



MEASURING FOR PROSPERITY

Indicators Report 2020





TAHOE PROSPERITY CENTER



In 2010, the Lake Tahoe Basin Prosperity Plan identified a variety of economic trends, opportunities, and constraints within the region and suggested several initiatives aimed at improving Tahoe’s economy. The Tahoe Prosperity Center was created to spearhead these initiatives and we have worked hard since our creation as the basin-wide economic and community development organization.

The Tahoe Prosperity Center is focused on creating a Lake Tahoe where anyone can live, work, play, and thrive. In order to make this beautiful region a truly inclusive community, we are working to establish attainable workforce housing, higher wage and less seasonal job opportunities, reliable and robust internet, and a safe Basin equipped with fire safety cameras - all driven by locally focused, topical community indicators data found in our Measuring for Prosperity Reports. We collaborate regionally with local businesses, jurisdictions, non-profits, and community members to advance data-

driven initiatives that better the environment, community, and economy for everyone living and working here. Our work for Lake Tahoe aligns with our Strategic Pillars:

-  **Collaborative Leadership**
-  **Infrastructure Improvements**
-  **Capital Generation**
-  **Economic and Community Revitalization**
-  **Policy and Planning**

We believe that community narratives, data, and best practices should inform all of our work and we tirelessly incorporate all of these pillars into our projects so that we can further our mission to Unite Tahoe’s Communities to Strengthen Regional Prosperity, ultimately making Lake Tahoe an accessible, inclusive, and prosperous region.

MEASURING FOR PROSPERITY AND PROJECT BACKGROUNDS:

The Measuring for Prosperity Report is our signature data report featuring an analysis of identified community and economic well-being indicators for the entire Tahoe basin. To ensure prosperity and equity in the Tahoe Basin, we have to understand where we have been and where we're going and the data in this report informs our vision for our communities. The Measuring for Prosperity Report analyzed trends in these indicators to determine where we are succeeding and where we need to improve as a region. In addition to this report, our other programs include:

- ▲ **AlertTahoe:** Partnering with UNR to get fire safety cameras installed throughout the Basin to protect our community, environment, and economy.
- ▲ **Connected Tahoe:** Bringing reliable and robust internet and cell service to Lake Tahoe.
- ▲ **Housing Tahoe:** Working with the community members and stakeholders to establish safe, attainable, long-term workforce housing.
- ▲ **Workforce Tahoe:** Diversifying our economy, creating pathways to high wage jobs for our local workforce, and fostering partnerships Basin-wide to offer training and mentorship programs with an emphasis on preserving our environment and restoring our communities.

We welcome and encourage feedback on this report because this report is for you: our community. We want to ensure this information is relevant and useful for everyone who lives and works in the Lake Tahoe region and for prospective community members. Please contact us for more information, to get involved, or to provide input on how to make this report more useful or accessible in future years.

For more information, please contact:

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The Measuring for Prosperity Report was generously funded by the Tahoe Mountain Resort Foundation, Darke Creative, El Dorado Community Foundation, and the Tahoe Regional Planning Agency. We also want to thank Dr. Larry Green's Fall 2019 and Winter 2020 Statistics class at Lake Tahoe Community College for contributing to the gathering and analysis of our median home price data points.

The Tahoe Prosperity Center appreciates the support of these organizations, institutions, and classes that recognize the importance of a community and economic indicators report specifically for the Lake Tahoe Basin. We encourage sharing the information within this report to anyone who will benefit, including: local governments, non-profit organizations, businesses, schools, future Lake Tahoe residents, our current community members, and anyone else invested in making data-driven decisions.

If you have suggestions for future data points, please reach out to the Tahoe Prosperity Center at info@tahoeprosperty.org



TAHOE BASIN CENSUS TRACTS

Census Tract 3 was not included in the analysis since it includes part of Carson City demographic counts.

Figure 1: Tahoe Basin Census Tracts

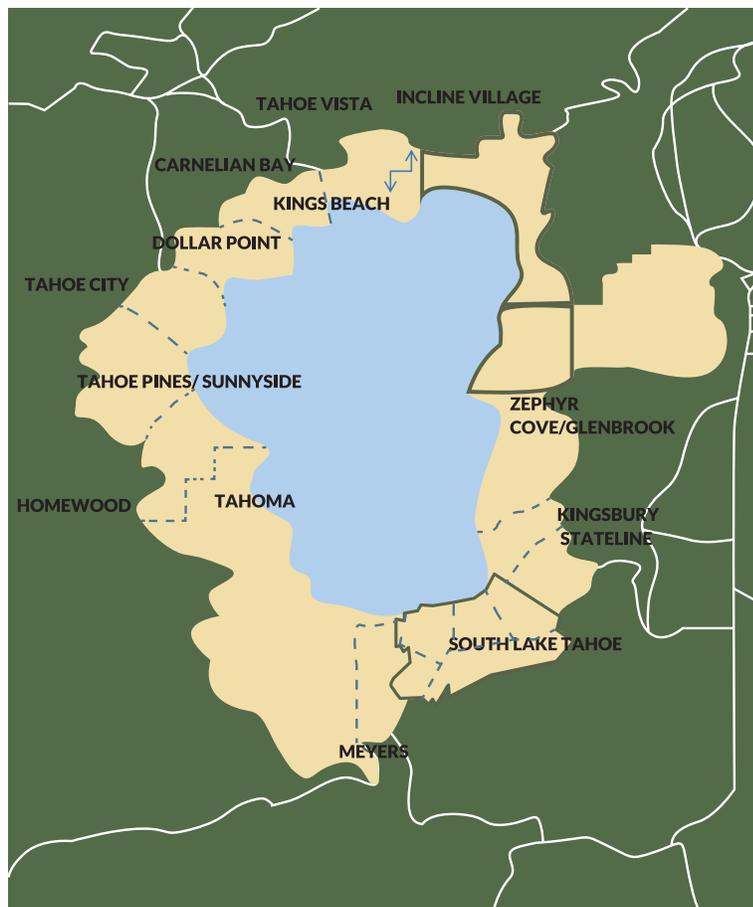


Table 1: Tahoe Basin Census Tracts

CENSUS TRACT 2010	COUNTY	STATE	COMMUNITY
Census Tract 302	El Dorado	California	South Lake Tahoe
Census Tract 316	El Dorado	California	South Lake Tahoe
Census Tract 303.01	El Dorado	California	South Lake Tahoe
Census Tract 303.02	El Dorado	California	South Lake Tahoe
Census Tract 304.01	El Dorado	California	South Lake Tahoe
Census Tract 304.02	El Dorado	California	South Lake Tahoe
Census Tract 305.02	El Dorado	California	Meyers
Census Tract 305.04	El Dorado	California	South Lake Tahoe
Census Tract 320	El Dorado	California	Tahoma
Census Tract 201.04	Placer	California	Dollar Point
Census Tract 201.05	Placer	California	Carnelian Bay
Census Tract 201.06	Placer	California	Tahoe Vista
Census Tract 201.07	Placer	California	Kings Beach
Census Tract 221	Placer	California	Tahoe Pines/ Sunnyside
Census Tract 222	Placer	California	Tahoe City
Census Tract 223	Placer	California	Homewood
Census Tract 16	Douglas	Nevada	Zephyr Cove/Glenbrook
Census Tract 17	Douglas	Nevada	Kingsbury
Census Tract 18	Douglas	Nevada	Stateline
Census Tract 33.05	Washoe	Nevada	Incline Village
Census Tract 33.06	Washoe	Nevada	Incline Village
Census Tract 33.07	Washoe	Nevada	Incline Village
Census Tract 33.08	Washoe	Nevada	Incline Village
Census Tract 33.09	Washoe	Nevada	Incline Village
Census Tract 3	Carson City	Nevada	Include in South Lake

Source: ADE, Inc. U.S. Census Tiger shapefiles; Note: Census Tract 305.03 is not in the Lake Tahoe Basin.

PER CAPITA INCOME

Since 2010, per capita income has grown faster in the Tahoe Basin than statewide in either California or Nevada. Per capita income has grown in the Tahoe Basin from \$30,516 in 2015 to \$38,337 in 2018, an increase of \$7,821. In California, the increase has been \$4,703, to \$35,021, and in Nevada per capita income has grown \$3,420, to \$29,961 in 2018. However, a number of the communities on the California side of the Basin remain below the California state average per capita income, including Carnelian Bay, Squaw Valley, Kings Beach, Tahoe Vista and the City of South Lake Tahoe. In addition, Stateline, at \$23,816, is below the Nevada state average.

Figure 2: Per Capita Income

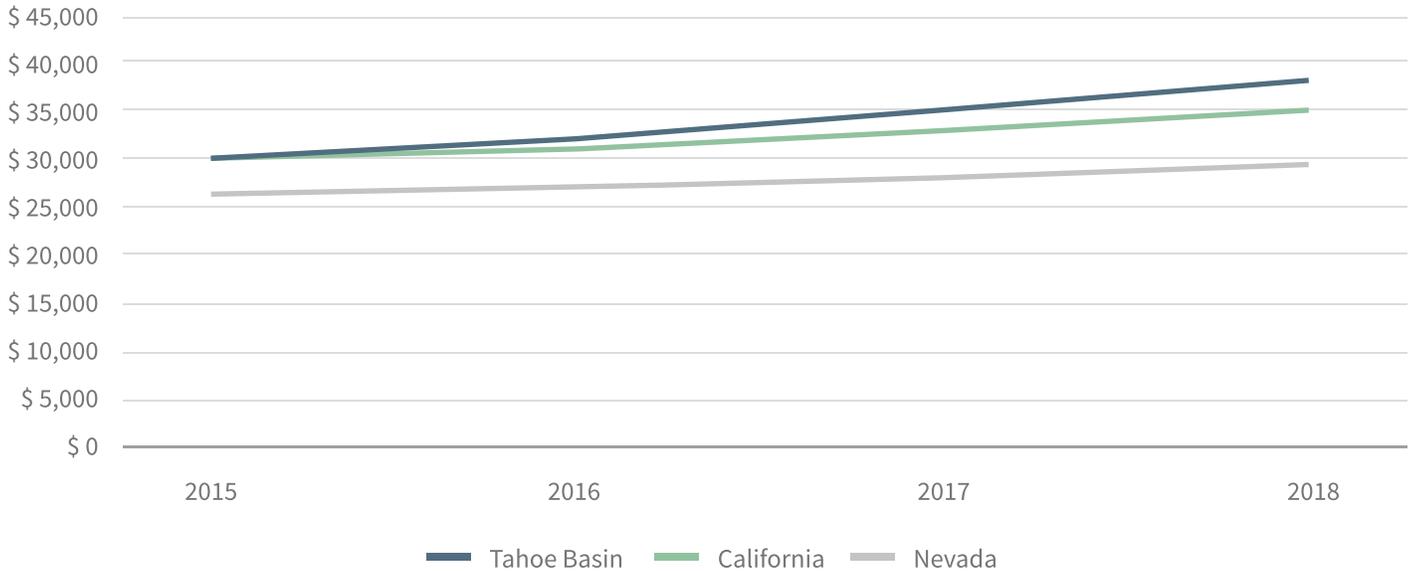


Figure 3: Per Capita Income By Location



Source: American Community Survey; 5 year Estimates Subject Tables

HOME PRICES

Home prices have made steady gains for the past several years and this trend continued in most areas in 2019. In the North shore communities price increases between 2018 and 2019 ranged from 3.2% in Meeks Bay/Rubicon to 9.0% in Kings Beach. One exception was the Alpine/Squaw area which saw a decline of 2.1% (Table 2.1). South Lake Tahoe increased 5.9% (Table 2.2). The trends shown in Figure 4 indicate that the East Shore communities also experienced steady home price gains in 2019.

Figure 4: Single Family Home Price Trends

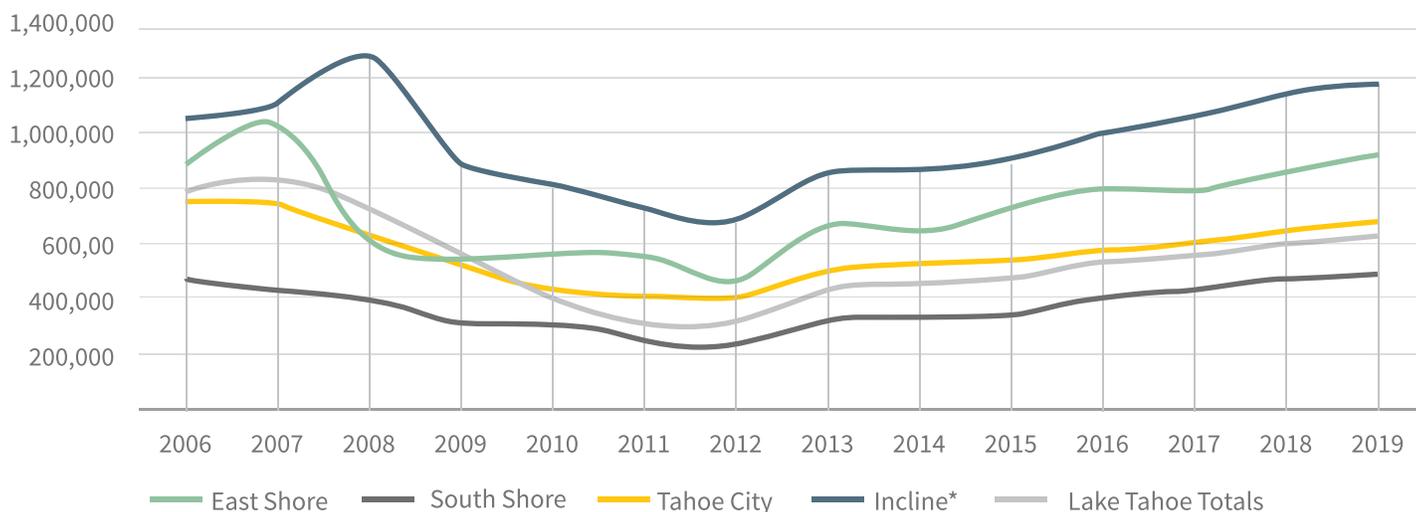


Table 2: Median Contract Rent

Place	Census Tracts	Median Rent 2015	Median Rent 2016	Median Rent 2017	Median Rent 2018	Percent Change
Incline Village	33.05	\$1,123	\$1,127	\$1,161	\$1,184	5%
	33.06	\$1,110	\$1,025	1,109	\$1,146	3%
	33.07	\$1,213	\$1,205	\$1,135	\$1,284	6%
	33.08	\$2,330	\$2,468	\$2,508	\$1,920	-18%
	33.09	\$1,211	\$1,239	\$1,238	\$1,548	28%
Stateline	18	\$918	\$1,047	\$997	\$1,038	13%
Zephyr Cove	16	\$959	\$1,635	\$1,533	\$1,471	53%
South Lake Tahoe	302	\$811	\$800	\$842	\$899	11%
	316	\$757	\$778	\$793	\$816	8%
	303.01	\$905	\$900	\$959	\$972	7%
	304.01	\$1,117	\$1,045	\$1,079	\$1,190	7%
	304.02	\$720	\$690	\$685	\$711	-1%
Tahoe City	222	\$1,163	\$1,021	\$800	\$1,176	1%
Homewood/ Tahoma	223	\$875	--	--		
	320	\$960	\$1,004	\$983	\$1,281	33%

POPULATION

The Basin population experienced a brief uptick between 2014 and 2015 but has been slowly declining again since 2016 (Figure 5). Most of the population decline has occurred in the North Lake area, where the 2018 population of 16,324 is 2,283 persons below the 2015 level. Declines occurred in all North Lake communities except Carnelian Bay, where an increase in 2018 brought the population back to 2015 levels after declines the previous two years.

In contrast, the South Lake communities increased population by 901 persons between 2015 and 2018. All of the communities in the South Lake area had some population increase during this time except Kingsbury, which lost 263 persons.

The younger age groups (0-24 years) in the Tahoe Basin have continued to decrease in share of the population between 2015 and 2018 (Table 3). The prime working age group of 25-44, however, increased its share from 26.6% to 27.7% during this period. The more experienced working age group of 45-64 decreased from 32.0% to 29.8% while the older age groups continued to increase their share of population between 2015 and 2018. While there may be local reasons for these shifts in the Tahoe Basin, they do approximately mirror statewide trends in both California and Nevada.

Figure 5: Population

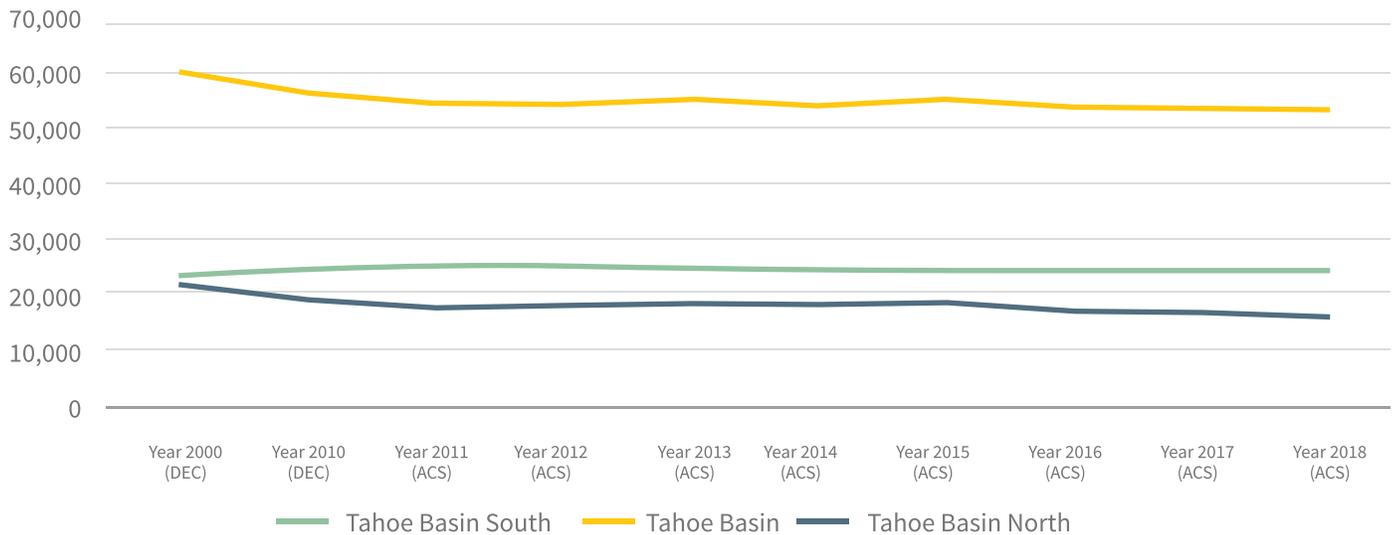


Table 3: Population Distribution by Age Group

Place	Year	0-17 years	18-24 years	25-44 years	45-64 years	65-84 years	85+ years	Total
Lake Tahoe Basin	2000 (Census)	13,431	5,479	19,187	16,226	5,542	430	60,295
	Percentage	22.30%	9.10%	31.80%	26.90%	9.20%	0.70%	100%
	2010 (Census)	10,463	5,160	15,167	18,410	6,883	626	56,709
	Percentage	18.50%	9.10%	26.70%	32.50%	12.10%	1.10%	100%
	2010 (ACS)	10,697	5,582	15,128	16,653	6,564	635	55,258
	Percentage	19.40%	10.10%	27.40%	30.10%	11.90%	1.10%	100%
	2015	9,147	4,949	14,485	17,399	7,766	614	54,361
	Percentage	16.80%	9.10%	26.60%	32.00%	14.30%	1.10%	100%
	2018	8,417	3,732	14,657	15,782	9,538	853	52,979
	Percentage	15.90%	7.00%	27.70%	29.80%	18.00%	1.60%	100%

Place	Year	0-17 years	18-24 years	25-44 years	45-64 years	65-84 years	85+ years	Total
Nevada	2000 (Census)	13,431	5,479	19,187	16,226	5,542	430	60,295
	Percentage	22.30%	9.10%	31.80%	26.90%	9.20%	0.70%	100%
	2010 (Census)	10,463	5,160	15,167	18,410	6,883	626	56,709
	Percentage	18.50%	9.10%	26.70%	32.50%	12.10%	1.10%	100%
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	Percentage	15.90%	7.00%	27.70%	29.80%	18.00%	1.60%	100%
California	2000 (Census)	511,779	179,708	628,572	459,249	201,940	16,989	1,998,57
	2000 (Census)	9,249,829	3,366,030	10,714,403	6,945,728	3,170,001	425,657	33,871,648
	Percentage	27.30%	9.90%	31.60%	20.50%	9.40%	1.30%	100%
	2010 (Census)	9,295,040	3,922,951	10,500,587	9,288,864	3,645,546	600,698	37,253,956
	Percentage	25%	10.50%	28.20%	24.90%	9.80%	1.60%	100%
	2010 (ACS)	9,305,872	3,810,278	10,533,221	8,902,861	3,517,180	567,878	36,637,290
	Percentage	25.40%	10.40%	28.80%	24.30%	9.60%	1.60%	100.00%
	2015	9,305,872	3,810,278	10,533,21	8,902,861	3,517,180	567,878	
	Percentage	23.80%	10.40%	28.20%	25.20%	10.70%	1.70%	
	2018	9,073,655	3,856,220	11,089,177	9,814,251	4,613,887	701,570	39,148,760
Percentage	23.20%	9.90%	28.30%	25.10%	11.80%	1.80%	100%	

Source: American Community Survey; 5 Year Estimates Data Profiles
Table: DP05; ACS Demographic and Housing Estimates.

OVERNIGHT STAYS/TOT

Both Incline Village and South Lake Tahoe have shown steady increases in Average Daily Room Rates (ADR) over the past three years (Figure 7). In Zephyr Cove/Stateline, the ADR is higher in 2018-19 than two years previous but dipped about 10% in 2017-18, despite a 2% increase in occupancy rate. ADRs are substantially higher in Incline Village. The available occupancy data for Incline Village is incomplete but suggests that those rates are also higher than the other areas. Occupancy rates are very low in South Lake Tahoe, due to an overstock of motel rooms on that side of the lake. Due to this inventory, ADRs remain low and make it so that there is almost always an inexpensive motel room available, regardless of the season.

The data in the upper part of Table 4.1 come from the government jurisdictions in these areas. Smith Travel research (STR) also offers a limited sample of data for the Tahoe basin as a whole. The STR sample includes 29 lodging properties of about 100 in the inventory (which does not include vacation rentals). The sample features many of the larger hotel properties in the region, however, and represents 56% of existing rooms. The STR data at the bottom of the table suggests that occupancy rates have been fairly steady over the past three years while ADR has increased more than 5%.

Total lodging revenues increased 5.9% per year over the past three years, but this was slower than the 2010-2016 period, when revenues grew 10.7% per year on average (Table 4.2). Stateline, Tahoe Vista and Homewood have had the highest sustained revenue growth since 2010. South Lake Tahoe revenues grew well from 2010 to 2016 but have been flat since then.

Transient Occupancy Taxes (TOT) have grown more rapidly than room revenues due to some increases in tax rates since 2017 (Table 4.3). But despite the higher tax rates, the growth rates in TOT revenues have been slower over the past three years than previously.

Figure 6: Lake Tahoe Basin Occupancy Rate

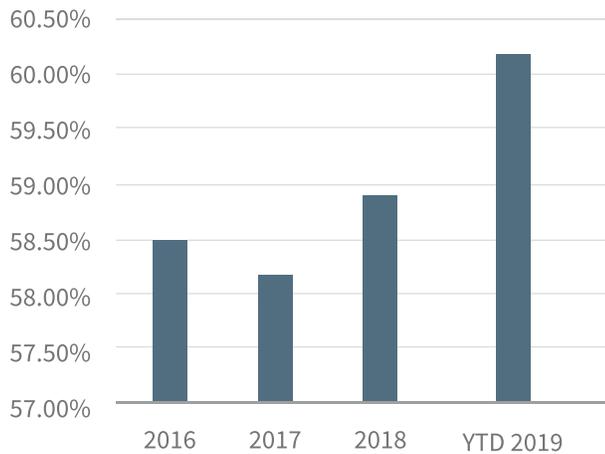


Figure 7: Average Daily Rate

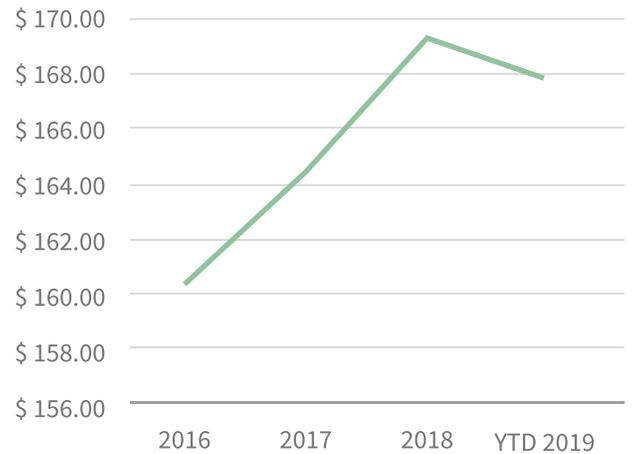
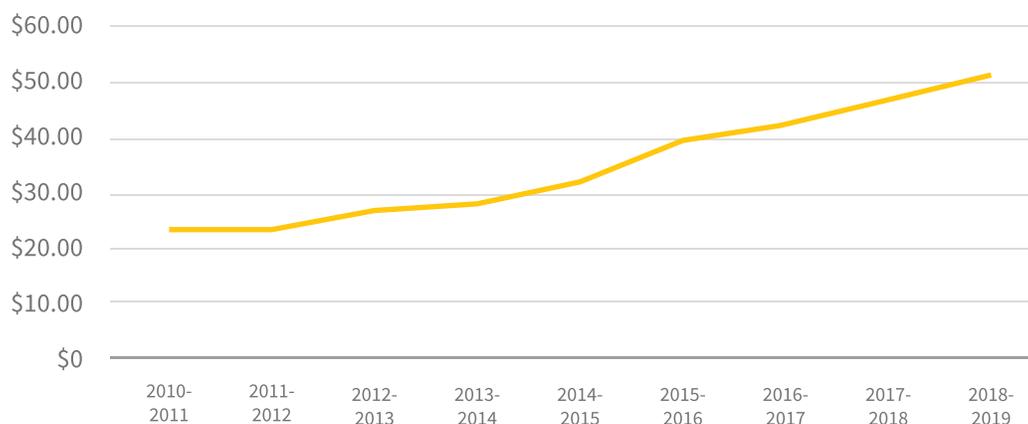


Figure 8: TOT Revenues (\$000's)





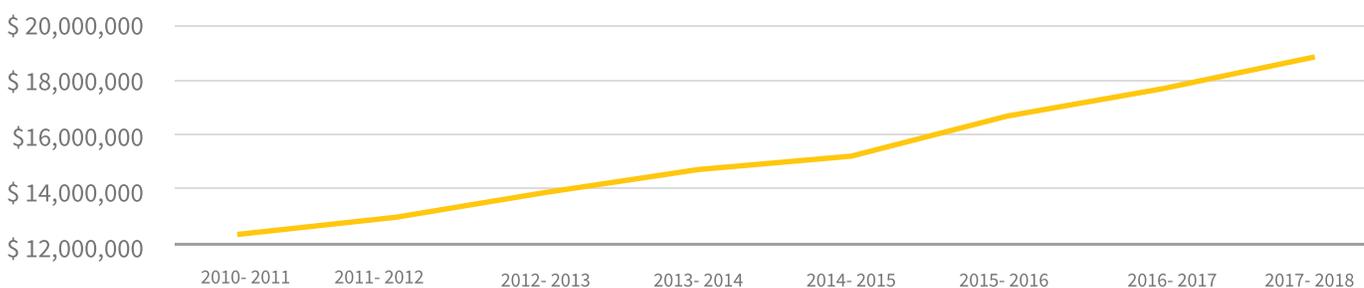
SALES TAX COLLECTIONS

Sales Tax revenues have generally increased at a healthy rate since 2010, growing Basin-wide at 4% per year after inflation (Table 5.1). This growth rate has been remarkably steady for the region as a whole, but individual communities have experienced different rates recently compared to the longer term back to 2010. Incline Village, Zephyr Cove/Stateline, Kings Beach/Carnelian Bay and Tahoe Vista have accelerated sales tax collections since 2015 compared to earlier in the decade, while the other communities have had decreasing growth rates more recently, with Alpine/Squaw showing an actual decline in real dollar terms since 2015.[1]

Taxable sales follow similar patterns (Table 5.2). Only Incline Village has increased its sales tax rate in the past three years.

[1] The percentages in Tables 5.1 and 5.2 are calculated based on inflation adjusted figures while the actual dollar figures in the Tables are not inflation adjusted.

Figure 9: Sales Tax Collections Trends



GAMING REVENUE

Gaming revenues in South Lake Tahoe increased both 2017 and 2018 over the previous year but then declined 0.4% in 2019 (Table 6.1). On the North Shore, revenues declined 0.9% in 2017, increased 3.1% in 2018 but then declined 5.4% in 2019 (Table 6.2). On an inflation adjusted basis, Tahoe gaming revenues decreased back to 50% of their 2004 levels in 2019, while statewide, the revenues remained at about 81% of the 2004 levels (Figure 10).

Figure 10: Gaming Revenues Percent Change 2004-2018



PUBLIC & PRIVATE JOB GROWTH BY INDUSTRY

Private sector jobs had not yet quite recovered from the last recession by the end of 2019. In particular, jobs in accommodations and food services were more than 1,200 jobs below the 2005 level (Table 4). However, arts, entertainment and recreation jobs are up nearly 30% over the 2005 numbers. We believe increases in outdoor recreation activities have led to this growth. Among other sectors especially affected by the recession, retail and construction are still below 2005 jobs levels, while real estate, finance and insurance have enjoyed growth of 3.7% and 9.7%, respectively between 2005 and 2019. Service sectors have generally maintained steady growth throughout the 14-year period with the exception of utilities. Other economic base sectors have been growing since 2011, but 2019 jobs levels remain below the 2005 figures overall.

Public sector jobs peaked at over 3,000 in 2010 and then dropped by 500 jobs in 2011. The public sector began substantially increasing jobs again in 2015 and stabilized at just under 3,000 jobs in 2018 and 2019 (Table 7.2).

Among the communities around the Basin, South Lake Tahoe has had the greatest job gain, adding more than 2,300 jobs since 2011 and is 1,250 jobs above its 2005 level (Table 7.3). However, Zephyr Cove/Stateline has had minimal growth since 2011 and is more than 2,400 jobs below its 2005 level. The other area failing to fully recover from the last recession is Homewood. Tables 7.10 - 7.15 provide detailed job estimates by sector for each community.

Figure 11: Tahoe Annual Job Estimates



Table 4: Summary of Job Growth in the Tahoe Basin, 2005 - 2019

NAICS	Description	2005 Jobs	2011 Jobs	2019 Jobs	2005-2019 Change	2005-2011 CAGR	2011-2019 CAGR
	Total	31,214	26,056	31,187	-0.10%	-3.00%	2.30%
Visitor Serving Sectors							
72	Accommodation and Food Services	13,200	11,051	11,926	-9.70%	-2.90%	1.00%
71	Arts, Entertainment, and Recreation	2,299	2,381	2,964	28.90%	0.60%	2.80%
Other Sectors Affected by the Recession							
44	Retail Trade	2,729	2,358	2,708	-0.80%	-2.40%	1.70%
23	Construction	3,711	1,615	3,116	-16.00%	-12.90%	8.60%
53	Real Estate and Rental and Leasing	1,265	949	1,312	3.70%	-4.70%	4.10%
52	Finance and Insurance	759	583	833	9.70%	-4.30%	4.50%
Service Sectors							
56	Admin. Support/Waste Mgmt.	978	996	1,292	32.10%	0.30%	3.30%
61	Educational Services	397	561	588	48.00%	5.90%	0.60%
62	Health Care and Social Assistance	1,829	2,014	2,126	16.20%	1.60%	0.70%
81	Other Services (except Public Admin.)	1,055	1,089	1,370	29.90%	0.50%	2.90%
22	Utilities	70	191	61	-12.70%	18.20%	-13.20%
Other Economic Base Sectors							
31	Manufacturing	373	188	279	-25.30%	-10.80%	5.00%
42	Wholesale Trade	361	292	356	-1.40%	-3.40%	2.50%
48	Transportation and Warehousing	288	227	422	46.60%	-3.90%	8.10%
51	Information	206	149	229	10.90%	-5.20%	5.50%
54	Professional, Scientific, and Technical Services	1,347	1,072	1,199	-11.00%	-3.70%	1.40%
55	Management of Companies and Enterprises	182	221	277	52.00%	3.30%	2.80%
	Other	163	116	130	-20.30%	-5.60%	1.50%

Source: EMSI

TAHOE BASIN SCHOOLS

Each community around the lake has seen a decline in students each year from 2015-2018. The younger population in Lake Tahoe has been declining steadily which could account for the decrease in student enrollments. There has also been a dramatic increase in the percentage of students needing to utilize the free or subsidized lunch programs in most school districts and communities around the lake, save Zephyr Cove. This is a key indicator when examining the wellbeing of a community and indicates an increase in rental prices and a lack of affordability in the basin.

Figure 12: Number of Lake Tahoe Basin Public and Private School Students Who Enrolled in Grades K-12

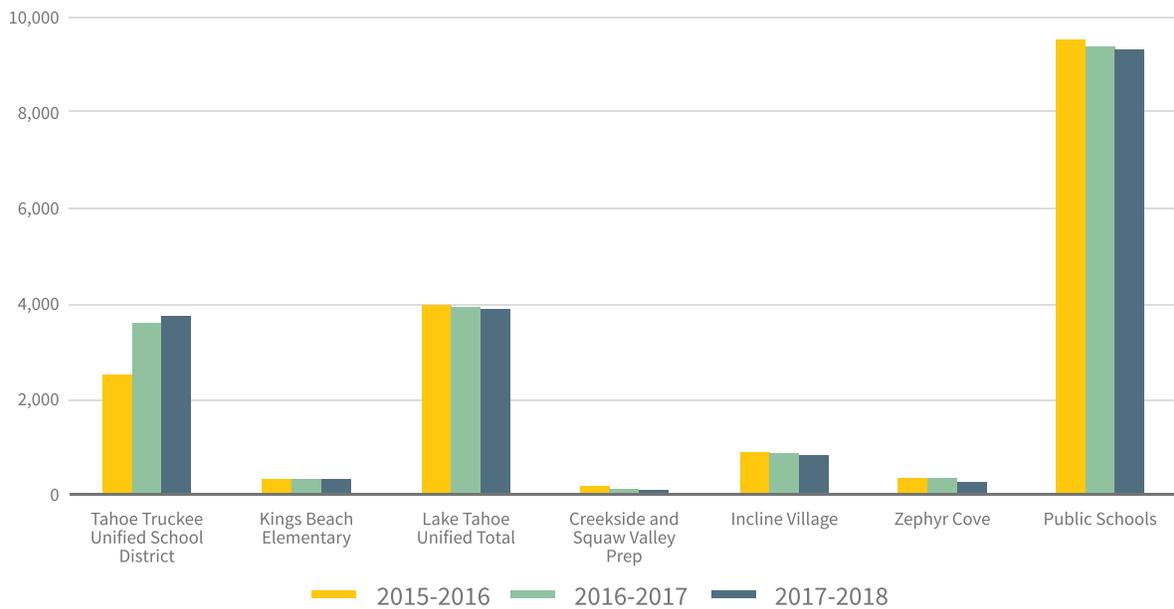


Figure 13: Students Receiving Free or Subsidized Lunches as Percent of Total Students

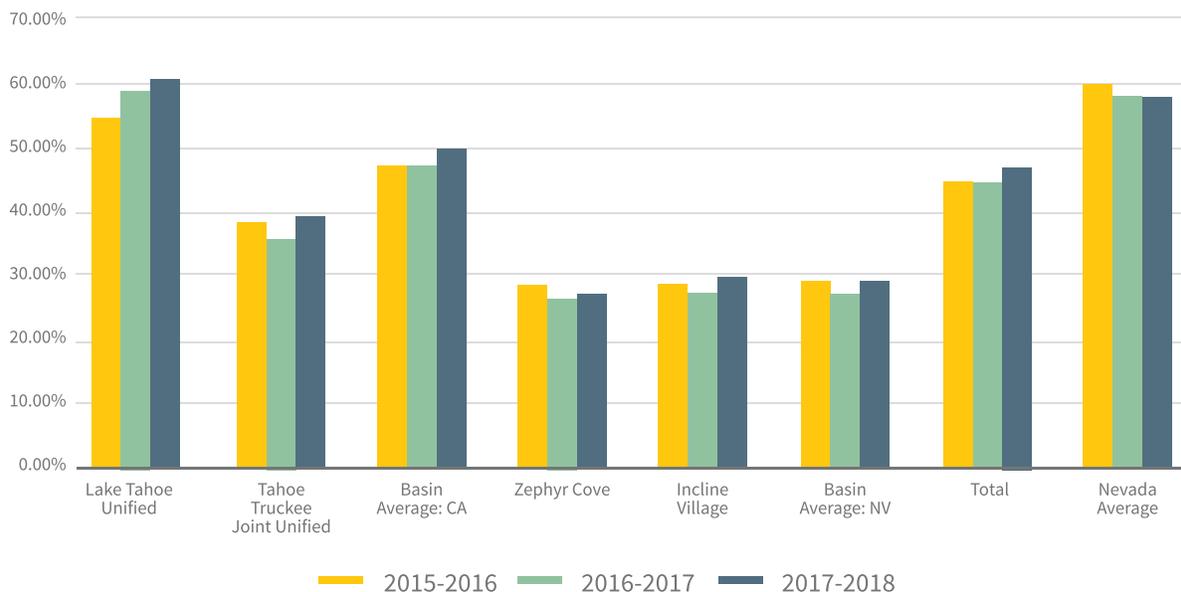
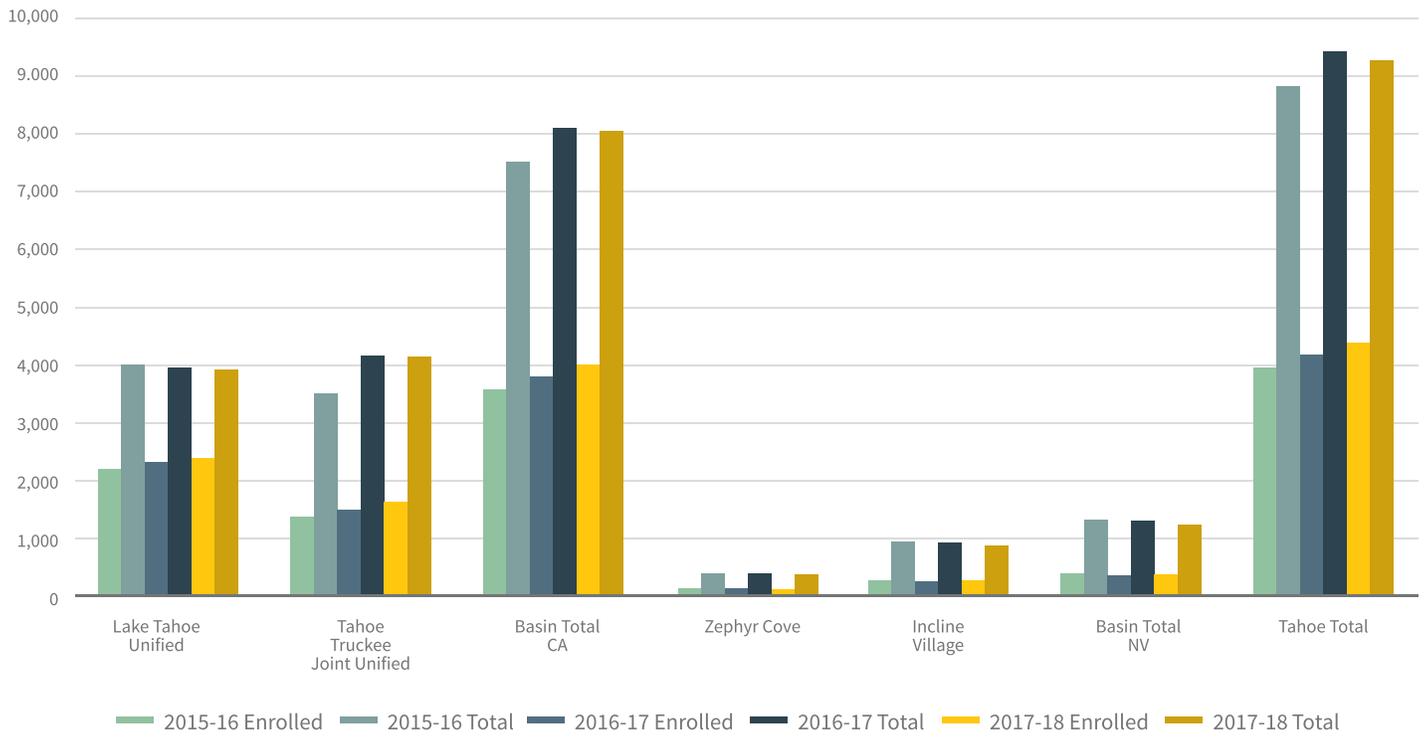


Figure 14: Number Students Receiving Free or Subsidized Lunches



Source : http://agri.nv.gov/Resources/Data_and_Reports/Food_and_Nutrition/SN/SN_Data_Reports

APPENDIX 1: INCOME

Table 1.1: Per Capita Income

Place	2015	2016	2017	2018	% Change
North Lake Tahoe					
Carnelian Bay CDP, CA	\$39,995	\$43,489	\$42,936	\$34,322	-14%
Dollar Point CDP, CA	\$44,872	\$49,178	\$44,065	\$48,439	8%
Kings Beach CDP, CA	\$21,170	\$24,757	\$25,833	\$27,716	31%
Squaw Valley CDP, CA	\$24,659	\$25,010	\$28,094	\$27,889	13%
Sunnyside-Tahoe City CDP, CA	\$30,460	\$33,969	\$38,743	\$42,816	41%
Tahoe Vista CDP, CA	\$26,249	\$28,490	\$29,757	\$30,928	18%
Incline Village CDP, NV	\$50,050	\$52,295	\$56,759	\$65,692	31%
Homewood	\$43,348	\$39,710	\$42,807	\$55,891	29%
Tahoma CDP, CA	\$30,576	\$32,703	\$43,070	\$41,222	35%
South Lake Tahoe City, CA	\$21,136	\$25,880	\$28,098	\$29,521	40%
Stateline CDP, NV	\$19,945	\$19,744	\$23,302	\$23,816	19%
Zephyr Cove CDP, NV	\$50,870	\$53,411	\$50,156	\$70,030	38%
Tahoe Basin	\$30,516	\$32,381	\$35,204	\$38,337	26%
California	\$30,318	\$31,458	\$33,128	\$35,021	16%
Nevada	\$26,541	\$27,253	\$28,450	\$29,961	13%

Source: American Community Survey; 5 year Estimates Subject Tables

APPENDIX 2: HOME PRICES

Table 2.1: Median Contract Rent

Year	Community						
	Meeks Bay/ Rubicon	Homewood/ Tahoma	Tahoe City	Alpine/Squaw	Carnelian Bay	Kings Beach	North/West Shore
2008	\$700,000	\$652,500	\$791,500	\$950,000	\$653,450	\$460,000	\$650,000
2009	\$650,000	\$575,000	\$737,500	\$680,000	\$458,000	\$450,000	\$530,000
2010	\$420,000	\$542,500	\$874,500	\$750,000	\$452,500	\$355,750	\$449,500
2011	\$450,000	\$525,000	\$628,500	\$615,000	\$417,500	\$345,500	\$433,500
2012	\$410,000	\$545,000	\$612,500	\$600,000	\$417,000	\$330,000	\$430,000
2013	\$523,750	\$507,000	\$740,000	\$765,000	\$475,000	\$434,000	\$510,000
2014	\$513,500	\$664,500	\$719,500	\$992,500	\$555,000	\$467,000	\$545,000
2015	\$491,700	\$554,435	\$689,496	\$815,000	\$483,727	\$332,808	\$551,848
2016	\$470,500	\$528,984	\$748,201	\$900,000	\$519,375	\$408,579	\$591,753
2017	\$497,205	\$555,150	\$769,637	\$905,000	\$540,180	\$434,967	\$662,468
2018	\$534,956	\$596,004	\$823,415	\$1,044,500	\$570,404	\$470,044	\$688,924
2019	\$552,016	\$623,332	\$877,936	\$1,023,000	\$600,899	\$512,199	\$725,881

Source: Tahoe Sierra Board of Realtors for Alpine/Squaw and North/West Shore. Others from Chase International through 2016 and Zillow home price index for 2017-2019.

Table 2.2: South Tahoe Median Home Prices

Place	3/31/08	3/31/09	3/31/10	3/31/11	3/31/12	3/31/13	3/31/14	2015	2016	2017	2018	3/31/19	3/31/20
Al Tahoe	\$425,000	\$425,000	\$295,000	\$280,000	\$223,000	\$235,000	\$285,500	\$300,000	\$359,000	\$395,000	\$431,500	\$427,000	\$465,000
Bijou 1	\$372,500	\$366,250	\$262,750	\$260,000	\$197,200	\$229,000	\$294,500	\$292,500	\$298,500	\$362,000	\$340,000	\$365,000	\$395,000
Bijou 2	\$390,000	\$319,000	\$285,000	\$223,500	\$203,500	\$188,500	\$271,250	\$299,000	\$339,000	\$349,000	\$342,000	\$350,000	\$407,500
Black Bart	\$375,000	\$500,000	\$215,000	\$240,000	\$255,000	\$255,000	\$250,000	\$361,000	\$330,000	\$400,000	\$420,000	\$420,000	\$349,000
Christmas Valley 1	\$400,000	\$512,500	\$318,000	\$424,500	\$251,500	\$275,000	\$265,750	\$337,000	\$304,500	\$404,000	\$410,000	\$420,000	\$448,000
Christmas Valley 2	\$435,750	\$330,000	\$316,250	\$317,000	\$340,000	\$235,000	\$375,000	\$398,475	\$390,000	\$462,000	\$541,750	\$665,000	\$484,750
Echo View Estates			\$385,000	\$350,000	\$330,000	\$399,000	\$458,000	\$409,000	\$420,000	\$590,000		\$675,000	\$800,000
Country Club Estates	\$518,500	\$635,000	\$389,500	\$480,000	\$327,000	\$325,000	\$410,000	\$464,500	\$386,000	\$566,000	\$577,500	\$580,000	\$543,500
Gardner Mountain	\$339,900	\$305,000	\$290,000	\$244,000	\$221,900	\$230,000	\$257,000	\$297,000	\$319,900	\$341,000	\$370,000	\$370,000	\$419,500
Heavenly Valley	\$590,000	\$593,000	\$442,500	\$432,000	\$387,500	\$327,500	\$397,500	\$397,500	\$500,000	\$399,000		\$567,500	\$495,000
Highland Woods	\$402,250	\$405,000	\$328,500	\$267,500	\$304,950	\$315,000	\$377,500	\$325,000	\$324,500	\$513,000	\$465,000	\$475,000	\$458,200
Highland Woods PUD	\$360,000				\$156,500	\$171,500		\$215,000	\$249,500	\$329,000			\$336,400
Meyers	\$394,500	\$330,000	\$290,000	\$287,000	\$185,000	\$209,500	\$298,000	\$325,000	\$325,000	\$385,000	\$387,500	\$390,000	\$418,000
Montgomery Estates	\$571,500	\$450,457	\$439,000	\$470,000	\$395,750	\$353,125	\$425,000	\$485,000	\$500,000	\$657,500	\$605,000	\$582,500	\$588,000
N Upper Truckee 1	\$522,000	\$386,250	\$532,900	\$337,500	\$240,500	\$249,000	\$425,000	\$425,000	\$435,000	\$455,025	\$507,500	\$520,000	\$499,500
N Upper Truckee 2	\$586,000	\$750,000	\$340,000	\$505,000	\$350,000	\$520,000	\$475,000	\$448,500	\$532,500	\$649,500	\$550,000	\$604,000	\$725,000
Pioneer Trail	\$489,000	\$412,500	\$310,000	\$323,250	\$270,500	\$265,000	\$359,000	\$357,000	\$379,000	\$439,000	\$487,500	\$505,000	\$464,500
Pioneer Village	\$374,000	\$350,000	\$172,500	\$244,950	\$168,500	\$185,000	\$263,000	\$327,500	\$275,000	\$397,500	\$424,000	\$424,000	\$392,500
Sierra Tract	\$297,000	\$262,500	\$205,000	\$188,500	\$141,500	\$167,500	\$213,000	\$252,000	\$280,000	\$330,000		\$339,750	\$349,000
Sky Meadows			\$222,000	\$181,250	\$185,300	\$157,200	\$230,000	\$255,000.00	--	\$344,000	\$312,000	\$312,000	\$350,000
Stateline	\$970,000	\$295,000	\$270,000	\$146,500	\$218,000	\$139,000	\$253,750	\$276,500	\$253,500	\$372,000	\$566,250	\$430,000	\$413,000
Tahoe Island Drive	\$330,000	\$342,500	\$275,000	\$247,000	\$225,000	\$202,212	\$300,000	\$326,500	\$339,000	\$414,000	\$422,000	\$423,500	\$439,000
Tahoe Island Park	\$410,000	\$368,000	\$290,000	\$229,500	\$231,000	\$247,750	\$309,000	\$373,000	\$350,000	\$440,000	\$445,000	\$445,530	\$442,000
Tahoe Keys	\$982,000	\$828,750	\$697,500	\$672,000	\$575,500	\$633,000	\$710,000	\$700,000	\$839,000	\$794,200	\$685,000	\$905,000	\$912,000
Tahoe Meadows	\$504,000		\$707,500	\$590,000				\$451,325	\$260,000	-	\$692,000	\$692,000	\$1,545,000
Tahoe Paradise	\$512,000	\$377,500	\$350,000	\$385,000	\$212,000	\$297,000	\$325,000	\$427,500	\$384,500	\$522,450	\$497,425	\$495,000	\$506,000
Y Area	\$339,000	\$317,000	\$215,000	\$172,500		\$210,500	\$227,000	\$286,000	\$301,500	\$241,500	\$210,000	\$349,750	\$355,000
	\$475,596	\$428,748	\$340,150	\$326,863	\$263,864	\$270,050	\$338,190					\$489,713	\$518,531

Source: Tahoe Sierra Board of Realtors

APPENDIX 3: POPULATION

Table 3.1: Population

North Lake	Year 2000 (DEC)	Year 2010 (DEC)	Year 2011 (ACS)	Year 2012 (ACS)	Year 2013 (ACS)	Year 2014 (ACS)	Year 2015 (ACS)	Year 2016 (ACS)	Year 2017 (ACS)	Year 2018 (ACS)	Ann. Percent Change
Homewood	808	709	774	792	817	738	657	465	372	321	-5.00%
Tahoe Pines/ Sunnyside	1,087	961	775	964	915	975	695	712	613	545	-3.80%
Tahoe City	1,058	909	1,031	1,071	981	1,080	973	720	767	785	-1.60%
Lake Forest/Dollar Hill	1,806	1,288	1,115	1,221	1,049	1,140	1,198	1,025	979	803	-4.40%
Carnelian Bay	1,694	1,352	1,284	1,313	1,186	1,183	1,124	910	965	1,129	-2.20%
Tahoe Vista	1,931	1,719	1,546	1,470	1,722	1,605	1,708	1,549	1,488	1,404	-1.80%
Kings Beach/ Brockway	3,774	3,510	2,966	3,240	3,355	3,111	3,279	2,974	2,626	2,717	-1.80%
Crystal Bay/ Incline Village	9,952	9,087	8,347	8,127	8,654	8,582	8,973	8,776	8,901	8,620	-0.80%
Subtotal North	22,110	19,535	17,838	18,198	18,679	18,414	18,607	17,131	16,711	16,324	-1.70%
South Lake Tahoe	23,663	24,343	24,464	24,517	24,230	23,928	23,866	24,019	24,037	24,166	0.10%
Meyers	3,047	2,641	2,767	2,446	2,296	2,340	2,408	2,393	2,638	2,693	-0.70%
Tahoma	1,158	1,015	666	681	628	676	667	793	639	834	-1.80%
Glenbrook	5,535	5,397	5,034	4,889	4,819	4,932	4,834	4,805	4,929	5,094	-0.50%
Kingsbury	2,169	1,601	1,622	1,563	1,722	1,762	2,009	1,894	1,730	1,746	-1.20%
Stateline	2,613	2,152	1,621	1,690	2,005	2,027	1,970	2,242	2,303	2,122	-1.10%
Subtotal South	38,185	37,149	36,174	35,786	35,700	35,665	35,754	36,146	36,276	36,655	-0.20%
Tahoe Basin	60,295	56,684	54,012	53,984	54,380	54,079	54,361	53,277	52,987	52,979	-0.70%

Source: American Community Survey; 5 Year Estimates Detailed Tables

APPENDIX 4: HOTEL OCCUPANCY & REVENUE

Table 4.1: Recent Trend in Occupancy and Avg. Daily Room Rates

	2016-2017	2017-2018	2018-2019	
Incline Village				
<i>Occupancy Rate</i>				
Average Daily Rate	\$247.66	\$250.78	\$260.29	
Zephyr/Stateline				
<i>Occupancy Rate</i>				
Average Daily Rate	\$103.14	\$90.69	\$106.00	
South Lake Tahoe				
<i>Occupancy Rate</i>				
Average Daily Rate	\$198.76	\$209.15	\$211.22	
STR Sample	2016	2017	2018	YTD 2019
Lake Tahoe Basin				
<i>Occupancy Rate</i>				
Average Daily Rate	\$160.35	\$164.42	\$169.16	\$167.77

Table 4.2: Hotel Revenues Subject to TOT Tax

Community	2010- 2011	2011- 2012	2012- 2013	2013- 2014	2014- 2015	2015- 2016	2016-2017	2017-2018	2018-2019	Annual Change: 2010/11 to 2018-2019	Annual Change 2016/17 to 2018/19
Incline Village	\$27,812	\$27,515	\$30,315	\$31,499	\$35,603	\$41,813	\$46,044	\$46,785	\$50,965	8.50%	5.20%
Zephyr Cove \ Stateline	\$43,183	\$44,097	\$48,231	\$48,244	\$65,169	\$80,687	\$69,072	\$80,438	\$89,379	13.30%	13.80%
South Lake Tahoe	\$86,700	\$88,246	\$102,975	\$110,347	\$124,936	\$155,475	\$150,909	\$145,150	\$151,008	12.40%	0.00%
Alpine Meadows	\$1,451	\$1,355	\$1,586	\$1,403	\$1,556	\$1,923	\$2,450	\$2,260	\$2,640	5.80%	3.80%
Carnelian Bay	\$6,002	\$6,387	\$7,519	\$7,648	\$7,624	\$9,121	\$11,330	\$12,050	\$13,720	8.70%	10.00%
Kings Beach	\$3,210	\$3,155	\$3,542	\$3,432	\$3,736	\$3,831	\$4,510	\$5,190	\$6,140	3.60%	16.70%
Squaw Valley	\$31,352	\$29,296	\$31,907	\$32,083	\$32,002	\$40,207	\$44,130	\$42,940	\$49,710	5.10%	6.10%
Tahoe Vista	\$5,526	\$5,531	\$7,249	\$7,541	\$9,179	\$10,188	\$11,190	\$11,950	\$13,770	13.00%	10.90%
Tahoe City	\$9,999	\$10,262	\$11,816	\$11,847	\$12,926	\$14,757	\$18,170	\$19,260	\$21,220	8.10%	8.10%
Homewood	\$10,463	\$10,586	\$12,148	\$13,425	\$14,040	\$17,312	\$20,850	\$22,530	\$26,090	10.60%	11.90%
Total	\$225,702	\$226,435	\$257,292	\$267,474	\$306,770	\$375,314	\$378,655	\$388,553	\$424,642	10.70%	5.90%

Source: ADE, based on Reno-Sparks Convention Visitors Authority, City of South Lake Tahoe, Placer County Office of CEO, and Douglas County Finance Department

Table 4.3: TOT Revenues (\$000's)

Community	2010- 2011	2011- 2012	2012- 2013	2013- 2014	2014- 2015	2015- 2016	2016-2017	2017-2018	2018-2019	Annual Change: 2010/11 to 2015/16	Annual Change: 2016/17 to 2018/19
Incline Village	\$3,616	\$3,577	\$3,941	\$4,095	\$4,628	\$5,436	\$5,436	\$6,446	\$6,550	8.50%	9.80%
Zephyr Cove \ Stateline	\$4,318	\$4,409	\$4,823	\$4,824	\$6,517	\$8,069	\$8,979	\$11,257	\$12,994	13.30%	20.30%
South Lake Tahoe	\$8,670	\$8,824	\$10,297	\$11,034	\$12,494	\$15,547	\$16,600	\$17,418	\$18,121	12.40%	4.50%
Alpine Meadows	\$145	\$135	\$158	\$140	\$156	\$192	\$245	\$226	\$264	5.80%	3.80%
Carnelian Bay	\$600	\$638	\$751	\$764	\$762	\$912	\$1,133	\$1,205	\$1,372	8.70%	10.00%
Kings Beach	\$321	\$315	\$354	\$343	\$374	\$383	\$451	\$519	\$614	3.60%	16.70%
Squaw Valley	\$3,135	\$2,929	\$3,190	\$3,208	\$3,200	\$4,021	\$4,413	\$4,294	\$4,971	5.10%	6.10%
Tahoe Vista	\$552	\$553	\$724	\$754	\$918	\$1,019	\$1,119	\$1,195	\$1,377	13.00%	10.90%
Tahoe City	\$999	\$1,026	\$1,181	\$1,184	\$1,293	\$1,476	\$1,817	\$1,926	\$2,122	8.10%	8.10%
Homewood	\$1,046	\$1,058	\$1,214	\$1,342	\$1,404	\$1,731	\$2,085	\$2,253	\$2,609	10.60%	11.90%
Total	\$23,402	\$23,464	\$26,633	\$27,688	\$31,745	\$38,786	\$42,278	\$46,739	\$50,994	10.60%	9.80%

Source: ADE, based on Reno-Sparks Convention Visitors Authority, City of South Lake Tahoe, Placer County Office of CEO, and Douglas County Finance Department

APPENDIX 5: SALES TAX

Table 5.1: Sales Tax Collections Trends

Community	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	Annual Percent Change*: 10-11 through 14-15	Annual Percent Change*: 15-16 through 17-18
Incline Village	\$2,808,180	\$2,873,527	\$3,088,118	\$3,315,640	\$3,499,754	\$3,897,680	\$4,329,301	\$4,502,122	4%	5%
Zephyr Cove\ Stateline	\$2,213,020	\$2,309,331	\$2,460,975	\$2,494,582	\$2,499,207	\$2,525,373	\$2,792,058	\$2,973,531	2%	6%
South Lake Tahoe	\$5,327,442	\$5,681,786	\$6,063,716	\$6,609,020	\$6,855,547	\$7,795,925	\$7,964,272	\$8,826,672	5%	4%
Alpine Mead.\Squa. Va.	\$380,922	\$404,870	\$446,930	\$454,410	\$503,783	\$576,236	\$645,122	\$587,005	6%	-1%
Kings Beach/ Carnelian Bay	\$374,398	\$395,887	\$408,821	\$425,315	\$386,793	\$424,777	\$440,929	\$462,879	0%	2%
Tahoe Vista	\$136,544	\$147,179	\$168,330	\$177,805	\$178,981	\$181,302	\$208,132	\$226,228	6%	9%
Tahoe City	\$828,564	\$868,687	\$928,696	\$938,680	\$932,837	\$998,389	\$1,061,460	\$1,044,326	2%	0%
Homewood	\$224,056	\$223,680	\$247,417	\$243,746	\$264,256	\$272,400	\$271,236	\$291,142	3%	1%
Total	\$12,293,126	\$12,904,947	\$13,813,003	\$14,659,198	\$15,121,158	\$16,672,082	\$17,712,509	\$18,913,905	4%	4%

Source: ADE, Inc., based on City of South Lake Tahoe ("City of South Lake Tahoe Sales Tax" and "City of South Lake Tahoe Measure Q Tax" Reports), and Office of Placer County CEO ("Tahoe Area Revenues - Sales Tax Revenues By Quarter" Report). Taxable sales and sales tax revenue estimates for Incline Village and Zephyr Cove\Stateline are based on relationship between County-level CTX (SCRRT) and GID-level CTX (SCRRT) for Incline Village and Zephyr Cove\Stateline. *Note: annual percentage changed based on uniform \$2018 dollar.

Table 5.2: Taxable Sales Trends

Community	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	Annual Per. Change*: 10-11 through 14-15	Annual Per. Change*: 15-16 through 17-18
Incline Village	\$36,351,841	\$37,197,756	\$39,975,636	\$42,920,905	\$45,304,260	\$50,455,406	52,381,133	54,472,137	6%	4%
Zephyr Cove\Stateline	\$31,169,294	\$32,525,794	\$34,661,616	\$35,134,959	\$35,200,101	\$35,568,639	\$39,324,756	\$41,880,723	3%	8%
South Lake Tahoe	\$68,741,187	\$73,313,368	\$78,241,497	\$85,277,677	\$88,458,671	\$100,592,581	\$102,764,800	\$113,892,542	6%	6%
Alpine Mead.\Squa. Va.	\$5,254,097	\$5,584,414	\$6,164,552	\$6,267,724	\$6,948,731	\$7,948,083	\$8,898,234	\$8,096,621	7%	1%
Kings Beach/Carnelian Bay	\$5,164,110	\$5,460,510	\$5,638,910	\$5,866,414	\$5,335,076	\$5,858,993	\$6,081,779	\$6,384,538	1%	4%
Tahoe Vista	\$1,883,366	\$2,030,055	\$2,321,793	\$2,452,483	\$2,468,703	\$2,500,717	\$2,870,786	\$3,120,386	7%	12%
Tahoe City	\$11,428,469	\$11,981,890	\$12,809,600	\$12,947,310	\$12,866,717	\$13,770,883	\$14,640,828	\$14,404,497	3%	2%
Homewood	\$3,090,428	\$3,085,241	\$3,412,648	\$3,362,014	\$3,644,910	\$3,757,241	\$3,741,186	\$4,015,752	4%	3%
Total	\$163,082,791	\$171,179,029	\$183,226,252	\$194,229,486	\$200,227,170	\$220,452,543	\$230,703,503	\$246,267,195	5%	6%

“Source: ADE, Inc., based on City of South Lake Tahoe (“City of South Lake Tahoe Sales Tax” and “City of South Lake Tahoe Measure Q Tax” Reports), and Office of Placer County CEO (“Tahoe Area Revenues - Sales Tax Revenues By Quarter” Report). Taxable sales and sales tax revenue estimates for Incline Village and Zephyr Cove\Stateline are based on relationship between County-level CTX and GID-level CTX for Incline Village and Zephyr Cove\Stateline. *Note: annual percentage changed based on uniform \$2018 dollar.

APPENDIX 6: CASINO GAMING REVENUE

Table 6.1: Douglas County & Stateline Casinos Gaming Revenue (\$000's)

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Annual	Percent Change
1996	24,089	21,053	25,585	20,885	24,001	28,125	33,437	37,215	27,057	22,301	19,995	20,751	304,494	
1997	18,780	19,102	22,953	20,948	25,792	27,336	34,588	33,441	25,949	23,624	21,399	22,003	295,915	-2.80%
1998	21,830	16,398	23,363	19,302	27,403	22,828	39,683	36,814	30,618	25,659	18,861	22,130	304,889	3.00%
1999	24,092	21,037	25,575	19,562	24,827	29,948	39,839	34,605	28,037	27,692	20,694	25,335	321,243	5.40%
2000	24,796	20,262	27,059	24,756	26,164	32,979	41,958	44,515	32,115	24,768	25,251	28,118	352,741	9.80%
2001	24,454	21,538	26,205	22,496	25,782	27,827	41,769	36,047	32,042	25,464	20,132	25,319	329,075	-6.70%
2002	19,614	25,334	25,012	27,840	26,706	28,662	42,136	34,011	33,474	25,790	21,664	26,159	336,402	2.20%
2003	24,204	26,165	25,429	22,191	24,500	27,603	39,868	37,062	32,088	26,765	20,570	29,052	335,497	-0.30%
2004	25,368	25,620	26,690	24,882	28,986	25,260	31,168	40,878	36,101	22,361	21,617	29,136	338,067	0.80%
2005	15,017	22,410	31,318	23,582	27,960	25,611	42,464	37,323	31,080	28,454	24,249	23,005	332,473	-1.70%
2006	28,779	25,445	20,518	28,741	25,828	27,532	39,639	32,529	27,781	29,180	22,701	22,018	330,691	-0.50%
2007	31,122	24,512	19,320	31,690	32,079	26,986	36,763	30,469	29,348	27,319	22,018	24,300	335,926	1.60%
2008	26,629	22,675	29,863	24,438	24,357	20,512	40,786	30,864	24,506	20,891	21,657	17,260	304,438	-9.40%
2009	20,306	16,595	19,690	15,783	18,146	17,419	27,257	21,939	21,839	15,850	15,881	15,314	226,019	-25.80%
2010	18,322	14,048	21,097	12,502	15,868	19,776	23,767	23,519	30,030	15,131	15,047	12,587	221,694	-1.90%
2011	16,883	13,702	14,810	14,376	18,254	14,129	29,809	27,332	17,153	15,739	14,006	13,345	209,538	-5.50%
2012	17,235	15,106	12,737	13,739	13,339	16,555	29,636	22,017	18,012	15,859	17,735	20,953	212,923	1.60%
2013	16,784	16,290	11,343	15,729	14,633	12,522	32,372	21,425	22,188	12,292	17,381	15,782	208,741	-2.00%
2014	14,699	14,741	14,931	9,081	17,321	12,230	25,079	28,419	23,782	18,776	12,104	15,948	207,111	-0.80%
2015	14,140	15,575	13,911	14,521	16,150	17,613	23,313	18,883	21,248	18,213	14,193	17,951	205,711	-0.70%
2016	15,435	16,174	17,138	12,708	13,709	18,754	27,985	23,917	21,731	14,175	15,979	18,724	216,427	5.20%
2017	17,106	15,053	16,743	13,287	17,821	20,513	23,853	25,576	21,085	16,463	15,511	18,490	221,501	2.30%
2018	19,641	19,862	14,578	14,938	18,022	18,717	29,940	26,789	17,747	17,059	17,137	16,808	231,238	4.40%
2019	16,892	14,572	15,913	13,064	20,095	16,462	34,994	23,683	18,190	19,503	18,757	18,169	230,294	-0.40%

Source: Nevada Gaming Control Board.

Table 6.2: Washoe County Casinos Gaming Revenue (\$000's)

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Annual	Percent Change
1996						4,949						2,597	7,546	
1997						4,886						3,793	8,679	15.00%
1998						4,940						3,758	8,698	0.20%
1999						3,067						2,691	5,758	-33.80%
2000						3,606						3,427	7,033	22.10%
2001						3,398						3,048	6,446	-8.30%
2002						3,185						2,404	5,589	-13.30%
2003						3,211						2,583	5,794	3.70%
2004	3,133	3,261	2,554	2,657	3,018	3,410	5,133	5,256	4,197	3,172	2,648	3,355	41,794	16.80%
2005	3,496	3,169	3,063	2,690	2,682	3,295	5,242	4,897	4,209	3,392	2,635	4,039	42,809	2.40%
2006	2,978	2,874	2,754	2,940	3,105	3,537	5,431	3,892	4,154	3,300	2,842	3,552	41,359	-3.40%
2007	2,605	3,292	3,069	3,065	3,237	3,966	5,034	4,933	3,944	2,576	2,733	3,822	42,276	2.20%
2008	2,531	2,435	2,385	2,667	2,667	2,902	4,837	4,557	3,052	2,173	1,997	2,659	34,862	-17.50%
2009	2,244	1,854	1,822	1,707	2,168	2,434	3,716	3,432	3,042	2,120	1,672	2,349	28,560	-18.10%
2010	1,990	2,076	1,960	1,473	1,948	2,177	3,799	3,404	3,020	2,290	1,543	2,153	27,833	-2.50%
2011	2,011	1,754	1,685	1,895	2,003	1,871	3,400	2,759	2,574	2,132	1,537	2,249	25,870	-7.10%
2012	1,927	1,623	1,837	1,596	1,806	2,418	3,580	3,266	2,755	1,652	1,648	1,824	25,932	0.20%
2013	1,939	2,195	2,120	1,641	1,808	2,504	3,401	3,575	2,595	1,773	1,432	2,131	27,114	4.60%
2014	1,585	1,708	1,806	1,594	1,838	2,118	3,583	3,316	2,195	1,958	1,748	2,150	25,599	-5.60%
2015	1,994	1,762	1,530	1,331	1,765	2,125	3,381	2,796	2,355	2,008	1,757	2,008	24,812	-3.10%
2016	2,440	2,073	1,625	1,381	1,634	2,501	3,323	2,853	2,506	1,953	1,564	2,508	26,359	6.20%
2017	1709	1997	1736	1532	1514	2114	3444	3149	2920	1883	1859	2257	26,114	-0.90%
2018	2257	1684	1876	2040	1550	1894	3513	3249	2549	2236	1761	2316	26,925	3.10%
2019	2316	1727	1412	2085	1300	1963	3645	2682	2574	1853	1757	2150	25,464	-5.40%

Source: Nevada Gaming Control Board.

APPENDIX 7: JOB GROWTH BY INDUSTRY

Table 7.1: Summary of Job Growth in the Tahoe Basin, 2005 - 2019

NAICS	Description	2005 Jobs	2011 Jobs	2019 Jobs	2005-2019 Change	2005-2011 CAGR	2011-2019 CAGR
	Total	31,214	26,056	31,187	-0.10%	-3.00%	2.30%
Visitor Serving Sectors							
72	Accommodation and Food Services	13,200	11,051	11,926	-9.70%	-2.90%	1.00%
71	Arts, Entertainment, and Recreation	2,299	2,381	2,964	28.90%	0.60%	2.80%
Other Sectors Affected by the Recession							
44	Retail Trade	2,729	2,358	2,708	-0.80%	-2.40%	1.70%
23	Construction	3,711	1,615	3,116	-16.00%	-12.90%	8.60%
53	Real Estate and Rental and Leasing	1,265	949	1,312	3.70%	-4.70%	4.10%
52	Finance and Insurance	759	583	833	9.70%	-4.30%	4.50%
Service Sectors							
56	Admin. Support/Waste Mgmt.	978	996	1,292	32.10%	0.30%	3.30%
61	Educational Services	397	561	588	48.00%	5.90%	0.60%
62	Health Care and Social Assistance	1,829	2,014	2,126	16.20%	1.60%	0.70%
81	Other Services (except Public Admin.)	1,055	1,089	1,370	29.90%	0.50%	2.90%
22	Utilities	70	191	61	-12.70%	18.20%	-13.20%
Other Economic Base Sectors							
31	Manufacturing	373	188	279	-25.30%	-10.80%	5.00%
42	Wholesale Trade	361	292	356	-1.40%	-3.40%	2.50%
48	Transportation and Warehousing	288	227	422	46.60%	-3.90%	8.10%
51	Information	206	149	229	10.90%	-5.20%	5.50%
54	Professional, Scientific, and Technical Services	1,347	1,072	1,199	-11.00%	-3.70%	1.40%
55	Management of Companies and Enterprises	182	221	277	52.00%	3.30%	2.80%
	Other	163	116	130	-20.30%	-5.60%	1.50%

Source: EMSI

Table 7.2: Tahoe Basin Public Sector Jobs, 2005 - 2019

Description	2005 Jobs	2006 Jobs	2007 Jobs	2008 Jobs	2009 Jobs	2010 Jobs	2011 Jobs	2012 Jobs	2013 Jobs	2014 Jobs	2015 Jobs	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs
Federal Government, Civilian, Excl. Postal Service	163	146	146	152	172	201	165	156	149	144	144	146	138	130	129
State Government, Excl. Education and Hospitals	117	119	119	114	108	108	105	103	101	99	102	161	163	168	169
Local Government															
Elementary and Secondary Schools	582	597	623	662	640	613	584	587	590	621	613	628	633	649	659
Colleges, Universities, and Professional Schools	548	541	323	281	269	598	248	300	318	269	431	373	476	440	451
All Other Schools and Educational Support Services	0	0	0	0	0	44	0	0	0	0	37	94	17	75	53
Local Government, Excl. Education and Hospitals	1,249	1,301	1,348	1,409	1,629	1,533	1,484	1,452	1,436	1,448	1,458	1,487	1,489	1,516	1,511
Total	2,658	2,705	2,559	2,618	2,817	3,098	2,587	2,598	2,593	2,581	2,786	2,890	2,915	2,977	2,973

Table 7.3: Summary of Job Estimates by Community, 2005 - 2019

Community	2005	2011	2019	2005-2019 Change	2005-2011 CAGR	2011-2019 CAGR
Incline Village	5,244	4,464	5,316	1.40%	-2.60%	2.20%
Zephyr Cove/Stateline	8,359	5,824	5,933	-29.00%	-5.80%	0.20%
Other East Shore	358	271	444	24.00%	-4.50%	6.40%
South Lake Tahoe	9,597	8,517	10,847	13.00%	-2.00%	3.10%
Kings Beach/Tahoe Vista	1,525	1,139	1,686	10.60%	-4.70%	5.00%
Alpine/Carnelian/Tahoe City/Squaw	5,621	5,412	6,464	15.00%	-0.60%	2.20%
Homewood (West Shore)	510	429	496	-2.70%	-2.80%	1.80%
Total	31,214	26,056	31,186	-0.10%	-3.00%	2.30%

Table 7.4: Annual Jobs Data for Tahoe Basin, 2005 - 2019

NAICS	Description	2005 Jobs	2006 Jobs	2007 Jobs	2008 Jobs	2009 Jobs	2010 Jobs	2011 Jobs	2012 Jobs	2013 Jobs	2014 Jobs	2015 Jobs	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs	2005 - 2019 Change	2005 - 2019 % Change
	Total	38,574	38,928	38,937	37,387	34,119	33,302	32,797	33,075	33,678	34,084	34,805	36,215	37,550	38,164	38,236	-338	-1%
Visitor Serving Sectors																		
72	Accommodation and Food Services	13,481	13,309	13,283	12,651	11,303	11,029	11,226	10,873	11,219	11,300	11,750	11,989	12,246	12,173	12,026	-1,455	-11%
71	Arts, Entertainment, and Recreation	2,606	2,647	2,666	2,714	2,599	2,549	2,751	2,682	2,909	2,755	2,752	2,949	3,228	3,264	3,356	750	29%
Other Sectors Affected by the Recession																		
44	Retail Trade	3,128	3,166	3,220	3,087	2,778	2,694	2,668	2,690	2,743	2,716	2,718	2,781	2,918	3,007	3,029	-100	-3%
23	Construction	4,882	4,898	4,455	3,729	2,942	2,577	2,541	2,617	2,773	2,997	3,163	3,312	3,547	3,883	4,073	-809	-17%
53	Real Estate and Rental and Leasing	1,798	1,838	1,771	1,682	1,504	1,442	1,312	1,376	1,384	1,439	1,485	1,570	1,639	1,720	1,734	-64	-4%
52	Finance and Insurance	861	859	789	722	655	643	661	676	627	630	651	942	967	1,002	852	-9	-1%
Service Sectors																		
56	Administrative and Support and Waste Management and Remediation Services	1,279	1,281	1,347	1,271	1,121	1,145	1,220	1,346	1,410	1,391	1,466	1,576	1,666	1,691	1,662	383	30%
61	Educational Services	424	447	456	538	588	1,076	614	626	609	556	554	625	584	610	596	172	41%
62	Health Care and Social Assistance	1,987	1,981	2,271	2,214	2,252	2,091	2,138	2,204	2,079	2,103	2,155	2,186	2,171	2,208	2,198	211	11%
81	Other Services (except Public Administration)	1,784	1,831	1,887	1,955	1,904	1,827	1,818	2,003	2,099	2,173	2,122	2,189	2,205	2,269	2,270	487	27%
22	Utilities	92	158	204	187	157	163	162	211	156	206	196	195	203	67	67	-25	-27%
Other Economic Base Sectors																		
31	Manufacturing	429	488	542	491	359	289	232	281	311	307	282	257	288	294	291	-137	-32%
42	Wholesale Trade	420	390	365	328	304	281	310	320	348	324	347	345	391	386	365	-54	-13%
48	Transportation and Warehousing	403	489	432	436	414	386	283	277	464	482	455	478	552	590	604	201	50%
51	Information	277	313	302	302	234	227	234	238	219	247	293	284	334	342	329	51	19%

NAICS	Description	2005 Jobs	2006 Jobs	2007 Jobs	2008 Jobs	2009 Jobs	2010 Jobs	2011 Jobs	2012 Jobs	2013 Jobs	2014 Jobs	2015 Jobs	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs	2005 - 2019 Change	2005 - 2019 % Change
54	Professional, Scientific, and Technical Services	1,787	1,856	1,872	1,815	1,673	1,607	1,535	1,569	1,578	1,589	1,543	1,567	1,651	1,684	1,726	-61	-3%
55	Management of Companies and Enterprises	190	209	209	183	190	190	210	210	220	221	261	229	235	262	283	93	49%
	Other																	
11	Agriculture, Forestry, Fishing and Hunting	166	166	150	142	132	136	133	132	142	134	136	140	128	153	156	-10	-6%
21	Mining, Quarrying, and Oil and Gas Extraction	53	40	43	28	24	25	<10	15	22	27	17	20	32	23	21	-32	-60%
99	Unclassified Industry	10	<10	23	106	67	61	98	81	71	71	115	149	121	28	19	9	88%

Table 7.5: Annual Job Estimates by Community

Community	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2005-2019 Change
Incline Village	5,244	5,425	5,314	5,075	4,600	4,893	4,464	4,409	4,484	4,505	4,644	4,863	5,013	5,177	5,316	1.40%
Zephyr Cove/Stateline	8,359	8,167	7,995	7,444	6,300	5,738	5,824	5,737	5,781	5,816	6,025	5,861	5,913	6,015	5,933	-29.00%
Other East Shore	358	349	337	323	281	258	271	291	315	337	337	315	387	436	444	24.00%
South Lake Tahoe	9,597	9,569	9,718	9,464	8,713	8,479	8,517	8,723	8,986	9,190	9,405	10,142	10,657	10,844	10,847	13.00%
Kings Beach/Tahoe Vista	1,525	1,573	1,722	1,469	1,262	1,156	1,139	1,240	1,276	1,349	1,393	1,490	1,555	1,634	1,686	10.60%
Alpine/Carnelian/Tahoe City Squaw	5,621	5,851	5,834	5,638	5,117	5,222	5,412	5,395	5,739	5,419	5,606	5,936	6,123	6,326	6,464	15.00%
Homewood (West Shore)	510	553	565	509	431	436	429	417	424	413	422	432	453	476	496	-2.70%
Total	31,214	31,487	31,485	29,922	26,704	26,182	26,056	26,212	27,005	27,029	27,832	29,039	30,101	30,908	31,186	-0.10%

Table 7.6: Comparison of EMSI Job Data with ADE Estimates, 2005-2016

Community	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Tahoe Basin	-2,631	-1,417	-1,560	-1,591	-1,497	-2,355	-1,909	-1,070	-1,309	-902	1,795	1,474
Visitor Serving Sectors												
72 Accommodations and Food	-429	-205	-288	256	-2	342	401	1,318	1,780	1,375	3,109	2,147
71 Arts, Entertainment, Rec.	-1,949	-817	-1,469	-933	-881	-1,825	-1,601	-2,448	-2,509	-1,912	-1,062	-975
Other Sectors Affected by the Recession												
44-45 Retail	-626	-505	-394	-436	-397	-718	-382	-219	-230	-199	-400	-253
23 Construction	1,395	826	612	100	72	-183	81	219	73	-8	336	427
53 Real Estate	-291	-235	-78	-625	-472	-521	-551	-470	-251	-214	-398	-308
52 Finance	-23	-3	73	26	17	41	101	64	62	110	84	369
Service Sectors												
56 Waste Mgt. and Admin Svs	-736	-607	-566	-604	-574	-413	-333	-538	-1,193	-546	-430	-108
61 Education	58	28	9	145	195	607	57	201	175	-69	51	-54
62 Health	82	-13	389	254	395	314	369	528	422	373	270	208
81 Other services	-173	-45	-33	-2	18	37	-5	125	115	12	60	-55
22 Utilities	-32	101	154	122	75	84	128	170	109	70	136	150
Other Economic Base Sectors												
31 -33 Manufacturing	187	186	242	248	160	85	50	-93	133	97	52	10
42 Wholesale	41	80	81	40	43	19	-82	137	132	53	35	29
48-49 Warehouse / Trans	103	-58	-248	-66	86	115	88	126	148	183	169	108
51 Information	-352	-251	-213	-193	-183	-152	-155	-162	-211	-133	-136	-189
54 Professional Technical	-93	-91	-82	-111	-240	-345	-269	-179	-187	-204	-298	-219
55 Mgt. of Companies etc.	81	65	146	139	138	49	83	31	14	2	120	89
11,21 Other	145	144	136	91	97	110	108	120	111	109	96	100

Table 7.7: ADE Original Estimates of Tahoe Basin Job Change by Sector

Community	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Tahoe Basin	33,845	32,906	33,046	31,513	28,200	28,538	27,965	27,282	28,314	27,931	26,037	27,565
Visitor Serving Sectors												
72 Accommodations and Food	13,629	13,252	13,320	12,136	11,106	10,530	10,650	9,360	9,240	9,747	8,443	9,643
71 Arts, Entertainment, Rec.	4,248	3,163	3,819	3,332	3,128	4,006	3,982	4,814	5,069	4,242	3,436	3,526
Other Sectors Affected by the Recession												
44-45 Retail	3,355	3,263	3,193	3,149	2,820	3,089	2,740	2,614	2,644	2,611	2,802	2,713
23 Construction	2,316	2,858	2,708	2,531	1,796	1,787	1,534	1,454	1,804	2,079	1,911	1,994
53 Real Estate	1,556	1,532	1,339	1,832	1,533	1,566	1,500	1,449	1,251	1,246	1,460	1,428
52 Finance	782	759	627	604	549	512	482	531	495	467	504	510
Service Sectors												
56 Waste Mgt. and Admin Svs	1,714	1,566	1,590	1,579	1,452	1,292	1,329	1,636	2,358	1,677	1,605	1,401
61 Education	339	388	411	360	361	427	504	373	376	543	423	591
62 Health	1,747	1,837	1,664	1,803	1,677	1,603	1,645	1,551	1,530	1,587	1,729	1,827
81 Other services	1,228	1,164	1,199	1,215	1,144	1,096	1,094	1,049	1,060	1,226	1,174	1,330
22 Utilities	102	104	84	82	84	86	63	48	42	37	42	44
Other Economic Base Sectors												
31 -33 Manufacturing	186	209	182	189	138	137	138	328	156	165	173	177
42 Wholesale	320	288	277	285	248	257	374	173	190	232	284	294
48-49 Warehouse / Trans	185	402	627	425	258	194	139	96	223	221	218	254
51 Information	558	484	461	405	347	304	304	326	367	306	344	386
54 Professional Technical	1,440	1,468	1,435	1,443	1,444	1,499	1,341	1,287	1,291	1,310	1,322	1,290
55 Mgt. of Companies etc.	101	137	65	57	59	145	138	183	210	219	141	140
11,21 Other	18	15	14	42	14	8	8	10	8	16	26	17

Source: Applied Development Economics, based on ZIP Business Patterns

Table 7.8: Variance from ADE by Area

Community	2010	2011	2012	2013	2014	2015	2016
Incline Village	566	2	168	-179	760	852	640
Zephyr Cove/Stateline	-826	-581	-1,033	-753	-699	32	12
Other East Shore	166	180	214	267	272	293	267
South Lake Tahoe	-697	-243	186	167	-76	38	-119
Kings Beach/Tahoe Vista	-77	106	171	130	24	91	126
Alpine/Carnelian/Tahoe City/Squaw	-1,489	-1,283	-698	-742	-1,016	595	699
Homewood (West Shore)	0	-90	-78	-199	-167	-106	-151
Total	-2,357	-1,909	-1,070	-1,309	-902	1,795	1,474

Table 7.9: ADE Original Trends in Total Number of Private Sector Jobs, 2010 - 2016

Year	2010	2011	2012	2013	2014	2015	2016	Annual Per. Change 10-16	Annual Avg 2005-2007: Pre-Recession	Annual Avg 2008-2010: Recession	Annual Avg 2011-2016: Post-Recession
Region	28,539	27,965	27,282	28,314	27,931	26,037	27,565	-0.60%	33,242	29,388	27,516
01 Incline Village (Washoe Co.)	4,327	4,462	4,241	4,663	3,745	3,792	4,223	-0.40%	5,358	4,522	4,188
02 Zephyr Cove\Stateline (Douglas Co.)	6,564	6,405	6,770	6,534	6,515	5,993	5,849	-1.90%	8,815	6,835	6,344
03 Other - East Shore	92	91	77	48	65	44	48	-10.30%	145	107	62
03 South Lake Tahoe	9,176	8,760	8,537	8,819	9,266	9,367	10,261	1.90%	11,005	9,574	9,168
04 Kings Beach\Tahoe Vista	1,233	1,033	1,069	1,146	1,325	1,302	1,364	1.70%	1,281	1,235	1,207
05 Alpine Meadows\Carnelian Bay\ Tahoe City\Squaw Valley	6,711	6,695	6,093	6,481	6,435	5,011	5,237	-4.00%	6,163	6,641	5,992
07 Homewood (West Shore)	436	519	495	623	580	528	583	5.00%	474	475	555

Source: ADE, Inc, based on US Census ZIP Business Patterns. Note: (note: Incline Village = 89402, 89450, 89451, and 89453; Zephyr Cove\Stateline = 89448 and 89449; Other - East Shore = 89413; South Lake Tahoe = 96150, 96151, 96152, 96154, 96155, 96156, 96157, and 96158; Kings Beach (incl. Tahoe Vista) = 96140, 96143, and 96148; Alpine Meadows, Carnelian Bay, Tahoe City = 96145, Squaw Valley = 96146; and West Shore (Homewood) = 96141 and 96142) (note: ZIP Code 89402 added to Incline Village, and ZIP Codes 89703 and 89705 removed from East Shore)

Table 7.10: Incline Village Jobs, 2005 - 2019

NAICS	Description	2005 Jobs	2006 Jobs	2007 Jobs	2008 Jobs	2009 Jobs	2010 Jobs	2011 Jobs	2012 Jobs	2013 Jobs	2014 Jobs	2015 Jobs	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs
11	Ag., Forestry, Fishing and Hunting	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	Mining, Quarrying	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	Utilities	5	5	5	17	33	29	18	25	26	17	15	15	17	18	19
23	Construction	812	860	736	579	396	347	359	374	432	500	549	598	653	702	714
31	Manufacturing	31	33	34	37	18	17	19	22	20	19	21	25	29	32	28
42	Wholesale Trade	142	146	139	133	127	122	120	121	129	104	113	118	125	126	130
44	Retail Trade	316	310	315	319	290	275	271	262	267	276	287	296	302	311	320
48	Transportation and Warehousing	58	72	72	60	48	44	58	63	59	72	70	75	66	76	86
51	Information	52	51	55	54	47	48	49	48	44	43	48	54	58	78	89
52	Finance and Insurance	291	304	270	260	231	225	229	227	195	214	231	230	236	243	242
53	Real Estate and Rental and Leasing	256	276	264	269	238	224	217	229	246	254	259	266	290	307	320
54	Professional, Scientific, and Tech. Serv.	376	373	382	408	364	333	332	345	355	358	381	404	420	432	465
55	Management of Companies	24	23	35	39	38	38	32	32	32	31	32	34	33	34	34
56	Admin. Support/Waste Mgmt.	314	339	367	341	319	301	308	330	355	370	377	399	403	422	428
61	Educational Services	292	317	312	381	437	920	434	443	416	335	318	388	386	388	397
62	Health Care and Social Assistance	154	160	166	167	171	171	158	157	158	165	173	181	187	202	208
71	Arts, Entertainment, and Recreation	813	851	839	748	700	676	748	613	616	601	613	598	603	607	635
72	Accommodation and Food Services	1,138	1,125	1,140	1,081	954	935	926	929	946	961	972	986	997	990	991
81	Other Services (except Public Admin.)	168	178	183	183	189	188	186	191	187	185	183	196	209	211	212
	Total	5,244	5,425	5,314	5,075	4,600	4,893	4,464	4,409	4,484	4,505	4,644	4,863	5,013	5,177	5,316

Source: EMSI. Note: ADE estimated missing data.

Table 7.11: Zephyr Cove/Stateline Jobs, 2005 - 2019

NAICS	Description	2005 Jobs	2006 Jobs	2007 Jobs	2008 Jobs	2009 Jobs	2010 Jobs	2011 Jobs	2012 Jobs	2013 Jobs	2014 Jobs	2015 Jobs	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs
11	Ag., Forestry, Fishing and Hunting	26	25	18	18	17	17	18	18	18	18	19	18	19	19	21
21	Mining, Quarrying	44	41	44	29	19	23	20	28	21	29	21	21	22	19	16
22	Utilities	7	8	15	17	15	15	12	14	14	14	18	18	18	18	18
23	Construction	425	422	354	260	183	143	142	132	149	191	222	244	258	282	304
31	Manufacturing	162	170	180	171	124	77	84	114	114	117	64	48	54	77	79
42	Wholesale Trade	83	85	90	89	83	82	100	107	102	98	114	108	110	116	108
44	Retail Trade	238	249	246	245	223	232	222	248	248	228	198	200	190	197	199
48	Transportation and Warehousing	8	48	50	33	29	25	22	25	30	37	36	38	28	26	25
51	Information	62	79	76	59	47	45	42	45	46	62	84	70	71	69	68
52	Finance and Insurance	89	84	101	98	99	89	88	92	91	90	88	87	90	93	92
53	Real Estate and Rental and Leasing	224	210	216	198	184	187	195	192	179	155	157	174	172	189	180
54	Professional, Scientific, and Tech. Serv.	254	259	259	259	247	266	258	250	239	232	235	244	259	257	269
55	Management of Companies	93	114	110	129	136	129	143	145	154	153	145	104	103	131	144
56	Admin. Support/Waste Mgmt.	167	158	162	163	120	123	142	147	163	192	228	231	224	202	159
61	Educational Services	6	8	9	10	14	14	12	9	14	14	9	9	9	9	13
62	Health Care and Social Assistance	171	173	252	265	284	130	143	147	154	150	155	151	157	152	156
71	Arts, Entertainment, and Recreation	123	110	124	110	106	96	94	116	139	182	149	148	210	263	275
72	Accommodation and Food Services	6,043	5,796	5,561	5,154	4,232	3,903	3,951	3,771	3,764	3,709	3,927	3,791	3,763	3,744	3,652
81	Other Services (except Public Admin.)	132	129	128	136	137	141	136	136	141	147	155	156	153	150	156
	Total	8,359	8,167	7,995	7,444	6,300	5,738	5,824	5,737	5,781	5,816	6,025	5,861	5,911	6,012	5,933

Source: EMSI. Note: ADE estimated missing data.

Table 7.12: East Shore Jobs, 2005-2019

NAICS	Description	2005 Jobs	2006 Jobs	2007 Jobs	2008 Jobs	2009 Jobs	2010 Jobs	2011 Jobs	2012 Jobs	2013 Jobs	2014 Jobs	2015 Jobs	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs
11	Ag., Forestry, Fishing and Hunting	17	16	15	14	14	14	12	14	13	13	14	14	14	14	15
21	Mining, Quarrying	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	Utilities	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	Construction	44	42	33	25	16	14	11	9	9	13	15	18	20	22	22
31	Manufacturing	3	3	3	5	3	2	3	7	4	9	14	4	5	7	7
42	Wholesale Trade	3	3	3	3	3	2	3	3	3	3	3	3	3	3	3
44	Retail Trade	13	14	14	14	11	10	7	12	11	13	13	14	11	11	11
48	Transportation and Warehousing	0	0	0	0	0	0	1	2	1	0	2	2	2	2	0
51	Information	3	3	3	4	3	2	3	3	3	3	4	3	3	3	3
52	Finance and Insurance	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
53	Real Estate and Rental and Leasing	13	12	13	10	9	9	9	9	9	9	10	10	12	13	15
54	Professional, Scientific, and Tech. Serv.	3	3	3	4	3	2	3	3	3	3	4	3	3	3	3
55	Management of Companies	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
56	Admin. Support/Waste Mgmt.	7	11	8	9	8	7	16	20	22	24	16	12	12	11	9
61	Educational Services	3	3	3	4	3	2	3	3	3	3	4	3	3	3	3
62	Health Care and Social Assistance	0	1	2	3	2	2	1	2	2	1	2	2	2	2	2
71	Arts, Entertainment, and Recreation	94	88	92	89	82	80	73	77	90	100	100	93	156	200	213
72	Accommodation and Food Services	153	148	142	136	120	109	122	125	139	141	133	131	138	138	135
81	Other Services (except Public Admin.)	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
	Total	358	349	337	323	281	258	271	291	315	337	337	315	387	436	444

Source: EMSI. Note: ADE estimated missing data.

Table 7.13: South Lake Tahoe Jobs, 2005-2019

NAICS	Description	2005 Jobs	2006 Jobs	2007 Jobs	2008 Jobs	2009 Jobs	2010 Jobs	2011 Jobs	2012 Jobs	2013 Jobs	2014 Jobs	2015 Jobs	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs
11	Ag., Forestry, Fishing and Hunting	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	Mining, Quarrying	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	Utilities	37	106	115	118	100	103	149	160	99	68	139	165	161	30	30
23	Construction	889	842	824	678	485	405	404	431	471	487	509	537	610	767	804
31	Manufacturing	108	134	151	153	109	88	52	53	103	79	73	70	88	128	112
42	Wholesale Trade	53	58	70	60	40	40	45	57	67	58	63	73	70	104	98
44	Retail Trade	1,459	1,447	1,464	1,436	1,279	1,265	1,249	1,235	1,228	1,206	1,245	1,303	1,419	1,488	1,521
48	Transportation and Warehousing	208	161	183	197	212	198	119	114	232	276	249	210	192	230	259
51	Information	69	81	96	79	54	41	41	49	47	43	48	50	49	49	50
52	Finance and Insurance	157	156	123	135	117	118	137	139	128	135	128	439	463	481	433
53	Real Estate and Rental and Leasing	417	428	429	434	384	361	311	328	336	370	393	419	463	461	449
54	Professional, Scientific, and Tech. Serv.	379	407	406	376	350	314	288	292	272	269	159	161	171	178	177
55	Management of Companies	59	59	65	27	22	26	45	36	36	35	82	88	96	96	98
56	Admin. Support/Waste Mgmt.	346	314	348	331	309	318	388	450	473	383	365	444	452	458	436
61	Educational Services	4	4	5	18	15	15	16	13	15	12	12	12	10	13	13
62	Health Care and Social Assistance	1,437	1,420	1,458	1,545	1,539	1,540	1,644	1,652	1,565	1,566	1,584	1,608	1,580	1,636	1,628
71	Arts, Entertainment, and Recreation	180	182	181	184	165	175	193	222	220	216	211	231	225	213	213
72	Accommodation and Food Services	3,268	3,193	3,185	3,047	2,942	2,908	2,914	2,943	3,145	3,397	3,581	3,761	4,010	3,883	3,887
81	Other Services (except Public Admin.)	525	578	617	646	592	562	523	548	549	590	564	573	598	627	640
	Total	9,597	9,569	9,718	9,464	8,713	8,479	8,517	8,723	8,986	9,190	9,405	10,142	10,657	10,844	10,847

Source: EMSI. Note: ADE estimated missing data.

Table 7.14: Kings Beach/Tahoe Vista Jobs, 2005-2019

NAICS	Description	2005 Jobs	2006 Jobs	2007 Jobs	2008 Jobs	2009 Jobs	2010 Jobs	2011 Jobs	2012 Jobs	2013 Jobs	2014 Jobs	2015 Jobs	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs
11	Ag., Forestry, Fishing and Hunting	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	Mining, Quarrying	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	Utilities	4	41	53	27	8	12	8	8	7	7	7	0	1	1	4
23	Construction	494	490	449	372	279	248	252	266	290	318	346	376	411	443	450
31	Manufacturing	27	14	19	15	10	9	9	12	12	12	12	12	12	12	12
42	Wholesale Trade	68	47	33	15	10	10	10	12	12	12	12	12	12	12	12
44	Retail Trade	168	180	192	186	167	165	167	176	184	195	183	183	192	194	193
48	Transportation and Warehousing	4	4	5	4	4	4	4	5	5	3	7	8	8	8	8
51	Information	16	17	17	16	10	10	10	10	10	10	10	10	10	10	10
52	Finance and Insurance	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
53	Real Estate and Rental and Leasing	51	53	49	44	37	40	30	32	32	34	36	38	39	62	64
54	Professional, Scientific, and Tech. Serv.	82	69	54	44	36	33	31	32	38	45	47	46	46	42	46
55	Management of Companies	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
56	Admin. Support/Waste Mgmt.	53	46	46	44	42	43	52	53	57	54	55	67	75	85	94
61	Educational Services	31	27	27	29	27	29	33	36	34	36	42	41	44	52	57
62	Health Care and Social Assistance	37	39	145	47	45	43	36	67	42	44	51	56	60	68	80
71	Arts, Entertainment, and Recreation	79	109	125	122	104	66	63	80	81	77	76	81	76	78	88
72	Accommodation and Food Services	312	330	405	399	382	343	332	326	343	357	359	398	404	404	400
81	Other Services (except Public Admin.)	94	100	99	100	97	96	97	121	124	139	144	157	161	159	162
	Total	1,525	1,573	1,722	1,469	1,262	1,156	1,139	1,240	1,276	1,349	1,393	1,490	1,555	1,634	1,686

Source: EMSI. Note: ADE estimated missing data.

Table 7.15: Alpine/Carnelian Bay/Tahoe City/Squaw Valley Jobs, 2005-2019

NAICS	Description	2005 Jobs	2006 Jobs	2007 Jobs	2008 Jobs	2009 Jobs	2010 Jobs	2011 Jobs	2012 Jobs	2013 Jobs	2014 Jobs	2015 Jobs	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs
11	Ag., Forestry, Fishing and Hunting	77	77	74	71	60	62	65	68	65	65	66	62	71	77	79
21	Mining, Quarrying	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	Utilities	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	Construction	892	880	786	605	428	375	377	394	447	475	513	541	573	646	687
31	Manufacturing	17	21	17	32	23	17	18	25	33	20	35	22	17	18	28
42	Wholesale Trade	4	5	5	5	11	7	7	7	8	5	6	5	5	5	5
44	Retail Trade	515	540	554	497	428	403	419	440	454	467	450	437	450	449	441
48	Transportation and Warehousing	13	64	66	62	48	35	19	18	40	18	27	35	36	29	40
51	Information	8	10	10	9	9	9	9	9	10	10	10	8	8	8	8
52	Finance and Insurance	209	201	193	130	111	114	122	129	125	125	124	107	94	85	53
53	Real Estate and Rental and Leasing	269	283	255	220	186	198	169	172	184	195	195	204	215	249	263
54	Professional, Scientific, and Tech. Serv.	249	259	246	239	201	201	154	177	190	196	195	208	214	234	229
55	Management of Companies	4	5	5	5	5	5	5	5	5	5	5	5	4	4	4
56	Admin. Support/Waste Mgmt.	70	70	73	70	66	72	77	81	85	97	123	124	135	145	146
61	Educational Services	63	58	60	62	56	54	62	67	64	68	82	80	80	88	98
62	Health Care and Social Assistance	41	46	45	45	43	42	43	64	44	44	49	51	58	62	64
71	Arts, Entertainment, and Recreation	980	964	946	1,103	1,051	1,062	1,185	1,226	1,379	1,126	1,199	1,380	1,478	1,470	1,516
72	Accommodation and Food Services	2,091	2,247	2,375	2,351	2,256	2,435	2,554	2,358	2,451	2,344	2,361	2,495	2,508	2,585	2,622
81	Other Services (except Public Admin.)	120	121	125	132	133	130	128	156	156	159	167	173	177	171	181
	Total	5,621	5,851	5,834	5,638	5,117	5,222	5,412	5,395	5,739	5,419	5,606	5,936	6,123	6,326	6,464

Source: EMSI. Note: ADE estimated missing data.

Table 7.16: Homewood Jobs, 2005-2019

NAICS	Description	2005 Jobs	2006 Jobs	2007 Jobs	2008 Jobs	2009 Jobs	2010 Jobs	2011 Jobs	2012 Jobs	2013 Jobs	2014 Jobs	2015 Jobs	2016 Jobs	2017 Jobs	2018 Jobs	2019 Jobs
11	Ag., Forestry, Fishing and Hunting	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	Mining, Quarrying	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	Utilities	13	46	58	31	10	15	7	7	7	10	10	4	7	4	5
23	Construction	153	146	136	108	76	67	65	65	77	82	90	101	110	126	135
31	Manufacturing	14	5	5	4	4	4	4	4	5	5	5	5	4	4	5
42	Wholesale Trade	13	18	16	15	5	4	4	5	5	5	5	5	4	4	5
44	Retail Trade	17	16	10	15	17	14	14	15	10	10	10	10	15	8	9
48	Transportation and Warehousing	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
51	Information	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
52	Finance and Insurance	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
53	Real Estate and Rental and Leasing	41	42	41	39	32	36	24	25	22	20	15	8	17	22	25
54	Professional, Scientific, and Tech. Serv.	8	8	8	8	8	8	8	10	10	10	10	10	8	8	8
55	Management of Companies	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
56	Admin. Support/Waste Mgmt.	8	8	8	8	8	8	8	10	10	10	10	15	18	20	18
61	Educational Services	5	5	5	4	4	4	5	5	5	5	5	5	4	5	5
62	Health Care and Social Assistance	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
71	Arts, Entertainment, and Recreation	29	37	40	39	33	22	21	26	28	27	26	24	20	20	23
72	Accommodation and Food Services	194	208	224	224	218	239	253	226	232	214	219	228	229	236	239
81	Other Services (except Public Admin.)	14	14	14	15	15	15	15	20	15	15	17	17	18	18	19
	Total	510	553	565	509	431	436	429	417	424	413	422	432	453	476	496

Source: EMSI. Note: ADE estimated missing data.

Table 7.17: Public Sector Employment

Community	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Tahoe Basin															
Federal Government, Civilian, Excl. Postal Service	163	146	146	152	172	201	165	156	149	144	144	146	138	130	129
State Government, Excl. Education and Hospitals	117	119	119	114	108	108	105	103	101	99	102	161	163	168	169
Local Government															
Elementary and Secondary Schools	582	597	623	662	640	613	584	587	590	621	613	628	633	649	659
Colleges, Universities, and Professional Schools	548	541	323	281	269	598	248	300	318	269	431	373	476	440	451
All Other Schools and Educational Support Services	0	0	0	0	0	44	0	0	0	0	37	94	17	75	53
Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Government, Excl. Education and Hospitals	1,249	1,301	1,348	1,409	1,629	1,533	1,484	1,452	1,436	1,448	1,458	1,487	1,489	1,516	1,511
Total	2,658	2,705	2,559	2,618	2,817	3,098	2,587	2,598	2,593	2,581	2,786	2,890	2,915	2,977	2,973
Incline Village															
Federal Government, Civilian, Excl. Postal Service	6	6	6	7	7	7	6	7	7	6	6	7	7	8	7
State Government, Excl. Education and Hospitals	60	62	62	58	58	58	57	57	56	56	55	55	53	52	51
Local Government															
Elementary and Secondary Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Colleges, Universities, and Professional Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
All Other Schools and Educational Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Government, Excl. Education and Hospitals	159	165	170	169	157	146	137	135	136	136	137	140	141	141	141
Total	225	233	238	234	221	212	201	199	199	198	199	202	201	200	200

Community	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Zephyr Cove/Stateline															
Federal Government, Civilian, Excl. Postal Service	0	0	0	0	0	1	1	1	1	0	1	0	0	0	0
State Government, Excl. Education and Hospitals	14	15	16	16	15	14	12	11	11	11	11	11	12	15	14
Local Government															
Elementary and Secondary Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Colleges, Universities, and Professional Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
All Other Schools and Educational Support Services	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0
Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Government, Excl. Education and Hospitals	115	119	120	123	122	122	119	114	117	118	126	135	133	141	140
Total	129	134	136	138	137	137	132	126	129	129	138	148	145	156	154
Other East Shore															
Federal Government, Civilian, Excl. Postal Service	2	3	3	3	3	3	3	3	3	3	3	2	3	3	3
State Government, Excl. Education and Hospitals	2	2	2	2	4	4	2	2	2	2	2	2	2	2	2
Local Government															
Elementary and Secondary Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Colleges, Universities, and Professional Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
All Other Schools and Educational Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Government, Excl. Education and Hospitals	11	11	11	12	11	11	11	11	11	11	12	13	12	13	13
Total	15	16	16	17	18	18	16	16	16	16	17	17	17	18	18

Community	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
South Lake Tahoe															
Federal Government, Civilian, Excl. Postal Service	152	135	135	139	158	185	151	142	135	131	130	133	125	117	116
State Government, Excl. Education and Hospitals	28	28	28	27	23	24	24	23	23	23	25	72	71	74	75
Local Government															
Elementary and Secondary Schools	582	597	623	662	640	613	584	587	590	621	613	628	633	649	659
Colleges, Universities, and Professional Schools	548	541	323	281	269	598	248	300	318	269	431	373	476	440	451
All Other Schools and Educational Support Services	0	0	0	0	0	44	0	0	0	0	37	93	17	75	53
Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Government, Excl. Education and Hospitals	667	693	721	777	1,020	951	926	914	893	902	901	914	913	921	916
Total	1,976	1,995	1,830	1,886	2,110	2,415	1,933	1,966	1,958	1,945	2,137	2,213	2,235	2,275	2,271
Kings Beach/Tahoe Vista															
Federal Government, Civilian, Excl. Postal Service	4	4	4	4	4	4	4	3	3	3	3	4	5	5	5
State Government, Excl. Education and Hospitals	3	3	3	2	2	3	2	2	2	2	2	7	7	8	8
Local Government															
Elementary and Secondary Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Colleges, Universities, and Professional Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
All Other Schools and Educational Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Government, Excl. Education and Hospitals	138	145	151	152	143	135	130	125	125	126	127	128	130	135	136
Total	145	152	158	158	149	142	136	130	130	131	132	139	142	148	149

Community	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Alpine/Carnelian/Tahoe City/Squaw															
Federal Government, Civilian, Excl. Postal Service	2	2	2	2	2	2	2	2	2	2	1	3	4	4	4
State Government, Excl. Education and Hospitals	5	3	4	3	3	4	3	4	3	3	3	6	7	7	8
Local Government															
Elementary and Secondary Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Colleges, Universities, and Professional Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
All Other Schools and Educational Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Government, Excl. Education and Hospitals	127	134	139	140	132	125	120	115	115	116	117	118	120	125	125
Total	134	139	145	145	137	131	125	121	120	121	121	127	131	136	137
Homewood															
Federal Government, Civilian, Excl. Postal Service	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
State Government, Excl. Education and Hospitals	1	1	1	1	1	1	1	1	1	0	1	2	2	3	3
Local Government															
Elementary and Secondary Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Colleges, Universities, and Professional Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
All Other Schools and Educational Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Government, Excl. Education and Hospitals	31	32	33	35	43	41	40	39	39	40	39	39	40	40	40
Total	32	33	34	36	44	42	41	40	40	40	40	41	42	43	43

APPENDIX 8: TAHOE BASIN SCHOOLS

Table 7: Number of Lake Tahoe Basin Public and Private School Students Who Enrolled in Grades K-12

Place	2015-2016	2016-2017	2017-2018	
Tahoe Truckee Unified School District	2,542	3,621	3,768	LTUSD minus Kings Beach Elementary
Kings Beach Elementary	364	374	365	
Lake Tahoe Unified Total	3,996	3,951	3,906	
Creekside and Squaw Valley Prep	226	159	135	
Incline Village	926	909	848	
Zephyr Cove	389	390	312	
Public Schools	9,547	9,404	9,334	

Source CA: California Department of Education (see <http://www.cde.ca.gov/ds/sd/sd/filesenr.asp> [enrollment] and <http://www.cde.ca.gov/ds/si/ps/> [private schools])

Source NV: Nevada Department of Education (see <http://www.doe.nv.gov/DataCenter/Enrollment/> [enrollment] and http://www.doe.nv.gov/Private_Schools/ [private schools])
schooldigger.com

Table 8: Students Receiving Free or Subsidized Lunches as Percent of Total Students

School District	2015-16	2016-17	2017-18	% Change
Lake Tahoe Unified	54.60%	58.80%	60.70%	11%
Tahoe Truckee Joint Unified	38.30%	35.90%	39.30%	3%
Basin Average: CA	47.20%	47.00%	49.70%	5%
Zephyr Cove	28.70%	26.50%	27.30%	-5%
Incline Village	28.70%	27.50%	29.90%	4%
Basin Average: NV	29.20%	27%	29.20%	0%
Total	44.60%	44.50%	46.90%	5%
Nevada Average	59.80%	57.90%	57.75%	-3%

Table 9: Number Students Receiving Free or Subsidized Lunches

School District	2015-16 Enrolled	2015-16 Total	2016-17 Enrolled	2016-17 Total	2017-18 Enrolled	2017-18 Total
Lake Tahoe Unified	2,182	3,996	2,322	3,951	2,371	3,906
Tahoe Truckee Joint Unified	1,366	3,515	1,489	4,153	1,625	4,133
Basin Total CA	3,548	7,511	3,811	8,104	3,996	8,039
Zephyr Cove	110	383	103	388	102	373
Incline Village	271	921	250	908	256	855
Basin Total NV	381	1,304	353	1,296	358	1,228
Tahoe Total	3,929	8,815	4,164	9,400	4,353	9,267

Source : http://agri.nv.gov/Resources/Data_and_Reports/Food_and_Nutrition/SN/SN_Data_Reports/