Retirement System
CIP	Capital Improvement Program
CY	Calendar Year
District	San Diego Unified Port District
FTE	Full-Time Employees
FY	Fiscal Year
GASB	Government Accounting Standards Board
GIS	Geographic Information System
GRP	Gross Regional Product
IT	Information Technology
LQ	Location Quotient
MM	Major Maintenance
NAICS	North American Industry Classification System
OPEB	Other Postemployment Benefits
REMI	Regional Economic Models, Inc.
RV	Recreational Vehicle
SANDAG	San Diego Association of Governments
SDCERS	San Diego City Employees' Retirement System
TMP	Technology Management Program

1.0 Introduction

1.1 Study Overview

The San Diego Unified Port District (District), a public benefit corporation and regional Government agency, controls approximately 2,400 acres of land and approximately 11,800 acres of submerged lands spread across its five-member city jurisdictions of Chula Vista, Coronado, Imperial Beach, National City, and San Diego; and protects the Tidelands of San Diego Bay for the people who live, work, and visit there. With control of 34 of the 54 total miles along the San Diego Bay, the District plays a key role in both administering a unique maritime, visitor-serving, environmental, and recreational asset, and furthering the development of commerce, navigation, fisheries, and recreation on behalf of the State of California which owns these lands. The lands are conveyed to the District as a trustee of the State.

This study serves as a comprehensive economic impact analysis to determine the magnitude of the economic activities on the Port District Tidelands. The District is a critical economic engine for the San Diego region, generating jobs and strengthening the local economy. The results of this study will serve as the foundation for communication with the public, media, and elected officials about the critical role of the District in the economy for the District members cities, San Diego County, the Southern California region, the State of California, and the entire Nation.

1.2 Task Objective

This task implemented the economic impact assessment methodology documented in the **Economic Impact Assessment Methodology Technical Memorandum** (or **Task 4 Deliverable**), which is designed to promote more informed decision-making and built on the following four guiding principles:

1. Ensure the study process is transparent, objective, and defensible with support from a data-driven, stakeholder-led process.
2. Use existing data and tools to the extent possible while maintaining objectivity and defensibility.
3. Define metrics that reflect what stakeholders care about.
4. Develop sound assumptions based on available data and review of relevant literature.

The economic impact assessment estimates the total economic impacts resulting from the District and the businesses located on Port Tidelands that most significantly drive demand for marine cargo, visitors, passengers, and freight transportation and services in 2019, including:

- District enterprise.
- Maritime trade and cargo-handling activities.
- Industrial and warehousing activities.
- Cruise industry activities.
- Tourism and commercial enterprises.

1.3 Task Approach

The **Economic Impact Assessment** is accomplished through the following two main steps:

1. **Step 1: Allocate direct impacts to relevant industries, geographies, and policy variables in REMI TranSight model.** This step allocates the direct impacts in 2019 documented in the District Economic Base Analysis Technical Memorandum (or Task 3 Deliverable) to relevant industry sectors, geographies, and policy variables in the Regional Economic Models, Inc.¹ (REMI) TranSight model for the San Diego Association of Governments (SANDAG), as proposed in the Economic Impact Assessment Methodology Technical Memorandum (or Task 4 Deliverable).
2. **Step 2: Estimate total impacts.** Using the REMI TranSight model for SANDAG (or the economic model), this step estimates the indirect and induced economic impacts arising from the direct changes in jobs, demand for goods and services, local government spending, and consumer spending in 2019. The economic model estimates the indirect (business-to-business) effects and induced (consumer-related) effects; and yields the total (combined direct, indirect, and induced) economic impacts in San Diego County, San Diego neighboring counties, the rest of California, and the rest of the U.S.

This technical report is organized as follows:

- **Section 2.0: Allocation of Direct Impacts to Relevant REMI Policy Variables and Industries.** This section allocates the direct impacts in 2019 to relevant industry sectors, geographies, and policy variables in the REMI TranSight model for SANDAG.
- **Section 3.0: Total Economic Impacts.** This section estimates the total (combined direct, indirect, and induced) economic impacts generated by the District enterprise and the businesses in Port Tidelands within the sectors of interest (i.e., maritime trade and cargo handling, industrial and wholesale, cruise industry, and tourism and commercial industry) in 2019. The total (combined direct, indirect, and induced impacts) economic impacts are reported in terms of job creation, personal income, Gross Regional Product (GRP), and economic output.

¹ <http://www.remi.com/>.

2.0 Allocation of Direct Impacts to Relevant REMI Policy Variables and Industries

This section documents the allocation of the direct economic impacts (i.e., the direct jobs created by the District and the District users within each of the four sectors of interest and the direct spending from all the District-related activities) to relevant industry sectors, geographies, and policy variables in the REMI TranSight model to estimate the total (combined direct, indirect, and induced) economic impacts. The REMI TranSight model used in this analysis includes 23 regions (shown in **Appendix A**) and 70 industry sectors (shown in **Appendix B**).

2.1 District Payroll Expenses

The District's full-time employees (FTE) and their compensation (salaries and benefits) in fiscal year (FY) 2019 are shown in **Table 2.1**. This analysis assumes that the shares of employees by county of residence in 2022 represent the shares of employees by county of residence in 2019. The estimated number of FTE by county of employee residence and the corresponding payroll expenditures in 2019, shown in **Table 2.2**, are input into the REMI TranSight model as changes in 'number of employees' and 'employment compensation adjustment' in the local government sector.

Table 2.1 District FTE and Payroll Expenditures, FY2019

Item	FY2019	REMI Industry (North American Industry Classification System (NAICS))
FTE	556	Local Government (NAICS 92)
Payroll Expenditures	\$93,928,933	Local Government (NAICS 92)

Source: San Diego Unified Port District.

Note: The District payroll expenditures exclude temporary services and Government Accounting Standards Board (GASB) accounting adjustments.

Table 2.2 Estimated District FTE by County of Residence and Payroll Expenditures, FY2019

County of Residence of FTE	FTE by County of Residence	Distribution of Payroll Expenditures
San Diego	528 (95%)	\$89,143,874
Riverside	15 (3%)	\$2,481,142
Orange, Los Angeles, San Bernardino, and Imperial	13 (2%)	\$2,303,917
Total	556 (100%)	\$93,928,933

Source: San Diego Unified Port District and Cambridge Systematics Analysis.

Using the REMI TranSight model, this analysis measures the total (combined direct, indirect, and induced) economic impact that the District employees and their compensation in 2019 had in the economies of counties they live in (i.e., San Diego, Riverside, Orange, Los Angeles, San Bernardino, and Imperial) and the spillover impact in the rest of California, and the rest of U.S.

2.2 District Contribution to Pension Payments

The number of the District retirees and the retirement benefits they received from the District's defined pension plan, administered by the San Diego City Employees' Retirement System (SDCERS), and other postemployment health care benefits, in FY 2019 are shown in **Table 2.3**. This analysis allocated the District contributions to pension payments by retirees' place of residence by applying the following assumptions:

- For the last three decades, Californians who leave the State have mostly gone to other parts of the country, mainly to Texas and neighboring States such as Arizona, Nevada, and Oregon, and Washington.² According to the California Public Employees' Retirement System (CalPERS), 84 percent of CalPERS retirees and beneficiaries reside in California.³ This analysis assumes that 84 percent of the District retirees receiving benefits live in California. This share is used to estimate the number of retirees who remain in California.
- This analysis assumes that the District retirees who remain in California live in the counties consistent with where current employees live.

Table 2.3 District Retirees and Retirement Benefits Paid by the District, FY2019

Item	FY2019
Retirees that Received Benefits	588
Pension Plan	\$27,457,000
Other Postemployment Benefits (OPEB)	\$3,616,196
Retirement Benefits Expenditures	\$31,073,196

Sources: Pension Plan data comes from the San Diego City Employees' Retirement System (SDCERS) Annual Comprehensive Financial Report. OPEB data comes from the San Diego Unified Port District.

Note: OPEB include medical, dental, and life insurance benefits.

The estimated District pension payments by retirees' place of residence in 2019, shown in **Table 2.4**, are input into the REMI TranSight model as changes in 'government social benefits'. Using the economic model, this analysis measures the impact that these social benefits had in the economies of San Diego County; its neighboring counties (i.e., Riverside, Orange, Los Angeles, San Bernardino, and Imperial); the rest of California, and the rest of U.S.

² Lin, J., and A. Watson, 2022, *California migration: The story of 40 million*. Updated June 24, 2022. Available at [California migration: The story of 40 million—CalMatters](#).

³ California Public Employees' Retirement System (CalPERS). Thinking About Moving Out of California in Retirement? Available at [Thinking About Moving Out of California in Retirement?—CalPERS PERSpective](#).

Table 2.4 District Retirees and Retirement Benefits Paid by the District, FY2019

Item	FY2019	Distribution of District Contribution to Pension Payments by Retirees' Place of Residence
San Diego County = (a)	469 (94.9%)	\$24,771,787
Riverside County = (b)	13 (2.6%)	\$689,473
Orange, Los Angeles, San Bernardino, and Imperial Counties = (c)	12 (2.5%)	\$640,225
Estimated Number of Retirees that Received Benefits and Reside in CA = (a) + (b) + (c) = (d)	494	\$26,101,485
Estimated Number of Retirees that Received Benefits and Reside outside of CA = (e)	94	\$4,971,711
Total = (d) + (e)	588	\$31,073,196

Source: San Diego Unified Port District and Cambridge Systematics Analysis.

2.3 District Non-Payroll Operating and Capital Expenditures

The District non-payroll operating expenditures, total and by expense category, in FY2019 are shown in **Table 2.5**. The non-payroll operating expenditures by expense type, excluding the OPEB amount already allocated as part of the retirement benefits paid by the District to its retirees in FY2019, are allocated to the selected REMI industries shown in **Table 2.6**.

Table 2.5 District Non-Payroll Operating Expenditures, FY2019

Non-Payroll Operating Expenditure by Type	FY2019
Services	\$38,273,631
Maintenance	\$8,099,869
Equipment, Materials, and Supplies	\$4,744,419
Utilities	\$3,104,981
Non-Payroll Employee Expenses	\$2,934,235
Other	\$6,944,271
Subtotal	\$64,101,406
OPEB	\$3,616,196
Total	\$67,717,602

Source: San Diego Unified Port District.

Table 2.6 District Non-Payroll Operating Expenditures Allocated to Selected REMI Industries

Expenditure Category	REMI Industry (NAICS)
Services	<ul style="list-style-type: none"> • Administrative and support services (NAICS 56) • Ambulatory health care services (NAICS 62) • Construction (NAICS 23) • Insurance carriers and related activities (NAICS 52) • Professional, scientific, and technical services (NAICS 54) • Telecommunications (NAICS 51)
Maintenance	<ul style="list-style-type: none"> • Professional, scientific, and technical services (NAICS 54) • Repair and maintenance (NAICS 81) • Retail trade (NAICS 44 – 45)
Equipment, Materials, and Supplies	<ul style="list-style-type: none"> • Rental and leasing services; Lessors of nonfinancial intangible assets (NAICS 53) • Retail trade (NAICS 44 – 45)
Non-Payroll Employee Expenses	<ul style="list-style-type: none"> • Air transportation (NAICS 48 – 49) • Educational services; private (NAICS 6) • Food services and drinking places (NAICS 72) • Hospitals; private (NAICS 62) • Professional, scientific, and technical services (NAICS 54) • Retail trade (NAICS 44 – 45)
Utilities	<ul style="list-style-type: none"> • Utilities (NAICS 22)
“Other” Expenses	<ul style="list-style-type: none"> • Couriers and messengers (NAICS 48 – 49) • Forestry and Logging; Fishing, hunting, and trapping (NAICS 11) • Performing arts, spectator sports, and related industries (NAICS 71) • Professional, scientific, and technical services (NAICS 54) • Rental and leasing services; Lessors of nonfinancial intangible assets (NAICS 53) • Repair and maintenance (NAICS 81) • Retail trade (NAICS 44 – 45) • Securities, commodity contracts, other investments; Funds, trusts, other financial vehicles (NAICS 52) • Local Government (NAICS 92) • Waste management and remediation services (NAICS 56)

Source: San Diego Unified Port District and Cambridge Systematics Analysis.

The District capital expenditures, total and by expense category, in FY2019 are shown in **Table 2.7**. The capital expenditures by expense type are allocated to the selected REMI industries shown in **Table 2.8**.

Table 2.7 District Capital Expenditures, FY2019

Capital Expenditures by Type	FY2019
Capital Improvement Program (CIP)	\$22,535,667
Technology Management Program (TMP) Capital Projects	\$3,641,515
Capital Major Maintenance (MM) Projects	\$8,281,223

Capital Expenditures by Type	FY2019
Equipment Outlay and Other Capital Projects	\$4,475,627
Capital Labor	\$1,952,438
Total	\$40,886,470

Source: San Diego Unified Port District.

Table 2.8 District Capital Expenditures Allocated to Selected REMI Industries

Expenditure Category	REMI Industry (NAICS)
CIP	<ul style="list-style-type: none"> Construction (NAICS 23)
TMP Capital Projects	<ul style="list-style-type: none"> Computer and electronic product manufacturing (NAICS 31 – 33) Data processing, hosting, and related services; Other information services (NAICS 51)
Capital MM Projects	<ul style="list-style-type: none"> Construction (NAICS 23) Professional, scientific, and technical services (NAICS 54)
Equipment Outlay and Other Capital Projects	<ul style="list-style-type: none"> Construction (NAICS 23)
Capital Labor	<ul style="list-style-type: none"> Professional, scientific, and technical services (NAICS 54)

Source: San Diego Unified Port District and Cambridge Systematics Analysis.

To take into account that some non-payroll operating and capital expenditures occurred within San Diego County while others occurred outside of the County, this analysis estimates allocation factors for the selected REMI industries based on employment location quotients (**Table 2.9**). The employment location quotients (LQ) help to identify export industries in the County (those industries producing more of a good or service than is needed to meet the County demand) and import industries in the County (those industries producing less than enough to meet County demand). Any spending beyond San Diego County is considered expenditure leakages, and consequently, have no economic value for the County, but for the rest of California or the U.S.

Table 2.9 Allocation Factors Applied to the District Non-Payroll Operating and Capital Expenditures

LQ	Industry Employment Concentration in San Diego County Compared to the U.S.	Allocation Factor
LQ > 1.00	All local	1.00
0.75 < LQ ≤ 1.00	Mostly local	0.75
0.50 < LQ ≤ 0.75	Even split	0.50
0.25 < LQ ≤ 0.50	Mostly non-local	0.25
LQ ≤ 0.25	All non-local	0.00

Source: Cambridge Systematics Analysis.

The District non-payroll operating expenditures are allocated to the selected REMI industries in San Diego County and outside of San Diego County according to expenditure breakdowns shown in **Table 2.10**.

Table 2.10 Estimated Non-Payroll Operating Expenses Spent in San Diego County and Outside of San Diego County, 2019

REMI Industry (NAICS)	San Diego County, FY2019	Outside of San Diego County, FY2019
Administrative and support services (NAICS 56)	\$5,533,624	\$1,844,541
Air transportation (NAICS 48 – 49)	\$159,604	\$478,813
Ambulatory health care services (NAICS 62)	\$5,996,669	\$1,998,890
Construction (NAICS 23)	\$108,806	\$36,269
Couriers and messengers (NAICS 48 – 49)	\$36,499	\$12,166
Educational services; private (NAICS 6)	\$937,509	\$312,503
Food services and drinking places (NAICS 72)	\$36,895	\$0
Forestry and Logging; Fishing, hunting, and trapping (NAICS 11)	\$0	\$137,000
Hospitals; private (NAICS 62)	\$1,299	\$3,897
Insurance carriers and related activities (NAICS 52)	\$944,983	\$314,994
Performing arts, spectator sports, and related industries (NAICS 71)	\$368,852	\$0
Professional, scientific, and technical services (NAICS 54)	\$27,085,236	\$0
Rental and leasing services; Lessors of nonfinancial intangible assets (NAICS 53)	\$488,251	\$162,750
Repair and maintenance (NAICS 81)	\$4,418,732	\$1,472,911
Retail trade (NAICS 44 – 45)	\$4,718,279	\$1,572,760
Securities, commodity contracts, other investments; Funds, trusts, other financial vehicles (NAICS 52)	\$358,418	\$0
State Government (NAICS 92)	\$23,996	\$7,999
Telecommunications (NAICS 51)	\$865,180	\$288,393
Utilities (NAICS 22)	\$2,328,736	\$776,245
Waste management and remediation services (NAICS 56)	\$202,280	\$67,427
Total	\$54,613,848	\$9,487,558
Grant Total	\$64,101,406	

Source: Cambridge Systematics Analysis.

Note: Allocation of spending to San Diego County is based on the employment concentration of each industry in San Diego County compared to the U.S.

The District capital expenditures are allocated to the selected REMI industries in San Diego County and outside of San Diego County according to expenditure breakdowns shown in **Table 2.11**.

Table 2.11 Estimated Capital Expenditures Spent in San Diego County and Outside of San Diego County, FY2019

REMI Industry (NAICS)	San Diego County, FY2019	Outside of San Diego County, FY2019
Computer and electronic product manufacturing (31 – 33)	\$2,549,061	\$0.00
Construction (23)	\$25,537,750	\$8,512,583.39
Data processing, hosting, and related services; Other information services (51)	\$273,114	\$819,340.88
Professional, scientific, and technical services (54)	\$3,194,621	\$0.00
Total	\$31,554,546	\$9,331,924
Grant Total		\$40,886,470

Source: Cambridge Systematics Analysis.

Notes: 1) Allocation of spending to San Diego County is based on the employment concentration of each industry in San Diego County compared to the U.S.; and 2) software expenditures associated with TMP capital projects (i.e., hardware- and software-related expenditures that aim to manage technologies within the District) were assumed at 30 percent of the total TMP capital project costs, based on Information Technology (IT) cost breakdown provided by OMTCO, available at <http://omtco.eu/references/sam/it-costs-the-costs-growth-and-financial-risk-of-software-assets/>.

The estimated District non-payroll operating and capital expenditures, which occurred within San Diego County and outside of the County in 2019, are input into the REMI TranSight model as changes in ‘Exogenous Final Demand’ for the relevant REMI industries. Using the economic model, this analysis measures the total (combined direct, indirect, and induced) economic impact that the demand for goods and services provided by these industries had in the economies of San Diego County, its neighboring counties (i.e., Riverside, Orange, Los Angeles, San Bernardino, and Imperial), the rest of California, and the rest of the U.S.

2.4 Direct Jobs Created by District Users

The direct jobs created by the four sectors of interest in 2019 shown are allocated to the REMI industries shown in **Table 2.12**.

Table 2.12 District—Sectors of Interest and Corresponding REMI Industries

Sector of Interest	District Users	REMI Industries (NAICS Codes)
Maritime Trade and Cargo Handling	<ul style="list-style-type: none"> Marine cargo terminals—Marine cargo offloading activities that may include storage of vehicles, equipment, and/or products for ongoing activities and offsite transportation. 	<ul style="list-style-type: none"> Port and Harbor Operations (NAICS 48831) Marine Cargo Handling (NAICS 48832) Navigational Services to Shipping (NAICS 48833) Other Support Activities for Water Transportation (NAICS 48839)

Sector of Interest	District Users	REMI Industries (NAICS Codes)
Industrial and Wholesale	<ul style="list-style-type: none"> • Shipyards—Shipbuilding, maintenance, and repair of large vessels. • Boatyards—Maintenance, repair, and cleaning of private boats. • Turbine manufacturer—Establishment engaged in manufacturing of steam, hydraulic, and/or gas turbines, except aircraft. • Food Manufacturers—Establishment engaged in manufacturing prepared foods and miscellaneous food specialties. • Wholesalers—Warehousing and storage of perishable goods under refrigeration. • Wholesalers—Wholesale lumber storage and distribution; wholesale distribution of petroleum and petroleum products; wholesale fueling services; wholesale cement storage. 	<ul style="list-style-type: none"> • Ship and Boat Building (NAICS 336600) • Engine, Turbine, and Power Transmission Manufacturing (NAICS 333600) • Food Manufacturers (NAICS 311) • Wholesale Trade (NAICS 42)
Cruise Industry	<ul style="list-style-type: none"> • Cruise Ship Terminals—Water-based excursions and/or transportation primarily aimed at providing entertainment to cruise passengers. 	<ul style="list-style-type: none"> • Deep Sea Passenger Transportation (NAICS 483112)
Tourism and Commercial Industry	<ul style="list-style-type: none"> • Hotels, Motels, Recreational Vehicle (RV) Parks Marinas/Yacht clubs. • Marine services and supplies sites. • Sportfishing sites. • Museums. • Restaurants/eating or drinking establishments/specialty food and beverage shops. • Parks or other recreational areas/facilities. • Parking lots/storage. • Realty, including boat and automobile sales. • Retail sale of fresh, frozen, or cured meats, fish, shellfish, and other seafoods sites. • Retail fueling sites. • Water transportation services for visitors. 	<ul style="list-style-type: none"> • Traveler Accommodation (NAICS 7211) • Restaurants and Other Eating Places (NAICS 7225) • Marinas/Yacht Clubs (NAICS 71393) • Finfish Fishing (NAICS 11411) • Museums (NAICS 71211) • Parking Lots and Garages (NAICS 81293) • Office of Real Estate Agents and Brokers (NAICS 5312) • Automotive Equipment Rental and Leasing (NAICS 5321) • Motorcycle, Boat and Other Motor Vehicle Dealers (NAICS 44122) • Retail Trade (NAICS 44 – 45) • Scenic and Sightseeing Transportation on Water (NAICS 48721) • Tour Operators (NAICS 56152)

Source: Cambridge Systematics Analysis.

To take into account that some employees in the sectors of interest might reside in San Diego County while other employees might reside in San Diego neighboring counties (i.e., Riverside, Orange, Los Angeles, San Bernardino, and Imperial), this analysis estimates allocation factors for the REMI industries that represent the sectors of interest using employment LQs. The LQs indicate if the sector employment share is greater in San Diego County compared to its neighboring counties. An LQ greater than 1.0 indicates that San Diego County is a strong cluster with local production able to satisfy local consumption and any excess can be exported. An LQ less than 1.0 indicates that San Diego County is a relative weaker cluster, where the

industry cannot satisfy local consumption and the industry requires imports. An LQ equals 1.0 indicates that San Diego County production can satisfy local demand, but there is no excess for export.

The estimated direct jobs within each sector of interest in 2019 are allocated to San Diego County and its neighboring counties as changes in the 'number of employees' in the corresponding REMI industries, according to the job breakdowns shown in **Table 2.13**. Using the REMI TranSight model, this analysis measures the total (combined direct, indirect, and induced) economic impact that these direct jobs had in the economies of San Diego County and its neighboring counties (i.e., Riverside, Orange, Los Angeles, San Bernardino, and Imperial), and the spillover impact in the rest of California and the rest of the U.S.

Table 2.13 District—Direct Jobs Created by the Sectors of Interest and Jobs by Place of Residence, 2019

Sectors of Interest	LQ	Allocation Factor	2019	San Diego County	San Diego Neighboring Counties
Maritime Trade and Cargo Handling	0.16	0%	1,846	---	1,846
Industrial and Wholesale Industry	0.75	50%	6,557	3,279	3,278
Cruise Industry	0.02	0%	474	---	474
Tourism and Commercial Industry	0.98	75%	30,110	22,582	7,528
Total	---	---	38,987	25,861	13,126

Source: Cambridge Systematics Analysis and San Diego Unified Port District.

2.1 Cruise Industry Purchases

The estimated direct purchases by the cruise industry in California due to cruise passenger traffic at the Port of San Diego in 2019 are input into the REMI TranSight model as changes in 'Exogenous Final Demand' for the relevant REMI industries listed in in **Table 2.14**. Using the economic model, this analysis measures the total (combined direct, indirect, and induced) economic impact that the purchases made by the cruise industry in California had in the regional, State, and national economies in 2019.

Table 2.14 District—Direct Purchases by the Cruise Industry Due to Cruise Passenger Traffic at the Port of San Diego, 2019

Industry	Direct Spending by the Cruise Industry in California	REMI Sector (NAICS)
Services & Government	\$31,261,321	Public Administration (NAICS 92)
Manufacturing	\$17,901,001	Manufacturing (NAICS 31 – 33)
Transportation	\$13,212,853	Transportation (NAICS 48)
Wholesale & Retail Trade	\$3,309,719	Wholesale Trade (NAICS 42) Retail Trade (NAICS 44 – 45)
Finance, Insurance, Real Estate & Leasing	\$2,415,632	Finance and Insurance (NAICS 52) Real Estate and Rental and Leasing (NAICS 53)
Information Services	\$748,079	Information (NAICS 51)
Agriculture, Mining, Utilities & Construction	\$14,458	Agriculture, Forestry, Fishing, and Hunting (NAICS 11)

Total **\$68,863,063**

Source: Cambridge Systematics Analysis.

2.2 Cruise Ship Crew and Onshore Passenger Spending

The estimated direct spending by cruise ship crew and onshore cruise passengers in San Diego County in 2019 is input into the REMI TranSight model as changes in ‘consumer spending’ according to the expenditure breakdowns shown in **Table 2.15**. Using the economic model, this analysis measures the total (combined direct, indirect, and induced) economic impact that these consumer expenditures had in the economy of San Diego County and the spillover impact in the rest of California and the rest of the U.S. in 2019.

Table 2.15 District—Direct Spending by Cruise Ship Crew and Passengers in San Diego, 2019

Expense Type	Combined Cruise Crew and Passenger Spending in San Diego	Consumer Spending
Lodging	\$12,996,121	<ul style="list-style-type: none"> • Accommodations
Food and Beverage	\$11,595,875	<ul style="list-style-type: none"> • Purchased meals and beverages
Local Air Transportation	\$9,469,465	<ul style="list-style-type: none"> • Air transportation
Car Rental	\$7,405,274	<ul style="list-style-type: none"> • Other motor vehicle services
Non-Food Shopping	\$6,179,881	<ul style="list-style-type: none"> • Durable goods (e.g., clothing and footwear) • Nondurable goods (e.g., personal care products)
Amusement/Attractions	\$4,131,345	<ul style="list-style-type: none"> • Recreational services
Shore Tours and Local Transportation	\$3,210,075	<ul style="list-style-type: none"> • Water transportation • Ground transportation
Groceries	\$1,827,293	<ul style="list-style-type: none"> • Food and non-alcoholic beverages purchases for off-premise consumption
Total	\$56,815,329	

2.3 Hotel Visitors Spending

The estimated direct spending by Port Tidelands hotel visitors in San Diego in 2019 is input into the REMI TranSight model as changes in ‘consumer spending’ according to the expenditure breakdowns shown in **Table 2.16**. Using the REMI TranSight model, this analysis measures the total (combined direct, indirect, and induced) economic impact that the spending by Port Tidelands hotel visitors had in the economies of San Diego County and the spillover impacts in the rest of California and the U.S. in 2019.

Table 2.16 District—Direct Spending by Tideland Hotel Visitors in San Diego, 2019

Expense Type	Spending by All Tidelands Hotel Visitors in San Diego	Consumer Spending
Lodging	\$985,516,154	• Accommodations
Food and Beverage	\$417,049,961	• Purchased meals and beverages
Non-food shopping	\$144,595,134	• Durable goods (e.g., clothing and footwear) • Nondurable goods (e.g., personal care products)
Amusement/Attractions	\$132,011,444	• Recreational services
Car rental	\$70,369,853	• Other motor vehicle services
Local ground transportation	\$35,184,926	• Ground transportation
Groceries	\$27,839,891	• Food and non-alcoholic beverages purchases for off-premise consumption
Total	\$1,812,567,363	

Source: Cambridge Systematics Analysis.

2.4 Tax Revenue Impacts

The tax revenue from the District tenants' sales and the District properties located within each of the five-member city jurisdictions of Chula Vista, Coronado, Imperial Beach, National City, and San Diego in 2019, summarized in **Table 2.17**, are input into the REMI TranSight model as changes in 'local government spending', assuming the funds collected are spent by the local government and are not used to fill a gap in the five-member cities' budgets. Using the REMI TranSight model, this analysis measures the total (combined direct, indirect, and induced) economic impact that the additional local government spending had in the economy of San Diego County and the spillover impacts in the rest of California and the U.S. in 2019.

It should be noted that the estimation of the tax revenue in this analysis relied on reported sales from concession rent tenants. Since reported sales from fixed rent tenants were not available at the time this analysis was conducted, the outcome of this analysis is considered conservative because it does not include tax revenue from sales from fixed rent tenants.

Table 2.17 District—Tax Revenue by Source, Calendar Year (CY) 2018 to CY2021

Tax Type	CY2019 (in Millions of U.S. Dollars)	REMI Policy Variable
Property Tax	\$42,061,918	Local Government Spending
Sales Tax	\$7,668,508	Local Government Spending
Transient Occupancy Tax	\$58,049,377	Local Government Spending
Total	\$107,779,802	

Sources: Cambridge Systematics Analysis, San Diego Port District, Interviews with the District's Five-Member Cities in April – May 2022, SANDAG Geographic Information System (GIS) Database, and San Diego Assessor website.

3.0 Total Economic Impacts

This section documents the total (combined direct, indirect, and induced) economic impacts resulting from the District enterprise (i.e., direct spending from all the District-related activities) in 2019 and the District tenants' activities within each of the four sectors of interest, including maritime trade and cargo handling activities, industrial and warehousing activities, cruise industry activities, and tourism and commercial enterprises, in 2019. The total economic impacts are presented by geography and for each of the District activities.

This section also presents the potential economic impacts from tax revenues generated by the District tenants in 2019 assuming the local governments spent these funds in the District's five-member cities of Chula Vista, Coronado, Imperial Beach, National City, and San Diego.

3.1 District Economic Impacts

The total (combined direct, indirect, and induced) economic impacts of the District by geography in 2019 are shown in **Table 3.1**. The results indicate the following:

- In 2019, the District supported 64,410 jobs in San Diego County, which represented 49 percent of the total jobs attributable to the District. These jobs added \$4.0 billion in personal income, \$5.4 billion in GRP, and \$9.2 billion in economic output to San Diego County.
- In 2019, the District supported 110,390 jobs in the Southern California region, which represented 85 percent of the total jobs attributable to the District. These jobs added \$7.4 billion in personal income, \$10.5 billion in GRP, and \$19.7 billion in economic output to the Southern California region.
- In 2019, the District supported 114,530 jobs in California, which represented 88 percent of the total jobs attributable to the District. These jobs added \$7.7 billion in personal income, \$11.1 billion in GRP, and \$20.9 billion in economic output to the State.
- Overall, the District supported a total of 130,590 jobs, which added \$7.9 billion in personal income, \$13.1 billion in GRP, and \$24.5 billion in economic output in 2019.

Table 3.1 Total (Combined Direct, Indirect, and Induced) Economic Impacts of the San Diego Unified Port District by Geography, 2019

Geography	Job Impacts Attributable to the District	Personal Income Impacts Attributable to the District (Millions of 2019 Dollars)	Gross Regional Product Impacts Attributable to the District (Millions of 2019 Dollars)	Economic Output Impacts Attributable to the District (Millions of 2019 Dollars)
San Diego County	64,410	\$3,983	\$5,366	\$9,237
San Diego Neighboring Counties	45,980	\$3,435	\$5,169	\$10,562
Southern California Region	110,390	\$7,418	\$10,535	\$19,799
Rest of California	4,140	\$321	\$591	\$1,052
California	114,530	\$7,739	\$11,126	\$20,851
Rest of U.S.	16,060	\$193	\$1,955	\$3,788
Total Economic Impacts	130,590	\$7,932	\$13,081	\$24,639

Geography	Distribution of Job Impacts Attributable to the District	Distribution of Personal Income Impacts Attributable to the District (%)	Distribution of Gross Regional Product Impacts Attributable to the District (%)	Distribution of Economic Output Impacts Attributable to the District (%)
San Diego County	49%	50%	41%	37%
San Diego Neighboring Counties	36%	44%	40%	43%
Southern California Region	85%	94%	81%	80%
Rest of California	3%	4%	4%	5%
California	88%	98%	85%	85%
Rest of U.S.	12%	2%	15%	15%
Total Economic Impacts	100%	100%	100%	100%

Source: Outputs from the REMI TranSight model for SANDAG Regions.

Notes: 1) San Diego neighboring counties include Riverside, Orange, Los Angeles, San Bernardino, and Imperial; 2) Southern California Region includes San Diego, Riverside, Orange, Los Angeles, San Bernardino, and Imperial Counties; and 3) The percentages indicate the percent of the District's total economic impact by geography. For example, of the 130,590 jobs that the District supported in 2019, 88% of them were in California.

The total (combined direct, indirect and induced) economic impacts of the District by each sector of interest and the Port District itself (or District enterprise) in 2019 are shown in **Table 3.2**. The tourism and commercial activities generated 51 percent of the total jobs attributable to the District (or 66,560 new jobs); 42 percent of the total personal income attributable to the District (or \$3.3 billion); 43 percent of the total GRP attributable to the District (or \$5.7 billion); and 39 percent of the total economic output attributable to the District (or \$9.7 billion).

Table 3.2 Total (Combined Direct, Indirect, and Induced) Economic Impacts of the San Diego Unified Port District by District Activity, 2019

District Activity	Job Impacts Attributable to the District	Personal Income Impacts Attributable to the District (Millions of 2019 Dollars)	Gross Regional Product Impacts Attributable to the District (Millions of 2019 Dollars)	Economic Output Impacts Attributable to the District (Millions of 2019 Dollars)
Tourism and Commercial Industry Activities	66,560	\$3,309	\$5,679	\$9,696
Industrial and Wholesale Industry Activities	27,460	\$2,213	\$3,316	\$6,668
Maritime Trade and Cargo Handling Industry Activities	24,710	\$1,613	\$2,801	\$5,800
Cruise Industry Activities	7,950	\$501	\$875	\$1,793
District Enterprise	3,910	\$296	\$410	\$682
Total Economic Impacts	130,590	\$7,932	\$13,081	\$24,639

Source: Outputs from the REMI TranSight model for SANDAG Regions.

The total (combined direct, indirect, and induced) economic impacts from direct spending by Port Tidelands hotel visitors, cruise ship crew, onshore cruise passengers, and the cruise industry (due to cruise passenger traffic at the Port of San Diego) in 2019 are shown in **Table 3.3**. The results indicate the following:

- The direct spending by Port Tidelands hotel visitors contributed with between 56 percent and 57 percent of the total economic impacts generated by the tourism and commercial activities in 2019.
- The direct spending by the cruise ship crew, onshore cruise passengers, and the cruise industry (due to cruise passenger traffic at the Port of San Diego) contributed with between 3 percent and 4 percent of the total economic impacts generated by the tourism and commercial activities in 2019.

Table 3.3 Snapshot of the Total Economic Impacts Generated by Direct Spending by Port Tidelands Hotel Visitors, Cruise Ship Crew, Onshore Cruise Passengers, and the Cruise Industry, 2019

Total Economic Impact Resulting from:	Job Impacts	Personal Income Impacts (Millions of 2019 Dollars)	Gross Regional Product Impacts (Millions of 2019 Dollars)	Economic Output Impacts (Millions of 2019 Dollars)
Tourism and Commercial Industry Activities = (a)	66,560	\$3,309	\$5,679	\$9,696
Direct Spending by Tideland Hotel Visitors in San Diego = (b)	37,370	\$1,841	\$3,236	\$5,562
Direct Spending by Tideland Hotel Visitors in San Diego = (b) / (a)	56%	56%	57%	57%

Total Economic Impact Resulting from:	Job Impacts	Personal Income Impacts (Millions of 2019 Dollars)	Gross Regional Product Impacts (Millions of 2019 Dollars)	Economic Output Impacts (Millions of 2019 Dollars)
Direct Spending by Cruise Ship Crew, Onshore Cruise Passengers, and Cruise Industry = (c)	2,250	\$109	\$197	\$356
Direct Spending by Cruise Activities = (c) / (a)	3%	3%	3%	4%

Source: Outputs from the REMI TranSight model for SANDAG Regions.

The total (combined direct, indirect, and induced) economic impacts of the District to San Diego County by sector of interest and the Port District itself (or District enterprise) in 2019 are shown in **Table 3.4**. The results indicate the following:

- In 2019, the District contributed 3.0 percent to San Diego County jobs (i.e., one in 30 jobs in San Diego County was supported by the District), 1.9 percent to San Diego County personal income, 2.2 percent to San Diego County GRP, and 2.3 percent to San Diego County economic output.
- The tourism and commercial activities on Port Tideland supported nearly 53,000 jobs (or 82 percent of the total jobs attributable to the District) in 2019. These jobs generated \$2.7 billion in personal income (or 68 percent of the total personal income attributable to the District), \$4.1 billion in GRP (or 76 percent of the total GRP attributable to the District), and \$6.7 billion in economic output (or 72 percent of the total economic output attributable to the District) in 2019.

Table 3.4 Total (Combined Direct, Indirect, and Induced) Economic Impacts of the San Diego Unified Port District to San Diego County, 2019

District Activity	Job Impacts Attributable to the District	Personal Income Impacts Attributable to the District (Millions of 2019 Dollars)	Gross Regional Product Impacts Attributable to the District (Millions of 2019 Dollars)	Economic Output Impacts Attributable to the District (Millions of 2019 Dollars)
Tourism and Commercial Industry	52,990	\$2,711	\$4,063	\$6,694
Industrial and Wholesale Industry	8,570	\$1,030	\$1,030	\$2,087
Maritime Trade and Cargo Handling	350	\$26	\$38	\$64
Cruise Industry	110	\$8	\$11	\$20
District Enterprise	2,390	\$208	\$224	\$372
Total Economic Contribution = (a)	64,410	\$3,983	\$5,366	\$9,237
San Diego County, 2019 (b)	2,158,421	\$204,973	\$246,731	\$409,329
Total Economic Contribution as a Share of San Diego County Economy, 2019 = (a)/(b)	3.0%	1.9%	2.2%	2.3%

Source: Outputs from the REMI TranSight model for SANDAG Regions.

The jobs multipliers by geography and District activity (i.e., the District enterprise and the four sectors of interest) are shown in **Table 3.5** and **Table 3.6**, respectively. These jobs multipliers reveal the following:

- Every direct job created by the District, or the sectors of interest, supports one additional job (in other industries) in San Diego County and two additional jobs (in other industries) in San Diego neighboring counties. At the regional level, every direct job created by the District, or the sectors of interest, supports two additional jobs (in other industries) in Southern California.
- Among the sectors of interest, the cruise industry and the maritime trade and cargo-handling industry yield the highest jobs multipliers. Every direct job created by the cruise industry supports 16 jobs (in other industries) while every direct job created by the maritime trade and cargo-handling industry supports 12 jobs (in other industries). These 12 to 16 jobs are located across San Diego County, the rest of California, and the rest of U.S.
- Every direct job at the District supports 6 additional jobs (in other industries). These 6 jobs are located across San Diego County, the rest of California, and the rest of U.S.

Table 3.5 San Diego Unified Port District —Jobs Multipliers by Geography, 2019

Geography	Direct Jobs	Total (Direct, Indirect, and Induced) Job Impacts	Jobs Multiplier
San Diego County	26,389	64,410	2
San Diego Neighboring Counties	13,154	45,980	3
Southern California Region	39,543	110,390	3

Source: Outputs from the REMI TranSight model for SANDAG Regions and Cambridge Systematic Analysis.

Table 3.6 San Diego Unified Port District —Jobs Multipliers of the District Enterprise and the Four Sectors of Interest, 2019

District Activity	Direct Jobs	Total (Direct, Indirect, and Induced) Job Impacts	Jobs Multiplier
Tourism and Commercial Industry	30,110	66,560	2
Industrial and Wholesale Industry	6,557	27,460	4
Maritime Trade and Cargo Handling	1,846	24,710	13
Cruise Industry	474	7,950	17
District Enterprise	556	3,910	7

Source: Outputs from the REMI TranSight model for SANDAG Regions and Cambridge Systematic Analysis.

3.2 Tax Revenue Impacts

The total (combined direct, indirect and induced) economic impacts from tax revenues from the District tenants in 2019 are summarized in **Table 3.7**. If the tax revenue generated by the District tenants are spent

by the local governments of Chula Vista, Coronado, Imperial Beach, National City, and San Diego cities, these expenditures would support 1,930 additional jobs in San Diego County. These new jobs would add \$136 million in personal income, \$173 million in GRP, and \$289 million in economic output to San Diego County.

Table 3.7 Total (Combined Direct, Indirect and Induced) Economic Impacts from Tax Revenue Generated by District Properties Taxes, Sales Taxes, and Transient Occupancy Taxes, 2019

Region	Job Impacts	Personal Income Impacts (Millions of 2019 Dollars)	Gross Regional Product Impacts (Millions of 2019 Dollars)	Economic Output Impacts (Millions of 2019 Dollars)
San Diego County	1,930	\$136	\$173	\$289

Source: Outputs from the REMI TranSight model for SANDAG Regions.

Notes: This analysis assumes that the tax revenue collected are spent by the local government and are not used to fill a gap in the five-member cities budgets.

Appendix A. Regions in the REMI TranSight Model

Table A.1 below lists the regions in the REMI TranSight model.

Table A.1 Regions in the REMI TranSight Model

Regions	
1	San Diego County
2	Los Angeles County
3	Orange County
4	Riverside County
5	San Bernardino County
6	Imperial County
7	Ventura County
8	Alameda County
9	Contra Costa County
10	Marin County
11	Napa County
12	San Francisco County
13	San Mateo County
14	Santa Clara County
15	Solano County
16	Sonoma County
17	Sacramento Area Council of Governments (SACOG)
18	San Joaquin Council of Governments (SJCOG)
19	Central Valley Small Neighbors
20	Association of Monterey Bay Area Governments (AMBAG)
21	North San Francisco Bay Area (SFBA) Border
22	Rest of California
23	Rest of U.S.

Appendix B. REMI Industries

Table B.1 below highlights the relevant NAICS Industries and sub-industries utilized in the REMI TranSight model, along with the corresponding NAICS industry code.

Table B.1 NAICS Industries and Sub-Industries from REMI Along with the Associated NAICS Industry Code

NAICS Industry Description (Code)	REMI Industry
Agriculture, Forestry, Fishing, and Hunting (NAICS 11)	<ul style="list-style-type: none"> • Forestry and Logging; Fishing, Hunting, and Trapping • Support Activities for Agriculture and Forestry • Farm
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	<ul style="list-style-type: none"> • Oil and Gas Extraction • Mining (except Oil and Gas) • Support Activities for Mining
Utilities (NAICS 22)	<ul style="list-style-type: none"> • Utilities
Construction (NAICS 23)	<ul style="list-style-type: none"> • Construction
Manufacturing (NAICS 31 – 33)	<ul style="list-style-type: none"> • Wood Product Manufacturing • Nonmetallic Mineral Product Manufacturing • Primary Metal Manufacturing • Fabricated Metal Product Manufacturing • Machinery Manufacturing • Computer and Electronic Product Manufacturing • Electrical Equipment, Appliance, and Component Manufacturing • Motor Vehicles, Bodies And Trailers, and Parts Manufacturing • Other Transportation Equipment Manufacturing • Furniture and Related Product Manufacturing • Miscellaneous Manufacturing • Food Manufacturing • Beverage and Tobacco Product Manufacturing • Textile Mills; Textile Product Mills • Apparel Manufacturing; Leather and Allied Product Manufacturing • Paper Manufacturing • Printing and Related Support Activities • Petroleum and Coal Products Manufacturing • Chemical Manufacturing • Plastics and Rubber Products Manufacturing
Wholesale Trade (NAICS 42)	<ul style="list-style-type: none"> • Wholesale Trade
Retail Trade (NAICS 44 – 45)	<ul style="list-style-type: none"> • Retail Trade

NAICS Industry Description (Code)	REMI Industry
Transportation and Warehousing (NAICS 48 – 49)	<ul style="list-style-type: none"> • Air Transportation • Rail Transportation • Water Transportation • Truck Transportation • Couriers and Messengers • Transit and Ground Passenger Transportation • Pipeline Transportation • Scenic and Sightseeing Transportation; Support Activities for Transportation • Warehousing and Storage
Information (NAICS 51)	<ul style="list-style-type: none"> • Publishing Industries, except Internet • Motion Picture and Sound Recording Industries • Data Processing, Hosting, and Related Services; Other Information Services • Broadcasting, except Internet • Telecommunications
Finance and insurance (NAICS 52)	<ul style="list-style-type: none"> • Monetary Authorities—Central Bank; Credit Intermediation and Related Activities • Securities, Commodity Contracts, Other Investments; Funds, Trusts, Other Financial Vehicles • Insurance Carriers and Related Activities
Real Estate and Rental and Leasing (NAICS 53)	<ul style="list-style-type: none"> • Rental and Leasing Services; Lessors of Nonfinancial Intangible Assets
Professional, Scientific, and Technical Services (NAICS 54)	<ul style="list-style-type: none"> • Professional, Scientific, and Technical Services
Management of Companies and Enterprises (NAICS 55)	<ul style="list-style-type: none"> • Management of Companies and Enterprises
Administrative, support, waste management, and remediation services (NAICS 56)	<ul style="list-style-type: none"> • Administrative, Support, Waste Management, and Remediation Services • Administrative and Support Services • Waste Management and Remediation Services
Educational Services (NAICS 61)	<ul style="list-style-type: none"> • Educational Services; Private
Health Care and Social Assistance (NAICS 62)	<ul style="list-style-type: none"> • Ambulatory Health Care Services • Hospitals; Private • Nursing and Residential Care Facilities • Social Assistance
Arts, Entertainment, and Recreation (NAICS 71)	<ul style="list-style-type: none"> • Performing Arts, Spectator Sports, and Related Industries • Museums, Historical Sites, and Similar Institutions • Amusement, Gambling, and Recreation Industries
Accommodation and Food Services (NAICS 72)	<ul style="list-style-type: none"> • Accommodation • Food Services and Drinking Places

NAICS Industry Description (Code)

REMI Industry

Other Services (Except Public Administration)
(NAICS 81)

- Repair and Maintenance
- Personal and Laundry Services
- Religious, Grantmaking, Civic, Professional, and Similar Organizations
- Private Households

Public Administration (NAICS 92)

- State Government
 - Local Government
 - Federal Civilian
 - Federal Military
-