San Diego

ASSOCIATION OF
GOVERNMENTS

What are Industrial Clusters?

This section provides an overview of cluster theory and explains why clusters are important to a regional economy.

Clusters are groups of inter-related industries that drive wealth creation in a region, primarily through export of goods and services. The use of clusters as a descriptive tool for regional economic relationships provides a richer, more meaningful representation of local industry drivers and regional dynamics than do traditional methods. An industry cluster is different from the classic definition of industry sectors because it represents the entire value chain of a broadly defined industry from suppliers to end products, including supporting services and specialized infrastructure. Cluster industries are geographically concentrated and inter-connected by the flow of goods and services, which is stronger than the flow linking them to the rest of the economy. Clusters include both high and low-value added employment.

The San Diego Region In The Early Nineties

As a result of defense industry cutbacks, the reduction of numerous major financial institutions, and downturn in the real estate market, the San Diego region experienced a significant loss of high value-added jobs in the early 1990's. In an effort to aid in the economic recovery of the region, the Regional Technology Alliance hired a private contractor named Collaborative Economics. A local group of advisors encouraged Collaborative Economics to identify a way to increase employment opportunities in high paying sectors, thereby ensuring a rise in the region's standard of living.

Collaborative Economics identified eight industrial clusters that would serve as the mechanism by which the San Diego region could regain some of the lost high-value jobs that were prevalent in the 1980's. The work completed by Collaborative Economics was not intended to be a comprehensive economic development tool or encompassing strategy. Clusters were introduced locally as a means to increase the number of high paying jobs in the region. However, today's cluster analysis is a more descriptive tool that defines the economic drivers in a region, whether the drivers contain high paying jobs or not. For example, the San Diego region's Amusement and Entertainment cluster is an important regional driver with an average wage below that of the region.

<u>The San Diego Region Today</u>

The San Diego regional economy continues to recover from the recession and is no longer reeling from the shock of massive cuts in defense spending. The region is transitioning and restructuring itself into what can be referred to as a modern, export-driven economy. The "Modern Export-Driven Economy" is driven by a set of 16 export-oriented industrial clusters.[1] Today, cluster industries are emerging as the engines of economic activity, capable of providing a rising standard of living for the San Diego region (see diagram).
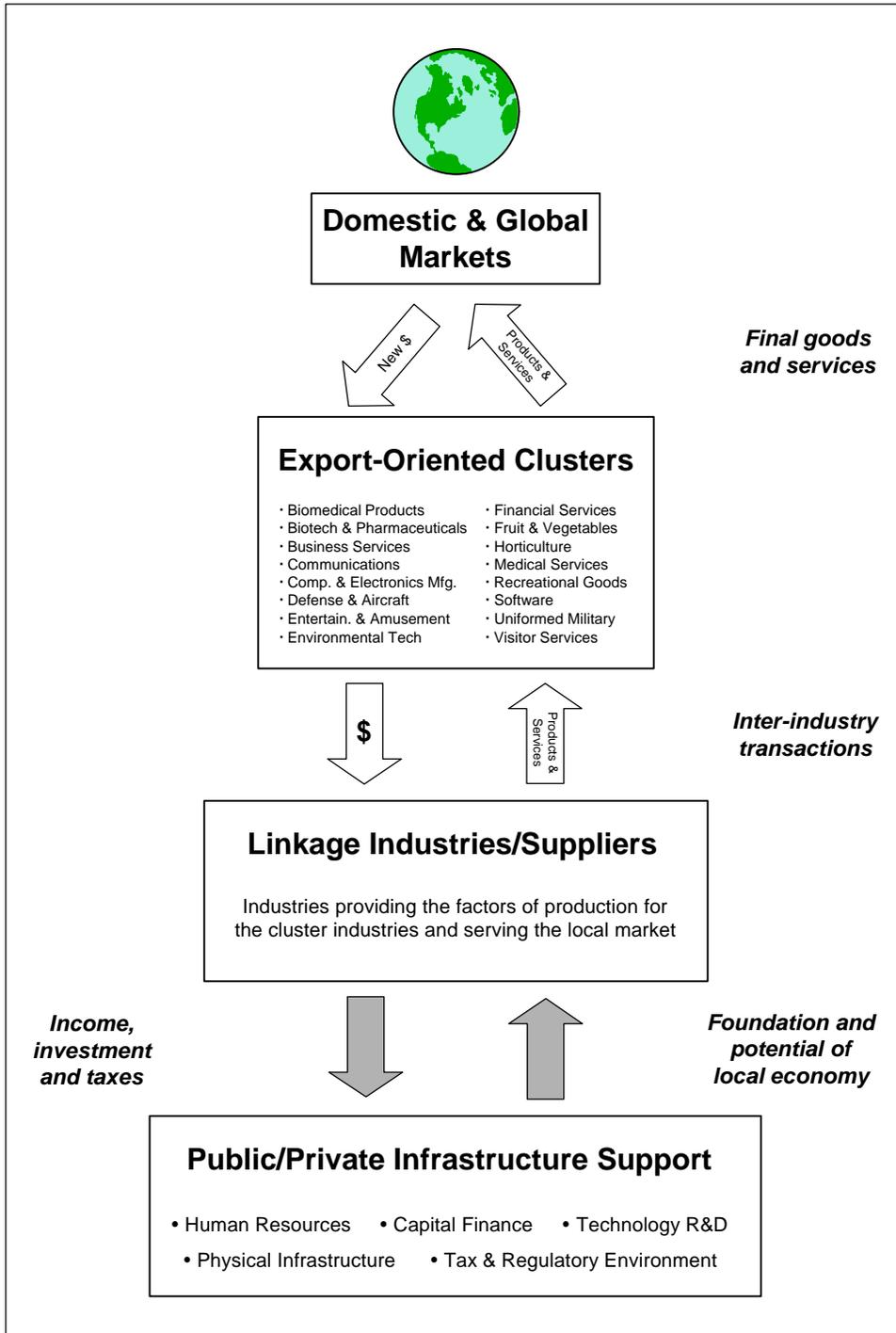
The 16 clusters drive wealth creation in the region by exporting goods and services and attracting new wealth from both domestic and international markets. The cluster industries are supported by and rely directly on linkage industries. The linkage industries provide the goods and services required by the driving clusters. Linkage industries include certain business services, distribution services, and some of the input components of a cluster's production process. The more strongly related input industries are included as part of the export-oriented cluster definitions. Supporting these clusters is a reliable and sustainable infrastructure. Important components include a skilled labor force, advanced research and development, and an adequate physical infrastructure that includes a reliable water supply and a communications infrastructure capable of handling the needs of today's industries. To a large extent this infrastructure "sector" is funded by income, investment and tax dollars. Included in the diagram are the population support industries such as retail, construction and real estate. These industries are critical to our local economy but, by definition, are not parts of the exporting chain of the Modern Export-Driven Economy. The primary driving force behind population support industries are the demands of the industrial clusters.

The San Diego region must now look deeply at the fundamental structure of its economy and determine what direction it will take into the 21st century. With funding from the San

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[1] The San Diego region contains a Uniformed Military cluster. It is export-oriented because it brings in significantly more tax dollars than the region pays. Because the information we have on the Uniformed Military cluster is more limited than the other clusters, we excluded it from further analysis.

Modern Export-Driven Economy
Cluster Industries are Emerging as the Engines of Economic Activity

Domestic & Global Markets

New $

Products & Services

Final goods and services

Export-Oriented Clusters

· Biomedical Products
· Biotech & Pharmaceuticals
· Business Services
· Communications
· Comp. & Electronics Mfg.
· Defense & Aircraft
· Entertain. & Amusement
· Environmental Tech

· Financial Services
· Fruit & Vegetables
· Horticulture
· Medical Services
· Recreational Goods
· Software
· Uniformed Military
· Visitor Services

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Products & Services

Inter-industry transactions

Linkage Industries/Suppliers

Industries providing the factors of production for the cluster industries and serving the local market

Income, investment and taxes

Foundation and potential of local economy

Public/Private Infrastructure Support

• Human Resources   • Capital Finance   • Technology R&D

• Physical Infrastructure   • Tax & Regulatory Environment

Source: San Diego Regional Technology Alliance, compiled by SANDAG.

Diego Regional Technology Alliance, a more comprehensive and current picture of the region's economic drivers has been developed. Industrial cluster analysis provides a tool to evaluate an appropriate strategy to ensure long-term prosperity.

Cluster Analysis

Industrial cluster analysis is a tool to better understand our regional economy. The purpose of cluster analysis is to identify those areas of the economy in which a region has comparative advantages and to develop short and long-term strategies for growing the regional economy. Increased regional prosperity is achieved by creating a positive environment to nurture these clusters. An industry cluster is considered to have a comparative advantage if the output, productivity and growth of a cluster are high relative to other regions. In addition, local infrastructure and collaborative efforts afford cluster industries other advantages that are a result of their shared geographic location and common goals. While the total number of jobs in comparative-advantage industries in a region may not represent the majority of the region's employment, these industries are the economic engines of the rest of the economy. Workers, inventors, community, institutions such as government and education, and others support the cluster industries and affect a broad range of industry cluster groupings.

The Standard Industrial Classification (SIC) system has been used to classify employment sectors by the type of activity in which they are engaged throughout the late 1900's. This traditional method can, at times, have difficulty defining the driving industries in a region in terms of their spatial location, employment size, wage rates, infrastructure needs, suppliers and competitors. The SIC system is based on a four-digit industry coding system and groups industries by sectors such as Wholesale Trade, Services, and Manufacturing. Today, new driving industries like biotechnology, software, environmental technology, and communications do not fit into classic SIC sector definitions of the Manufacturing or Service sectors.[2] Industries broadly labeled

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[2] Within the next few years a new industrial classification system will be implemented in the NAFTA countries. The North American Industry Classification System (NAICS) will be more detailed and will allow for multi-national comparisons. While some definitional problems may be solved, the grouping of

"biotech" straddle sector definitions, refusing to fall neatly into the categories outlined by the SIC system. The use of clusters as a descriptive tool for regional economic relationships provides a richer and more meaningful representation of local industry drivers and regional dynamics than the one provided by the traditional Standard Industrial Classification system.

Firms within a cluster exhibit strong inter-relationships. The flow of goods and services between geographically concentrated industries in a cluster is stronger than the flow linking them to the rest of the economy.   An industry cluster is different from the classic definition of industry sectors (e.g., construction, manufacturing services, etc.) because it represents the entire value chain of a broadly defined industry from suppliers to end producers, including supporting services and specialized infrastructure. By locating close to one another, businesses are able to acquire information, communicate and share inputs in such a way as to add to a "collective" advantage that could not otherwise be achieved alone. Clustering facilitates collaboration to overcome shared problems and obstacles. This can be done directly by the formation of industry associations, or indirectly through regional legislation. Even though some firms may be competing, certain collaborations, such as providing industry-relevant training, are still beneficial. Common goals and geographic concentration leads to the development of specialized skills, institutions, and alliances within the cluster agglomeration.

Focusing on clusters does not mean that economic prosperity will be limited only to those employed in cluster industries nor does it suggest that other industry sectors are unimportant. It must be emphasized that high technology employment sectors include many non-high technology jobs. Thus, cluster focus is not an attempt to pick winners nor does it focus solely on very high skilled, elite jobs.   Clusters are a way to track employment trends underlying structural shifts in our economy. Cluster analysis is an attempt to maximize the efficiency of public policy and investment by focusing efforts primarily on the economic drivers of the region. More importantly, positive benefits are gained by non-cluster sectors as a result of the inter-industry relationships that exist in a

manufacturing and service-based industries will likely remain an important issue that will require cluster analysis for clarification.

regional economy. Because industries in an economy are linked and inter-related, positive investment in one sector is also felt by numerous other sectors of the economy. Focusing on the economic drivers of an economy is not a new approach. The manufacturing sector used to be the primary driver of a regional economy and was the recipient of past economic investments. Since today's driving industries are no longer solely located in manufacturing, economic policy has adapted to incorporate broader industries—made possible with industrial cluster analysis. Cluster analysis is an evolving analytical tool, over time cluster definitions and the statistics used to track them will need to be revised.

Emerging Clusters

As technology and industries change, new cluster groupings may come into existence. For example, the region may develop the underpinnings of an advanced transportation cluster or the various players to form a lasers and optics cluster. Industries such as these may not be identified when applying the strict rules of cluster analysis because of their "emerging" status and therefore require special attention. Emerging clusters are groups of relatively small, inter-related industries that have initially experienced high rates of growth. They can be non-traditional industries, such as environmental technology, which have not previously been assigned their own SIC sector.

Since there are neither official guidelines nor standardized definitions for industry clustering, each of the potential emerging cluster suggestions must be analyzed case-by-case in order to determine whether or not they exist in the region.   Since SANDAG's cluster analysis determines which industries belong in a cluster and whether or not the region has a particular cluster concentration, it may be used to analyze emerging cluster possibilities.[3]

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[3] For more detail on emerging clusters and how they are analyzed, please refer to "Understanding Cluster Analysis." In addition, a watch list of potential emerging clusters is included at the end of "Industrial Clusters in the San Diego Region."

Cluster Support

Many industry sectors have a relationship with numerous cluster groups and serve as support institutions.   Industries such as real estate, construction, banking, education and maintenance services are all industries that interact with a broad spectrum of establishments. Specific industries underneath these broad sector headings are often part of the cluster definitions. In addition, certain groups of industries within these support institutions may even constitute a regional cluster if they are highly concentrated, export-oriented and inter-related.[4] Cluster analysis is a tool for understanding industry dynamics and focusing on high-value added jobs. It does not suggest abandoning important industry sectors based on their designation as a support industry. All support industries are important, often generating large amounts of revenue for the region, and are the foundation that supports the high-value added cluster industries.

Using Industrial Clusters for Economic Development Planning

Business Attraction/ Retention

The results obtained from cluster analysis can be used in determining where there are gaps in the value-adding chain that exist in the region's economic drivers. The value-added chain of a cluster is the set of broadly defined steps in the production process of a good or service. Each step of the process adds value to the good or service, and can begin with the initial, primary input suppliers and continue up to the end producers, including supporting distribution services. An example of a "gap in the value-adding chain" can be illustrated by assuming that an electronics-manufacturing cluster lacks an adequate supply of local input components (such as printed circuit boards). The printed circuit board is an essential element in many electronic devices and can be sourced

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[4] For example, SANDAG examined the possibility of a higher education cluster in the San Diego region. It was determined that on a comparative basis the regional higher education sector does not currently represent an industry cluster. Despite these results, education will continue to play a critical role as a support institution to the cluster industries and is a necessary infrastructure component to ensure regional prosperity. In particular, educational institutions are extremely important for the research and development of regional, knowledge-based industries such as biotechnology.

locally or imported from out of the region. If it is determined through the analytical process that the printed circuit board industry is a key element of the electronics manufacturing cluster but that the local concentration of this industry is below the national average, than a "missing link" in the regional value-added chain has been identified. In this instance, local electronics manufacturers are demanding more of the printed circuit board product than local suppliers can produce and thus are importing some of their boards. Cluster analysis enables a planner to identify specific "missing links" in a value-added chain, such as the printed circuit board industry in this example. Identifying the "missing links" allows policy makers to more efficiently focus investment programs, attraction efforts and infrastructure decisions toward the areas that require the most attention and which will produce the greatest benefits in terms of economic contributions to the region and its driving industries.

Clusters serve as an employee attraction tool as they show the relative size and economic importance of local industries. Local economic development organizations can assist companies trying to attract employees by displaying the breadth and wide range of regional activity in their particular field. For example, cluster analysis can highlight linkages within high tech industries and show the variety of jobs in the region to be found in this sector (from software to wireless communications). Clusters can illustrate the diverse employment possibilities in San Diego and help to ease the uncertainties about making a career decision facing new entrants into San Diego's labor force. Using cluster data as the central piece of a regional development strategy enables a region to focus resources on a specific goal in order to increase efficiency and leverage efforts.

Cluster analysis is made easier when combined with a Geographic Information System (GIS). For example, combining cluster definitions, GIS software and an employment database allows analyses that were only hypothetical a few years ago. The GIS/cluster partnership opens up a myriad of possibilities for economic development organizations and could form the basis of a regional economic development information system. Using a GIS enables the user to connect each business address and name to its cluster attribute. Economic development organizations could identify industry focus groups both spatially and by cluster thereby assisting them in their retention and attraction programs. The GIS

allows the user to attach additional information or attributes to each file record (each business name and address is a record). For example, the recreational goods cluster in Carlsbad, a jurisdiction in the San Diego region, could be targeted and a list of all the firms in this industry located in Carlsbad could be generated. Production capacity, number of employees, area of specialization and other attributes could also be attached to this file. Once a desired cluster or sub-group of the cluster has been selected many applications, such as constructing mailing lists and focus group relationships, are then made available to the economic development organization. There are limitations when using a GIS tool in conjunction with a regional employment database. To maintain reliability, constant revisions and updates to the employment database are required.

Land Use Monitoring/General Plan Updates

Cluster theory is also useful to land-use and transportation planning agencies. Combining industry clustering theory with spatial analysis is not a new approach; however, due to the relatively recent advances in technology using clusters in conjunction with a Geographic Information System (GIS) has increased the potential for this type of coordination. Clusters can be mapped and site-level information accessed with most desktop computers. City and county land-use plans could be analyzed and compared to the location of cluster firms thereby assisting them in updates of these plans. Similarly, transportation planning departments in a region could spatially identify where growing cluster concentrations and their employees are located or where particular buyers and suppliers tend to ship their goods. This information would be useful in determining where road expansions are necessary or where new roads need to be built. It could also be useful in analyzing port and rail expansions or the need for new fiber-optic infrastructure.

Industry Organization

Emerging, nascent clusters are often those most in need of resources and assistance dedicated to enhancing their regional prosperity. One method of cluster assistance is to facilitate the creation of cluster industry associations and organizations. Cluster

organizations provide a comparative advantage to regional industries. Cluster organizations foster complementary relationships and increase industry cohesiveness and exposure. Such an organization encourages a collective identity and strength for an emerging regional cluster. This approach has worked particularly well for the Optics cluster in Arizona and the Software and Computer Services cluster locally. The San Diego Regional Technology Alliance is the group most responsible for assisting these emerging clusters in the early stages of organization.

Industrial Clusters in the San Diego Region[5]

Biomedical Products

The San Diego region's Biomedical Products cluster produces instruments, medical devices, equipment and other apparatus primarily for consumption by the medical field. Examples of this cluster's products include X-ray machines, surgical knives, and contact lenses. Biomedical products have a wide range of uses such as delivering pharmaceuticals, monitoring patients, providing therapy, and serving as artificial human organs. The Biomedical Products cluster is knowledge-intensive, requiring advanced research and development. The cluster is often combined with the Biotechnology and Pharmaceuticals cluster and referred to as a "Bio-Sciences" cluster.

SIC	Industry Description
3821	Laboratory apparatus & furniture
3827	Optical instruments & lenses
3841	Surgical & medical instruments
3842	Surgical appliances & supplies
3843	dental equipment & supplies
3844	X-ray apparatus & tubes
3845	Electromedical equipment
3851	Ophthalmic goods

Biotechnology and Pharmaceuticals

The Biotechnology and Pharmaceuticals cluster includes industries engaged in researching, manufacturing, or processing a broad range of biological, chemical, and medicinal products. Medical and industrial chemicals and preparations are also included in this grouping. The cluster does not include instrument or equipment production. Examples of the products include antibiotics, bacterial vaccines, and biological laboratories. "Biotechnology is an umbrella term for research and product development activities that use organisms or their cellular components to find new therapeutic and diagnostic medical tools."[6] The Biotechnology and Pharmaceuticals cluster is often combined with the Biomedical Products cluster and referred to as a "Bio-Sciences" cluster.

SIC	Industry Description
2835	Diagnostic substances
2836	Biological products excluding diagnostic
8071	Medical laboratories
8731	Commercial physical research (60%)
8733	Noncommercial research org. (100%)
2833	Medicinals & botanicals
2834	Pharmaceuticals preparations

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[5] Portions of the employment in Standard Industrial Classification Industries 8711 and 8731 are included in more than one cluster group. Collaborative Economics determined the percentages for these industries based on general industry analysis.

[6] "The Health Care Technology Cluster in San Diego." Collaborative Economics, Inc. Draft report April 20, 1995. Page 2.

5122	Drugs, proprietaries, & sundries
8734	Testing laboratories
2819	Industrial inorganic chemicals, nec
2869	Industrial organic chemicals, nec
2899	Chemical preparations

Business Services

The Business Services cluster includes industries that provide a variety of professional services to local business establishments, including management, legal and personnel supply services. Many of today's business service industries, such as intellectual property law, catalog publishers, and computer facilities management, are developing specialized skills to better serve the region's cluster industries.

SIC	Industry Description
2741	Miscellaneous publishing
7311	Advertising agencies
7319	Advertising, nec
7361	Employment agencies
7363	Help supply services
7375	Information retrieval services
7376	Computer facilities management
7377	Computer rental & leasing
7389	Business services, nec
8111	Legal services
8712	Architectural services
8720	Accounting, auditing & bookkeeping
8741	Management services
8742	Management consulting services
8748	Business consulting, nec

Communications

The Communications cluster includes industries primarily engaged in researching and manufacturing communications-related products. The cluster also includes industries that provide point-to-point communications services such as cellular phone and beeper services. Examples of cluster products include cellular phones, fax machines, and encryption devices. The Communications cluster was one of the region's first emerging growth, high technology clusters.

SIC	Industry Description
3661	Telephone & telegraph apparatus
3663	Radio & TV communications
3669	Communications equipment, nec
4812	Radio/telephone communications
4899	Communications services
8711	Engineering services (10%)
8731	Commercial physical research (25%)

Computer and Electronics Manufacturing
The Computer and Electronics Manufacturing cluster includes industries that manufacture and assemble electronic components and products. The emphasis of this cluster is on high technology and computer-related products and their input components. Cluster products include speaker systems, printed circuit boards, and computer terminals. The Computer and Electronics Manufacturing cluster plays a vital role in the regional economy because it produces essential input components for numerous high-tech clusters such as Biomedical Products, Communications and Defense and Transportation Manufacturing.

SIC   Industry Description
3571   Electronic computers
3572   Computer storage devices
3577   Computer peripheral equipment, nec
3825   Instruments to measure electricity
3695   Magnetic & optical recording media
5045   Computers, peripherals & software, wholesale
3651   Household audio & video equipment
3629   Electrical industrial apparatus, nec
3671   Electron tubes
3672   Printed circuit boards
3674   Semiconductors & related devices
3675   Electronic capacitors
3676   Electronic resistors
3677   Electronic coils & transformers
3678   Electronic connectors
3679   Electronic components, nec
3699   Electrical equipment & supplies, nec
5065   Electronic parts & equipment, wholesale

Defense and Transportation Manufacturing
The Defense and Transportation Manufacturing cluster includes industries engaged in manufacturing or assembling aircraft, ships, boats, and defense related products such as guided missiles. As a result of decreased defense spending, the cluster's focus has shifted away from defense and military related goods to more commercial and high technology products. Despite the massive defense cutbacks, today's Defense and Transportation Manufacturing cluster continues to be highly concentrated when compared to the rest of the nation.

SIC   Industry Description
3511   Steam engines & turbines
3721   Aircraft
3724   Aircraft engines & engine parts
3728   Aircraft parts & equipment, nec
3731   Ship building & repairing
3732   Boat building & repairing
3761   Guided missiles & space vehicles
3769   Space vehicle equipment
3812   Search & navigation equipment

Entertainment and Amusement

The Entertainment and Amusement cluster includes industries engaged in arranging and providing amusement, recreation and entertainment services. Examples of firms in this cluster include tour operators, zoos, museums, and golf courses. The Entertainment and Amusement cluster, combined with the Visitor Industry Services cluster, in the past have been referred to as the tourism industry.

SIC	Industry Description
4725	Tour operators
4830	Radio & TV broadcasting stations
7922	Theatrical producers & services
7941	Sports clubs, managers & promoters
7948	Racing, including tract operations
7992	Public golf courses
7996	Amusement parks
7999	Amusement & recreation, nec
8400	Museums, art galleries, botanical, zoological gardens

Environmental Technology

The Environmental Technology cluster is an emerging cluster of industries that manufacture products with environmental applications. Examples of cluster specializations include: environmental engineering services; laboratory analysis; marine sciences; air and water filtration; environmental construction; and toxic, hazardous and radiological waste disposal and monitoring. Characteristic issues facing today's environmental marketplace include: water purification, pollution prevention and monitoring, waste disposal site renovation, and waste treatment and storage.

SIC	Industry Description
3564	Blowers & fans
3569	General industrial machinery, nec
3589	Service industry machinery, nec
3823	Process control instruments
3824	Fluid meters & counting devices
3826	Analytical instruments
3829	Measuring & controlling devices, nec

Financial Services

The Financial Services cluster includes industries engaged primarily in deposit banking, extending credit in the form of loans, and the exchange of securities and commodities. A unique characteristic of this cluster is that almost all of the other clusters have a significant relationship with the Financial Services cluster and, more precisely, the Banking industry

SIC	Industry Description
6035	Saving institutions, Federally chartered
6036	Saving institutions, not Federally chartered

6061	Credit unions, Federally chartered
6062	State credit unions
6140	Personal credit institutions
6162	Mortgage bankers & loan correspondents
6163	Loan brokers
6282	Investment advice

Fruits and Vegetables

The Fruits and Vegetables cluster includes industries engaged in the production and maintenance of fruit, melons, tree nuts and vegetable crops. The San Diego region ranks as the top avocado producer in the country. Other important fruit and vegetable crops include lemons and tomatoes.

SIC	Industry Description
0161	Vegetables & melons
0171	Berry crops
0172	Grapes
0174	Citrus fruits
0175	Deciduous tree fruits
0179	Fruits & tree nuts, nec
0762	Farm management services
2033	Canned fruits & vegetables
2449	Wood containers, nec

Horticulture

The Horticulture cluster includes industries engaged in the production and maintenance of ornamental plants, nursery crops and food crops grown under cover. The Horticulture cluster accounts for a majority of the value of the region's agricultural products. Four of the region's top ten agricultural crops, including the top three, are part of the horticulture cluster.

SIC	Industry Description
0181	Ornamental nursery products
0182	Food crops grown under cover
0191	General farms, primarily crop
0781	Landscape counseling & planning
0783	Ornamental shrub & tree services

Medical Services

The Medical Services cluster includes industries primarily offering health services to the general public through hospitals, medical facilities and offices.

SIC	Industry Description
5047	Medical & hospital equipment
7352	Medical equipment rental
8011	Offices & clinics of doctors of medicine

8021	Offices & clinics of dentists
8049	Offices of health practitioners, nec
8062	General medical & surgical hospitals
8063	Psychiatric hospitals
8069	Specialty hospitals, except psychiatric
8072	Dental laboratories
8092	Kidney dialysis centers
8093	Specialty outpatient facilities, nec
8099	Health & allied services, nec

Recreational Goods Manufacturing

The Recreational Goods Manufacturing cluster includes companies that manufacture recreational goods, sporting and athletic goods, and toys. Due to high performance benefits, new composite materials are becoming more common in goods produced for the golf, tennis, biking, surfing, and scuba diving industries. The San Diego region now contains the nation's largest manufacturer of golf clubs.

SIC	Industry Description
3940	Toys & sporting goods
5091	Sporting & recreational goods, wholesale

Software and Computer Services

The local Software industry developed as a service to the Defense industry. When defense spending decreased, the Software industry adjusted its focus towards the commercial market and has now linked itself to most of the other high technology cluster industries. The Software and Computer Services cluster includes industries that provide services such as computer programming, prepackaged software, and software development. The cluster has grown very quickly and offers the highest wages of all 15 industry clusters, 120% above the regional average wage.

SIC	Industry Description
7371	Computer programming services
7372	Prepackaged software
7373	Computer integrated systems design
7374	Computer processing & data prep. services
7379	Computer related services, nec
8711	Engineering services (5%)
8731	Commercial physical/biol. research (15%)

Uniformed Military

The Uniformed Military cluster is comprised of all enlisted, non-civilian military personnel. It is export-oriented because it brings in significantly more tax dollars than the region pays.

This cluster includes all uniformed military personnel. There are no SIC codes to represent this cluster.

Visitor Industry Services
The Visitor Industry Services cluster includes industries, such as Hotels and Motels, which provide services to the entertainment and visitor industry. The primary focus of the cluster is the hotels and other lodging places sector.

SIC	Industry Description
4489	Water passenger transportation, nec
4499	Water transportation services, nec
4724	Travel agencies
5800	Eating & drinking places (55%)
7011	Hotels & motels
7021	Rooming & boarding houses
7032	Sporting & recreational camps
7033	Trailer parks & campsites
7041	Organization hotels & lodging house
7514	Passenger car rental