

# Economic Impacts of the San Diego Unified Port District in FY2023

## Summary

**San Diego Unified Port District**

prepared by

**Cambridge Systematics, Inc.**

*executive summary*

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# Executive Summary

## Study Purpose

The San Diego Unified Port District (Port), a public benefit corporation and government agency, manages approximately 2,400 acres of land and almost 12,000 acres of submerged lands<sup>1</sup> 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 jurisdiction over 34 of the 54 total miles along the San Diego Bay waterfront, the Port 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 Port as a trustee of the State.

The Port is a vital economic engine for the San Diego region, generating jobs and strengthening the local economy. Public support for necessary investments is critical and will be based largely on the perceived benefits to and importance of the Port in the region's economy. This study serves as a comprehensive economic impact analysis to determine the magnitude of the economic activities on the Port in 2023. The results of this study will serve as the foundation for communication with the public, media, and elected officials about the critical role the Port plays in the economy of its member cities, San Diego County, the Southern California region, the State of California, and the entire Nation.

## Port Benefits

### *Enterprise Benefits*

The Port provides economic vitality and public benefit by balancing the interests of the maritime industry, tourism, water and land recreation, environmental stewardship, and public safety. The presence of the Port itself contributes to the regional economy. The Port generates employment and purchases goods and services from local, regional, national, and international firms. It can be assumed that without the Port, the region would lose the benefits generated by its economic activities. Based on Port employment and compensation data, and operations, maintenance, and capital spending, this analysis measures the enterprise effects of the Port.

### *Sectors of Interest*

The industries located on the Port that most significantly drive demand for marine cargo, visitors, passengers, and freight transportation and services—and generate vital economic activity in the Port—are grouped in the following four sectors of interest:

1. Maritime trade and cargo handling
2. Industrial and wholesale

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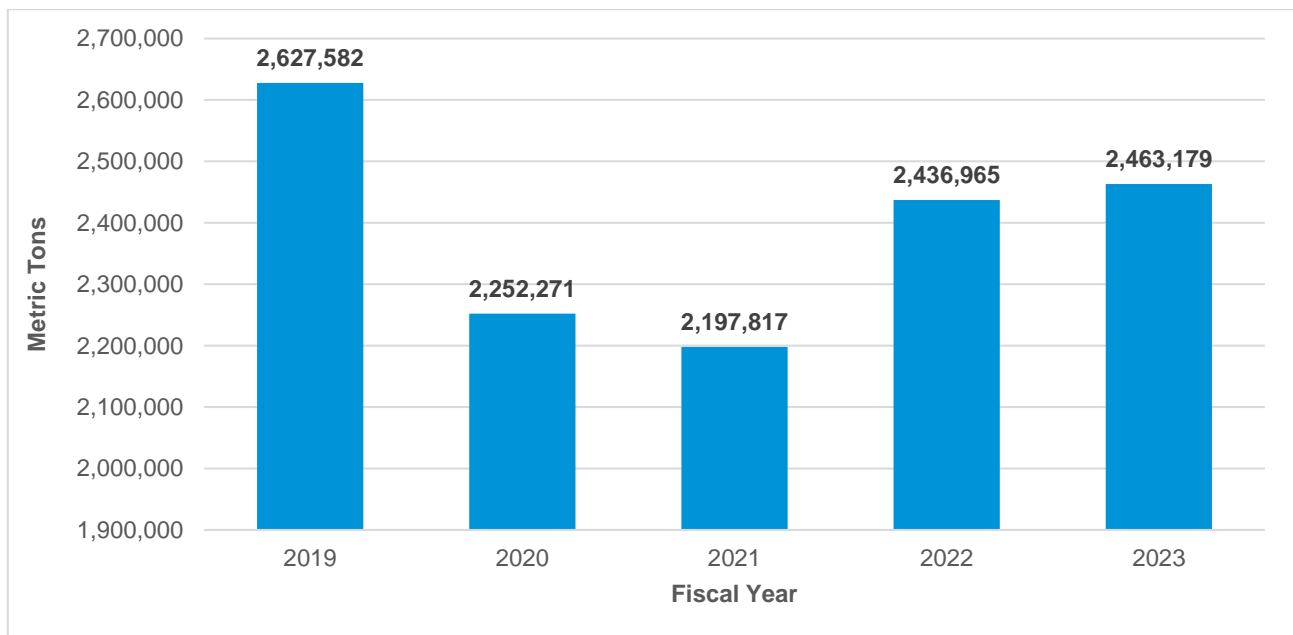
<sup>1</sup> On January 1, 2020, approximately 8,300 additional acres of submerged lands were transferred to the Port of San Diego per California State Senate Bill 507, which have not yet been incorporated into the Port's Master Plan.

3. Cruise industry
4. Tourism and commercial industry

### Maritime Trade and Cargo-Handling Activities on the Port

The Port of San Diego is the fourth largest port in California and one of 18 commercial strategic ports in the U.S.<sup>2</sup> By fiscal year 2023 (FY 2023), marine cargo that moved through the Port of San Diego had partially rebounded from pre-pandemic levels (**Figure S.1**). A total of nearly 2.5 million tons was shipped through the Port in FY 2023 which represented a decrease of 6 percent compared with FY 2019.<sup>3</sup>

**Figure S.1 Total Marine Cargo Tonnage Moved by the Port of San Diego, FY2019 to FY2023**



Source: Data provided by the San Diego Unified Port District.

Note: Marine cargo tons shown in this chart include minimum annual guarantee (MAG) tonnage.

Maritime trade and cargo-handling users are contained within the **Tenth Avenue Marine Terminal (TAMT)** and the **National City Marine Terminal (NCMT)**. TAMT is located in the City of San Diego. This terminal is the Port’s omni-terminal, where refrigerated containers, break-bulk, and bulk cargoes are handled. TAMT also features an on-dock cold storage facility, providing approximately 300,000 square feet of temperature-controlled storage and cargo handling. TAMT also has ample open space and flexibility to efficiently handle noncontainerized cargo. NCMT is located on the National City waterfront in southern San Diego Bay and is the Port’s “roll-on, roll-off” (Ro-Ro) cargo terminal. NCMT is home to auto processor, Pasha Automotive Services. NCMT serves as the primary port of entry for one out of every 10 new foreign cars shipped to the United States. NCMT also is located 10 miles from the U.S.–Mexico border and provides on-dock rail and

<sup>2</sup> Port of San Diego. Cargo and Trade, <https://www.portofsandiego.org/maritime/cargo-and-trade>.

<sup>3</sup> San Diego Unified Port District.

access to nearby regional freeways. The Port is committed to supporting its Maritime Clean Air Strategy (MCAS) and has focused efforts on increasing shore power systems at both TAMT and NCMT.<sup>4</sup> The Maritime Clean Air Strategy includes 34 objectives to reduce emissions and improve air quality in and around the Port. Nineteen of these objectives go beyond or seek action prior to regulatory requirements. To date, the Port has committed over \$60M to advance electrification projects. These efforts aim to reduce the Port's emissions, improve air quality, improve productivity, improve public health, and contribute to health cost savings which may be reinvested into the local economy improving local economic resilience in both the short and long term.

The Port of San Diego's [Maritime Clean Air Strategy](#) (MCAS) offers significant environmental, public health, and economic benefits by prioritizing the reduction of air pollution and the promotion of sustainable maritime practices. By implementing advanced emission control technologies and enhancing energy efficiency across maritime operations, the MCAS not only contributes to improved public health and environmental quality, which encourages significant reinvestment into the local economy, but also drives economic growth through the creation of green jobs and the attraction of environmentally conscious businesses. The Port's commitment to sustainability positions it as a leader in integrating natural capital into economic planning, supporting holistic decision making on port tidelands and enhancing long-term regional prosperity.

The Port is interested in aligning the MCAS and environmental-economic accounting efforts with national and state strategies, reports, and standards, such as the December 2023 White House Press Release: [Advancing the Frontiers in Benefit-Cost Analysis](#), and the accompanying report, [Advancing the Frontiers of Benefit Cost Analysis: Federal Priorities and Directions for Future Research](#). Additionally, the January 2023 White House Fact Sheet: [National Strategy to Put Nature on the Nation's Balance Sheet](#), and the [Full Report](#) on developing statistics for environmental-economic decisions, provide a framework that the Port are aligning with at the local agency level. These initiatives underscore the importance of incorporating environmental and public health benefits into economic assessments, which is a cornerstone of the MCAS.

The cargo handled at the NCMT includes domestic coastwise cargo to and from Hawaii, international original equipment manufacturer automobile imports and exports, and coastwise lumber and other large project cargo. The Pasha Group is the current NCMT terminal operator for the automobile imports and exports (Pasha Automotive Services) and domestic Hawaii service (Pasha Hawaii Transport Line) and is the carrier for the Hawaii service.

Pasha's state-of-the art automotive terminal at the NCMT can process up to 400,000 vehicles annually<sup>5</sup> and its post-production facilities for paint and body repair have become the model for new Pasha automotive processing centers.<sup>6</sup> The number of tons and vehicles processed by Pasha Automotive Services has not yet rebounded to pre COVID-19 pandemic levels (**Figure S.2**). In FY 2023, Pasha Automotive Services handled over 570,000 metric tons of vehicles (including automobiles, commercial vehicles, and trailers), or 8.4 percent more tonnage compared to FY 2022 but 24 percent less tonnage compared to FY 2019. Over 362,000 automobiles were shipped through the Port of San Diego in FY 2023, an increase of 5.2 percent compared to FY 2022, but a reduction of 30 percent compared to FY 2019.

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<sup>4</sup> San Diego Unified Port District.

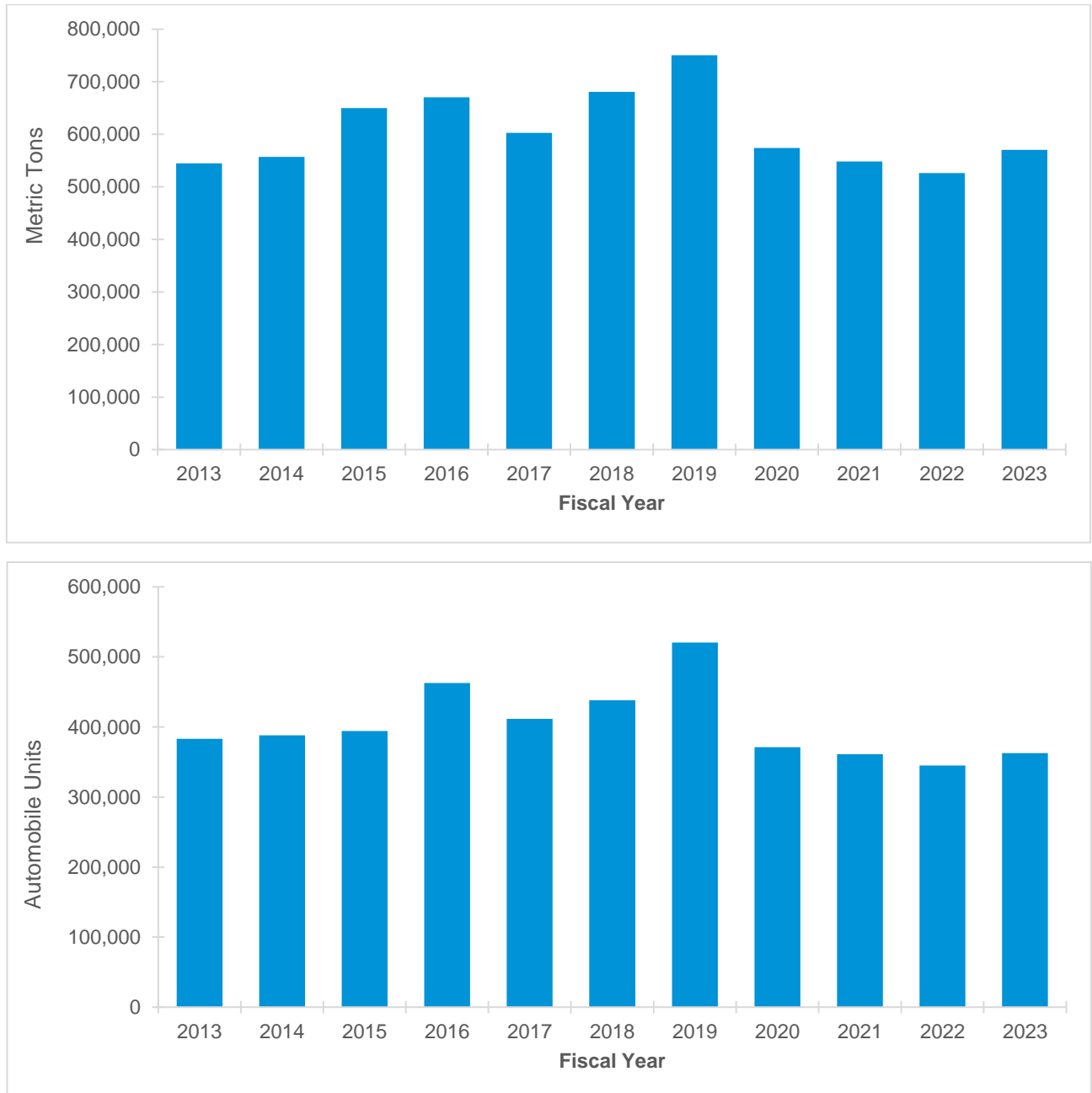
<sup>5</sup> The Pasha Group. [Pasha Automotive Services | Pasha Group](#)

<sup>6</sup> The Pasha Group Company History Timeline, <https://www.zippia.com/pasha-group-careers-41398/history/>.



Pasha Hawaii Transport Line provides specialized vehicle, container, and oversize cargo transport services between NCMT and Hawaii. Vehicles and parts, moved by Pasha Group, comprise over 90 percent of total tonnage flowing between Hawaii and the Port of San Diego and over 20 percent of total vehicles and parts tonnage moved by the Port.

**Figure S.2 Vehicles Moved by the Port of San Diego, FY2013 to FY2023**



Source: Data provided by the San Diego Unified Port District.

Note: Marine cargo tons shown in these charts include minimum annual guarantee (MAG) tonnage.

## Industrial and Wholesale Activities on Port Tidelands

Major Port industrial users include shipbuilding and boat building and repair businesses, such as National Steel and Shipbuilding Company (NASSCO), BAE Systems Ship Repair, and Continental Maritime of San Diego. The shipyards along the working waterfront work with their suppliers to build, repair, and maintain commercial and U.S. Navy vessels. Port industrial users also include Solar Turbines Incorporated, which designs and manufactures industrial gas turbines; International Materials, Inc., which is a bulk raw material trading company that serves the steel market through the products it ships; and CP Kelco U.S. Inc., which is engaged in manufacturing nature-based food products that have a variety of applications.

Also, major wholesale businesses are located on the Port because of their vital connection to the shipping and cargo industry. These businesses provide warehousing and storage of perishable goods (e.g., Dole Fresh Fruit Company); wholesale lumber storage and distribution (e.g., Dixieline ProBuild Company, LLC); wholesale distribution of petroleum and petroleum products (e.g., Pepper Oil Company, Inc.); and wholesale fueling services (e.g., High Seas Fuel Dock).

Containers and liquid bulk cargo shipped through the Port have steadily risen in the last decade. From FY 2013 to FY 2023, container cargo tonnage has increased by 62 percent while liquid bulk commodity tonnage has increased by 41 percent.<sup>7</sup> Container volume places the Port as 35<sup>th</sup> in the Nation for total loaded container traffic.<sup>8</sup> Dole Fresh Fruit Company receives the majority of these with about 50,000 containers of fruits and vegetables a year at the Port of San Diego, with bananas and plantains representing 34 percent of total port tonnage.<sup>9</sup>

**Figure S.3** provides a closer overview of Port of San Diego volume trends with respect to containerized and noncontainerized commodities, except vehicles, over the last five fiscal years. Examples of break cargo moved through the Port include brewery equipment, engines, generators, lumber, propellers, steel, turbines, tanks, wind turbine components, and yachts.<sup>10</sup> Examples of dry bulk cargo moved through the Port include bauxite, cement, fertilizer, sand, soda ash, and sugar. Examples of liquid bulk cargo moved through the Port includes fuel for airplanes and vessels. The Port of San Diego also handles refrigerated cargo which include produce, frozen goods, temperature-controlled equipment, and other perishables. By FY 2023, the Port of San Diego reported tonnage growth of 53 percent in liquid bulk cargo, 44 percent in break bulk cargo, and 16 percent in container cargo compared to FY 2019.<sup>11</sup> In contrast, the dry bulk cargo tonnage shipped through the Port of San Diego decreased by 24 percent in FY 2023 compared to FY 2019.

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<sup>7</sup> Cambridge Systematics Analysis based on the maritime cargo data provided by the San Diego Unified Port District.

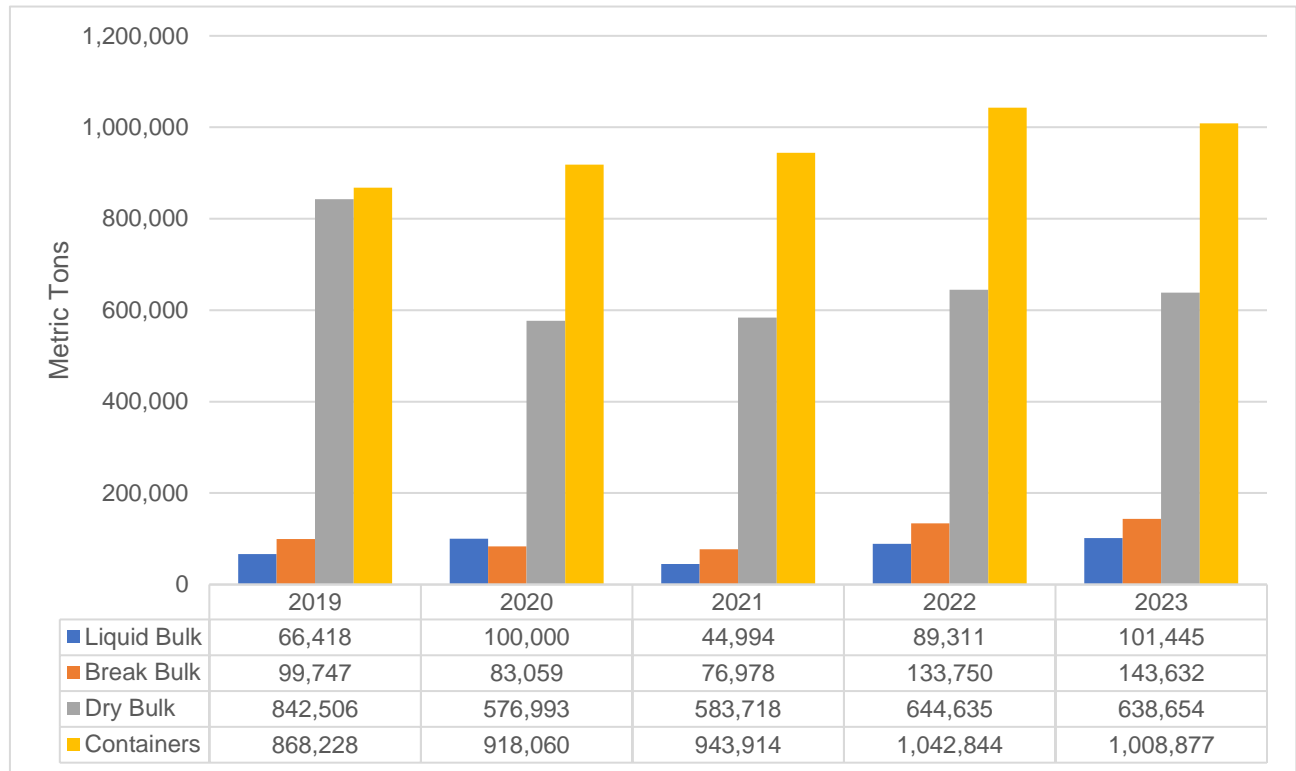
<sup>8</sup> U.S. Army Corps of Engineers.

<sup>9</sup> 3 Things the Port Brings In, Joel Hoffmann. Voice of San Diego, January 2, 2014. <https://voiceofsandiego.org/2014/01/02/3-things-the-port-brings-in/>.

<sup>10</sup> San Diego Unified Port District.

<sup>11</sup> Liquid bulk is primarily used as fuel for San Diego International Airport and vessels calling to Port.

**Figure S.3 Break Bulk, Dry Bulk, Liquid Bulk and Containers Moved by the Port of San Diego, FY2019 to FY2023**



Source: San Diego Unified Port District.

Note: Marine cargo tons shown in this chart include minimum annual guarantee (MAG) tonnage.

### Cruise Industry Activities on the Port

The cruise industry is a vital component of the Port of San Diego’s offerings and supports a significant amount of economic activity in the region as well as in the State of California. Cruises departing from San Diego typically visit the west coast of Mexico or travel up the California coastline to British Columbia. Several longer cruises (14 nights or more) also include itineraries to Hawaii, the South Pacific, or Australia.

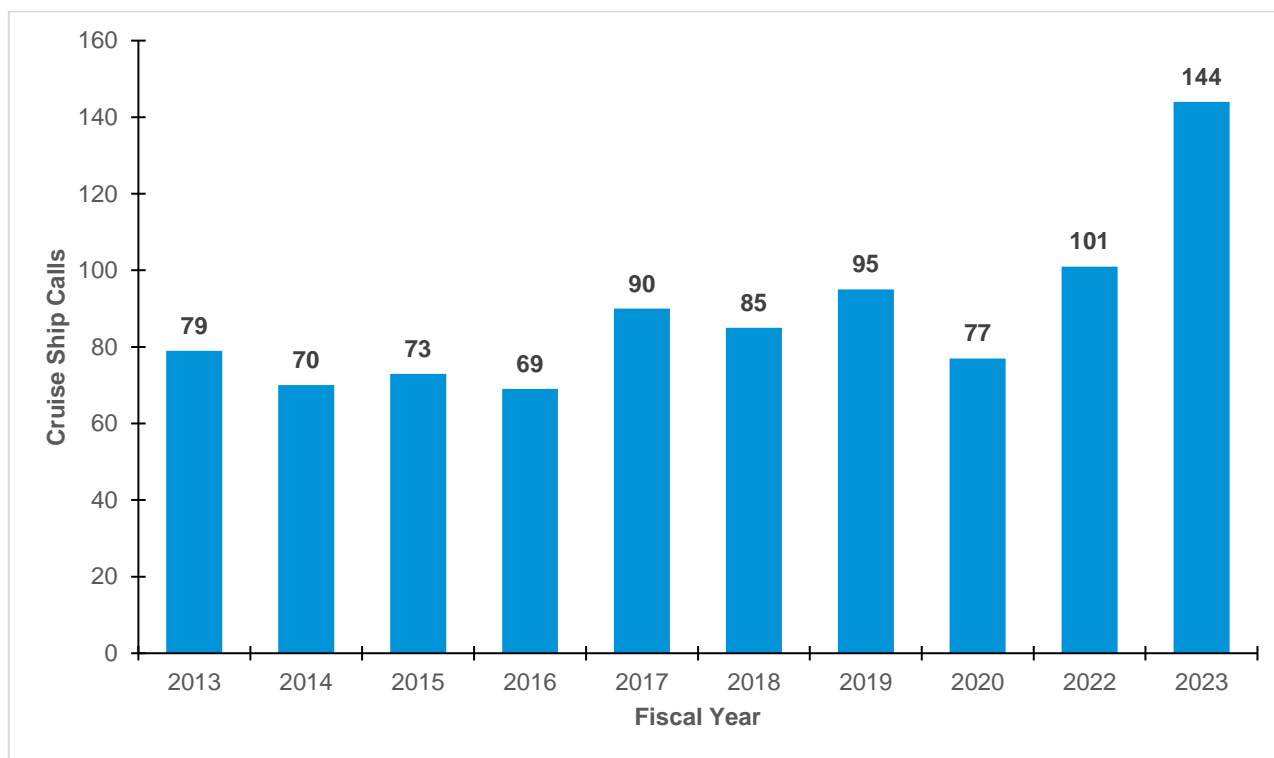
Cruise ship operations are contained within the City of San Diego. The Port’s two cruise ship terminals are located on the Embarcadero, a two-mile stretch of the downtown San Diego waterfront offering dining, shopping, lodging, museums, and attractions. The majority of cruise ships dock at the larger pier, the **B-Street Pier & Cruise Ship Terminal**. The second terminal, the **Port Pavilion on Broadway Pier**, handles cruise ships and is a venue for special events and public waterfront access with a restaurant, visitor center, and public plaza. Due to the flexible nature of cruise ship itineraries, the cruise lines and ships that call the Port each year may vary.

Major cruise lines serving the Port of San Diego’s two cruise ship terminals includes Holland America Line, Disney Cruise Line, Princess Cruises, Celebrity Cruises, and Norwegian Cruise Line.<sup>12</sup> Despite the significant challenges the cruise industry has faced due to the COVID-19 pandemic that started in December 2019, the number of cruise ship calls at the Port of San Diego has rebounded and exceeded pre-pandemic

<sup>12</sup> San Diego Unified Port District.

levels in the last two fiscal years (**Figure S.4**). By FY 2023, the number of cruise ship calls increased by 52 percent compared to pre-pandemic (2019) cruise calls. Cruise calls reached a peak of 144 ships in FY 2023 before consistently ranging between 69 and 101 cruise calls per year in the last decade. It is important to note that due to the COVID-19 pandemic, cruises stopped sailing from the United States in March 2020 and did not resume sailing from the Port of San Diego's cruise ship terminals until October 2021.

**Figure S.4 Annual Count of Cruise Ship Calls at the Port of San Diego, FY2013 to FY2023**

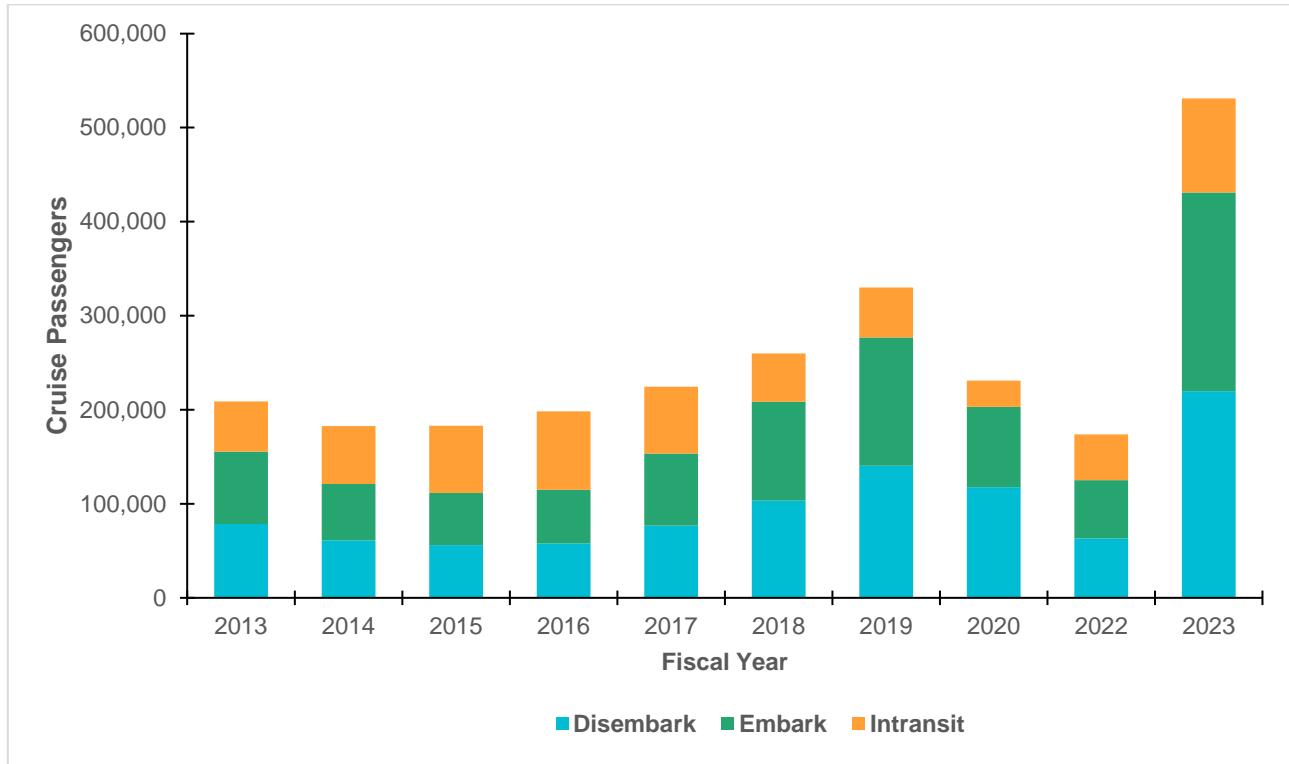


Source: San Diego Unified Port District

Over the last decade, the arrival of these cruise ships has resulted in an average of 254,000 passengers passing through the Port of San Diego on an annual basis (**Figure S.5**). Between FY 2014 and FY 2019, there was an 80 percent increase in cruise ship passengers. Further cruise ship passenger growth in FY 2020 and FY 2021 was hampered by ongoing impacts of COVID-19. But in FY 2023 this trend reversed and cruise passenger volume at the Port of San Diego exceeded pre-pandemic levels.<sup>13</sup> Between FY 2019 and FY 2023, there was a 61 percent increase in cruise ship passengers (from 330,073 passengers in FY 2019 to 531,130 passengers in FY 2023), with disembarking and embarking passengers comprising 41 percent and 40 percent, respectively, and intransit passengers comprising the remaining 19 percent.

<sup>13</sup> The Port of San Diego handled 900,000 passengers in 2008.

**Figure S.5 Annual Cruise Passenger Throughput at the Port of San Diego, FY2013 to FY2023**



Source: San Diego Unified Port District.

**Table S.1** shows ocean passenger volume in 2019 and 2023 by region and the Port of San Diego. In 2023, ocean cruise passengers volume worldwide reached 31.7 million, exceeding pre-pandemic levels (or 29.7 million).<sup>14</sup> Despite the fact that the cruise ship industry has been affected by the COVID-19 pandemic, 27 percent of cruise passengers worldwide over the past two years were new-to-cruise.<sup>15</sup> Among the regions, North America leads with 18.1 million passengers in 2023 or a 17.5 percent increase compared to 2019. The 2023 cruise industry statistics also suggest that the number of ocean cruise passengers at the Port of San Diego has rebounded faster than the overall North American region. By FY 2023, cruise passengers passing through the Port of San Diego reached 161 percent of FY 2019 levels.

<sup>14</sup> Cruise Lines International Association. State of the Cruise Industry Report. April 2024.

<sup>15</sup> Cruise Lines International Association. State of the Cruise Industry Report. April 2024.

**Table S.1 Cruise Passenger Volumes by Region, 2019 and 2023**

Region	2019	2023	Growth Rate (2019 to 2023)
Global	29.7 million	31.7 million	6.8%
North America	15.4 million	18.1 million	17.5%
<b>Port of San Diego*</b>	330 k	531 k	60.9%
Europe	7.7 million	8.2 million	6.5%
Asia	3.7 million	2.3 million	-37.7%
Australasia	1.35 million	1.34 million	-1.0%
South America	935 k	996 k	6.5%

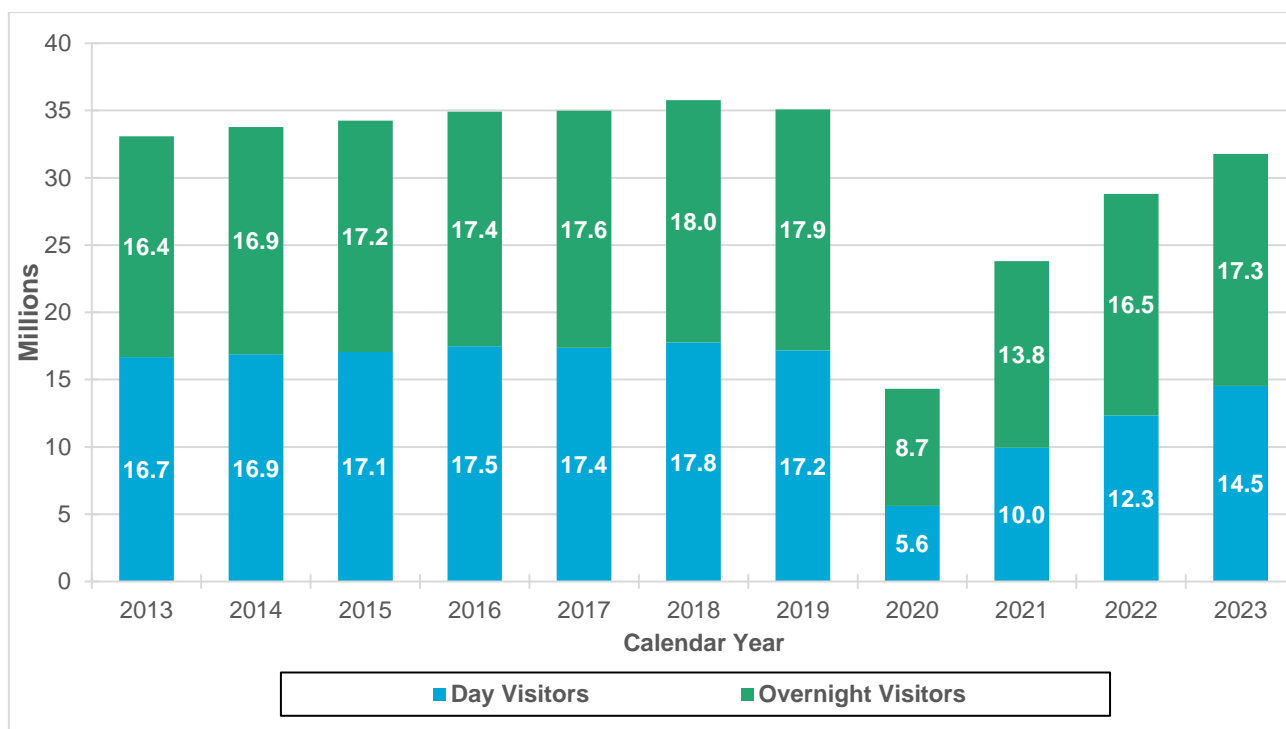
Source: Cruise Lines International Association. State of the Cruise Industry Report. April 2024. \*Estimated based on the number of embarking, disembarking, and in-transit cruise passengers at the Port of San Diego in FY 2023 provided by the San Diego Unified Port District.

Notes: 1. Global and North America cruise passenger volumes are in calendar years while cruise passenger volumes for the Port of San Diego are in fiscal years. 2. Calculations of the growth rates may differ due to rounding. 3. The Australasia region includes Australia, New Zealand, New Guinea, and neighboring islands in the Pacific Ocean.

## Tourism and Commercial Activities on Port Tidelands

Tourism is a major economic driver for the Port, supported by visitors throughout the year and accentuated by various extraordinary events. Tourism and commercial industry users at the Port include hotels, restaurants, retail stores, boat rental facilities, marinas, car rental agencies, commercial and sports fishing, tourist-oriented businesses like boat tours, and the San Diego Convention Center (SDCC). The SDCC is located within the South Embarcadero subdistrict within the City of San Diego, along with hotels, park space, recreational berthing, and fishing opportunities. Embarcadero Marina Park South also includes a permanent performance venue in the new Rady Shell as part of the San Diego Symphony Bayside Performance Park Enhancement Project. Tourism is a major economic driver for the Port, supported by visitors throughout the year and accentuated by various extraordinary events sponsored by the Port. Visitors from various conventions, such as Comic Con and corporate meetings, also benefit businesses on the Port.

**Figure S.6** shows the number of visitors to San Diego in the past 10 years. From 2013 to 2023, San Diego has seen an average of 31 million annual visitors. The COVID-19 pandemic in 2020 significantly impacted the tourism industry worldwide. San Diego experienced a decline of 59 percent in the number of visitors in 2020 compared to 2019. Although the number of visitors has rebounded in the past three years, it has not yet exceeded pre-pandemic levels. By 2023, the number of visitors reached 91 percent of 2019 levels. The split between day and overnight San Diego visitors has also changed in the past decade. San Diego had almost an equal ratio of day and overnight visitors from 2012 to 2019 but current trends show a stronger overnight market with such visitors representing between 54 percent and 61 percent of total visitors.

**Figure S.6 San Diego Annual Visitors, 2013 to 2023**

Source: San Diego Tourism Authority (SDTA), Annual Visitor Industry Summary, Calendar Year 2012 through 2021. <https://www.sandiego.org/about/industry-research.aspx>.

## Direct Impacts

### *District Enterprise*

The capital and operations spending by the Port is distributed through the regional economy on an annual basis. In other words, the presence of the Port itself contributes to the regional economy. The Port employs residents and purchases goods and services from local, regional, national, and international vendors. Without the Port in San Diego County, the region would lose these expenditures and associated benefits.

**Table S.2** shows the Port enterprise effects, which include Port spending on payroll, non-payroll operating and capital expenditures, and retirement benefits in FY 2023. The Port enterprise expenditures in FY2023 are estimated at \$241.0 million. The largest share of enterprise effects is attributed to payroll spending (42.5 percent), followed by non-payroll operating expenses (29.0 percent).

**Table S.2 San Diego Unified Port District—District Enterprise Expenditures, FY2023**

Expenditure Type	FY2023	Share
Payroll Expenditures (Millions of USD)	\$102.3	42.5%

Retirement Benefits Expenditures (Millions of USD)	\$39.9	16.6%
Non-Payroll Operating Expenditures (Millions of USD)	\$69.9	29.0%
Capital Expenditures (Millions of USD)	\$28.8	12.0%
<b>Total (Millions of USD)</b>	<b>\$241.0</b>	<b>100.0%</b>

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

Note: OPEB Benefits are included in the Retirement Benefits Expenditures.

This analysis measures the enterprise effects of the Port based on employment and compensation data in FY 2023 provided by the Port, including:

- Port full-time employees (FTE) by county of residence (**Table S.3**) and their compensation (salaries and benefits) (**Table S.4**).
- Number of Port retirees and retirement benefits that these retirees received from the Port's defined pension plan, administered by the San Diego City Employees' Retirement System (SDCERS), and other postemployment health care benefits (OPEB) (**Table S.5**).
- Port nonpayroll operating expenditures, total and by expense category (**Table S.6**). These expenses are grouped into six main categories:
  - **Services** represent around 60 percent of the total non-payroll operating expenditures and include expenses on professional, legal, facility management, security, emergency responders (e.g., fire, police), and other services required by the Port to perform their functions.
  - **Maintenance expenditures** include expenditures on facilities, equipment, and software maintenance.
  - **Equipment, materials, and supplies** include expenditures on equipment and systems, fuel, equipment rental/leasing, office supplies, and safety equipment and supplies.
  - **Utilities** include electric, gas, and water expenditures.
  - **Non-Payroll employee expenses** include expenditures on employee educational assistance, mileage reimbursement, travel, recruiting, employee recognition, and employee health and wellness. These expenses are in addition to employee fringe benefits.
  - **Other expenditures** range from real estate rental and environmental-related expenses (e.g., Climate Action Plan) to advertisement, public outreach, arts, and culture expenses.
  - **Other postemployment health care benefits (OPEB)** include postemployment medical, dental, and life insurance benefits.
- Port capital expenditures, total and by expense category (**Table S.7**). These expenditures are grouped into five main categories:
  - **Major Maintenance Capital Projects** include design and construction projects to maintain the Port's infrastructure in state of good repair.



- **Capital Improvement Program (CIP) Projects** include infrastructure projects aiming to improve District assets.
- **Technology Capital Projects** include hardware- and software-related expenditures that aim to manage technologies within the Port.
- **Economic Recovery Program (ERP) Capital Projects** include projects funded by the Federal Government in the wake of the COVID-19 pandemic to advance design and construction of infrastructure improvements within the Port.

**Table S.3 San Diego Unified Port District FTE by County of Residence, FY2023**

County of Residence of FTE	Number of FTE	Share (%)
San Diego County	567	94.8%
Riverside County	15	2.5%
Orange County	7	1.2%
Los Angeles	2	0.3%
San Bernardino	2	0.3%
Imperial, San Luis Obispo and Ventura County	3	0.5%
Other Counties Outside of California	2	0.3%
<b>Total</b>	<b>598</b>	<b>100.0%</b>

Source: San Diego Unified Port District.

**Table S.4 San Diego Unified Port District Payroll Expenditures, FY2023**

Item	FY2023
Employee Headcount	598
FTE Salaries and Wages (Millions of USD)	\$67.5
FTE Benefits (Millions of USD)	\$34.8
<b>Total Payroll Expenditures (Millions of USD)</b>	<b>\$102.3</b>

Source: San Diego Unified Port District.

Note: The data on this table excludes Temporary Services and GASB Accounting Adjustments.

**Table S.5 San Diego Unified Port District Retirees and Retirement Benefits Expenditures, FY2023**

Item	FY2023
Retired Employees that Received Pension and OPEB Benefits	443
Retired Employees that Received Pension Benefits but not OPEB	222
<b>Total Retirees that Received Benefits</b>	<b>665</b>
Pension Plan (Millions of USD)	\$36.2

Item	FY2023
OPEB (Millions of USD)	\$3.7
<b>Total Retirement Benefits Expenditures (Millions of USD)</b>	<b>\$33.9</b>

Sources: Pension Plan data come from the San Diego City Employees' Retirement System (SDCERS) 2023, Annual Comprehensive Financial Report for the Fiscal Year Ended June 30, 2023. OPEB data come from the San Diego Unified Port District.

Note: OPEB stands for Other Post-Employment Benefits and include medical, dental, and life insurance benefits.

**Table S.6 San Diego Unified Port District Non-Payroll Operating Expenditures, FY2023**

Item	FY2023	Share
Services (Millions of USD)	\$37.3	50.7%
Maintenance (Millions of USD)	\$13.3	18.0%
Equipment, Materials & Supplies (Millions of USD)	\$5.5	7.5%
Non-Payroll Employee Expenses (Millions of USD)	\$3.8	5.2%
Utilities (Millions of USD)	\$2.0	2.8%
Other (Millions of USD)	\$8.0	10.9%
<b>Sub-Total (Millions of USD)</b>	<b>\$69.9</b>	<b>95.0%</b>
Other Post-Employment Benefits (Millions of USD)	\$3.7	5.0%
<b>Total Non-Payroll Operating Expenditures (Millions of USD)</b>	<b>\$73.6</b>	<b>100.0%</b>

Source: San Diego Unified Port District.

**Table S.7 San Diego Unified Port District Capital Expenditures, FY2023**

Item	FY2023	Share
Capital Major Maintenance Projects (Millions of USD)	\$1.5	5.1%
Capital Improvement Projects (Millions of USD)	\$2.1	7.3%
Technology Capital Projects (Millions of USD)	\$2.9	10.1%
Economic Recovery Program Projects (Millions of USD)	\$22.4	77.5%
<b>Total Capital Expenditures (Millions of USD)</b>	<b>\$28.8</b>	<b>100.0%</b>

Source: San Diego Unified Port District.

### Direct Jobs Created by the District and District Users

To estimate the direct jobs created by the businesses located on the Port that represent the four sectors of interest in FY 2023, this analysis utilizes the employment data for San Diego County provided by REMI TranSight.<sup>16</sup> The estimation involves the following steps:

1. Obtain from REMI TranSight the number of jobs in San Diego County for the industries that represent the four sectors of interest in calendar years 2021, 2022, and 2023.
2. Estimate the number of direct jobs for each of the four sectors of interest in San Diego County in the last three fiscal years and the annual growth rates between these fiscal years using the employment data from REMI TranSight (**Table S.8**). Since the District fiscal years are from July 1 of the previous year to June 30 of the following year (e.g., FY 2021 starts on July 1, 2020 and ends on June 30, 2021), this analysis allocated 50 percent of the direct jobs in calendar year 2020 and 50 percent of the direct jobs in calendar year 2021 for FY 2021. The same allocation approach was used to estimate the number of direct jobs in San Diego County in FY 2022 and FY 2023.
3. Estimate the direct jobs created by the businesses located on the Port that represent the four sectors of interest in FY 2023 by using the annual growth rates at the county level. The estimated direct jobs are shown in **Table S.9**.

**Table S.8 Jobs Created by the Sectors of Interest in San Diego County, FY 2021-FY 2023**

Sectors of Interest	FY 2021	FY 2022	FY 2023	Growth FY 2021-2022	Growth FY 2022-2023
Maritime Trade and Cargo Handling	2,997	3,102	3,119	3.5%	0.6%
Industrial and Wholesale Industry	84,082	85,531	86,334	1.7%	0.9%
Cruise Industry	2,650	2,870	3,003	8.3%	4.6%
Tourism and Commercial Industry	192,887	208,968	218,595	8.3%	4.6%

<sup>16</sup> This analysis utilizes REMI TranSight Model for SANDAG Regions developed by Regional Economic Models, Inc. The model is a structural economic forecasting and policy analysis model that integrates input-output, computable general equilibrium, and econometric and economic geography methodologies to forecast how the levels of economic activity at the Port affect the economies of San Diego County, the Southern California region, the rest of California, and the rest of the U.S. REMI TranSight applies multiplier effects to changes in final demand (end users) for each industry within the defined region that are attributable to a change in expenditures in one or more industries to estimate the total (combined direct, indirect, and induced) economic impacts. For more information about the model, visit <http://www.remi.com/>.

Source: Cambridge Systematics Analysis based on employment in San Diego County provided by the REMI TranSight model for SANDAG Regions.

**Table S.9 Estimated Direct Jobs by Sector of Interest in Port Tidelands, FY 2023**

Sectors of Interest	FY 2021*	Growth FY 2021-2022	FY 2022	Growth FY 2022-2023	FY 2023
Maritime Trade and Cargo Handling	1,718	3.5%	1,778	0.6%	1,788
Industrial and Wholesale Industry	6,982	1.7%	7,102	0.9%	7,169
Cruise Industry	381	8.3%	412	4.6%	431
Tourism and Commercial Industry	27,717	8.3%	30,028	4.6%	31,412
<b>Total Four Sectors of Interest</b>	<b>36,798</b>	---	<b>39,321</b>	---	<b>40,800</b>

Source: \*Economic Impacts of the San Diego Unified Port District in 2021. \*\*Cambridge Systematics Analysis based on employment in San Diego County provided by the REMI TranSight model for SANDAG Regions.

**Table S.10** summarizes the direct jobs created by the Port and the Port users within each of the four sectors of interest. The Port itself and the four sectors of interest created nearly 41,400 direct jobs in FY 2023. Tourism and commercial activities are significant contributors to job creation, supporting 77 percent of the direct jobs in the Port in FY 2023.

**Table S.10 San Diego Unified Port District—Direct Jobs Created by the District and Sectors of Interest, FY 2023**

District and Sectors of Interest	FY 2023
San Diego Unified Port District*	598
Maritime Trade and Cargo Handling**	1,788
Industrial and Wholesale Industry**	7,169
Cruise Industry**	431
Tourism and Commercial Industry**	31,412
<b>Total</b>	<b>41,398</b>

Source: \*San Diego Unified Port District. \*\*Cambridge Systematics Analysis based on employment in San Diego County provided by the REMI TranSight model for SANDAG and direct jobs created by the cruise industry and the tourism and commercial industry in Port Tidelands in past fiscal years.

### Direct Spending by Onshore Cruise Passengers

Spending by onshore cruise passengers generates a significant impact on the local economy as passengers stay in hotels before/after their cruise, visit local attractions, eat in restaurants off the ship, and use local transportation options. **Table S.11** presents high-level estimates of direct spending by onshore cruise passengers by expense type in FY 2023 broken down by disembarking/embarking passengers and port-of-call passengers. Since the SDTA Port cruise ships data for FY 2023 was not available at the time this analysis was conducted, these high-level estimates are based on average daily spend per visitor in San

Diego for relevant expense types, average number of days cruise passengers spend in San Diego before cruise, average number of days cruise passengers spend in San Diego after cruise in 2022.<sup>17</sup>

Most of onshore cruise passenger spending is done by passengers disembarking or embarking on a cruise (\$97.9 million or 95 percent) as they spend more on hotels, food and beverages, entertainment, and transportation (i.e., airfare) to arrive in San Diego before and after their cruise versus port-of-call passengers who typically spend only a day in the area. The highest onshore cruise passenger spending categories include lodging (nearly 27 percent of spending, or \$27.6 million); food and beverage (close to 23 percent of spending, or \$23.5 million) and amusement (approximately 14 percent of spending, or \$13.8 million). The top three expenses made by onshore cruise ship passengers represent 63.2 percent of their total expenses.

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<sup>17</sup> San Diego Tourism Authority (SDTA), "2022 Visitor Profile Study Port Authority" presentation.

**Table S.11 San Diego Unified Port District - Estimates of Direct Spending by Onshore Cruise Ship Passengers in FY 2023**

Expense Type	Direct Spending by Disembarking/ Embarking Passengers (Millions of USD)	Direct Spending by Port-of-Call Passengers (Millions of USD)	Total Passenger Spending (Millions of USD)	Percent of Spending
Lodging	\$27.6	\$0.0	\$27.6	26.8%
Food and Beverages	\$21.8	\$1.8	\$23.5	22.8%
Amusement/Attractions	\$13.2	\$0.8	\$14.0	13.6%
Non-Food Shopping	\$10.9	\$0.8	\$11.7	11.3%
Local Ground Transportation	\$6.0	\$0.5	\$6.5	6.3%
Groceries	\$3.5	\$0.4	\$3.8	3.7%
Car Rental	\$3.6	\$0.0	\$3.6	3.4%
Other Expenses	\$11.3	\$1.0	\$12.3	11.9%
<b>Total</b>	<b>\$97.9</b>	<b>\$5.2</b>	<b>\$103.1</b>	<b>100.0%</b>
<b>Share (%)</b>	<b>95.0%</b>	<b>5.0%</b>	<b>100.0%</b>	

Source: High-level estimates developed by Cambridge Systematics based on data from the San Diego Tourism Authority (SDTA) presentation titled "2022 Visitor Profile Study Port Authority."

### *Direct Spending by Onshore Cruise Ship Crew Members*

**Table S.12** presents high-level estimates of direct spending by cruise ship crew members by expense type in FY 2023. These high-level estimates are based on average daily spend per visitor in San Diego for relevant expense types and the crew to cruise ship passenger ratios from the cruise industry. Since the STDA Port cruise ships data for FY 2023 was not available at the time this analysis was conducted, this analysis utilizes the average daily spend per visitor in San Diego for relevant expense types in 2022.<sup>18</sup> This analysis also assumes one crew member for every 2.5 cruise passengers. According to the cruise industry, most cruise ships in the world maintain between 2 and 3 passengers per crew member.<sup>19</sup>

In FY 2023, the direct spending by onshore cruise ship crew members in San Diego is estimated to total \$7.3 million (**Table S.12**). The highest spending categories include food and beverage (37 percent of spending, or \$2.7 million), amusement (26 percent of spending, or \$1.9 million), and non-food shopping (20 percent of spending, or \$1.5 million). The top three expenses made by onshore cruise ship crew members represent 83.5 percent of their total expenses.

<sup>18</sup> San Diego Tourism Authority (SDTA), "2022 Visitor Profile Study Port Authority" presentation.

<sup>19</sup> Cruisewatch. *These Cruise Ships Score the Highest Passenger-Crew Ratio*. [Highest Cruise Ships Passenger-Crew Ratio | Cruisewatch](#).

**Table S.12 San Diego Unified Port District—Estimates of Direct Spending by Onshore Cruise Ship Crew in FY 2023**

Expense Type	Direct Spending by the Cruise Ship Crew (Millions of USD)	Percent of Spending
Food and Beverages	\$2.7	37.4%
Amusement/Attractions	\$1.9	26.1%
Non-Food Shopping	\$1.5	20.0%
Local Ground Transportation	\$0.8	10.4%
Groceries	\$0.4	6.1%
<b>Total</b>	<b>\$7.3</b>	<b>100.0%</b>

Source: High-level estimates developed by Cambridge Systematics based on data from the San Diego Tourism Authority (SDTA) presentation titled “2022 Visitor Profile Study Port Authority”, and crew to cruise ship passenger ratios from the “These Cruise Ships Score the Highest Passenger-Crew Ratio” provided by Cruisewatch.

### *Direct Spending by the Cruise Industry in California due to Cruise Passenger Traffic at the Port of San Diego*

**Table S.13** presents high-level estimates of direct spending by the cruise industry in California associated with cruise passenger traffic at the Port of San Diego in FY 2023. To develop these high-level estimates, this analysis assumes that the direct spending by the cruise industry in California associated with cruise passenger traffic at the Port in FY 2023 increased at the same rate as the cruise ship calls between FY 2019 and FY 2023. Based on the direct spending by sector by the cruise industry in FY 2019 and the 52 percent increase in the number of cruise ship calls between FY 2019 and FY 2023, the total direct spending by the cruise industry in California due to cruise passenger traffic at the Port of San Diego in FY 2023 is estimated at \$104.4 million.

**Table S.13 San Diego Unified Port District—Direct Spending by Cruise Industry in California due to Cruise Passenger Traffic at the Port of San Diego in FY 2023**

Sector	Direct Spending by the Cruise Industry in 2019 (Millions of USD)	Direct Spending by the Cruise Industry in 2023 (Millions of USD)	Percent of Spending
Services & Government	\$31.3	\$47.4	45.4%
Manufacturing	\$17.9	\$27.1	26.0%
Transportation	\$13.2	\$20.0	19.2%
Wholesale & Retail Trade	\$3.3	\$5.0	4.8%
Finance, Insurance, Real Estate & Leasing	\$2.4	\$3.7	3.5%
Information Services	\$0.7	\$1.1	1.1%
Agriculture, Mining, Utilities & Construction	\$0.01	\$0.02	0.02%
<b>Total</b>	<b>\$68.9</b>	<b>\$104.4</b>	<b>100.0%</b>

Source: High-level estimates developed by Cambridge Systematics based on the direct spending by the cruise industry in California due to cruise passenger traffic at the Port of San Diego in FY 2019 documented in the Executive Summary of the *Economic Impacts of the San Diego Unified Port District in 2019* (December 2022) and the increase in the number of cruise ship calls at the Port of San Diego between FY 2019 and FY 2023.

### Port Tideland Visitors Spending

Visitors contribute to the local economy because they spend money to purchase various goods and services including airline tickets, hotels, restaurants, shopping, transportation, entertainment venues, and tourist hotspots. The number of visitors to the Port is estimated using the monthly statistics of day and overnight visitors at San Diego County in 2022 and 2023<sup>20</sup> and the share of day and overnight visitors at Seaport Village, Coronado Island, Harbor Island / Waterfront, Midway Aircraft Center, and the Rady Shell at Jacobs Park in 2022.<sup>21</sup> In FY 2023, the number of visitors to the Port is estimated at 11.5 million (**Table S.14**). Port day and overnight visitors account for 48 percent and 52 percent, respectively, of all Port visitors in FY 2023.

The spending by Port visitors (excluding cruise passengers to avoid double counting) is estimated at \$2.6 billion in FY 2023 (**Table S.14**). This analysis uses the average daily spend per person by expense type for day and overnight visitors of San Diego County provided in the “2022 Visitor Profile Study Port Authority” presentation to estimate spending of Port visitors. Spending by overnight visitors totals \$1.9 million or 73 percent of total visitors spending in FY 2023. Day visitors usually spend time during the day and leave for other places, whereas overnight visitors take accommodation at night. Overnight visitors contribute more toward the economy as they tend to visit multiple attractions; participate in diverse activities; and spend more money on food, beverages, and accommodation than day visitors. Lodging is the top expense category (30 percent of total spending), followed by food and beverages (21 percent of total spending). Total spending

<sup>20</sup> San Diego Tourism Authority (SDTA), San Diego County Visitor Industry Performance 2022 and San Diego County Visitor Industry Performance 2023.

<sup>21</sup> San Diego Tourism Authority (SDTA), “San Diego 2022 Visitor Profile Port of San Diego Crosstabs 8.7.23.xlsx” file.



from all Port visitors (excluding cruise visitors) represents 19 percent of total spending by all San Diego visitors in FY 2023.<sup>22</sup>

**Table S.14 Estimated Port Visitors, FY 2023**

Visitors	San Diego County Visitors	Estimated Port Tideland Visitors
Day Visitors	13,959,429	5,538,899
Overnight Visitors	16,569,405	5,985,508
<b>Total</b>	<b>30,528,834</b>	<b>11,524,406</b>

Source: Estimates developed by Cambridge Systematics using San Diego Tourism Authority (SDTA) data from its San Diego County Visitor Industry Performance 2022, San Diego County Visitor Industry Performance 2023, and “San Diego 2022 Visitor Profile Port of San Diego Crosstabs 8.7.23.xlsx” file.

**Table S.15 San Diego Unified Port District—Spending by Port Visitors (excluding Cruise Visitors), FY 2023**

Expense Type	Day Visitors (Millions of USD)	Overnight Visitors (Millions of USD)	All Visitors (Millions of USD)	All Visitors (%)
Lodging	\$0	\$798	\$798	30%
Food and Beverage	\$229	\$336	\$565	21%
Amusement/Attractions	\$104	\$249	\$353	13%
Non-food Shopping	\$109	\$174	\$283	11%
Local Ground Transportation	\$68	\$87	\$154	6%
Car Rental	\$26	\$69	\$95	4%
Groceries	\$47	\$40	\$87	3%
Other Expenses (e.g., airfares)	\$125	\$168	\$293	11%
<b>Total</b>	<b>\$708</b>	<b>\$1,921</b>	<b>\$2,629</b>	<b>100%</b>

Source: San Diego Tourism Authority (SDTA) data from the “2022 Visitor Profile Study Port Authority” presentation, San Diego County Visitor Industry Performance 2022 and San Diego County Visitor Industry Performance 2023; and Cambridge Systematics Analysis.

## Total Economic Impacts

This analysis utilized the Regional Economic Models, Inc. (REMI) model, a structural economic forecasting and policy analysis model that integrates input-output, computable general equilibrium, econometric, and economic geography methodologies<sup>23</sup> to forecast how a change in economic activity or policy affects a region’s economy. The REMI model applies multiplier effects to changes in final demand (end users) for each industry within the defined region that are attributable to a change in expenditures in one or more

<sup>22</sup> San Diego Tourism Authority (SDTA), San Diego County Visitor Industry Performance 2022 and San Diego County Visitor Industry Performance 2023.

<sup>23</sup> <http://www.remi.com/>.

industries, to estimate the total (combined direct, indirect, and induced) economic impacts. These three impacts are defined below.

- **Direct economic impacts** refers to the direct change entered through policy variables in the REMI model (e.g., direct jobs and spending directly related to the operation of the District).
- **Indirect economic impacts** refers to economic effects resulting from the purchases of inputs for the production of “direct” economic impacts (e.g., employment with companies that provide services to the District).
- **Induced economic impacts** refers to the economic effects resulting from the re-spending of wages related to “direct” and “indirect” economic impacts.

The total (combined direct, indirect, and induced) economic impacts are measured in terms of employment, personal income, Gross Regional Product (or value added), and business output (or gross business sales).

**Table S.16** shows the total (combined direct, indirect, and induced) economic impacts of the Port by geography in FY 2023. The results indicate the following:

- In FY 2023, the Port supported the creation of 71,360 jobs in San Diego County, which represented 48 percent of the total jobs attributable to the Port. These jobs added \$4.5 billion in personal income, \$7.5 billion in GRP, and \$13.8 billion in economic output to San Diego County.
- In FY 2023, the Port supported the creation of 121,600 jobs in the Southern California region, which represented 82 percent of the total jobs attributable to the Port. These jobs added nearly \$8.6 billion in personal income, \$13.6 billion in GRP, and \$24.8 billion in economic output to the Southern California region.
- In FY 2023, the Port supported the creation of 126,080 jobs in California, which represented 85 percent of the total jobs attributable to the Port. These jobs added \$9.0 billion in personal income, \$14.3 billion in GRP, and \$26.2 billion in economic output to California.
- Overall, the Port supported a total of 149,140 jobs, which added \$9.9 billion in personal income, \$17.4 billion in GRP, and nearly \$32.0 billion in economic output in FY 2023.

**Table S.16 Total (Combined Direct, Indirect, and Induced) Economic Impacts of the San Diego Unified Port District by Geography, FY 2023**

<b>Geography</b>	<b>Job Impacts Attributable to the District</b>	<b>Personal Income Impacts Attributable to the District (Millions of 2023 Dollars)</b>	<b>Gross Regional Product Impacts Attributable to the District (Millions of 2023 Dollars)</b>	<b>Economic Output Impacts Attributable to the District (Millions of 2023 Dollars)</b>
<b>San Diego County</b>	<b>71,360</b>	<b>\$4,525</b>	<b>\$7,458</b>	<b>\$13,806</b>
San Diego Neighboring Counties	50,240	\$4,067	\$6,093	\$10,988
<b>Southern California Region</b>	<b>121,600</b>	<b>\$8,593</b>	<b>\$13,551</b>	<b>\$24,794</b>
Rest of California	4,480	\$427	\$783	\$1,379
<b>California</b>	<b>126,080</b>	<b>\$9,020</b>	<b>\$14,334</b>	<b>\$26,172</b>
Rest of U.S.	23,060	\$831	\$3,081	\$5,815
<b>Total Economic Impacts</b>	<b>149,140</b>	<b>\$9,851</b>	<b>\$17,415</b>	<b>\$31,987</b>

<b>Geography</b>	<b>Distribution of Job Impacts Attributable to the District</b>	<b>Distribution of Personal Income Impacts Attributable to the District (%)</b>	<b>Distribution of Gross Regional Product Impacts Attributable to the District (%)</b>	<b>Distribution of Economic Output Impacts Attributable to the District (%)</b>
<b>San Diego County</b>	48%	46%	43%	43%
San Diego Neighboring Counties	34%	41%	35%	34%
<b>Southern California Region</b>	82%	87%	78%	78%
Rest of California	3%	4%	4%	4%
<b>California</b>	85%	92%	82%	82%
Rest of U.S.	15%	8%	18%	18%
<b>Total Economic Impacts</b>	100%	100%	100%	100%

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

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 149,140 (combined direct, indirect, and induced) jobs attributable to the District in FY 2023, 85 percent of them were in California.

**Table S.17** shows the total (combined direct, indirect, and induced) economic impacts of the Port enterprise and the four sectors of interest in FY 2023. The tourism and commercial activities generated 47 percent of the total jobs attributable to the Port (or 69,460 new jobs); 40 percent of the total personal income attributable to the Port (or \$3.9 billion); 38 percent of the total GRP attributable to the Port (or \$6.7 billion); and 36 percent of the total economic output attributable to the Port (or \$11.6 billion).

**Table S.17 Total (Combined Direct, Indirect, and Induced) Economic Impacts of the San Diego Unified Port District by District Activity, FY2023**

<b>District Activity</b>	<b>Job Impacts Attributable to the District</b>	<b>Personal Income Impacts Attributable to the District (Millions of 2023 Dollars)</b>	<b>Gross Regional Product Impacts Attributable to the District (Millions of 2023 Dollars)</b>	<b>Economic Output Impacts Attributable to the District (Millions of 2023 Dollars)</b>
Tourism and Commercial Industry	69,460	\$3,898	\$6,697	\$11,614
Industrial and Wholesale Industry	37,310	\$2,953	\$5,433	\$9,790
Maritime Trade and Cargo Handling	28,730	\$1,920	\$3,597	\$7,358
Cruise Industry	9,330	\$710	\$1,187	\$2,366
District Enterprise	4,310	\$371	\$501	\$860
<b>Total Economic Contribution</b>	<b>149,140</b>	<b>\$9,851</b>	<b>\$17,415</b>	<b>\$31,987</b>

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

**Table S.18** shows the total (combined direct, indirect, and induced) economic impacts of the Port enterprise and the four sectors of interest in San Diego County in FY 2023. The results indicate the following:

- In FY 2023, the Port contributed 3.3 percent to San Diego County jobs (i.e., **one in 30 jobs in San Diego County was supported by the Port**), 1.8 percent to San Diego County personal income, 2.6 percent to San Diego County GRP, and 2.9 percent to San Diego County economic output.
- The tourism and commercial activities on the Port supported 39,640 jobs (or 56 percent of the total jobs attributable to the Port) in FY 2023. These jobs generated \$2.1 billion in personal income (or 47 percent of the total personal income attributable to the Port), \$3.3 billion in GRP (or 44 percent of the total GRP attributable to the Port), and \$5.6 billion in economic output (or 40 percent of the total economic output attributable to the Port) in FY 2023.
- In FY 2023, the Port paid \$102.0 million in salaries and benefits to its 598 employees. This represents an average annual compensation rate of \$170,600 per Port employee, which is 44 percent higher than the average annual compensation rate that people working with the public sector in San Diego County made in 2023 (or \$118,700 per government employee).<sup>24</sup>

<sup>24</sup> REMI TranSight Model for SANDAG Regions.

**Table S.18 Total (Combined Direct, Indirect, and Induced) Impacts of the San Diego Unified Port District in San Diego County, FY 2023**

<b>District Activity</b>	<b>Job Impacts Attributable to the District</b>	<b>Personal Income Impacts Attributable to the District (Millions of 2021 Dollars)</b>	<b>Gross Regional Product Impacts Attributable to the District (Millions of 2021 Dollars)</b>	<b>Economic Output Impacts Attributable to the District (Millions of 2021 Dollars)</b>
Tourism and Commercial Industry	39,640	\$2,109	\$3,306	\$5,575
Industrial and Wholesale Industry	11,900	\$999	\$1,789	\$3,170
Maritime Trade and Cargo Handling	16,040	\$1,080	\$1,959	\$4,387
Cruise Industry	1,010	\$74	\$107	\$184
District Enterprise	2,770	\$264	\$296	\$489
<b>Total Economic Contribution</b>	<b>71,360</b>	<b>\$4,525</b>	<b>\$7,458</b>	<b>\$13,806</b>
	<b>County Jobs</b>	<b>County Personal Income</b>	<b>County Gross Regional Product (Millions of 2023 Dollars)</b>	<b>County Economic Output (Millions of 2023 Dollars)</b>
<b>San Diego County, 2021</b>	2,152,032	\$251,510	\$290,222	\$478,107
<b>Total Economic Contribution as a Share of San Diego County Economy, 2021</b>	3.3%	1.8%	2.6%	2.9%

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

The jobs multipliers by geography and Port activity (i.e., the Port enterprise and the four sectors of interest) in FY 2023 are shown in **Table S.19** and **Table S.20**, respectively. These jobs multipliers reveal the following:

- Every direct job created by the Port, or the sectors of interest, supported one additional job (in other industries) in San Diego County and four additional jobs (in other industries) in San Diego neighboring counties in FY 2023. At the regional level, every direct job created by the Port, or the sectors of interest, supported two additional jobs (in other industries) in Southern California in FY 2023.
- Among the sectors of interest, the maritime trade and cargo-handling industry and the cruise industry yielded the highest jobs multipliers. Every direct job created by the maritime trade and cargo-handling industry supported 15 additional jobs (in other industries) while every direct job created by the cruise industry supported 21 additional jobs (in other industries) in FY 2023. These 15 to 21 additional jobs were located across San Diego County, the rest of California, and the rest of U.S.
- Every direct job at the Port supported 6 additional jobs (in other industries) in FY 2023. These 6 additional jobs were located across San Diego County, the rest of California, and the rest of U.S.

**Table S.19 San Diego Unified Port District—Jobs Multipliers by Geography, FY 2023**

<b>Geography</b>	<b>Direct Jobs Attributable to the District</b>	<b>Total (Direct, Indirect, and Induced) Jobs Attributable to the District</b>	<b>Jobs Multiplier</b>
San Diego County	41,398	71,360	2
San Diego Neighboring Counties	11,937	50,240	4
Southern California Region	53,335	121,600	2

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

**Table S.20 San Diego Unified Port District—Jobs Multipliers of the District Enterprise and the Four Sectors of Interest, FY 2023**

<b>District Activity</b>	<b>Direct Jobs</b>	<b>Total (Direct, Indirect, and Induced) Jobs</b>	<b>Jobs Multiplier</b>
Tourism and Commercial Industry	31,412	69,460	2
Industrial and Wholesale Industry	7,169	37,310	5
Maritime Trade and Cargo Handling	1,788	28,380	16
Cruise Industry	431	9,330	22
District Enterprise	598	4,310	7

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

## Additional Benefits Generated by the District

Additional benefits generated by the Port that are difficult to reliably quantify but that need to be considered because of the economic value they generate to the Port members cities, San Diego County, the Southern California region, the State of California, and the entire Nation are:

- The Port revenue is reinvested in initiatives that lead to cleaner air, combat climate change, improve public health, and enhance public safety. Through the Maritime Clean Air Strategy (MCAS) adopted by the Port of San Diego Board of Port Commissioners in October 2021, the Port has:
  - Secured nearly \$60 million in new funding for electrification of terminals and vehicles. This funding includes \$14.7 million for electric crane system purchase for Tenth Avenue Marine Terminal (TAMT), \$11.5 million for maritime air emissions capture and control system at Port cargo terminals, \$9.6 million for design and construction of infrastructure components of TAMT Microgrid Project, \$8.9 million for electric crane system charging infrastructure at TAMT, \$7.2 million for shore power at National City Marine Terminal (NCMT), \$3.5 million for shore power for B Street Pier Cruise Ship

Terminals, \$1.08 million for clean trucks corridor deployment, \$1.0 million for electrification of Port fleet, and \$1.0 million for Zero Emission Heavy Duty Truck Incentive Program.<sup>25</sup>

- Adopted an enhanced Vessel Speed Reduction (VSR) Program to help reduce emissions of oceangoing vessels while in transit through San Diego Bay.<sup>26</sup>
- Contributed \$103,000 to the San Diego Air Pollution Control District's (SDAPCD) PAIR Program which directly funded the installation of 157 air purifiers and 177 air monitors to residents living within the Portside Community,<sup>27</sup> and planted 20 new trees at Cesar Chavez Park, increasing tree canopy coverage in the Barrio Logan community.<sup>28</sup>
- Sought “Health Equity for All” by establishing emission reduction goals that go beyond what current California regulations and policy requires (e.g., a goal of 100 percent of cargo handling equipment and freight trucks calling on the Port cargo maritime terminals being zero emissions by 2030).<sup>29</sup>
- The Port is host to many special events each year including Fourth of July San Diego Big Bay Boom Fireworks Show, San Diego Bay Wine and Food Festival, Wonderfront Music and Arts Festival, Makers Arcade Holiday Fair, and San Diego Holiday Bowl Parade and 5K Run/Walk. These events attract thousands of visitors, generate millions of dollars in sales, and promote the economic viability of not only the local economy but also the California economy and beyond.
- The Port provides public access along the waterfront for visitors and residents. Access to the Port’s waterfront, whether for swimming, fishing, boating, or just enjoying the spectacular views, is an amenity that impacts quality of life and drives spending and investments by residents, visitors, and businesses.
- The Port is committed to a culture of inclusion and values diverse backgrounds, experiences, and perspectives. Recognizing that diverse representation is essential to innovation and the success of the Port, the Port hires staff who embrace a diversity, equity, and inclusion (DEI) mindset.<sup>30</sup>

## Economic Contribution of the Port to the Economy of San Diego County Since 2015

The Port is an important driver of economic growth in the Port’s member cities, San Diego County, the Southern California region, the State of California, and the U.S. The direct jobs created by the Port and the

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<sup>25</sup> Port of San Diego. MCAS Highlights 2023. Published September 2023. [PowerPoint Presentation \(pantheonstorage.blob.core.windows.net\)](#)

<sup>26</sup> Port of San Diego. Maritime Clean Air Strategy. First Year Highlights and a Look Ahead. Last updated in September 2022.

<sup>27</sup> Port of San Diego. Maritime Clean Air Strategy. First Year Highlights and a Look Ahead. Last updated in September 2022.

<sup>28</sup> Port of San Diego. MCAS Highlights 2023. Published September 2023. [PowerPoint Presentation \(pantheonstorage.blob.core.windows.net\)](#)

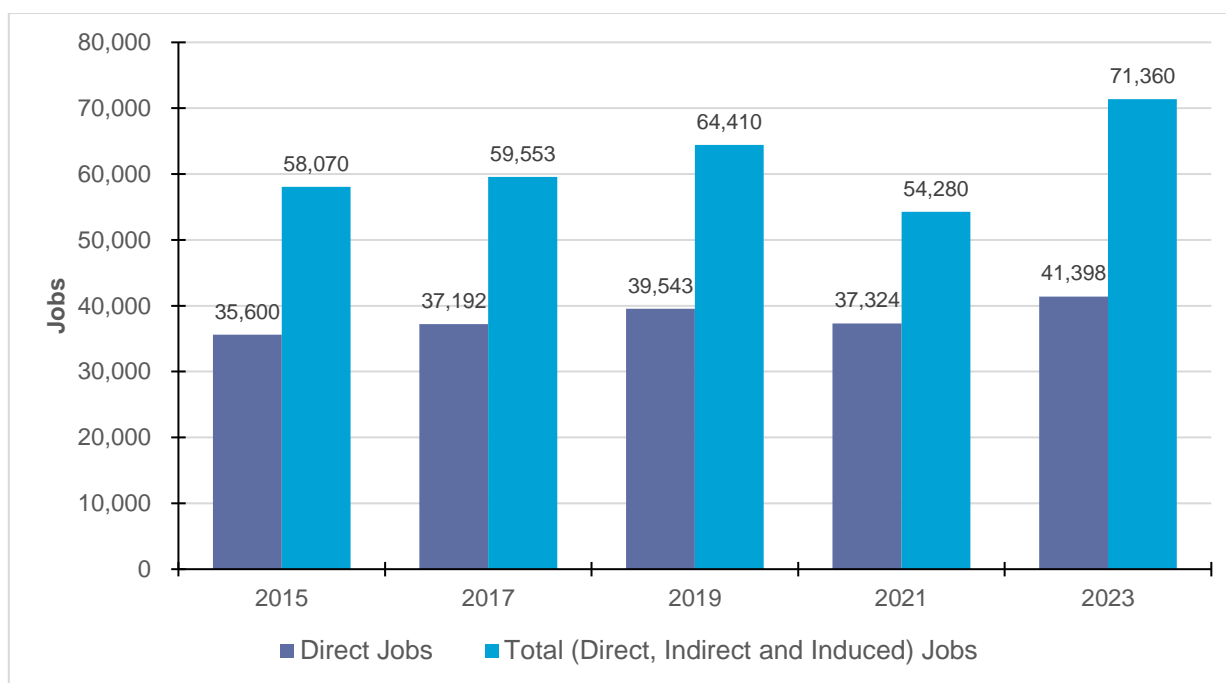
<sup>29</sup> Port of San Diego. Maritime Clean Air Strategy. *Health Equity for All*. <https://www.portofsandiego.org/mcas#collection-4745-tab-4743>

<sup>30</sup> Port of San Diego.

sectors of interest have a ripple effect in the economy, supporting indirect and induced jobs in the region, the State, and the Nation.

The number of direct jobs attributable to the Port in FY 2023 exceed pre-pandemic levels. In FY 2023, the Port supported 41,398 direct jobs, an increase of 5 percent compared to FY 2019 (or 39,543 direct jobs). The Port also supported a total of 71,360 (direct, indirect, and induced) jobs in San Diego County in FY 2023, an increase of 11 percent compared to FY 2019 (or 64,410 total jobs) (**Figure S.7**). While marine cargo tonnage moved by the Port of San Diego and the number of San Diego visitors have not yet reached pre-pandemic levels, the cruise ship calls and cruise ship passenger traffic at the Port of San Diego have rebounded and exceeded pre-pandemic levels by 52 percent and 61 percent, respectively, driving the economic growth in FY 2023. This can be seen in **Figure S.4** and **Figure S.5**. The continued recovery from the COVID-19 pandemic driven by the strong demand for travel, marine trade and cargo handling, and industrial and wholesale activities at the Port will contribute to the overall impact of Port activities on the economies of San Diego County, the Southern California Region, the State of California, and the entire Nation in the years to come.

**Figure S.7 Economic Contribution of San Diego Unified Port District—Employment Impact in San Diego County, 2015 to 2023**



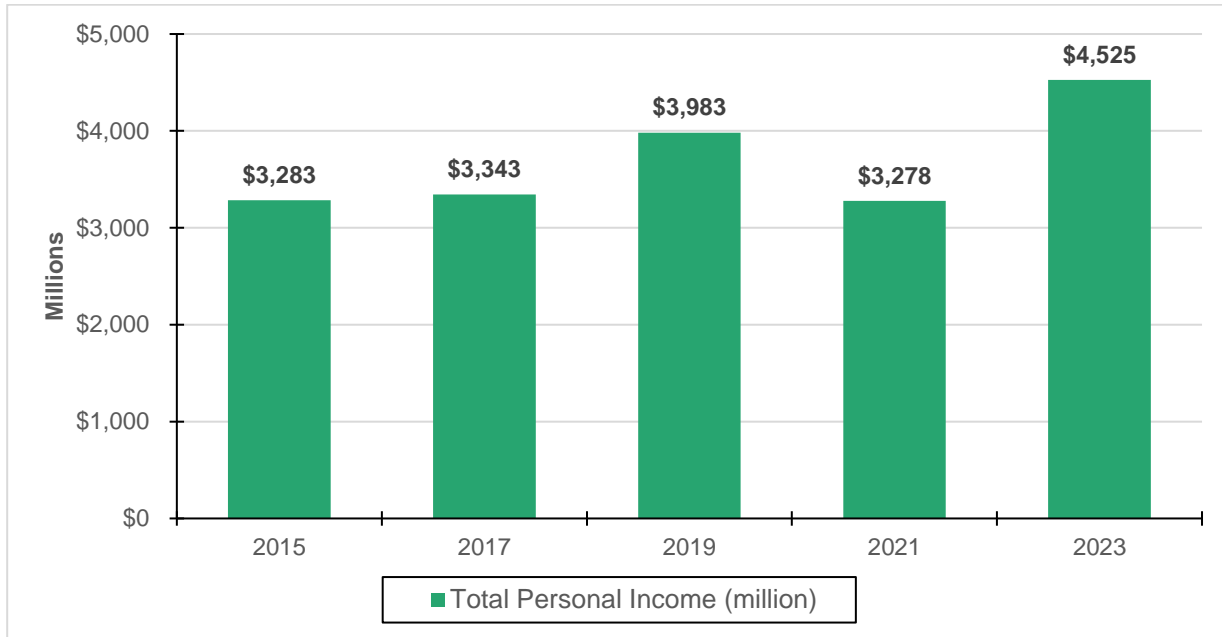
Source: Total (direct, indirect, and included) jobs in FY 2019, FY 2021 and FY 2023 estimated by Cambridge Systematics using the REMI Economic Model for SANDAG. Total and direct (on-site) jobs in 2017 come from the *Economic Impacts of the San Diego Unified Port District in 2017*, Final Report, prepared for the San Diego Unified Port District by the Economic & Planning Systems, Inc., February 28, 2019. Total jobs in 2015 come from the *Economic Impacts of the San Diego Unified Port District in 2015*, Final Report, prepared for the San Diego Unified Port District by the Economic & Planning Systems, Inc., December 20, 2016. Direct (on-site) jobs in 2015 estimated by Cambridge Systematics based on the data provided in the *Economic Impacts of the San Diego Unified Port District in 2015*, Final Report.

The 71,360 (direct, indirect, and induced) jobs in San Diego County in FY 2023 generated close to \$4.5 billion in personal income, an increase of 14 percent compared to FY 2019 (or \$3.98 billion) (**Figure**



S.8). The jobs supported by the Port and the four sectors of interest, and the associated personal income, added \$13.8 billion in economic output to San Diego County, an increase of 49 percent compared to FY 2019 (or \$9.2 billion).

**Figure S.8 Economic Contribution of San Diego Unified Port District—Personal Income Impact in San Diego County, 2015 to 2023**



Source: Total personal income in FY 2019, FY 2021 and FY 2023 estimated by Cambridge Systematics using the REMI Economic Model for SANDAG. Total personal income in 2017 comes from the *Economic Impacts of the San Diego Unified Port District in 2017*, Final Report, prepared for the San Diego Unified Port District by the Economic & Planning Systems, Inc., February 28, 2019. Total personal income in 2015 comes from the *Economic Impacts of the San Diego Unified Port District in 2015*, Final Report, prepared for the San Diego Unified Port District by the Economic & Planning Systems, Inc., December 20, 2016.