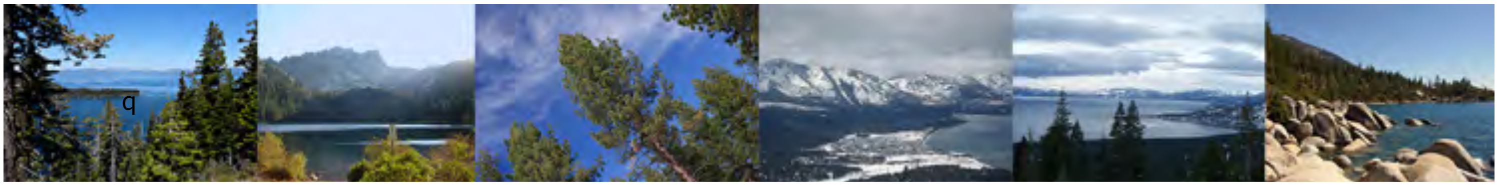

April 2018

MEASURING FOR PROSPERITY
Community and Economic Indicators for the Lake Tahoe Basin

Prepared for the:

Tahoe Prosperity Center

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APPLIED DEVELOPMENT ECONOMICS

BAY AREA GREEN BUSINESS

TAHOE PROSPERITY CENTER
tahoeprosperity.org

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 (TPC) is the basin-wide organization created out of that effort, whose mission is to unite Tahoe's communities to strengthen regional prosperity.

The TPC's work revolves around creating opportunities for vibrant communities, thriving businesses, diverse careers, and local workforce housing. As the catalyst for regional economic vitality, the TPC ensures that the community and environment are part of the picture, and all of our project work relates to the Prosperity Plan and our Strategic Pillars, which are:

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

This **Measuring for Prosperity Report** is our signature report on the current status of the Tahoe Basin's community and economy. To ensure prosperity in the Tahoe Basin, we must first understand where we have been, and where we are heading. The Measuring for Prosperity Report analyzed trends in several economic and community indicators, areas of success, and areas, which require improvement. We encourage feedback on this report as we want to ensure it is useful to all who live and work in the Lake Tahoe region – or for those seeking to live or work in Tahoe's communities. Please contact us for more information, to get involved, or to provide input on how to make this report more useful in future years.

In addition to this report, our current programs include:

- **AlertTahoe** – adding emergency preventative fire cameras around the lake to protect Tahoe from catastrophic wildfire (and to protect our community, environment and economy).
- **Connected Tahoe** – expanding high-speed internet access and cell phone coverage.
- **Tahoe Workforce Housing** – getting rid of blight and building local workforce housing.
- **Workforce Tahoe** – ensuring Tahoe businesses and residents are prepared for the changing jobs, regional influences and education needs in the new global economy.

For more information, please contact:
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775-298-0265 info@tahoeprosperity.org

The Measuring for Prosperity Report was generously funded by the Morgan Family Foundation and the Tahoe Regional Planning Agency. The Tahoe Prosperity Center appreciates the support of these two organizations that recognize the importance of a community and economic indicators report, specific to the Lake Tahoe Basin. The use of the data in this report is encouraged – to be shared by any and all that will benefit – including government, non-profit organizations, businesses, schools, future Tahoe residents, the public and anyone who cares about ensuring that good decisions are based in fact. If you have suggestions for future data points please reach out to Tahoe Prosperity Center at www.tahoeprosperity.org

Thank you.

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EXECUTIVE SUMMARY

The Measuring for Prosperity report is sponsored by the Tahoe Prosperity Center (TPC) and is intended to provide benchmarks for economic and social indicators in the Lake Tahoe Basin that can help to inform policy decisions to improve the economic and social vitality of the region. This is the second edition of the report, updating and adding to the first report published in 2015. The Measuring for Prosperity program updates many of the indicators first developed in the Lake Tahoe Basin Watershed Sustainability Measures Report and the Lake Tahoe Basin Prosperity Plan, both published in 2010, and also includes new indicators related to health conditions, crime rates, and development patterns.

The Tahoe economy sustained significant structural dislocations during the early part of the 2000's due to lack of investment in visitor serving attractions and services. This downward trend was exacerbated by the Great Recession and more recently has been affected by the long-term drought that reduced winter tourism through the 2015-2016 season, although the last winter season saw much better conditions.

With the adoption of the Tahoe Regional Plan in 2012, substantial new investments in facilities and services have begun to occur and there are signs that the Tahoe economy has stabilized, particularly through continued growth in summer recreation and tourism. Efforts in both north and south lake areas to build new performing arts and concert venues may further enhance the visitor experience as well as expand cultural opportunities for local residents.

The key challenge for the region is to gain continued investment in enhancing the facilities and services offered in the visitor services sector to maximize its economic benefit, while at the same time seeking ways to better support the workforce and develop higher wage employment opportunities.

There remain critical issues for a regional economy based overwhelmingly on tourism. Wage growth is slow and wage levels are not adequate to support home ownership for much of the workforce. While construction of new housing has begun to occur, the share of housing devoted to second homes has been increasing in many parts of the region and little if any of the new housing coming on the market is priced for the local workforce. Moreover, the Workforce Development Strategy prepared recently for the Tahoe Prosperity Center indicates that only 12.5 percent of the new jobs projected between 2010 and 2021 would pay $30 per hour or more, the minimum level necessary to purchase a single family home in most parts of the region. On the contrary, 69 percent of the projected jobs would require two earners combined just to purchase a condominium. Consequently, more than half of the jobs in the Basin are filled by workers living outside the area. This is not conducive to family formation and long term workforce prosperity. It also inhibits business expansion due to the difficulty of retaining a workforce. Seeking new higher wage-based industries and employers that can supplement the primarily tourist driven basin economy is critical for the basins economic diversity and prosperity. The basin needs to diversify its economic focus because, the current low wage, service-based tourist industry does not afford the potential for broad based economic growth as noted above.

The 2010 Prosperity Plan identified two industry clusters besides Visitor Services that could help to diversify the regional economy and increase the number of well-paying jobs: Health and Wellness and Environmental Innovation. As discussed below, these clusters have unfortunately not expanded job opportunities and in the case of Environmental Innovation, have actually declined at a faster rate than Visitor Services. In addition to the economic challenges the region has faced over the past number of years, there is also the issue that the urban land base in the Tahoe Basin will not support substantial floor areas for office or industrial development. This limits the potential for economic diversification, but the Workforce Strategy suggests that an attractive avenue would be to promote increased entrepreneurship and self-employment, so called "untethered talent", which could be housed at home or in small scale co-working and incubators spaces. This would not only reduce the environmental footprint of job growth in the region, but would take advantage of employment opportunities in many high paying sectors including information technology, professional services, and financial management, among others. A key factor to attract this talent is strong broadband capacity, which is a focus of the Tahoe Prosperity Center and others around the region.

The following sections highlight some of the details of these economic trends.

Jobs and Revenue

Detailed employment statistics for the Lake Tahoe Basin are currently available up through March of 2015 and reflect winter conditions during the last year of the drought.

- The Basin lost more than 1,500 lodging and food service jobs between 2013 and 2015 and nearly 2,300 jobs overall. Many of these jobs losses were concentrated in Incline Village, Tahoe City and the Zephyr Cove/Stateline areas, while the City of South Lake Tahoe maintained more steady employment. Skier-days dipped to a low of 2.6 million in 2015, but with improved snow conditions in the 2016-17 season skier days rebounded to nearly 4.1 million and are projected to exceed 4 million again in 2018. In North Lake Tahoe (Placer County), Runyan Associates reports that tourism jobs declined in 2012 and 2014 but began to increase again in 2015 and 2016.[1]

- Annual lodging revenues have been steadily increasing since 2010, driven by summer season visitors. Retail sales have also been increasing since 2011-12, fueled by increasing numbers of visitors but also enhanced by completion of several new retail centers as part of the visitor complexes in both North Shore and South Shore areas. These new centers have been successful in capturing increased spending from existing visitors to the area and may have also enhanced the visitor experience to attract new visitors.

- Gaming revenues have stabilized at about half of the levels they were in the Basin in 2004, while Nevada state gaming revenues are down 20 percent during the same period. However, gaming revenues in the Tahoe region did post a 5.4 percent increase between 2015 and 2016. While the gaming industry benefits from the overall uptick in summer visits due to increased recreation attractions, casinos in South Lake Tahoe have been making continued investments

[1] Dean Runyan Associates. *The Economic Significance of Travel to the North Lake Tahoe Area: Detailed Visitor Impact Estimates, 2003-2016.* October 2017.

to maintain customers and attract new ones. Gaming in the Basin continues to struggle with the competition surrounding the Basin from other gaming constituencies.

- Along with increases in retail sales, retail jobs have been increasing in the past several years, along with jobs in real estate and construction, sectors that were particularly hard hit during the recession. However, jobs totals in all these sectors remain 20 percent below their pre-recession levels. In addition, health care and professional and technical services jobs have generally maintained consistent jobs levels but without much growth. As discussed further below, population levels in the region have stabilized since about 2011 and have not grown much since then. Many of these business sectors depend on the local population for business.

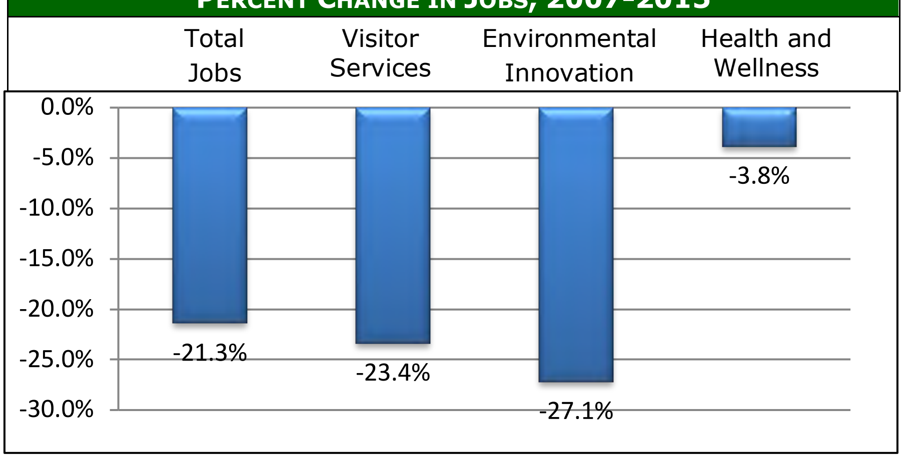
- Unemployment in the Tahoe Basin was down to 5.6 percent in 2016, slightly worse than the California state average of 5.4 percent but lower than the Nevada state average of 5.7 percent.

INDUSTRY CLUSTERS

As noted above, the Tahoe Prosperity Plan defined three industry clusters in the Tahoe Basin: Visitor Services, Environmental Innovation and Health and Wellness. Industry clusters are defined as agglomerations of industries that reflect the competitive advantage of the region. They typically reflect strong workforce talents and competencies as well as technological innovation. They are also typically traded sectors, meaning that their markets are outside the local region, and their function is to draw income and wealth into the region by selling products and services to a wider market area. In the case of tourist serving businesses, they serve this export market function by attracting visitors into the region, where they spend money.

Key elements of the three industry clusters continue to show strong levels of concentration in the Tahoe Basin. However, they have also seen substantial job losses that served to pull down the regional economy between 2007 and 2015 (Figure 1). As discussed above, while some of these sectors such as construction, professional services and health care have begun to recover jobs in recent years, they are still not back to pre-recession levels, as indicated in Figure 1.

FIGURE 1
PERCENT CHANGE IN JOBS, 2007-2015

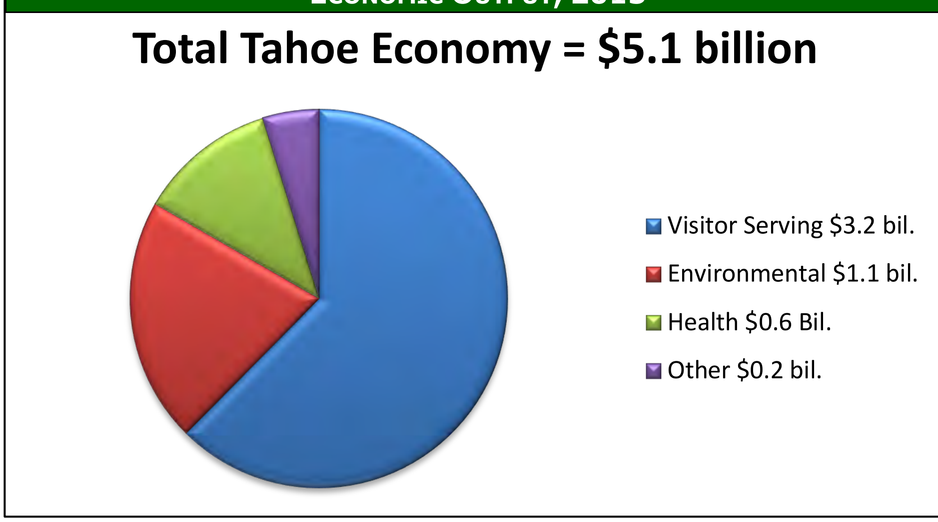


While total jobs decreased 21.3 percent during this time, economic output in the Tahoe Basin declined by nearly 14 percent in real dollar terms, and is estimated at $5.1 billion in 2015. However, the industry clusters represent a larger share of the regional economy than in 2007. Including multiplier effects from business to business transactions and employee spending, these clusters drive 95 percent of the regional economy (Figure 2). This suggests that the Tahoe Basin has experienced very little economic diversification during the past ten years.

Within the clusters, recreation has emerged ahead of gaming as the second most important component of the Visitor Services Cluster. Non-gaming lodging and food services remains the highest employment sector in this cluster, but also lost the highest number of jobs between 2007 and 2015.

The job losses in Environmental Innovation were mainly driven by construction sector declines fueled by the recession. Construction and building design services account for three-quarters of the jobs in this cluster. Environmental restoration services had some job growth during this period, but if construction were separated from this cluster, the remaining business activities would represent a very small share of regional employment.

FIGURE 2
ECONOMIC OUTPUT, 2015



As shown in Figure 1, Health and Wellness fared better than the other clusters and had a relatively small decline in jobs. The wellness component of this cluster was stable during this period, though small, at about ten percent of cluster employment.

INCOME AND HOUSING AFFORDABILITY

Hourly wages in hospitality and tourism the Tahoe Basin range from $10.32 for entry level jobs to $18.18 for mid-level and advanced occupations. This translates to about $21,000 to $38,000 per year for full time work, which many of the jobs are not. In 2015, the median price of a single family home was $490,000, up from $334,600 during the depth of the recession in 2011. Only 21 percent of households in the region could afford the median priced home in 2015. In 2016, the median price escalated to $549,000. Condominium prices are more reasonable at $349,500 in 2015 and $358,800 in 2016. But only 32 percent of households can afford these prices and these units are not always conducive to family housing. The Warm Room, a shelter program in South Lake Tahoe, reports that in this past winter season more than one quarter of their guests were employed, nearly all of them in recreation, hospitality and retail sectors.

Both per capita income and median household income have begun to increase since 2013, but remain below 2010 levels and have not kept pace with the general rate of inflation let alone escalating housing prices. Per capita incomes in the Tahoe region increased 3.5 percent between 2013 and 2015, reversing an earlier downward trend between 2010 and 2013. Median household income in the Tahoe Basin also increased slightly between 2013 and 2015, but is still down 4.3 percent from the 2010 level. This was much better than either California, which posted a 6.6 percent decline between 2010 and 2015, or Nevada which declined 14.4 percent during the same period.

The Tahoe Basin has at least two areas, Kings Beach and South Lake Tahoe, that qualify as "poverty pockets", in which 30 percent of the population is at 150 percent of the federal poverty level. Another indicator, student participation in the free or reduced price school lunch program, has tended to follow general economic trends, dropping during the run-up to the recession between 2004 and 2008 and then peaking in 2009. More recently, this indicator has improved in some areas with the gradual increase in household income. Between 2010 and 2014 the rates had stabilized at higher levels than before the recession, but in 2015 and 2016 the rates have dropped in the Tahoe Unified School District in South Lake Tahoe and in Zephyr Cove. The rates in Tahoe Truckee school district have stabilized at about 37 percent, nearly down to pre-recession levels while in the Incline Village District the rates have continued to gradually increase.

All communities in the region experienced steep declines in median home prices due to the recession, and prices still have not fully recovered in most communities. However, the median price for a single family home reached over $1 million in Incline Village in 2016 and over $800,000 in the East Shore area. The South Shore had more moderate prices, with a median of $415,000, while the Tahoe City area posted a median price of $590,000,000 for single family homes. Condominium prices are much more uniform across the region, ranging from $423,000 for the median in Incline Village to $305,000 in South Shore.

The market for second homes is driving some of this increase in price, ahead of growth in local incomes. The percentage of non-resident homeowners increased from 60 percent to 70 percent in Washoe County, and from 54 to 56 percent in Douglas County, up from 49 percent in 2003. The ratio in El Dorado County is the highest at 78 percent, but has remained steady since 2015.

A balanced housing market would mean that 50 percent of households could afford to buy a median priced home. However, the proportion of households who can afford the median priced single family home in their area ranges from 25 percent in South Shore to 10 percent in the East Shore area. The Basin-wide average is 21 percent. The values for condos are closer to the desired ratio, ranging from 41 percent in Incline Village to 32 percent in the East Shore and Basin-wide. Rental housing is much more affordable for households throughout the region. All of the markets for which data could be obtained show well over 50 percent of households are able to pay median rent. It is clear that the workforce in the Tahoe Basin is disproportionately housed in rental housing and has fewer ownership opportunities. This is an issue for the upward mobility prospects of the workers and their families.

It should also be noted that housing affordability has reached crisis proportions throughout much of California, if not in Nevada. The California legislature recently passed a comprehensive housing package in an attempt to generate more resources to fund affordable and workforce housing. Developers frequently indicate they cannot feasibly build for the "middle income" market, which is above traditional affordable housing thresholds but below the 150 percent of median income levels that can afford market rate housing. This issue will require close collaboration between local jurisdictions and private sector stakeholders to identify resources that can be devoted to building workforce housing.

A Strategy for Income Growth

While the Tahoe Basin will continue to be a visitor destination due to its many natural assets, it is clear that a broader strategy is needed to achieve economic diversification and income growth. The Prosperity Plan identified Health and Wellness and Environmental innovation as two economic clusters that could propel growth of professional, living wage jobs. We have not seen growth in these economic clusters so we must explore additional areas where we can expand the employer base and increase payrolls and earning potential in the Basin.

As noted in that plan and in the subsequent Indicators Reports including this one, the Tahoe Basin has an aging population and workforce. This can be viewed as an asset in terms of the level of experience and spending capacity this demographic segment brings to the area. It also underscores the importance of health care and the possibility of marketing the region as a health and wellness destination. As noted in the Prosperity Plan, wellness integrates closely with recreation and the stronger focus in the visitors services industry on providing a year round, active visitor experience.

However, in terms of other types of professional jobs, a broader focus would include financial services and management consulting as well as scientific and technical professions. The Basin has seen growth in these areas, although the trends have not been consistent. However, if the Tahoe Basin could achieve the same rates of growth as projected for its constituent counties as a whole, it could make real progress toward closing the gap between wages and housing costs, which would help to stabilize the population and lead to a host of other positive economic outcomes.

Table 1 and Figure 3 present ten year projections based on the region maintaining its share of projected growth in these industries in the California and Nevada counties surrounding the lake. Health and Wellness, while a smaller component of the regional economy, is projected to have the fastest growth rate among these industries, at 2.5 percent per year. Visitor services are projected to grow 2.2 percent per year and financial and professional services at a1.8 percent annual growth rate. Over the ten year period, the non-visitor services employment sectors would contribute about 24 percent of the new jobs but 45 percent of the growth in income. These jobs could be housed in small to mid-sized office buildings of suitable scale for the Tahoe Basin environment.

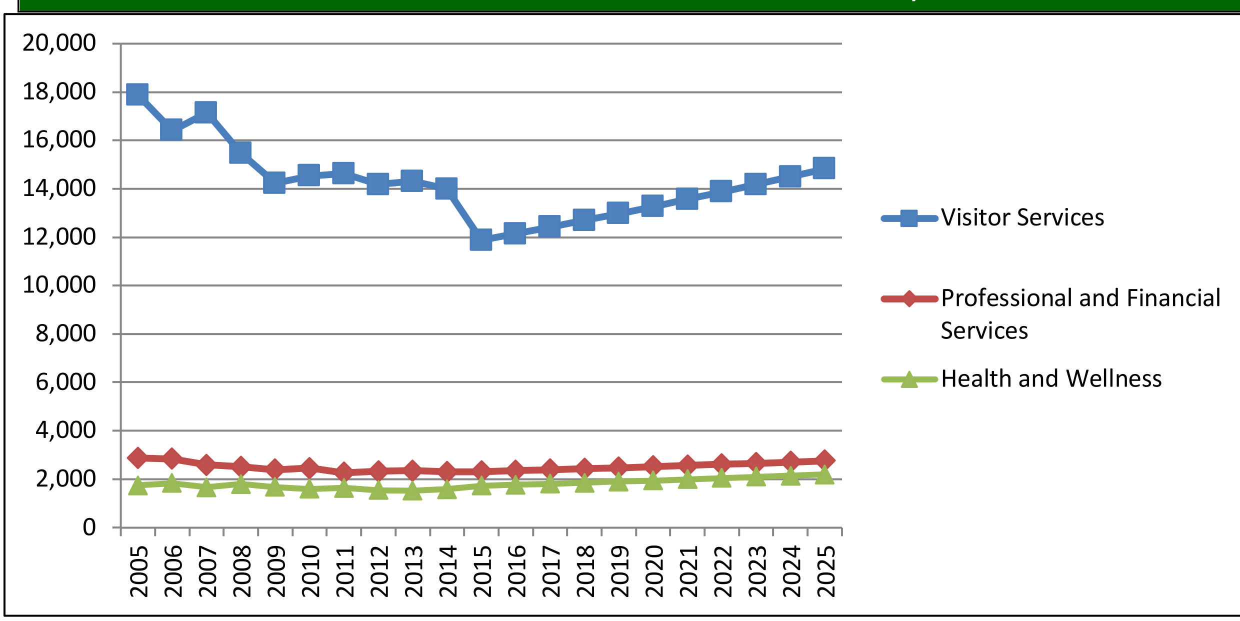
These projections are highly dependent on advancing the level of technological capacity in the Basin. The financial and professional services sector, which includes information technology, requires a high level of broadband capacity. Health care is increasingly delivered through remote access, particularly in rural areas. In visitors services as well, open jobs go unfilled due to competing wages in other sectors. Technological efficiencies can help reduce the personnel requirements in this industry and allow growth in revenues while offering a higher level of productivity and labor compensation.

TABLE 1
PROJECTIONS OF TAHOE BASIN JOBS AND WAGES IN SELECTED INDUSTRIES, 2015-2025

				2015-2025 Growth			
Industry Sector	**2005**	**2015**	**2025**	**Jobs**	**Percent**	**Annual Wages ($Mil.)**	**Percent**
Visitor Serving Sectors	17,877	11,879	14,822	2,943	76.1%	$65.9	55.1%
72 Accommodations and Food	*13,629*	*8,443*	*10,926*	*2,483*			
71 Arts, Entertainment, Rec.	*4,248*	*3,436*	*3,895*	*459*			
Health and Wellness	1,747	1,729	2,203	474	12.3%	$25.5	21.4%
Professional and Financial	2,881	2,311	2,762	451	11.6%	$28.1	23.5%
52 Finance	*782*	*504*	*551*	*47*			
51 Information	*558*	*344*	*387*	*43*			
54 Professional Technical	*1,440*	*1,322*	*1,672*	*350*			
55 Mgt. of Companies etc.	*101*	*141*	*151*	*10*			

Source: ADE, Inc., based on county level job projections from CA Employment Development Dept. and Nevada Dept. of Employment, Training and Rehabilitation. Wage data from BLS Weekly wages by industry by county.

FIGURE 3
PROJECTIONS OF JOB GROWTH IN SELECTED INDUSTRIES, 2015-2025



Demographics

The report presents a number of indicators related to population size and demographics, highlighted below.

- After more than a decade of decline, population in the Tahoe Basin has stabilized at about 54,000 people since 2011. The population posted a slight increase to 54,361 in 2015.
- The Tahoe region had lost 7,000 workers from the labor force between 2009 and 2010, but it has now remained steady at about 27,000 workers through 2016.
- Data on school enrollments are available through the 2015-16 school year and show recent increases that may suggest that overall population may begin to increase, particularly since the number of school age children in the region has been declining.
- The Tahoe Basin tends to have an older population than either California or Nevada and the older age groups in the region have continued to increase since 2010.

Social Conditions

The high rates of second home ownership in the region reduce social cohesion and presents challenges to provide local services, which impacts lake communities on many levels. Voter participation rates had declined in many communities in recent years but showed a resurgence for the 2016 general election. Fortunately, Tahoe Basin crime rates have remained below national averages. In addition, while Tahoe residents have the opportunity for an active outdoor life with related health benefits, both economic stress and lifestyle choices increase the incidence of substance abuse and mental disorders.

- Enrollments at Lake Tahoe Community College had stabilized at just over 1,700 full time equivalent (FTE) students for several years beginning in 2011, but then dropped more than 20 percent in 2015-16. This may mean that more would-be students are finding employment. During the recession, enrollments swelled unemployed workers returned to school to increase or improve their technical skills. Enrollments at Sierra Nevada College, a four year institution, have continued to rise, which is a positive reflection on students' perceptions of future career opportunities.
- The Sustainability Measures report (2010) indicated that voter participation rates had increased during the 2000's in the Basin. Participation in the 2012 Presidential election was slightly lower than in 2008 and the mid-term elections of 2010 and 2014 had even lower rates of participation, but the region rebounded big in the 2016 presidential election with the highest turnout rates since 2004 in many communities.
- Crime rates in most communities in the Basin are below US averages and have generally declined over the past number of years, in line with national trends.
- There has been a general trend of increasing reliance on government payment sources for health care in the Basin, which may signify declines in patients' ability to pay. There has also

been a general decline in hospital patient discharges, which may be related to the overall population decline.

- Tahoe Basin residents report being in good health at higher rates than does the national population, but issues of adverse mental health and substance abuse are reported to be significant community issues.

Planning

In an effort to achieve economic progress while maintaining environmental quality, the Tahoe Regional Plan, adopted in 2012, included a goal to incentivize and concentrate new development in existing community nodes. Between 2013 and 2016, three-quarters of the commercial permits issued by the Tahoe Regional Planning Agency (TRPA) have been in community centers, while 86 percent of residential permits have been outside of centers. Local permits issued by the jurisdictions have showed more than half of the commercial permits in community centers but most of the residential activity outside.

ECONOMIC AND SOCIAL TRENDS IN THE LAKE TAHOE BASIN

INTRODUCTION

This report provides an update to the inaugural edition of the Tahoe Prosperity Center's Measuring for Prosperity Report published in 2015. The Measuring for Prosperity Indicators build on earlier data analysis in the Watershed Sustainability Measures Report and the Lake Tahoe Basin Prosperity Plan both published in 2010. Generally the indicators address either economic or social characteristics of the communities, businesses and residents of the Lake Tahoe Basin. Additional information about environmental indicators is regularly published by the Tahoe Regional Planning Agency (TRPA), at http://www.trpa.org/tahoe-facts/science-data/.

The Tahoe Prosperity Center (TPC) is an innovative nonprofit collaborative created to champion the prosperity initiatives identified in the 2010 Lake Tahoe Basin Prosperity Plan. Using a regional stewardship model among existing entities, the TPC is bridging the fragmented governing systems and speaking in one voice to support the long-term economic, social and environmental health of the entire Basin. Collaboration is the foundation of the Tahoe Prosperity Center, with its mission statement of, "Uniting Tahoe's communities to strengthen regional prosperity."

In the Lake Tahoe Basin, great strides have been made in measuring environmental progress, which has led to understanding of the key factors that affect environmental quality and ensure prioritization of the policy tools that lead to environmental improvement. However, there has been much less attention paid to measuring economic vitality over time, making it difficult to assess whether key initiatives have been effective, and hindering the ability to identify the areas where additional resources and strategic efforts are needed.

This report begins with a discussion of economic trends and indicators including job trends, unemployment, tourism sector revenues, taxes and housing prices and affordability. The report then discusses a number of social indicators such as age demographics, health conditions, college enrollments, crime rates and development patterns. The report highlights changes in trends over the two years subsequent to the data included in the 2015 report. Due to lags in data availability, the 2015 report generally included data through 2013 or 2014. The current report updates the indicators to 2015 or 2016. More detailed data tables are provided in the Appendix. In order to match the geography of the Basin, which includes portions of five counties in California and Nevada and only one incorporated City, South Lake Tahoe, much of the data is collected at the census tract or zip code level, maps of which are provided in Appendix C.

ECONOMIC TRENDS

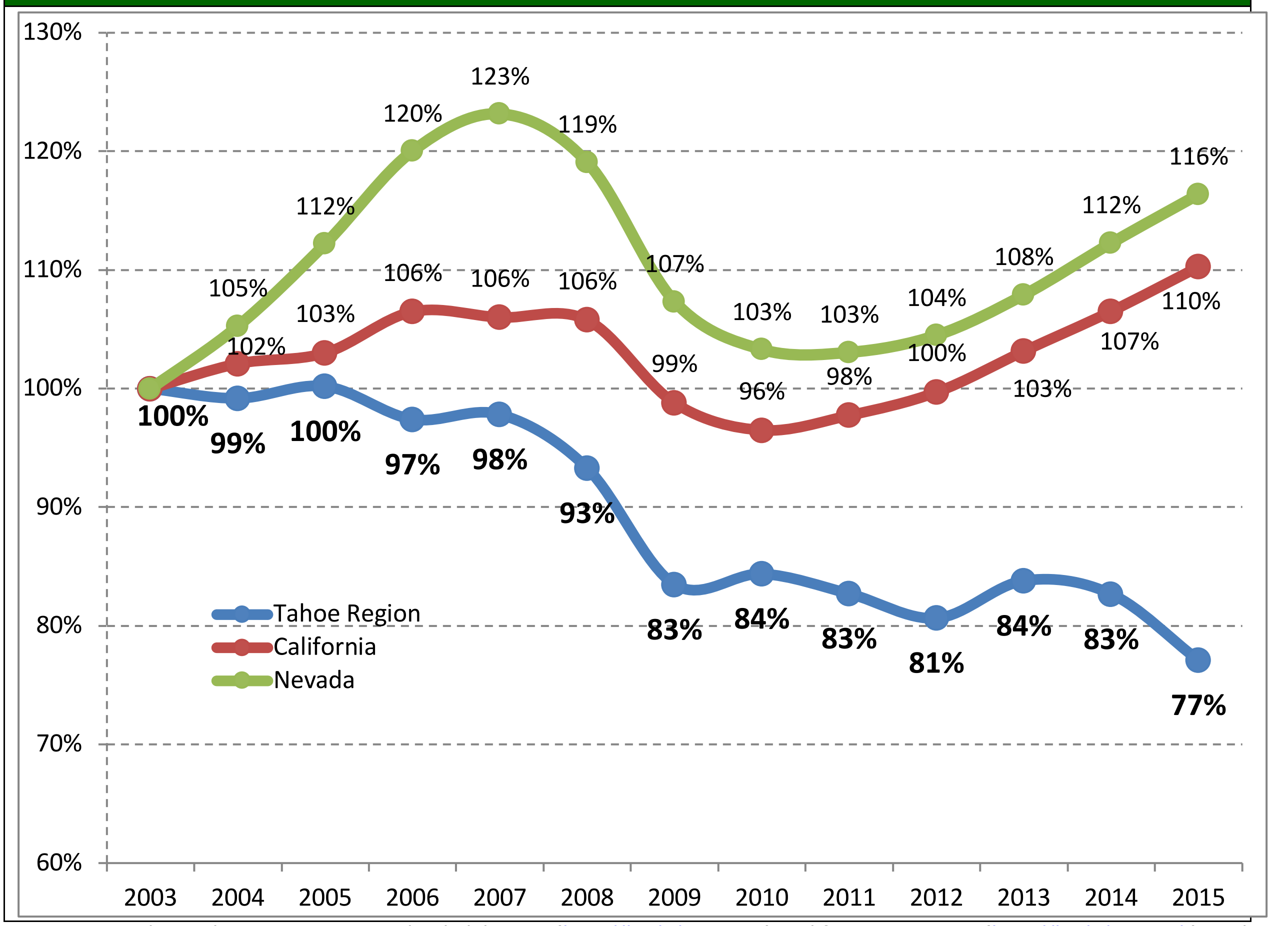
INTRODUCTION

The most significant circumstance to affect the Tahoe Basin economy between 2013 and 2015 was the drought, which reduced snow levels and affected winter tourism. The detailed employment data available to track job trends in the Basin is reported by the US Bureau of the Census for March of each year. These data reflect a loss of nearly 2,300 jobs between 2013 and 2015. Of this amount, more than 1,500 jobs were lost in visitor—serving businesses. We expect these figures will rebound in 2016 and 2017 when snow levels were closer to normal. In addition, as described below, summer tourism has continued an upward trend, so these jobs figures are not necessarily indicative of overall visitor industry trends during this period.

JOBS AND UNEMPLOYMENT

Following the recession, jobs have been growing in California since 2011 and in Nevada since 2012. In the Tahoe Basin, a different trend has occurred, with jobs starting to decline since at least 2003 and accelerating with the beginning of the recession. Job levels recovered slightly in 2010 but then have fluctuated before making another steep drop in the winter of 2015. Overall, the Tahoe Basin lost nearly 7,800 jobs, or 23 percent, between 2003 and 2015 (Figure 4).

Figure 4
CHANGE IN TOTAL PRIVATE SECTOR JOBS INDEXED TO 2003



Sources: Nevada Employment Training and Rehabilitation (http://bit.ly/1cQAcAv), California EDD LMID (http://bit.ly/1B8saPb), and ZIP Business Patterns.

The longer term jobs trends in the Tahoe Basin have been affected by other factors than the recession or the drought, although those events have accelerated the ongoing decline. In order to understand these employment trends, it is useful to categorize business sectors into several major groups (Figure 5). The Tahoe Basin Prosperity Plan (2010) and the Sustainable Communities Program Economic Development Strategy (2014) defined three main industry clusters in the region: Visitor Services, Health and Wellness and Environmental Innovation (Green Business and Environmental Research and Education). These clusters represent an estimated 70 percent of jobs in the Basin and represent significant future opportunities to expand the regional economy. However, they are also sectors that have had major issues through the recession as discussed below.

In order to address the overall employment trends in the region, the Measuring for Prosperity Report utilizes a broader industry grouping as shown in Figure 2 (more detailed data is also provided in Table 2). Accommodations and Food is the largest single jobs sector in the Tahoe Basin, and when combined with Arts, Entertainment and Recreation, represented over 50 percent of total jobs in the Basin in 2003 (this sector is labeled Visitor-Serving in Figure 5). However, the tourism sector has lost jobs continuously over the past decade and by 2015 was reduced to 45 percent of total jobs. During this time, 6,000 tourism jobs were lost, representing 77 percent of total job loss in the Basin. The long term decline in tourism activity was largely related to a lack of investment in hotel and restaurant properties during the late 1990s and through most of the 2000 decade. Many Tahoe tourism venues have lost appeal in relation to other resort areas that have continued to upgrade their facilities and attractions. Areas such as Northstar and Heavenly ski areas, which have been able to invest in new facilities and services, have seen positive consumer response. With the adoption of the new Tahoe Basin Regional Plan in 2012, new investments have begun to accelerate, particularly in South Lake Tahoe, and sales and visitor levels have responded very positively. Thus, there are signs that the regional policy of encouraging "environmentally-beneficial redevelopment" can help reverse the structural decline in the region's visitor-serving sector.[2]

In the Tahoe Basin, the recession exacerbated the overall downward jobs trend, with additional job losses in the construction, real estate, retail and financial sectors, similar to statewide and national trends. These industries, labeled "Recession" in Figure 5, had a loss of about 2,000 jobs between 2008 and 2013, but have recovered nearly 500 jobs by 2015. Retail and Real Estate jobs both increased between 2013 and 2015.

The services sector had begun to rebound in 2013 but flattened out again by 2015. Within this group, however, health care, administrative support and personal services all had positive growth between 2010 and 2015.

Other economic base industries also had positive growth between 2010 and 2015. Professional and technical services have not recovered to 2010 job levels but have been steadily increasing since 2012. The "Management of Companies" sector increased employment between 2011 and 2014, then lost those jobs again in 2015. This sector includes financial holding companies and corporate, subsidiary and regional management offices and provides high paying jobs in mostly small scale office spaces in the Tahoe Basin.

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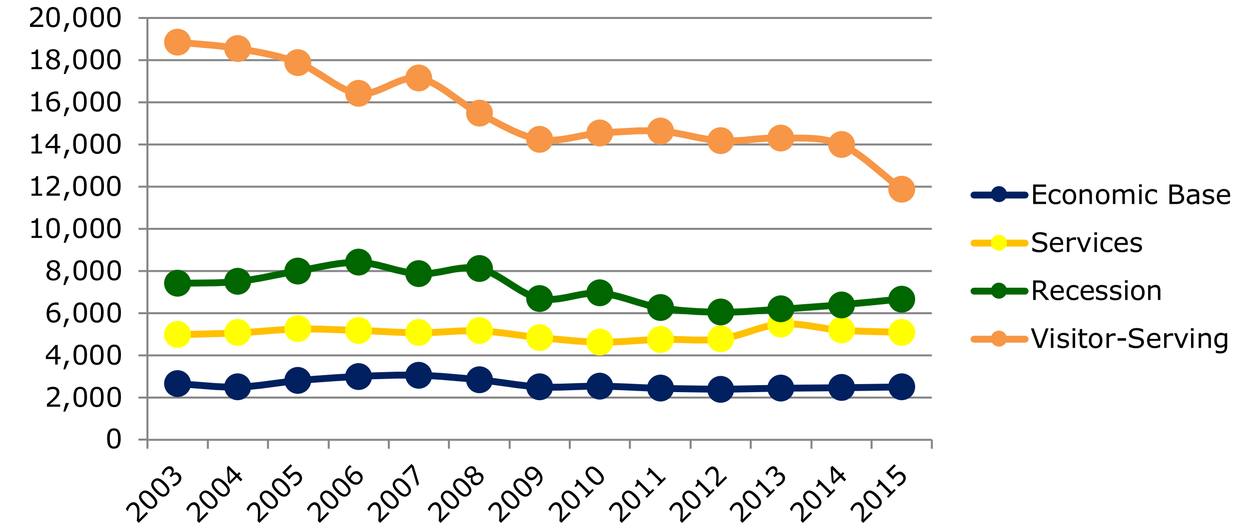
[2] TRPA Regional Plan, December 2012, p. 1-4.

FIGURE 5
INDUSTRY SECTOR JOBS CHANGE



Source: ADE, based on US Census ZIP Business Patterns (2003-2015)

JOB TRENDS BY COMMUNITY

The job trends have varied by community around the lake, depending on the concentration of business types in each area. Community job trends may be viewed in Tables A-2 to A-10 in the Appendix and are highlighted below.[3] The jobs data are published by zip code and reflect employment levels in mid-March of each year. Figure 6 shows the zip code areas by community. In addition, Figure C-1 shows census tracts for each community, which are used for a number of the demographic and social indicators.

Incline Village: Incline Village jobs declined steadily between 2005 and 2010 and fluctuated for several years before dropping again in 2014 and 2015. Construction jobs increased since 2013 but retail and visitor serving jobs have further declined, likely due to the drought conditions. Professional and technical services declined in 2014 but rebounded in 2015.

Zephyr Cove/Stateline: The lakeside areas in Douglas County reached 9,280 jobs in 2007, but then lost nearly 3,000 jobs in two years. Since then, job levels have fluctuated with very little recovery. 2015 saw a further decline of more than 500 jobs, mostly in visitor serving sectors.

South Lake Tahoe: Unlike the areas discussed above, South Lake Tahoe has seen steady job growth since 2013, and recovered to its 2009 level of jobs by 2015. Although the tourism sectors of

[3] The community level employment data in this report is obtained from Zip Business Patterns from the US Census, which only provides private sector employment. Thus, for example, jobs in educational services reflect private education facilities only. A separate estimate of public sector employment has been prepared in Table A-3 using a different US Census source, which is somewhat less reliable and cannot be directly compared with the Zip Business Patterns. However, based on this data, there are about 1,500 public sector jobs in the Basin, of which about 1,100 are public school positions and about 400 are other governmental agencies.

Table 2 **Tahoe Basin Private Sector Job Change by Sector**													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
Tahoe Basin	33,845	32,906	33,046	31,513	28,200	28,505	27,941	27,244	28,310	27,931	26,037	-2%	-2%
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	-5%	-4%
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	-1%	-3%
Other Sectors Most 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%	-2%
23 Construction	2,316	2,858	2,708	2,531	1,796	1,787	1,534	1,454	1,804	2,079	1,911	-5%	1%
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	0%	-1%
52 Finance	782	759	627	604	549	512	482	531	495	467	504	-8%	0%
Service Sectors													
56 Waste Mgt. and Admin Services	1,714	1,566	1,590	1,579	1,452	1,292	1,329	1,636	2,358	1,677	1,605	-5%	4%
61 Education	339	388	411	360	361	427	504	373	376	543	423	5%	0%
62 Health	1,747	1,837	1,664	1,803	1,677	1,603	1,645	1,551	1,530	1,587	1,729	-2%	2%
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	-2%	1%
22 Utilities	102	104	84	82	84	86	63	48	42	37	42	-3%	-13%
Other Economic Base Sectors													
31 -33 Manufacturing	186	209	182	189	138	137	138	328	156	165	173	-6%	5%
42 Wholesale	320	288	277	285	248	257	374	173	190	232	284	-4%	2%
48-49 Warehouse Transportation	185	402	627	425	258	194	139	96	223	221	218	1%	2%
51 Information	558	484	461	405	347	304	304	326	367	306	344	-11%	3%
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%	-2%
55 Mgt. of Companies etc.	101	137	65	57	59	145	138	183	210	219	141	8%	-1%
11,21 Other	18	15	14	42	14	8	8	10	8	16	26	-24%	45%

Source: ADE, based on US Census ZIP Business Patterns (2005-2015). Note that the historical data for health care have been revised from the figures in the 2015 Indicators Report to reflect more complete data obtained for the industry cluster analysis in the present report (2018). This also affects the historical total employment figures. Also, total employment figures include the Squaw Valley/Alpine area and may vary from those compiled by TRPA for the Basin, which do not include these areas.

Figure 6

TAHOE BASIN COMMUNITIES AND ZIP CODES

Community			Zip Code
Incline Village (Washoe Co.)			89450
Incline Village (Washoe Co.)			89451
Crystal Bay			89402
Carnelian Bay\Tahoe Vista			96140
Kings Beach\Tahoe Vista			96143
Kings Beach\Tahoe Vista			96148
Alpine Meadows\Squaw Valley			96146
Tahoe City			96145
Homewood			96141
Tahoma			96142
South Lake Tahoe		96151	96150
		96154	96152
	96157	96155	96158
Other - East Shore			89411
Zephyr Cove (Douglas Co.)			89448
Stateline (Douglas Co.)			89449

Source: ADE, Inc. U.S. Census ZipArea Shapefile

Accommodations, Food, and Recreation lost 90 jobs in 2015, retail, real estate and health care jobs have all grown.

Kings Beach/Tahoe Vista: The main job sectors in these communities are Construction, Retail, and Accommodations/Food Services. Most of these jobs declined in 2009 and 2010 but have started to recover more recently and had nearly recovered to their pre-recession levels by 2015.

Tahoe City/Other North Shore: By 2013, the remaining North Shore areas had regained jobs back to 2003 levels, although the area remained about 400 jobs, or six percent, below peak 2008 levels. However, in 2015 the area lost more than 1,400 jobs as winter tourism declined.

The Gaming Industry

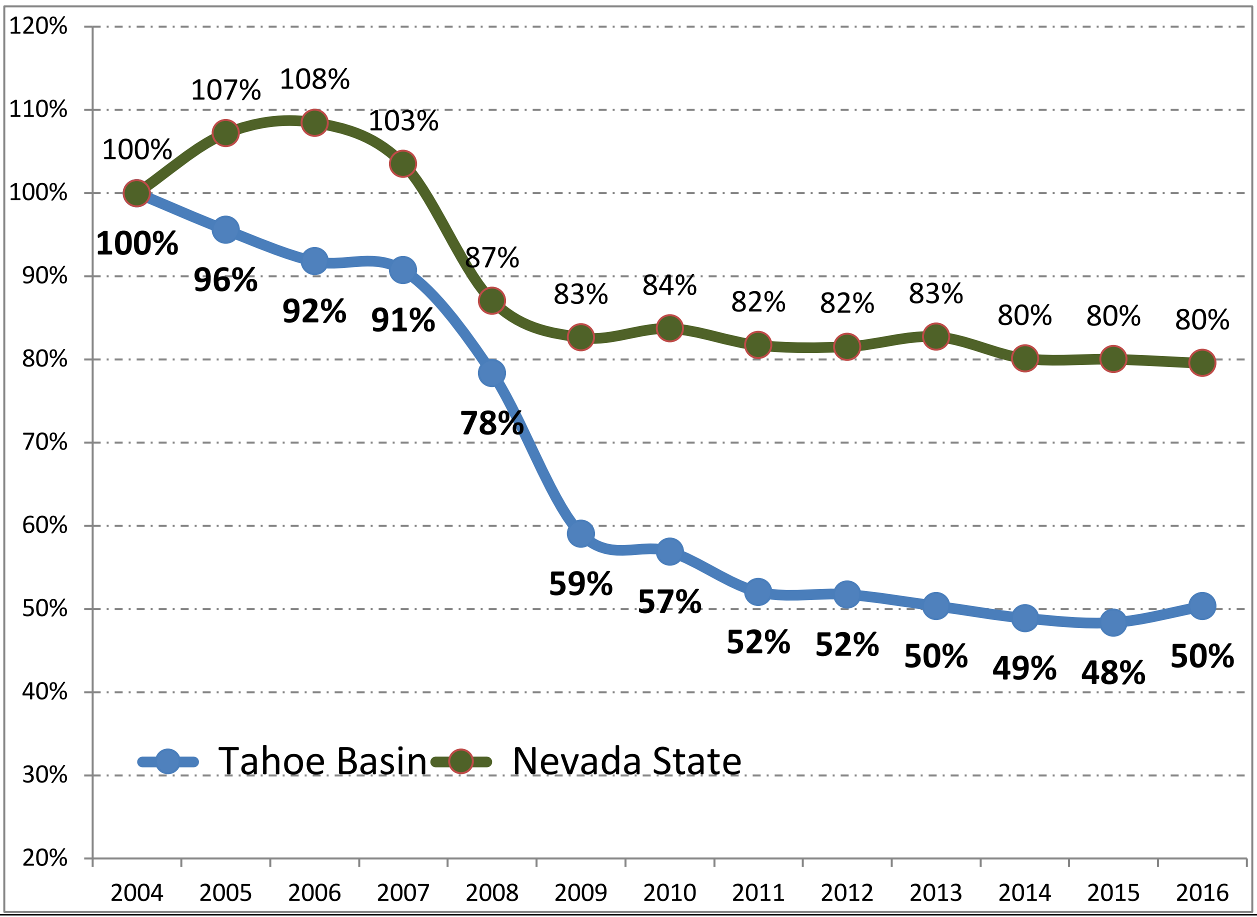
To some extent the loss in tourism in the region may be related to a similar steady decline in gaming revenue, which also peaked in 2000 and then suffered a 9.4 percent reduction in 2008, followed by a 25.8 percent decline in 2009 (See Tables A-15 and A-16 in the appendix). As shown in Figure 7, this downward trend is much steeper and more prolonged than what the gaming industry in Nevada as a whole has experienced (upper line in Figure 7). Nevada had seen significant annual increases in revenue until 2006 while Tahoe was already declining. During the recession, statewide gaming revenues dropped about 22 percent, but then have settled at a new normal at 80% of the level it had achieved back in 2004. Tahoe, with a modest uptick in 2016, is only at 50 percent of its 2004 level. The Tahoe casinos have seen significant competition from increased Indian casinos in California and also from newer properties and more contemporary offerings and amenities in Las Vegas. Local casino owners report that they are continuing to invest in their properties to create the best market attraction possible. This also highlights the need to develop other kinds of recreation and entertainment attractions to restore overall visitor levels in the Tahoe Basin. Casino owners have been collaborating with other industry stakeholders on efforts to develop new entertainment venues in particular.

Recreation and Lodging

Coming out of the recession, recreation had begun to rebound, led by the ski areas, but the continued drought had an effect in 2014 and 2015 on jobs. (Tables A-11 to A-14 provide an extensive breakdown of jobs in the tourism sector by community.) As shown in Table 3, the number of skier-days peaked in 2009-2010 and then dropped significantly in 2011-12 and again in 2013-14 and 2014-15, despite a slight reprieve in 2012-13. The 2015-16 season showed a rebound and projections for the current year are that will also exceed 4 million skier days. A number of the ski areas are repositioning themselves as year round recreation attractions and have invested in new facilities to support that direction. As discussed below, summer lodging revenues have showed continued strong growth patterns despite the slowdown in winter travel to Tahoe.

Looking at quarterly hotel revenue data for the Stateline/Zephyr Cove area (Figure 8), winter hotel revenues (Q3) reached average levels in 2013-2014 and 2014-2015, and exceeded average levels substantially in 2015-2016. In South Lake Tahoe (Figure 9) hotel revenues were below average in 2013-2014 but then met the average in 2014-2015 and exceeded it by 46 percent in 2015-2016. In the North Shore areas, the performance has not been as positive until recently (Figure 10). Third quarter hotel revenues were above average in 2012-2013 but then remained below average in the two years after that. However, Q3 hotel revenues in 15-16 significantly exceeded the long-term average. These data generally reinforce the jobs trends discussed earlier. Winter job losses have been much heavier in the north than in the south. It is also likely there has been some lag in rehiring at the hotels despite the fact that revenues have shown some improvement over the past couple years. Summer hotel revenues (Q1) have been above average for the past three years in nearly all the areas, showing continued strong demand for summer recreation opportunities in the Tahoe Basin.

FIGURE 7
GAMING REVENUES PERCENT CHANGE 2004-2015

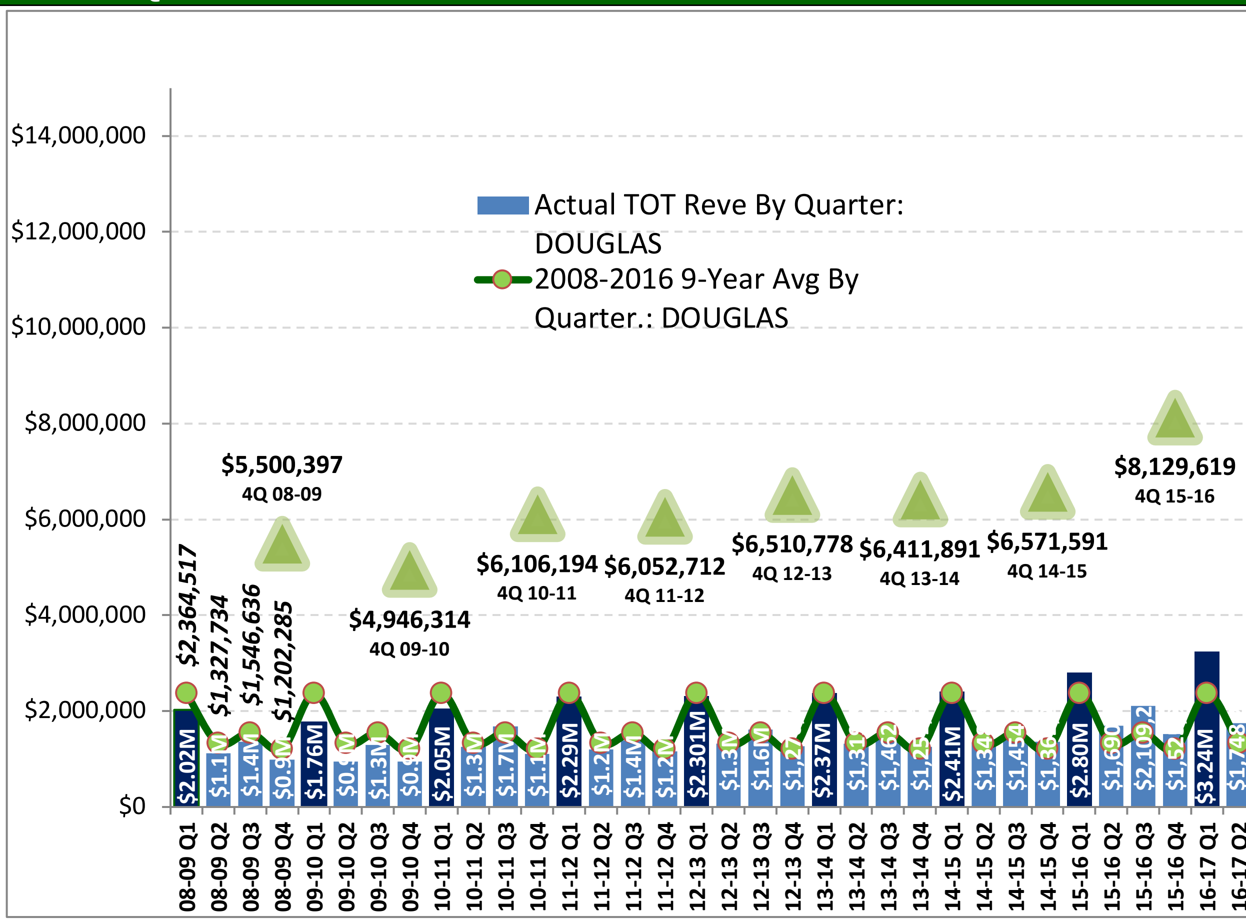


Source: Nevada Gaming Control Board

Table 3 Tahoe Skier-Days, 2008-09 to 2013-14								
Year	**2008-09**	**2009-10**	**2010-11**	**2011-12**	**2012-13**	**2013-14**	**2014-15**	**2015-16**
Skier-Days	3,569,000	4,628,000	4,556,000	3,254,000	4,001,000	2,886,000	2,589,000	4,077,000
Annual % Change		29.7%	-1.6%	-28.6%	23.0%	-27.9%	-10.3%	57.5%

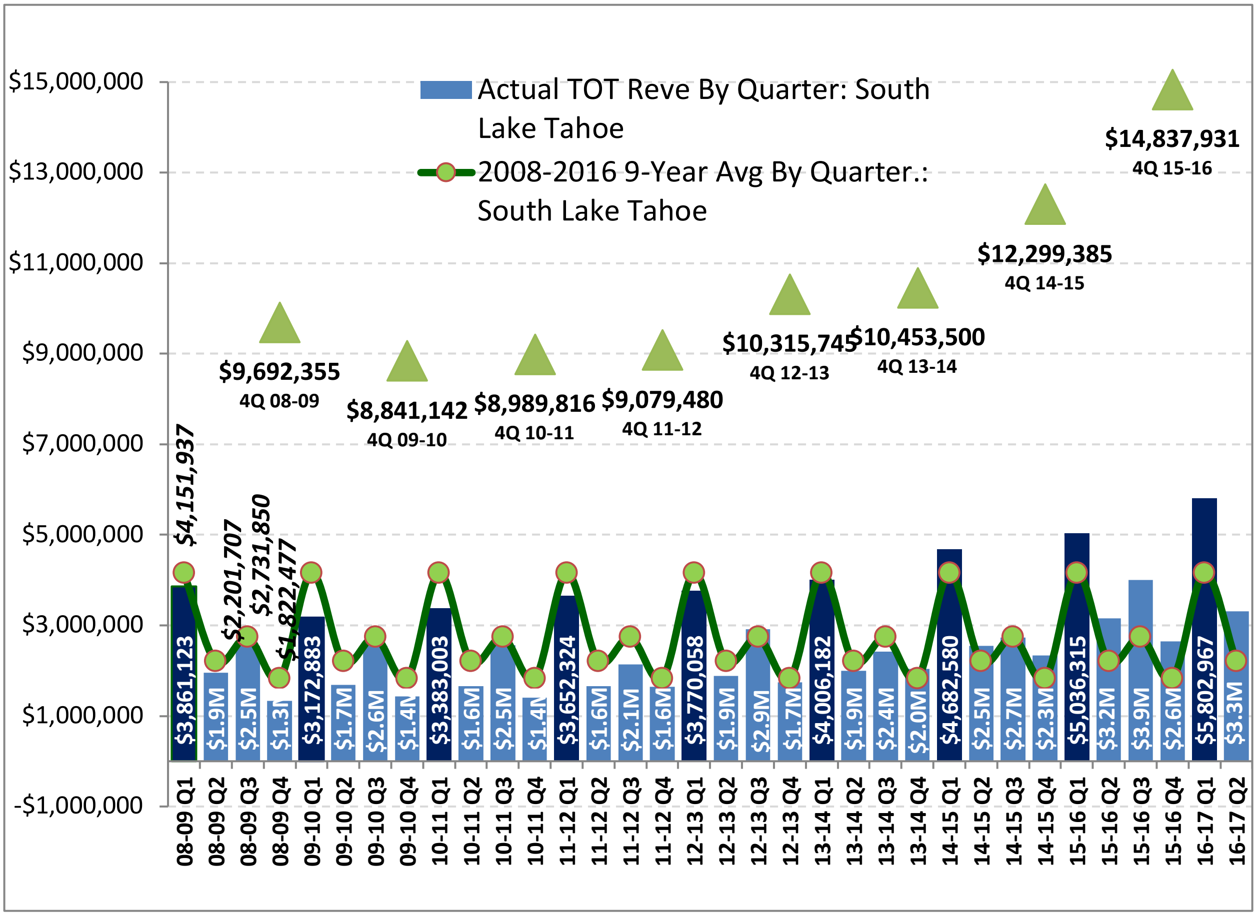
Source: Data for 2008- 2014 provided by Bob Roberts and more recent data provided by Michael Reitzell, President, California Ski Industry Assn. Includes the following ski areas: North Lake Tahoe: Alpine Meadows, Boreal/Soda Springs, Diamond Peak, Mt. Rose, Northstar, Ski Homewood, Squaw Valley, Sugar Bowl, Tahoe Donner. South Lake Tahoe: Heavenly, Kirkwood, Sierra-at-Tahoe

Figure 8
Quarterly Transient Occupancy Taxes for Zephyr Cove and Stateline



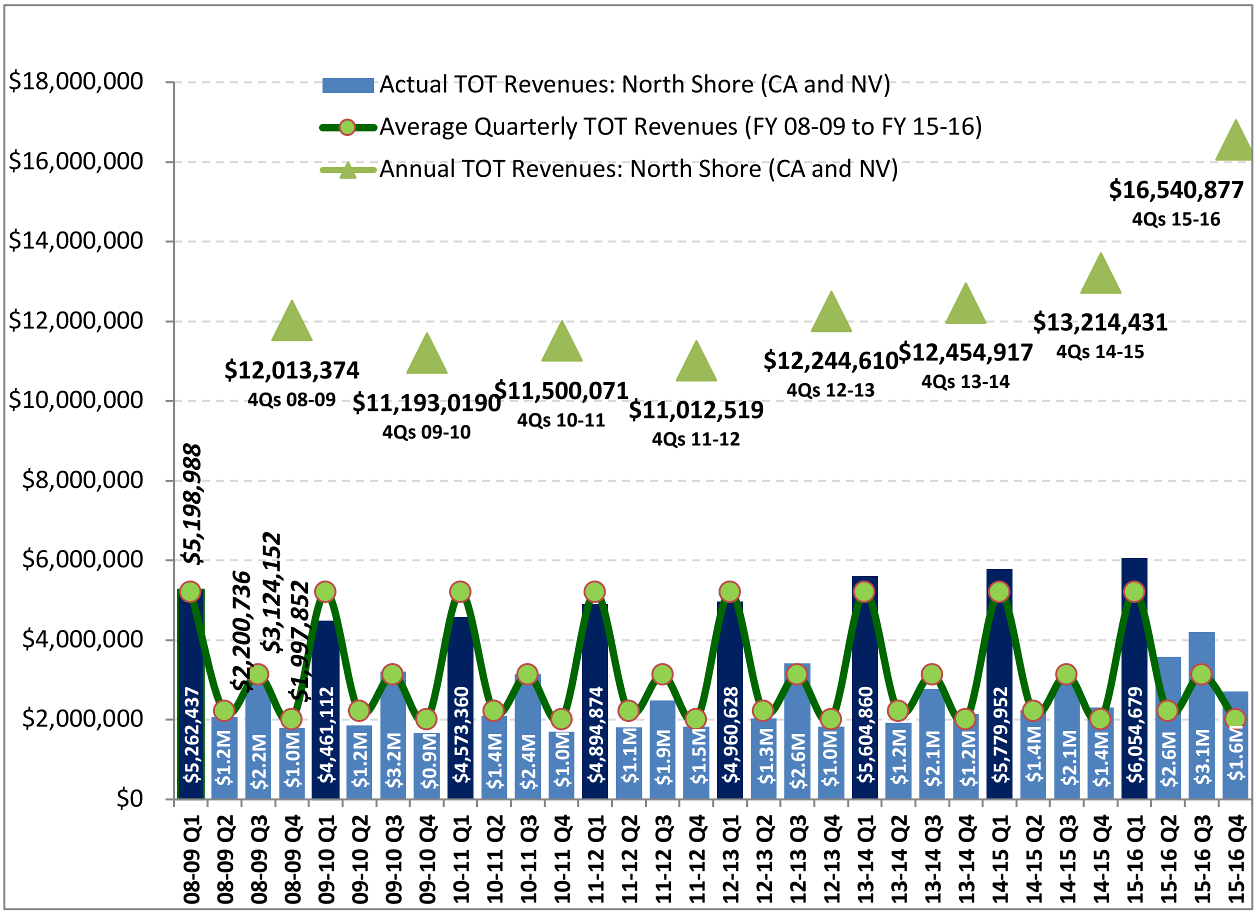
Source: Tahoe Douglas Visitors Authority

FIGURE 9
QUARTERLY TRANSIENT OCCUPANCY TAXES FOR SOUTH LAKE TAHOE



Source: City of South Lake Tahoe

FIGURE 10
QUARTERLY TRANSIENT OCCUPANCY TAXES FOR NORTH SHORE AREA INCLUDING HOMEWOOD *

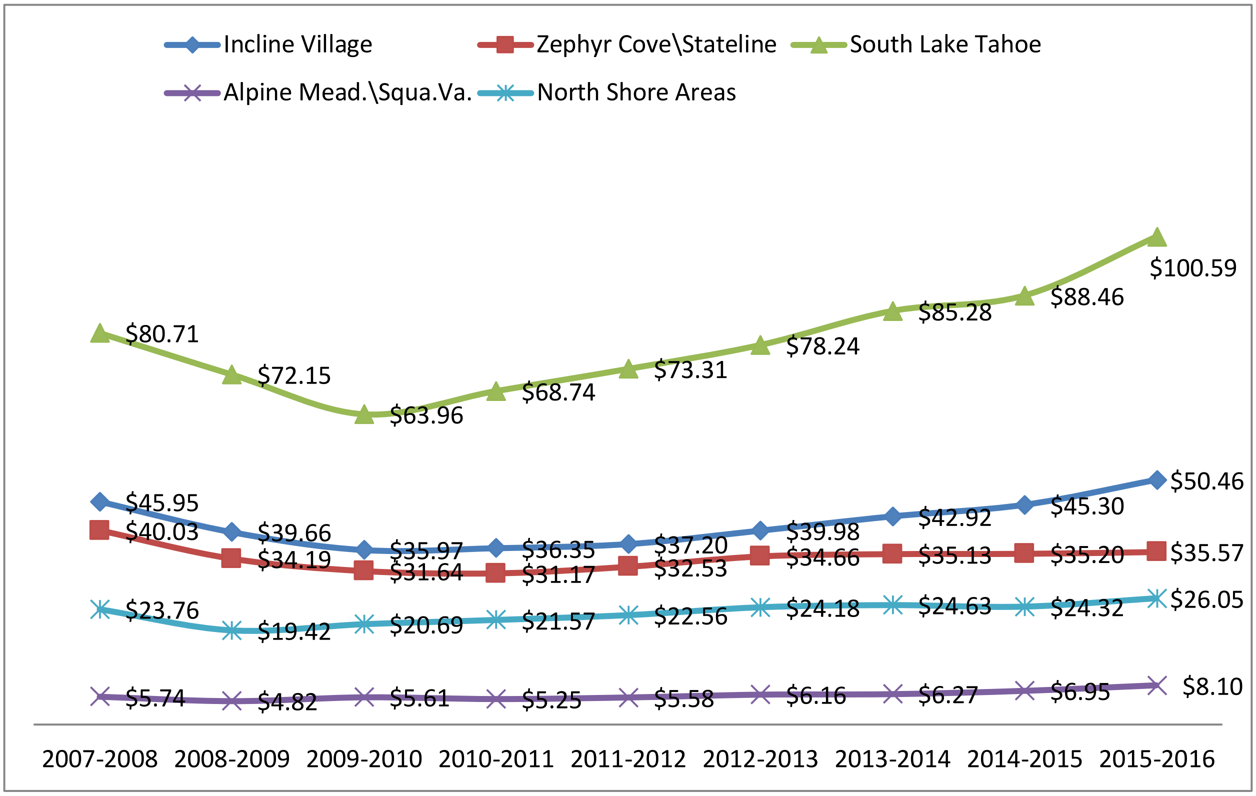


*Source: Applied Development Economics, based on Five-Year History TOT Collections By District (2005-2006--2009-2010 and 2010-2011--2014-2015), from Jennifer Merchant, Assistant to Placer Co. CEO; Reno-Sparks Convention & Visitors Authority, "Room Tax and Occupancy Statistics" (many months and years), from Robert Douglas RSCVA. Note: * Quarter One corresponds with July, August, and September*

RETAIL SALES

Sales Tax revenues, reflecting retail spending, also began to recover from the recession by 2009-10, and by 2015 have reached pre-recession levels in all of the larger areas except Stateline/Zephyr Cove (Figure 11). In South Lake Tahoe in particular, the newer Heavenly Village retail development has seen excellent sales growth in the past several years, as consumers have responded to the modern, upscale development. Further expansion of this center is planned, along with additional retail development across the street along the north side of SR 50. New retail developments in Squaw Valley and Northstar have also led to measurable increases in retail sales in those areas. In addition, these newer developments meet all the new environmental guidelines that serve to reduce run-off into the lake.

FIGURE 11
TRENDS IN RETAIL TRANSACTIONS SUBJECT TO SALES TAX (FY 07/08 - 15/16)



Sources: 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.

UNEMPLOYMENT

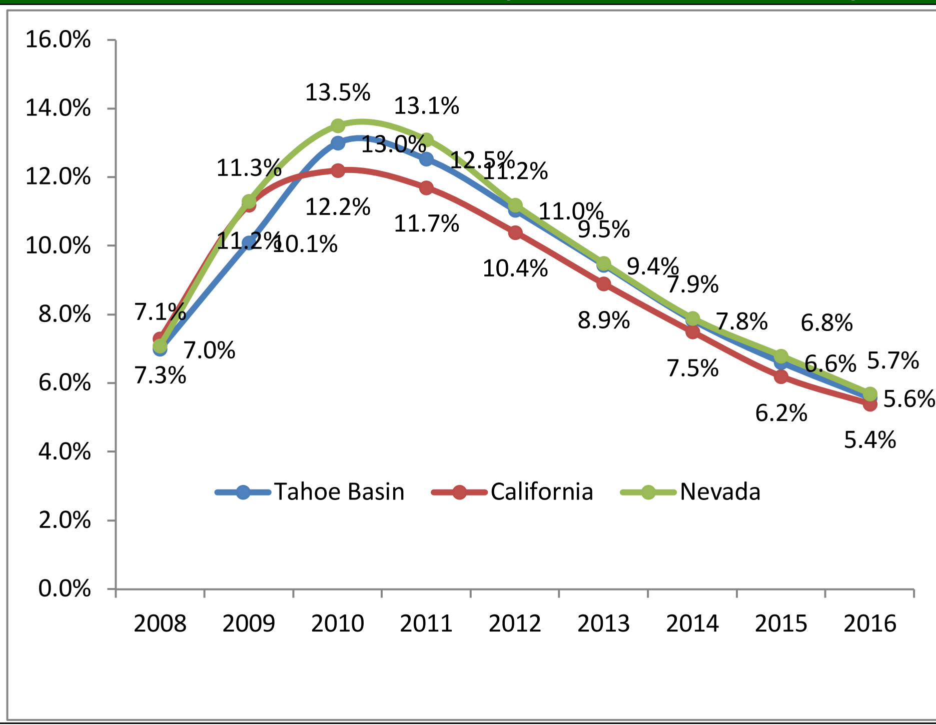
The unemployment rate in the Basin has shown a similar trend to the state averages between 2008 and 2013, although it was slightly below the statewide levels going into the recession, but has remained slightly above state levels coming out of the recession at 5.6 percent compared to 5.4 percent (Figure 12). For comparison, Nevada as a whole has maintained slightly higher rates of unemployment than California or the Tahoe Basin.

Similar to many areas, a number of Tahoe communities have seen reductions in the number of people in the labor force, meaning that workers have left the area or stopped looking for work and may not be counted in the unemployment rate. However, in several communities, the size of the labor force began increasing between 2015 and 2016, a positive sign for overall economic recovery. (see Tables A-22 to A-25 in the Appendix for more detailed labor force and unemployment data).

Among the communities, Kings Beach and Squaw Valley remain above the Basin-wide average for unemployment as of 2014 (Figures 13 and 14). These areas are typically communities where seasonal workers are able to find housing. On the other end of the spectrum, Dollar Point and Incline Village have relatively low unemployment rates and also relatively low seasonal job offerings in those communities and not as much housing for part-time workers.

FIGURE 12

UNEMPLOYMENT RATES FOR THE TAHOE BASIN, CALIFORNIA AND NEVADA, 2008-2013

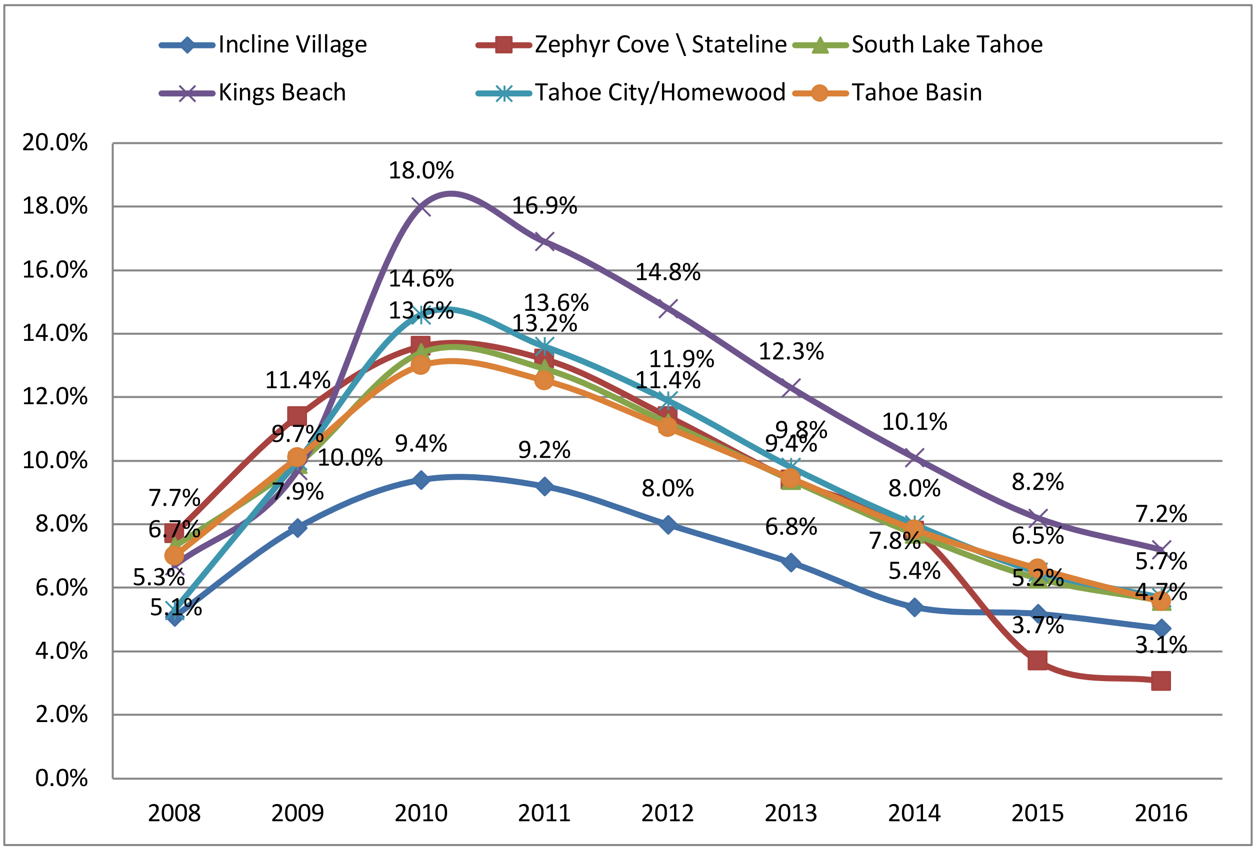


Sources: Nevada Employment Training and Rehabilitation (http://bit.ly/1cQAcAv), California EDD LMID (http://bit.ly/1B8saPb), and ZIP Business Patterns.

FIGURE 13

UNEMPLOYMENT TRENDS BY COMMUNITIES (EXCEPT DOLLAR POINT, SQUAW VALLEY, AND TAHOE VISTA)

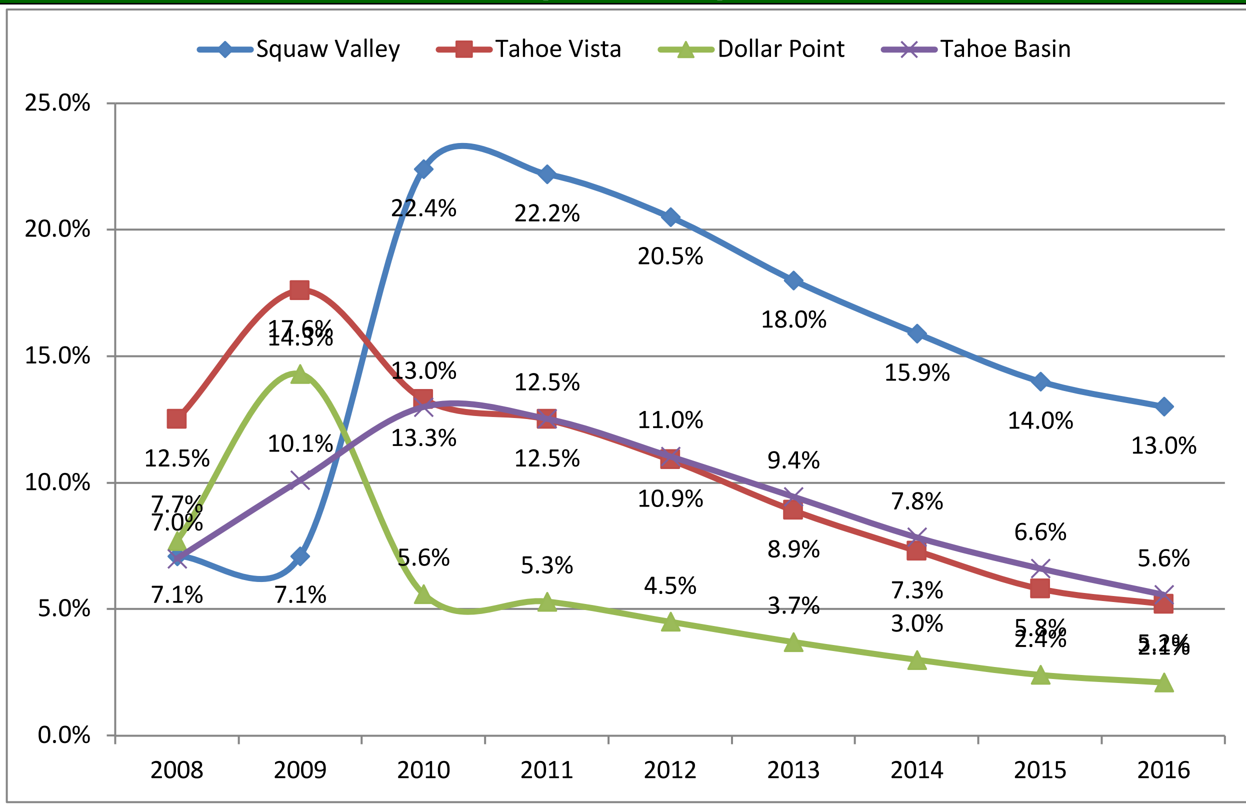
IN THE TAHOE BASIN, 2008-2013



Source: Nevada Employment Training and Rehabilitation (http://bit.ly/1cQAcAv), California EDD LMID (http://bit.ly/1B8saPb), and ZIP Business Patterns.

FIGURE 14

UNEMPLOYMENT TRENDS FOR THE TAHOE BASIN, DOLLAR POINT, SQUAW VALLEY AND TAHOE VISTA (2008-2013)



Source: Nevada Employment Training and Rehabilitation (http://bit.ly/1cQAcAv), California EDD LMID (http://bit.ly/1B8saPb), and ZIP Business Patterns.

VISITORS TO TAHOE

New efforts have been made recently by the Tahoe Transportation District (TTD) to measure the number of visitors to the Tahoe Basin by tracking cell phone usage by travelers. The initial analysis suggests as many as 24 million visitors come to the Tahoe Basin each year, of which 40 percent are day visitors.[4] This estimate is higher than other estimates based on more conventional methodologies and raises questions about the definition of visitor trips to the region and the types of activities they entail. Typically, a "visitor trip" is defined as a single person entering the region for a sustained trip, which may last one day (no overnight stay) or multiple days. If a person comes up for a weekend and stays one night, that would be measured as a one visitor trip, but two visitor-days. If that person comes up again for a weekend two weeks later, they would be counted as a new visitor trip and an additional two visitor-days. This approach derives from the data normally used to count visitors, which is lodging occupancy data and visitor counts at attractions in the region such as ski areas in the winter or boating and hiking areas in the summer. These sources track the frequency of visits but not usually the behavior of individuals. Surveys of visitor spending are typically

[4] Memoranda from Cynthia Albright, Stantec, to Carl Hasty, Director, Tahoe Transportation District, dated May 2, 2016 and August 22, 2016.

averaged on a per-visitor day basis to facilitate estimates of total visitor expenditures in the region. Day visitor spending is separated from overnight visitors since there are no lodging expenditures and other spending is typically less.

Using conventional methodologies, Dean Runyan Associates estimates 1.04 million visitor trips and 3.1 million visitor days in North Lake Tahoe, of which 436,000 are day visitors.[5] (Note that day visitors are estimated to be 42 percent of total trips, similar to the cell phone data). In the South Shore, Carl Ribaudo of Strategic Marketing Group has estimated nearly 5.2 million visitor days, but this does not include day visitors.[6] With that adjustment, the total visitors days in South Shore would be about 5.8 million, and the Basin total from both sources would be about 9 million. These estimates reflect 2011-2012 data, while Figures 8-10 above show an upward trend in lodging revenues since 2012. Using more current data on skier days and summer and off-peak lodging revenues, we can derive an estimate as high as 15.2 million visitor days, as outlined in Table 4.

TABLE 4
UPDATED ALTERNATE ESTIMATE OF TAHOE BASIN VISITOR DAYS

Skier Days	4,200,000
Summer @150% of skiers	6,300,000
Shoulder Seasons @75% of summer	4,725,000
Total visitor days	15,225,000

Source: ADE. Inc.

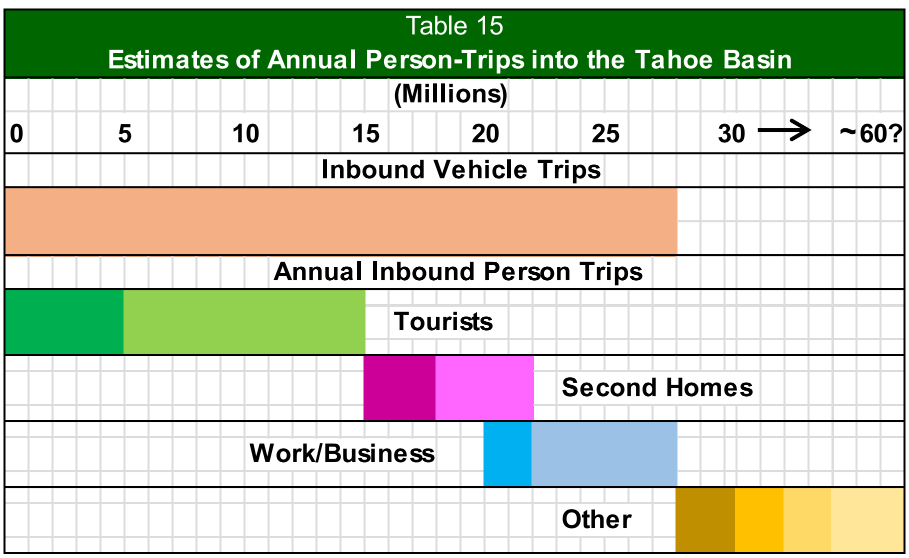
The cell phone data is picking up all travel into the Basin and counts a separate trip each time a person enters the Basin, even though this may entail multiple vehicle trips during the same sustained visitor trip as defined above. While it correlates fairly well to vehicle counts on the incoming roadways, the cell analysis must infer the purpose of the trips. There are several other trip components that could comprise a portion of the 24 million trips measured by TTD. The TTD data estimates about 185,000 inbound trips by work commuters in the month of July, which would translate to about 1.76 million annual trips. However, census journey-to-work data suggests that as many as 19,500 workers may commute into the Basin regularly, with 13,500 commuting out, at least occasionally.[7] The high housing costs in the Tahoe area have meant that many workers must find lodging in less expensive communities in the Carson Valley or in Truckee. ADE estimates this could account for 4.9 million in-commuter trips per year and 1.4 million out-commuter trips. Therefore, it is possible that some of the trips classified as "visitors" in the cell phone data are in fact workers on an irregular commute pattern. In addition, there is a component of business related travel (deliveries and other business related trips) that are not separated out in the cell phone data.

On the other hand, the high number of second homes in the region means that homeowners are driving in to their properties from their permanent residence locations. Many of these trips may not be counted in the conventional tourism numbers but would show up in the traffic data and cell phone records. Based on the percentages of second homes by county provided later in this report (see Table 7), we estimate there are

[5] Dean Runyan Associates, The Economic Significance of Visitor Travel to the North Lake Tahoe Area. 2012.
[6] Strategic Marketing Group. South Shore Vision, Economic Impact Analysis. 2012.
[7] Longitudinal Employer-Household Dynamics database, calibrated to American Community Survey labor force data.

about 58,600 houses in the Tahoe Basin with absentee owners. A portion of these may be rented to long term residents of the Basin, but many are short term rentals or kept for occasional use by their owners and their friends. Conventional tourist visitor estimates include short term vacation rentals where data is available (e.g., South Lake Tahoe permit program), but with the increasing popularity of AirBNB and other platforms, it is likely many of these visitors are missed. In addition, the conventional visitor counts would not include owners' occasional use of their own units. We estimate this would account for as many as 3.5 to 7.0 million trips into the Basin per year just based on two to four trips per month to each unit.

Figure 15 below summarizes the available information. The annual average daily vehicle counts published by Caltrans and Nevada DOT on incoming routes to the Tahoe Basin total about 24.8 million vehicle trips. TRPA uses an average vehicle occupancy rate of 2.43, which could mean as many as 60 million person trips into the Basin per year. Based on the conventional visitor estimates, we believe there are as many as 15 million tourist visitor days contributing to these trips and another 3.5 to 7 million are likely tourist and/or part time resident visitor days staying in second homes in the region. Between 1.8 and 6.3 million trips are estimated to be work and/or business related. The remaining trips would have other purposes. For example, the TTD data identifies 2.2 million annual incoming trips from persons that both live and work within the Tahoe Basin. These trips are not likely work related but are probably for shopping, entertainment, health care visits and other activities.



Source: ADE, based on sources cited in the text. Not to scale.

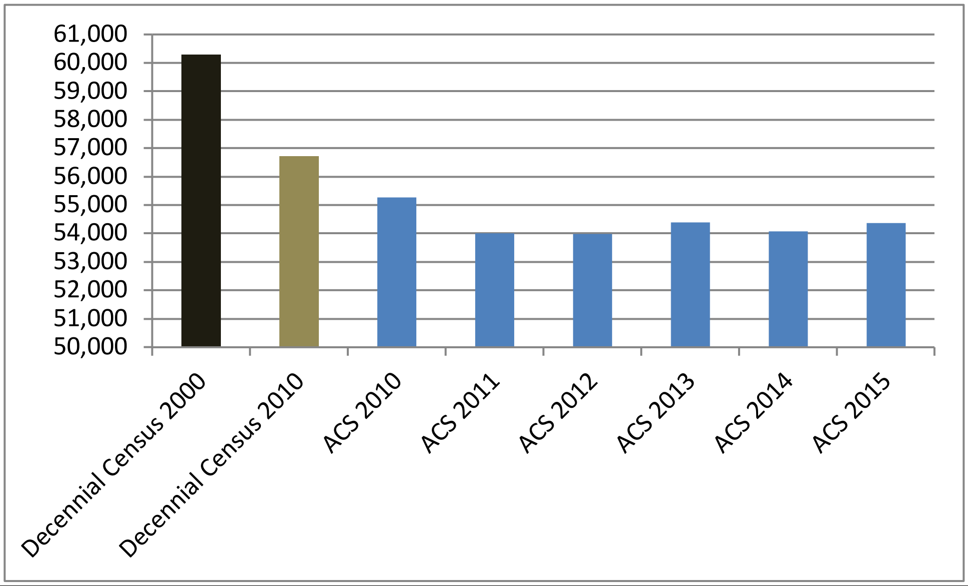
In comparing visitor counts from the Tahoe Basin with other tourist destinations, it is important to recognize that the use of cell phone data is increasing but not universal at this time. Data from other destinations may be based on more conventional estimating techniques that isolate true visitors from other travel activity that may occur in the region. Further work is needed to calibrate the cell phone data with other trip purpose information to achieve comparability with more conventional visitor measuring techniques.

POPULATION AND SCHOOL ENROLLMENT

Since 2011, population in the Tahoe Basin has stabilized at about 54,000 persons, down from 60,295 in 2000 (Figure 16). The earlier loss of population mirrored the reduction in job opportunities discussed earlier and the lack of new residential development generally over the past decade.

FIGURE 16

POPULATION CHANGE 2000-2013



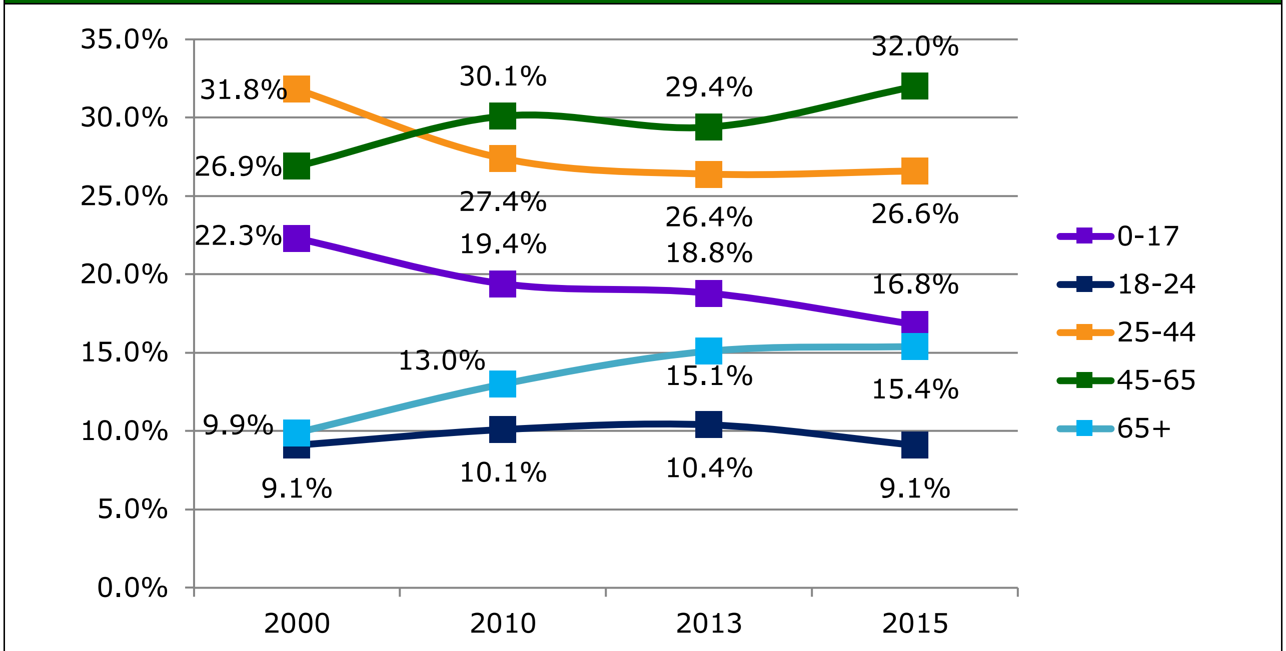
Source: ADE. Inc., Decennial Census 2000 and 2010, American Community Survey 2010- 2013.

Note: The Decennial Census and the American Community Survey (ACS) are based on different survey methodologies and do not report the same population figures for 2010. In the chart, the ACS data is useful for purposes of viewing recent trends, but the Decennial Census should be considered more accurate.

AGE DISTRIBUTION

The Tahoe Basin tends to have an older population than either California or Nevada as a whole. In 2000, the Tahoe Basin had 22.3 percent of its population in the age group of 17 years or younger (Figure 17), compared to 27.3 percent in California and 25.6 percent in Nevada (See Table B-2 in the Appendix). Conversely, Tahoe had 26.9 percent of its population in the 45-64 age group, compared to 20.5 percent for California and 23.0 percent for Nevada. With the aging of the Baby Boomer generation, there is a general shift nationally toward an older demographic. For example, in California the 45-64 age group increased from 20.5 percent in 2000 to 25.2 percent by 2015. In the Tahoe Basin, this age group increased from 26.9 percent to 32.0 percent. The 65-84 age group increased from 9.2 percent in 2000 to 14.3 percent by 2015. These trends have implications for the workforce in the Basin, as the younger working age groups of 25-44 have been declining in numbers while older workers from 45-64 have been increasing. The high cost of housing and the lack of jobs constitute impediments to younger workers remaining in the area.

FIGURE 17
TAHOE BASIN AGE DEMOGRAPHICS (2000-2015)



Source: US Census and American Community Survey.

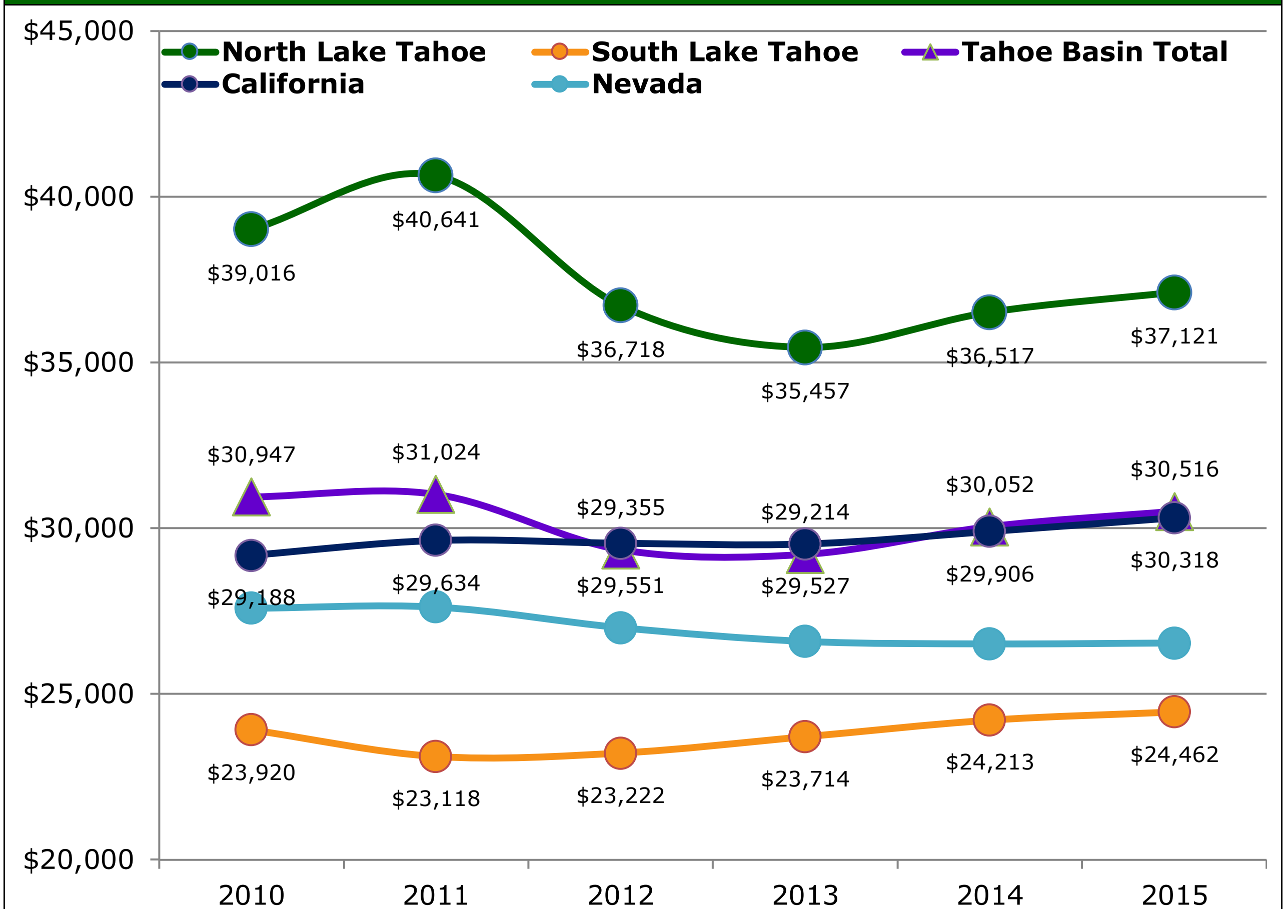
SCHOOL ENROLLMENTS

The number of school aged children in the region has been declining, with the 0-17 age group declining from 18.8 percent in 2013 to 16.8 percent of the population in 2015. Despite this trend, the number of children enrolled in school has increased over the past several years, with a 378 (4.0%) increase between the 2014-15 and 2015-16 school years (See Table B-3 in the Appendix). This latter figure suggests that more recent population figures for 2016, when available, may show some overall population increase and also that the remaining population is increasing in stability, with more families enrolling their kids in school.

INCOME

Per capita income levels in the Tahoe Basin have increased 3.9 percent between 2013 and 2015, despite the downward trend in winter employment during the period. The Tahoe Basin in 2015 had a slightly higher per capita income than California as a whole and 15 percent above the Nevada figure. This reverses a prior downward trend since 2011 and likely reflects the improving levels of summer tourism in the Basin (Figure 18). For reference, the San Francisco Bay Area Consumer Price Index increased 5.4 percent during this period and the Western Region smaller cities area by 3.1 percent. The actual inflation rate in the Tahoe Basin is likely in between these two measures, suggesting that the rise in per capita income has kept pace with inflation. The improvement was seen in both the North and South portions of the region. However, several areas continued to see declines including Squaw Valley, Tahoe City, Tahoe Vista, Tahoma, and Zephyr Cove (See Table A-26 in the Appendix).

FIGURE 18
PER CAPITA INCOME

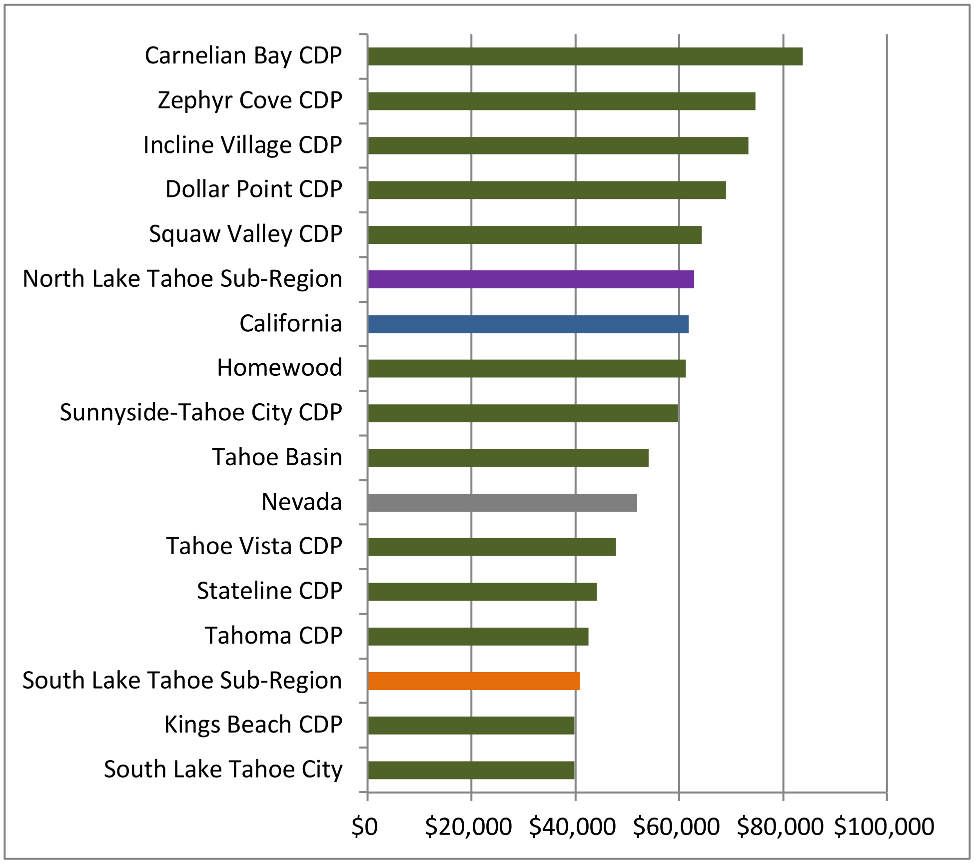


Source: American Community Survey.

The trends for median household income are also generally positive but more mixed within the region than the per capita income. The Tahoe region had a 0.2 percent annual increase in median household income between 2013 and 2015, but is still below the 2010 level (see Table 26.1 in the Appendix). For comparison, California median household income grew 0.6 percent annually between 2013 and 2015 and 0.3 percent between 2010 and 2015. The Tahoe Basin outperformed the Nevada State average, however, which has declined during this entire period. While come communities like Carnelian Bay and Zephyr Cove saw substantial increases in income, other places such as Tahoe Vista and Tahoma had 7-9 percent annual declines between 2010 and 2015. Two places – Kings Beach and South Lake Tahoe - have at least 30 percent of their populations living at 150 percent of the federal poverty line. A number of other communities have seen increases between 2013 and 2015 but still have negative growth rates for the 2010 to 2015 period Figure 19 below ranks the communities and the region and states in 2015. Overall Tahoe is in between California and Nevada in median household income levels, while North Shore is higher than California and South Shore is lower than Nevada.

FIGURE 19

MEDIAN HOUSEHOLD INCOME, 2015

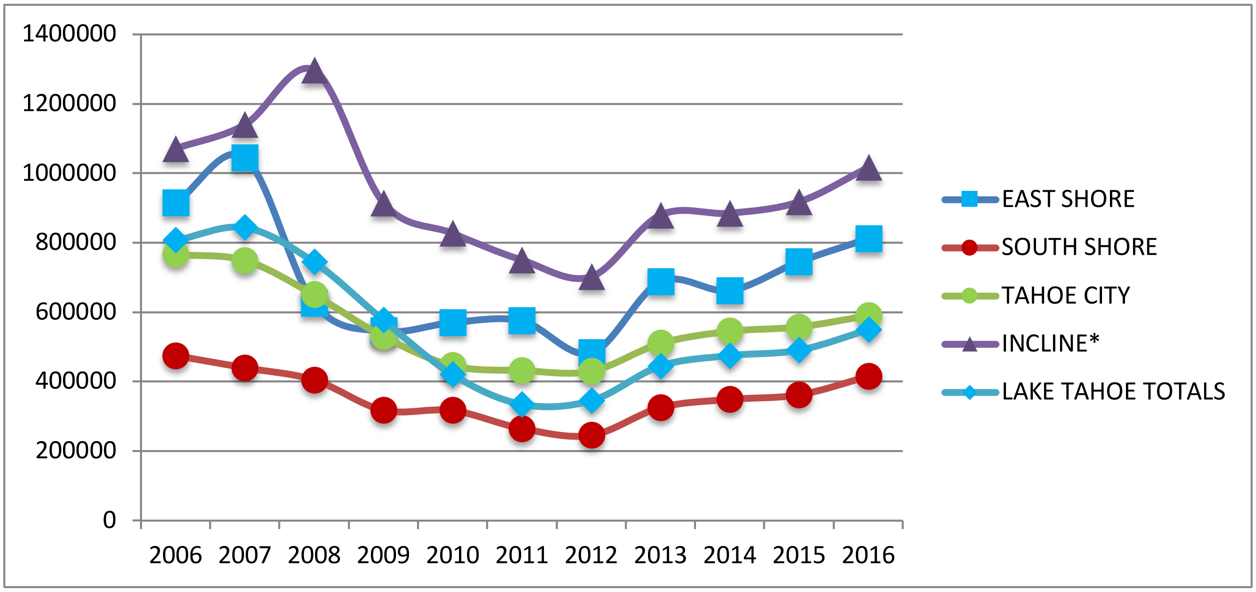


Source: American Community Survey.

HOME PRICES

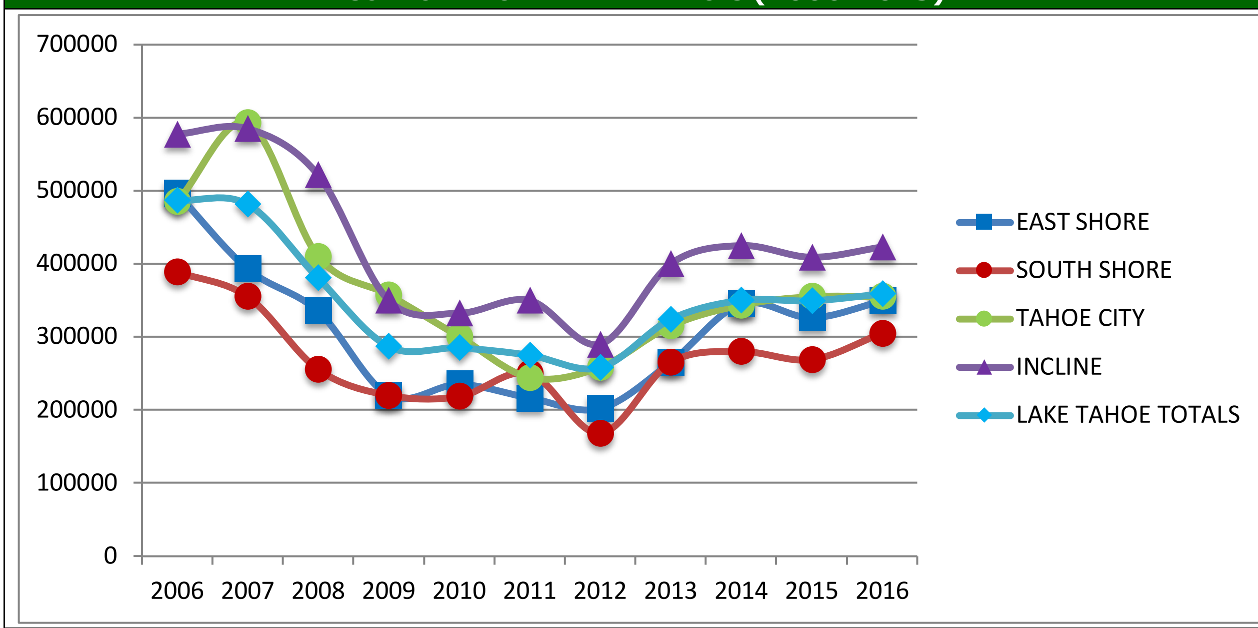
Home prices have generally been increasing since 2012, but Incline Village saw some major declines between 2014 and 2015 that have affected the regional averages (Figure 20). Single family home prices in Incline Village declined from $885,000 in 2014 to $850,000 in 2015 while prices in all the other major markets in the Basin were increasing (see also Tables A-27 and A-28 in the Appendix). Similarly, condo prices in Incline Village dropped from $350,000 in 2014 to $324,000 in 2015. Tahoe City condo prices also declined from $425,000 in 2014 to $333,000 in 2015, along with the regional average (Figure 21).

Figure 20
Single Family Median Prices (2006-2016)



Sources: Chase International
**Includes Planned Unit Developments.*

Figure 21
Condominium Median Prices (2006-2015)



Sources: Chase International

HOUSING AFFORDABILITY

Housing affordability in Basin is a major concern due to the income and housing price statistics just described. The lack of workforce housing is having a significant impact on employers' ability to recruit workers to support business expansion. Real estate professionals also report that very few younger local families are able to purchase homes and must wait years for their income to increase to make a housing purchase feasible. Table 5 provides an analysis of the proportion of households that could afford the median priced home in 2015 in several of the major markets within the region. The analysis reflects the standard policy threshold that housing costs should not exceed 30 percent of household income. The monthly housing costs shown in Table 5 reflect current mortgage terms for home purchase as well as allowances for taxes and insurance. A balanced housing market would mean that 50 percent of households could afford to buy a median priced home. However, as shown in the table, the proportion of households who can afford the median priced single family home in their area range from 25 percent in South Shore to 10 percent in the East Shore area. The Basin-wide average is 21 percent. The values for condos are closer to the desired ratio, ranging from 41 percent in Incline Village to 32 percent in the East Shore and Basin-wide, except in the Homewood/Tahoma area where some condos are priced very high.

Rental housing is much more affordable for households throughout the region, as shown in Table 6. All of the markets for which data could be obtained show well over 50 percent of households are able to pay median rent. It is clear that the workforce in the Tahoe Basin is disproportionately housed in rental housing and has fewer ownership opportunities. This is an issue for the upward mobility prospects of the workers and their families.

Table 5 Percent of Households Who Can Afford Median Priced Houses												
	Tahoe Basin		**Incline Village**		**East Shore**		**South Lake Tahoe**		**Tahoe City**		**Homewood/ Tahoma**	
Unit Type	**2015 Single Family**	**2015 Condo**	**2015 Single Family**	**2015 Condo**	**2015 Single Family**	**2015 Condo**	**2015 Single Family**	**2015 Condo**	**2015 Single Family**	**2015 Condo**	**2015 Single Family**	**2015 Condo**
Median Price	$490,500	$349,500	$917,500	$409,000	$745,000	$326,250	$362,000	$269,000	$557,500	$355,000	$554,435	$675,000
Monthly Cost	$2,595	$1,849	$4,855	$2,164	$3,942	$1,726	$1,915	$1,423	$2,950	$1,878	$2,934	$3,572
Qualifying Income	$103,817	$73,974	$194,194	$86,567	$157,684	$69,053	$76,620	$56,935	$117,998	$75,138	$117,350	$142,868
No. of Households That Qualify	3,256	5,017	507	1,593	66	221	2,107	3,180	95	198	142	111
Percent of Total	21%	32%	13%	41%	10%	32%	25%	38%	16%	33%	21%	16%

Notes: Housing cost based on 30 yr mortgage at 3.5% APR, 10% down payment, plus 1.5% for taxes/insurance.

Housing costs equal 30% of qualifying income.

Income based on US Census ACS 5-Year 2011-2015 Sample Tables B19001 and B25095

Source: ADE, Inc., based on data in Tables A-28-A29 and A- 26.2

Table 6 Rental Housing Affordability for Selected Places, 2015						
	Incline Village	**Stateline**	**Zephyr Cove**	**South Lake Tahoe**	**Tahoe City**	**Homewood/ Tahoma**
Median Rent	$1,193	$918	$959	$785	$1,093	$899
Qualifying Income	$47,720	$36,720	$38,360	$31,400	$43,720	$35,951
No. Households That Qualify	2,677	283	172	4,895	425	429
Percent of Total	69%	62%	77%	58%	71%	62%

Source: ADE, based on ACS data for household income distribution and median contract rent, 2015.

SECOND HOME OWNERSHIP RATES

Historically, the Tahoe Basin has seen a high rate of second home ownership, from about half to nearly two-thirds of the housing stock depending on the County. Based on more current data, these rates have been increasing , which is consistent with the loss of Basin population during the 2000's. In 2017, Douglas County has showed an increase of absentee ownership from 54 percent to 56 percent but Washoe County had a much larger increase from 60 to 70 percent (Table 7). El Dorado County has the highest share, at 78 percent, but this has remained steady since 2015. The City of South Lake Tahoe reports that about 12 percent of the housing stock is officially listed as vacation rentals, but 56 percent of units are rental vs. ownership housing.[8] Placer County data does not reflect a consistent geographic base through the years but the most recent data is concentrated in the Tahoe Basin area and shows a much higher absentee ownership rate. With so many absentee owners, this reduces social cohesion and has implications for the level of local support of community services, including hospitals. When more than half the homes are not primary residents, this results in fewer dollars spent at local businesses, less sales tax dollars and less community and civic engagement, when compared to full-time residents.

TABLE 7
SECOND HOME OWNERSHIP

COUNTY	PERCENT OWNED BY NON-RESIDENTS		
	2003	2015	2017
Douglas	49%	54%	56%
El Dorado	55%	78%	78%
Placer [a]	65%	59%	93%
Washoe	55%	60%	70%

Source: 2003 data: TRPA as reported in the Lake Tahoe Basin Prosperity Plan; 2015 and 2017 data: supplied by County Assessors.
[a] Placer County data for 2017 reflects areas within the Tahoe Basin, while earlier years include areas north of the Basin such as the Donner Lake Area.

COMMUNITY SOCIAL INDICATORS

FREE AND REDUCED COST SCHOOL LUNCH PROGRAM

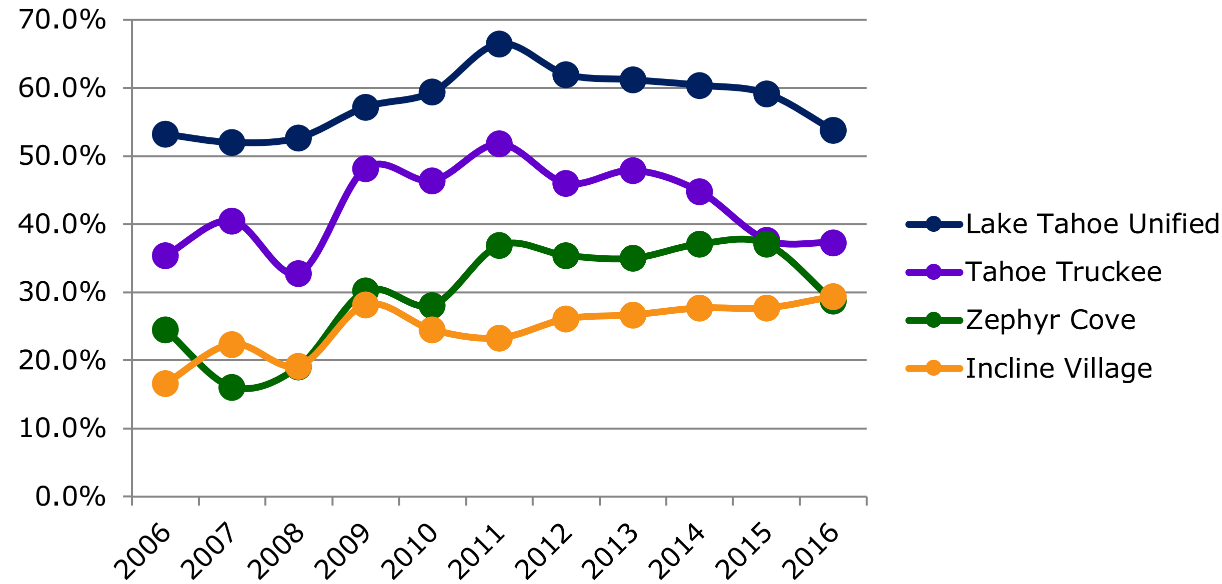
K-12 students' participation in the free and subsidized school lunch program is directly affected by economic conditions in their households. Participation rates generally declined between 2004 and 2008, but then spiked upward in 2009. The rates peaked at 62.3 percent in 2010, compared to 50.4 percent in 2004. Since then the rates have gradually declined and the Lake Tahoe Unified School District saw a dramatic improvement from 60.4 percent in 2014 to 53.8 percent of 2016. The Tahoe Truckee participation rates dropped from 44.8 percent of 2014 to 37.7 percent in 2015, with a further improvement to 37.3 percent in 2016. Zephyr Cove School District also experienced an improvement from 37.1 percent in 2015 to 28.7 percent in 2016. Incline Village is the one school district in the analysis that has had continued increasing participation in the free and reduced cost lunch program. Since 2011, its participation rate has increased from 23.3 percent to 29.4

[8] Michael Baker International. *Socioeconomic Impacts of Vacation Home Rentals in South Lake Tahoe*. June 5, 2017. pp. 2-32 and 2-35.

percent in 2016. As noted earlier in the report, Incline Village has also seen more significant drops in winter time employment and in real estate prices (see Figure 22 below and Table B-4 in the Appendix).

FIGURE 22

FREE/REDUCED PRICE LUNCH PARTICIPATION

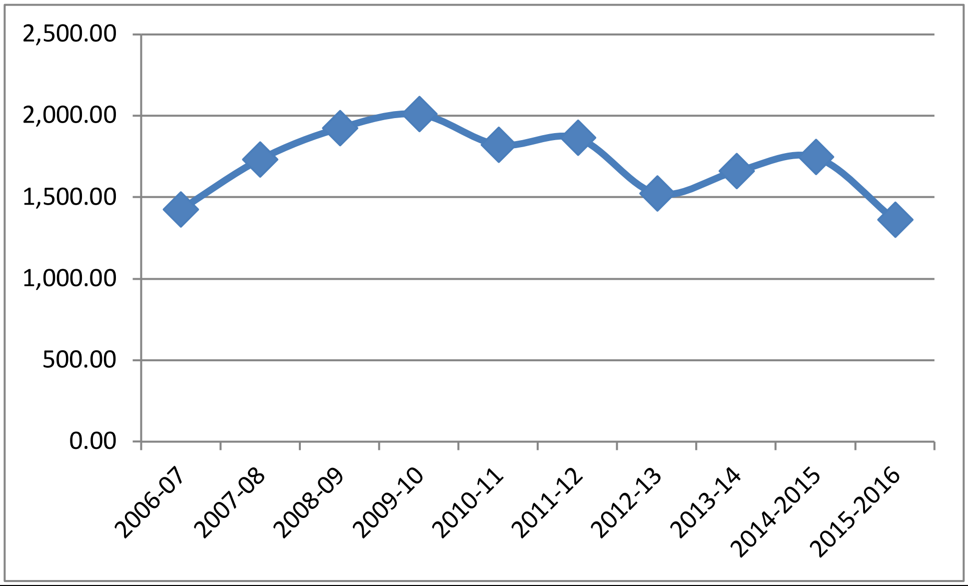


Sources: California Department of Education: www.cde.ca.gov/ds/sd/sd/files.asp.

COLLEGE ENROLLMENTS

During the past ten year period, enrollments at the Lake Tahoe Community College (LTCC) had peaked in 2009-10 at about 2,010 full time equivalent (FTE) students and then fluctuated at an average level of 1,723 FTE through the 2014-15 school year. In 2015-16 FTE dropped more than 20 percent below this recent average to 1,330 (see Figure 23 below and Table B-5 in the Appendix). Community College enrollments should generally follow population growth or decline, coupled with changes in course offerings or programs at the college. However, this may also be affected by economic conditions. As unemployment increases, workers may opt to return to school for training to help get new jobs or to improve skills until jobs become available. Conversely, the latest decline in enrollments may be a sign that more would-be students are finding jobs or have more income and are seeking 4 year college opportunities instead of community college.

FIGURE 23
LAKE TAHOE COMMUNITY COLLEGE ENROLLMENTS



Source: See Table B-5

At Sierra Nevada College, which is a private 4-year institution, total enrollments have been gradually increasing since 2012-13. The college projects modest increases in total student FTEs over the next two years (Table B-6).

HEALTH

There has been a general trend of increasing reliance on government payment sources for health care. This was noted in the Sustainability Measures Report and appears to continue in the more recent data compiled for this report (See Tables B-7 to B-10 in the Appendix). For Barton Health Systems, which serves the South Shore area, the State of California reports that government payments for hospital discharges increased from 53 percent in 2005 to 57 percent in 2015. At the same time, private health insurance declined from 42 percent to 38 percent. Medicare revenues remained steady throughout this period at about 31 percent, but Medi-Cal increased from 15 percent in 2005 to 26 percent in 2015. County indigent patients had accounted for about 7 percent of revenue through 2013, but then dropped to zero in 2014 and 2015. Without this drop, which may be temporary, the increase in government supported health care payments would have increased more substantially.

Similarly for the Tahoe Forest Hospital District, which serves the North Shore Lake Tahoe area, California reports that government payment sources increased from 39 percent in 2005 to 55 percent in 2015. Private insurance coverage and self-paying patients declined from 61 percent to 45 percent during this same period.

Overall, the number of patient discharges has declined for both hospitals during this period based on the California data, which is likely affected by the overall population decline but may also signify improving health conditions. In recent surveys within their service areas, both Barton Health and Tahoe Forest report high levels of respondents indicating their health is either excellent or very good. For Barton this percentage was 61.6 percent while for Tahoe Forest it was 72.4 percent. In California as a whole, 50.7 percent of respondents report excellent or very good health. In addition, both hospitals reported improvement in these figures since 2011 or 2012. In general, Tahoe residents report lower rates of overweight or obesity and meet national averages for consumption of fruit and vegetables. Based on data from Barton, Tahoe residents also enjoy lower rates of heart disease and stroke.

Stakeholder surveys for both Barton and Tahoe Forest Health Systems in 2015 identified mental health and substance abuse as major community issues. As shown in Table 8, the percent of the public reporting poor mental health is about the same as national averages but the Basin population displays higher rates of alcohol consumption and drug-induced deaths, as well as liver disease and suicide mortality.

TABLE 8
HEALTHY LIFESTYLE INDICATORS

INDICATOR	BARTON	TAHOE-FOREST	CALIFORNIA	NEVADA	US
Limited Access due to Cost	13.1%	12.9%	15.6%		15.3%
Self Report Excellent/Very Good Health	61.6%	72.4%	50.7%		
Consume 5+ Servings Fruits/Veg. per day	40.4%				39.5%
Prepare Family Meal 4+ times/week		80.9%			
Prevalence of Overweight	55.2%		60.1%	64.8%	63.1%
Prevalence of Obesity	23.2%		24.1%	26.2%	29.0%
Engage in Moderate Physical Act. 4-7 days		72.1%			
Self Report Poor Mental Health	10.3%	8.5%	10.9%		10.7%
Drug-Induced Deaths/100K Pop.	18.4%		11.4%	21.9%	14.1%
Current Drinkers (1 in last 30 days)	69.7%	81.1%	55.5%	54.1%	54.5%
Excessive Drinkers	33.5%	30.2%			
Cirrhosis/Liver Disease	13.8%		11.7%	12.2%	9.9%
Suicide Mortality Trends	16.0%		10.2%	18.4%	12.5%

Source: PRC Community Health Needs Assessment conducted for Barton Health Care Systems; Tahoe Forest Health System Results of 2014 Household Survey.

VOTER PARTICIPATION

The Sustainability Measures Report provided voter participation data through 2009, noting that Presidential elections generate higher participation rates than most other types of elections. Viewing more recent data, participation in the 2016 Presidential election was slightly lower than in 2008 and the mid-term elections of 2010 and 2014 had even lower rates of participation (See Table B-11 in the Appendix). Similar to past trends, Glenbrook has had the highest participation rates in recent elections, although Zephyr Cove had the highest rate in 2012 at 91.3 percent. Alpine Meadows/Squaw Valley, Tahoe City/Homewood, and Dollar Point also had relatively high participation rates through 2012, but while their rates dropped off significantly in 2014, they rebounded substantially in 2016. South Lake Tahoe has generally lower voter participation rates but had its highest turnout since 2004 in 2016, at 73.5 percent.

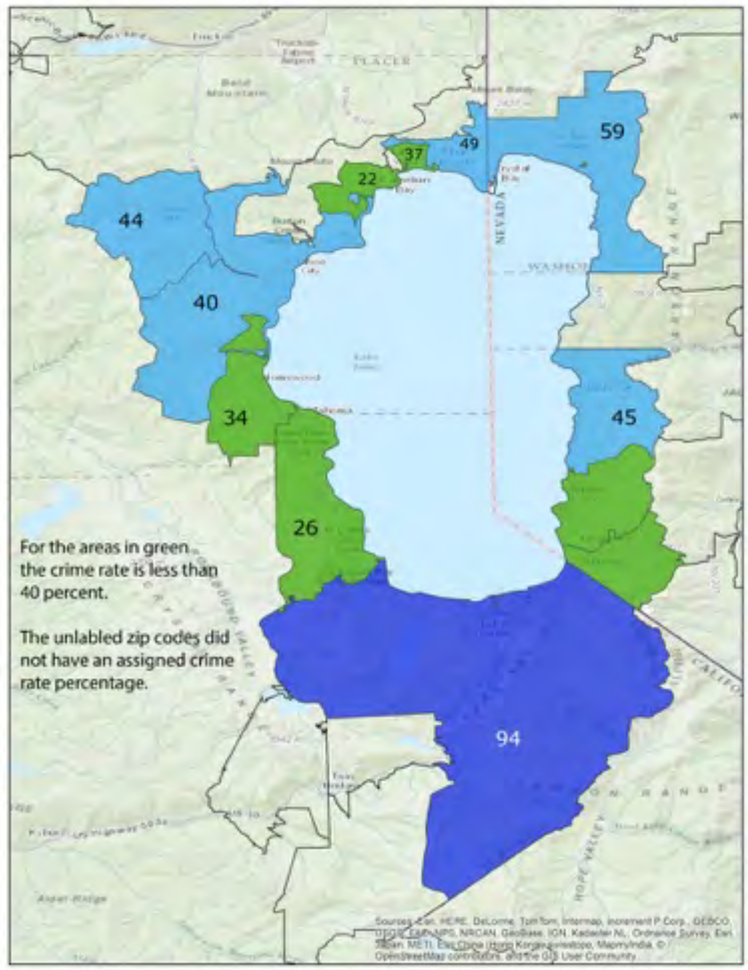
CRIME

The U.S. crime rate has generally been declining since 2005. In North Lake Tahoe and Incline Village, the rate peaked in 2007 and has since declined most years with major improvements since 2014 (See Table B-12 in the Appendix). While time series data has not been available in other Tahoe Basin communities, the crime rates generally compare favorably to national rates (Figure 24).

FIGURE 24
CRIME RATE INDEX BY ZIP CODE, 2013

Community	Zip Code	Crime Rate
Incline Village (Washoe Co.)	89450	59
Incline Village (Washoe Co.)	89451	59
Carnelian Bay\ Tahoe Vista	96140	22
Crystal Bay	89402	-
Kings Beach \Tahoe Vista	96143	49
Kings Beach\ Tahoe Vista	96148	37
Alpine Meadows\ Squaw Valley	96146	44
Tahoe City	96145	40
Homewood	96141	34
Tahoma	96142	26
South Lake Tahoe	96150	94
96151	96152	-
96154	96155	-
96157	96158	-
Other - East Shore	89411	-
Zephyr Cove (Douglas Co.)	89448	-
Stateline (Douglas Co.)	89449	-

Source: ADE, Inc. U.S. Census ZipArea Shapefile



Source: ADE, Inc. www.realtor.com
Note: The crime rate index represents the average crime rate for a local area in comparison to nearby areas and the national average. A crime index of 100 represents the national average.

DEVELOPMENT TRENDS

The Tahoe Regional Plan includes goals to concentrate new development in urban centers, in an effort to reduce vehicle miles traveled, preserve habitat and avoid additional run-off impacts to the Lake. This policy was adopted in 2012, and there has been limited development activity in the two years since. As shown in Table 9, TRPA issued only five new commercial building permits and 20 permits for additions, modifications or rebuilds between 2013 and 2016. Nineteen of the total 25 commercial permits were located in community centers. There were substantially more residential permits issued in these two years, but 86 percent of these permits were outside community centers.

Table 9
Number of TRPA Permits by Location Category, 2013 to 2016

Project Type/ Location	2013		2014		2015		2016	
	New	Additions/ Modifications/ Rebuilds	New	Additions/ Modifications/ Rebuilds	New	Additions/ Modifications/ Rebuilds	New	Additions/ Modifications/ Rebuilds
Commercial Total	0	6	1	6	3	2	1	6
Centers	0	3	1	4	3	2	1	5
Neutral	0	0	0	0	0	0	0	0
Outside	0	3	0	2	0	0	0	1
Residential Total	22	80	25	110	23	93	13	143
Centers	1	4	0	0	1	1	1	5
Neutral	4	6	8	12	5	11	1	9
Outside	17	70	17	98	17	81	11	129

Source: TRPA

One important note from this report is that retail sales numbers (as reported in the Retail Sales section/Figure 11) highlights that the town centers are thriving. These town centers, in addition to the walkability and community gathering areas they provide, have already shown positive economic improvements according to the data.

In addition to development permits issued by TRPA, local jurisdictions also issue development permits under an MOU with TRPA. Data on these permits have been received from El Dorado County, the City of South Lake Tahoe, Washoe County and Douglas County. In El Dorado County, about 20 percent of commercial permits have been issued in Meyers, which is a designated community center, but most of the residential permits have occurred more than one-quarter mile outside of Meyers (Table 10).

Table 10
Number of Local Development Permits in El Dorado County, 2013 - 2016

Project Type/ Location	2013		2014		2015		2016	
	New	Additions/ Mods/ Rebuilds	New	Additions/ Mods/ Rebuilds	New	Additions/ Mod/ Rebuilds	New	Additions/ Mod/ Rebuilds
Commercial Total	1	8	6	6	3	8	2	12
Centers	1	1	0	3	0	2	0	1
Neutral	0	0	1	0	0	0	0	0
Outside	0	7	5	3	3	6	2	11
Residential Total	29	130	42	262	26	186	29	180
Centers	0	0	0	1	0	0	0	0
Neutral	2	7	6	26	2	12	1	24
Outside	27	123	36	235	24	174	28	156

Source: ADE, with data downloaded from El Dorado County Permit System.

In the City of South Lake Tahoe, the overwhelming majority of new commercial development has occurred in the community centers while about one-third of new residential development has occurred in community centers or neutral locations (Table 11).

Table 11
Number of Local Development Permits in the City of South Lake Tahoe, 2013 to 2016

Project Type/ Location	2013-2014		2015-2016	
	New	Additions/ Modifications/ Rebuilds	New	Additions/ Modifications/ Rebuilds
Commercial Total	7	269	27	18
Centers	3	169	27	
Neutral	0	50	0	
Outside	4	50	0	18
Residential Total	64	673	6	
Centers	7	19	1	
Neutral	15	165	0	
Outside	42	453	5	

Source: City of South Lake Tahoe

For Douglas County, the community center is the South Shore Plan Area. In the past two years, more than half of the commercial permits have been in that area, but very few of the residential permits (Table 12).

Table 12
Number of Local Development Permits in Douglas County, 2013 to 2016

Project Type/ Location	2013-2014	2015-2016
	All Permits	All Permits
Commercial Total	17	91
Centers	3	47
Neutral	2	
Outside	12	44
Residential Total	261	595
Centers	4	5
Neutral	21	
Outside	236	590

Source: Douglas County. Note, permits for new construction are combined with those for additions, remodels, etc.

Similarly in Washoe County, the majority of commercial permits have been in the Incline Village Town Center, but only a small portion of residential development or modifications (Table 13).

Table 13 **Number of Local Development Permits in Washoe County, 2016**		
Project Type/ Location	**New Development**	**Additions/ Modifications/ Rebuilds**
Commercial Total	3	151
Centers	3	91
Outside		60
Residential Total	28	680
Centers	0	23
Outside	28	657

Source: Washoe County

APPENDIX A: ECONOMIC TRENDS

INFLATION

The US Bureau of Labor Statistics (BLS) compiles and reports the Consumer Price Index (CPI), which measures inflation. BLS measures CPI indexes for major metropolitan areas, which includes the San Francisco Bay Area, but does not report separate statistics for smaller urban areas such as Reno or Sacramento. (The State of Nevada uses the All Urban Consumers national index to escalate its tax categories annually). However, BLS does report a separate index for smaller urban areas of population ranging from 50,000 to 1,500,000 in the Western region. Sacramento and the Reno/Sparks area would fall into this category. As shown above the San Francisco area has seen price inflation of 18 percent since 2008, while the smaller cities index has shown inflation of about 12.2 percent. For comparison, all urban consumers nationally have experienced 10.9 percent inflation during the 2008-2016 period.

Since much of the economic activity in the Tahoe Basin is driven by visitor expenditures, primarily from San Francisco Bay Area residents, it is reasonable to believe that inflation in the Basin is running at a higher rate than in Reno. However, many workers in the Basin live in Nevada communities such as Reno and the Carson Valley and likely experience lower inflation in their local neighborhoods.

Table A-1: Selected Consumer Price Indexes (CPI)																	
Year	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
San Francisco Bay Area																	
CPI	180.2	189.9	193	196.4	198.8	202.7	209.2	216.0	222.8	224.4	227.5	233.4	239.6	245.0	252.0	258.6	266.3
Annual Per. Change		5.4%	1.6%	1.8%	1.2%	2.0%	3.2%	3.3%	3.1%	0.7%	1.4%	2.6%	2.7%	2.2%	2.8%	2.6%	3.0%
Cumulative Per. Change		5.4%	7.0%	8.8%	10.0%	12.0%	15.2%	18.4%	21.6%	22.3%	23.7%	26.3%	28.9%	31.2%	34.0%	36.6%	39.6%
Western Region Urban Areas 50,000 to 1,500,000 Population																	
CPI	174.8	181.2	184.7	188.6	193	198.9	205.7	212.2	219.6	218.8	221.2	227.5	232.4	235.8	240.2	243.0	247.7
Annual Per. Change		3.7%	1.9%	2.1%	2.3%	3.1%	3.4%	3.2%	3.5%	-0.4%	1.1%	2.8%	2.2%	1.5%	1.9%	1.2%	1.9%
Cumulative Per. Change		3.7%	5.6%	7.7%	10.0%	13.1%	16.5%	19.7%	23.2%	22.8%	23.9%	26.7%	28.9%	30.4%	32.2%	33.4%	35.3%
All Urban Consumers, US City Average																	
CPI	172.2	177.1	179.9	184	188.9	195.3	201.6	207.3	215.3	214.5	218.1	224.9	229.6	232.9	236.7	237.0	240.0
Annual Per. Change		2.8%	1.6%	2.3%	2.7%	3.4%	3.2%	2.8%	3.8%	-0.4%	1.6%	3.2%	2.1%	1.5%	1.6%	0.1%	1.3%
Cumulative Per. Change		2.8%	4.4%	6.7%	9.4%	12.8%	16.0%	18.8%	22.7%	22.3%	24.0%	27.1%	29.2%	30.6%	32.3%	32.4%	33.6%
Source: ADE, Inc., based on US Bureau of Labor Statistics, "CPI-All Urban Consumers (Current Series)(https://data.bls.gov/cgi-bin/surveymost?cu)																	

Table A-2: Ten-Year Trends in Total Number of Private Sector Jobs: 2005 through 2015															
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**Annual Per. Change 05-10**	**Annual Per. Change 10-15**	**Annual Avg 2005-2007: Pre-Recession**	**Annual Avg 2008-2010: Recession**	**Annual Avg 2011-2015: Post-Recession**
Tahoe Basin Region	33,845	32,906	33,046	31,513	28,200	28,505	27,941	27,244	28,310	27,931	26,037	-3.38%	-1.79%	33,265	29,406	27,493
01 Incline Village (Washoe Co.)	5,606	5,512	4,955	4,768	4,471	4,327	4,462	4,241	4,663	3,745	3,792	-5.0%	-2.6%	5,358	4,522	4,181
02 Zephyr Cove\Stateline (Douglas Co.)	8,572	8,637	9,311	7,658	6,368	6,532	6,379	6,735	6,534	6,515	5,993	-5.3%	-1.7%	8,840	6,853	6,431
03 Other - East Shore	165	104	167	119	111	92	91	77	48	65	44	-11.0%	-13.7%	145	107	65
03 South Lake Tahoe	11,839	11,069	10,106	10,193	9,354	9,176	8,760	8,537	8,819	9,266	9,367	-4.97%	0.41%	11,005	9,574	8,950
04 Kings Beach\Tahoe Vista	1,251	1,315	1,278	1,334	1,137	1,233	1,033	1,069	1,146	1,325	1,302	-0.3%	1.1%	1,281	1,235	1,175
05 Squaw Val./ Alpine Meadows\Carnelian Bay\Tahoe City\Homewood	5,933	5,798	6,756	6,897	6,314	6,709	6,697	6,090	6,477	6,435	5,011	2.5%	-5.7%	6,162	6,640	6,142
07 Homewood (West Shore)	479	471	473	544	445	436	519	495	623	580	528	-1.9%	3.9%	474	475	549

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 A-3: Estimated Public Sector Jobs: 2004-2014												
Location	**Job Type**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
01 Incline Village (Washoe Co.)	Total Public Jobs	289	417	425	418	392	476	458	466	405	394	506
	Public Administration	0	0	0	0	0	2	1	3	6	4	80
	Educational Services	0	0	0	0	0	9	0	0	0	0	0
	Health Care and Social Assistance	0	0	0	0	0	1	0	0	0	0	0
	Utilities	48	62	66	81	77	86	99	72	67	70	99
	Others	241	355	359	337	315	378	358	391	332	320	327
02 Zephyr Cove\Stateline (Douglas Co.)	Total Public Jobs	176	187	187	191	188	185	163	196	123	130	184
	Public Administration	145	152	151	155	162	149	127	153	104	108	141
	Educational Services	0	0	0	0	0	3	0	0	0	0	0
	Health Care and Social Assistance	0	0	0	0	0	0	0	0	0	0	0
	Utilities	31	35	35	35	25	32	34	39	16	19	39
	Others	0	0	1	1	1	1	2	4	3	3	4
03 Other - East Shore	Total Public Jobs	0	0	0	0	0	0	0	0	75	84	0
	Public Administration	0	0	0	0	0	0	0	0	60	67	0
	Educational Services	0	0	0	0	0	0	0	0	0	0	0
	Health Care and Social Assistance	0	0	0	0	0	0	0	0	0	0	0
	Utilities	0	0	0	0	0	0	0	0	15	17	0
	Others	0	0	0	0	0	0	0	0	0	0	0
03 South Lake Tahoe	Total Public Jobs	1,500	1,382	1,319	1,387	1,465	1,468	1,349	1,390	1,361	1,340	1,290
	Public Administration	352	293	284	312	323	328	340	393	331	340	267
	Educational Services	1,037	977	925	970	1,016	1,023	892	875	914	886	906
	Health Care and Social Assistance	0	0	0	0	7	0	1	0	0	0	0
	Utilities	108	103	107	101	115	115	111	116	110	107	107
	Others	3	9	3	4	4	2	5	6	6	7	10
04 Kings Beach\Tahoe Vista	Total Public Jobs	120	113	113	133	141	116	56	122	50	48	51
	Public Administration	0	0	0	0	0	0	12	19	10	5	5
	Educational Services	62	58	53	69	79	59	42	45	38	41	46
	Health Care and Social Assistance	0	0	0	0	0	0	2	1	2	2	0
	Utilities	58	55	60	64	62	57	0	57	0	0	0
	Others	0	0	0	0	0	0	0	0	0	0	0

Location	Job Type	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
05 Alpine Meadows\Carnelian Bay\Tahoe City\Homewood	Total Public Jobs	254	239	231	262	306	290	331	346	309	294	297
	Public Administration	52	91	87	87	99	114	119	160	138	124	113
	Educational Services	135	122	116	147	169	145	181	153	132	134	147
	Health Care and Social Assistance	0	0	0	0	0	2	2	1	0	0	0
	Utilities	67	26	28	28	38	29	29	29	38	34	37
	Others	0	0	0	0	0	0	0	3	1	2	0
07 Homewood (West Shore)	Total Public Jobs	18	10	11	12	16	12	23	39	51	60	56
	Public Administration	11	10	11	12	14	12	23	39	50	50	46
	Educational Services	0	0	0	0	0	0	0	0	1	3	5
	Health Care and Social Assistance	0	0	0	0	1	0	0	0	0	0	0
	Utilities	7	0	0	0	1	0	0	0	0	7	5
	Others	0	0	0	0	0	0	0	0	0	0	0
Regional Total	Total Public Jobs	2,357	2,348	2,286	2,403	2,508	2,547	2,380	2,559	2,449	2,434	2,384
	Public Administration	560	546	533	566	598	605	622	767	714	715	652
	Educational Services	1,234	1,157	1,094	1,186	1,264	1,239	1,115	1,073	1,145	1,131	1,104
	Health Care and Social Assistance	0	0	0	0	8	3	5	2	2	2	0
	Utilities	319	281	296	309	318	319	273	313	231	237	287
	Others	244	364	363	342	320	381	365	404	357	349	341

Source: Applied Development Economics, based on US Census Longitudinal Employer-Household Dynamics (LEHD), "OnTheMap" (http://bit.ly/2s7t8uA)

Table A-4: Trends in Total Private Sector Jobs: Incline Village: 2005 through 2015													
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2005-10 Annual Percent Change	2010-15 Annual Percent Change
Incline Village (Washoe Co.)	5,606	5,512	4,955	4,768	4,471	4,327	4,462	4,241	4,663	3,745	3,792	-5%	-3%
11 Agriculture	0	0	0	2	0	0	0	0	0	0	0	0%	0%
21 Mining	0	0	0	0	0	0	0	0	0	0	0	0%	0%
22 Utilities	26	14	15	11	12	17	15	13	13	6	6	-8%	-19%
23 Construction	566	905	855	686	429	304	321	322	487	544	554	-12%	13%
31 -33 Manufacturing	40	53	46	38	26	27	26	180	29	20	20	-8%	-6%
42 Wholesale	94	85	65	69	75	62	62	53	61	56	67	-8%	2%
44-45 Retail	430	325	365	288	293	338	306	262	274	256	266	-5%	-5%
48-49 Warehouse Transportation	8	11	10	5	10	13	7	6	38	27	23	10%	12%
51 Information	142	136	113	86	122	108	103	83	78	76	82	-5%	-5%
52 Finance	219	269	201	210	180	181	158	213	207	172	210	-4%	3%
53 Real Estate	403	437	223	200	182	201	270	238	230	226	274	-13%	6%
54 Professional Technical	471	547	516	552	604	622	547	526	443	384	454	6%	-6%
55 Mgt. of Companies etc.	54	83	23	19	20	22	16	12	16	20	27	-16%	4%
56 Waste Mgt. and Admin Services	724	493	511	415	431	446	416	471	972	399	427	-9%	-1%
61 Education	187	212	227	203	199	280	335	218	209	331	206	8%	-6%
62 Health	136	111	133	139	131	120	153	169	157	161	159	-2%	6%
71 Arts, Entertainment, Rec.	453	304	319	329	249	250	203	264	250	235	230	-11%	-2%
72 Accommodations and Food	1,454	1,340	1,120	1,317	1,307	1,138	1,319	1,011	993	635	626	-5%	-11%
81 Other services	199	187	213	199	201	198	205	200	206	197	161	0%	-4%
Source: Applied Development Economics, based on ZIP Business Patterns (note: Incline Village = 89402, 89450, 89451, and 89453)													

Table A-5: Trends in Total Private Sector Jobs: Zephyr Cove and Stateline: 2005 through 2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
Zephyr Cove\Stateline (Douglas Co.)	8,546	8,620	9,280	7,614	6,326	6,564	6,405	6,770	6,534	6,515	5,993	-5%	-2%
11 Agriculture	0	0	0	0	0	0	0	0	0	2	2	0%	0%
21 Mining	2	9	10	34	4	2	2	4	2	4	4	0%	15%
22 Utilities	5	8	6	10	10	6	6	9	8	8	9	4%	8%
23 Construction	296	275	246	272	189	375	215	153	133	156	162	5%	-15%
31 -33 Manufacturing	42	45	15	24	22	22	26	49	46	48	55	-12%	20%
42 Wholesale	146	130	115	125	106	128	253	72	66	94	160	-3%	5%
44-45 Retail	417	323	346	347	318	335	354	302	316	308	320	-4%	-1%
48-49 Warehouse Transportation	32	202	441	232	45	45	39	22	33	39	48	7%	1%
51 Information	226	143	105	102	103	105	99	134	153	115	157	-14%	8%
52 Finance	279	192	158	132	121	125	112	99	99	106	130	-15%	1%
53 Real Estate	496	390	369	473	316	298	346	270	243	251	253	-10%	-3%
54 Professional Technical	462	358	315	326	342	388	310	282	359	320	314	-3%	-4%
55 Mgt. of Companies etc.	29	40	38	21	36	56	49	90	49	44	44	14%	-5%
56 Waste Mgt. and Admin Services	195	169	144	182	251	168	300	636	892	808	691	-3%	33%
61 Education	53	38	35	6	11	6	11	13	30	18	28	-35%	36%
62 Health	212	197	183	163	158	131	133	115	122	139	165	-9%	5%
71 Arts, Entertainment, Rec.	85	62	58	67	71	57	59	254	78	86	60	-8%	1%
72 Accommodations and Food	5,209	5,739	6,416	4,788	3,925	4,047	3,820	4,003	3,650	3,703	3,112	-5%	-5%
81 Other services	360	300	280	310	298	270	271	263	255	266	279	-6%	1%
Source: ADE, based on US Census ZIP Business Patterns (2003-2013): Zephyr Cove and Stateline ZIPs: 89448 and 89449													

Table A-6: Trends in Total Private Sector Jobs: East Shore: 2005 through 2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
East Shore	165	104	167	119	111	92	91	77	48	65	44	-11%	-14%
11 Agriculture	0	0	0	0	0	0	0	0	0	0	0	0%	0%
21 Mining	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%
23 Construction	39	8	12	2	2	2	4	2	3	6	3	-45%	8%
31 -33 Manufacturing	0	0	0	0	0	0	0	0	0	0	0	0%	0%
42 Wholesale	6	0	0	0	0	0	0	0	0	0	0	-100%	0%
44-45 Retail	0	0	0	0	0	0	0	0	0	0	0	0%	0%
48-49 Warehouse Transportation	2	1	2	2	2	2	2	2	2	2	1	0%	-13%
51 Information	2	6	36	21	24	10	12	7	6	8	7	38%	-7%
52 Finance	10	7	8	6	6	4	4	2	2	4	3	-17%	-6%
53 Real Estate	20	10	8	10	8	7	8	14	8	9	6	-19%	-3%
54 Professional Technical	5	5	15	10	8	7	5	4	4	7	5	7%	-7%
55 Mgt. of Companies etc.	0	0	0	0	0	0	0	0	0	0	0	0%	0%
56 Waste Mgt. and Admin Services	20	25	28	31	31	25	25	23	0	0	0	5%	-100%
61 Education	0	1	2	2	2	2	2	1	1	2	1	0%	-13%
62 Health	3	3	10	4	6	5	5	8	3	3	2	11%	-17%
71 Arts, Entertainment, Rec.	29	12	8	15	8	14	14	6	6	8	7	-14%	-13%
72 Accommodations and Food	29	25	30	8	6	6	2	2	7	8	7	-27%	3%
81 Other services	0	1	8	8	8	8	8	6	6	8	2	0%	-24%
Source: Applied Development Economics, based on ZIP Business Patterns (note: Other - East Shore = 89413)													

Table A-7: Trends in Total Private Sector Jobs: South Lake Tahoe: 2005 through 2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
South Lake Tahoe	11,839	11,069	10,106	10,193	9,354	9,176	8,760	8,537	8,819	9,266	9,367	-5%	0.4%
11 Agriculture	2	0	0	2	2	2	2	2	2	2	2	0%	0%
21 Mining	12	6	0	0	0	0	0	0	0	0	0	-100%	0%
22 Utilities	31	37	25	25	25	29	30	16	15	16	22	-1%	-5%
23 Construction	522	662	659	662	458	380	324	330	419	468	439	-6%	3%
31 -33 Manufacturing	64	58	79	54	34	28	34	28	27	42	32	-15%	3%
42 Wholesale	41	41	46	63	44	50	37	33	46	60	34	4%	-7%
44-45 Retail	1,757	1,848	1,751	1,696	1,515	1,566	1,479	1,469	1,482	1502	1635	-2%	1%
48-49 Warehouse Transportation	115	155	157	159	166	111	81	50	128	139	130	-1%	3%
51 Information	97	121	141	137	78	63	70	78	108	79	81	-8%	5%
52 Finance	176	199	173	169	158	131	136	143	121	128	117	-6%	-2%
53 Real Estate	341	378	403	778	716	729	578	622	441	463	617	16%	-3%
54 Professional Technical	246	285	314	200	238	230	212	209	216	237	216	-1%	-1%
55 Mgt. of Companies etc.	18	14	4	17	3	6	10	75	139	149	64	-20%	61%
56 Waste Mgt. and Admin Services	404	413	439	546	500	430	428	326	329	305	306	1%	-7%
61 Education	51	62	77	82	84	91	105	87	70	100	76	12%	-4%
62 Health	1,231	1,328	1,199	1,359	1,264	1,227	1,241	1,153	1,148	1,186	1,299	-0.1%	1%
71 Arts, Entertainment, Rec.	1,243	1,050	1,051	1,105	1,073	1,091	1,078	1,079	1,091	1,112	1,116	-3%	0%
72 Accommodations and Food	5,027	3,945	3,128	2,680	2,582	2,581	2,490	2,474	2,645	2,782	2,692	-12%	1%
81 Other services	461	467	460	459	414	431	425	363	392	496	489	-1%	3%
Source: ADE, based on US Census ZIP Business Patterns (2003-2013). South Lake Tahoe ZIP Codes: 96150, 96151, 96152, 96154, 96155, 96156, 96157, and 96158													

Table A-8: Trends in Total Private Sector Jobs: Homewood: 2005 through 2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
Homewood (West Shore)	479	471	473	544	445	436	519	495	623	580	528	-2%	4%
11 Agriculture	0	0	0	0	0	0	0	0	0	0	0	0%	0%
21 Mining	0	0	0	0	0	0	0	0	0	0	0	0%	0%
22 Utilities	4	4	2	3	2	2	4	8	4	4	3	-13%	8%
23 Construction	110	125	79	89	45	46	72	76	102	89	72	-16%	9%
31 -33 Manufacturing	0	0	0	0	1	1	2	6	5	4	5	0%	38%
42 Wholesale	7	2	5	8	7	3	6	2	3	3	2	-16%	-8%
44-45 Retail	37	36	25	28	22	37	24	20	29	24	36	0%	-1%
48-49 Warehouse Transportation	0	0	0	0	0	0	0	0	0	0	0	0%	0%
51 Information	12	12	0	0	0	0	0	0	0	0	0	-100%	0%
52 Finance	2	0	0	1	1	1	2	0	0	0	1	-13%	0%
53 Real Estate	9	8	2	10	5	8	12	9	17	14	10	-2%	5%
54 Professional Technical	12	10	18	22	17	4	9	9	6	6	5	-20%	5%
55 Mgt. of Companies etc.	0	0	0	0	0	0	0	0	0	0	0	0%	0%
56 Waste Mgt. and Admin Services	9	12	4	12	7	6	9	11	13	8	16	-8%	22%
61 Education	2	2	1	2	1	1	2	2	3	3	2	-13%	15%
62 Health	0	0	0	0	0	0	0	0	0	0	0	0%	0%
71 Arts, Entertainment, Rec.	187	172	271	320	292	298	335	328	404	397	347	10%	3%
72 Accommodations and Food	68	68	54	34	32	16	28	16	27	18	17	-25%	1%
81 Other services	20	20	12	15	13	12	14	8	10	10	12	-10%	0%
Source: ADE, based on US Census ZIP Business Patterns (2003-2013). Homewood (West Shore) ZIP Code: 96141 and 96142													

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Table A-9: Trends in Total Private Sector Jobs: Alpine Meadows, Carnelian Bay, Tahoe City and Squaw Valley: 2005 through 2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
Total	5,936	5,798	6,756	6,897	6,314	6,711	6,695	6,093	6,481	6,435	5,011	2%	-6%
11 Agriculture	0	0	4	4	8	4	4	4	4	8	18	0%	35%
21 Mining	0	0	0	0	0	0	0	0	0	0	0	0%	0%
22 Utilities	4	8	0	2	2	0	0	0	0	0	0	-100%	0%
23 Construction	584	620	606	622	522	569	447	366	388	488	385	-1%	-8%
31 -33 Manufacturing	32	47	38	55	35	43	30	45	33	33	30	6%	-7%
42 Wholesale	22	22	36	6	6	3	4	2	6	10	6	-33%	15%
44-45 Retail	512	573	525	605	483	469	401	412	385	367	378	-2%	-4%
48-49 Warehouse Transportation	26	28	10	23	32	19	6	8	14	8	14	-6%	-6%
51 Information	40	45	47	40	16	14	16	20	16	20	13	-19%	-1%
52 Finance	74	68	66	65	65	52	56	56	58	47	33	-7%	-9%
53 Real Estate	216	233	256	285	240	261	223	226	244	223	242	4%	-2%
54 Professional Technical	185	213	179	250	172	196	203	214	214	288	278	1%	7%
55 Mgt. of Companies etc.	0	0	0	0	0	61	63	6	6	6	6	0%	-37%
56 Waste Mgt. and Admin Services	282	366	384	305	110	108	83	113	89	96	91	-17%	-3%
61 Education	40	69	65	65	64	45	45	46	50	75	71	2%	10%
62 Health	95	124	91	88	78	77	75	78	70	61	68	-4%	-2%
71 Arts, Entertainment, Rec.	2,205	1,517	2,066	1,448	1,405	2,264	2,259	2,852	3,197	2,350	1,630	1%	-23%
72 Accommodations and Food	1,498	1,733	2,227	2,876	2,926	2,404	2,662	1,505	1,577	2,221	1,622	10%	2%
81 Other services	121	132	156	158	150	122	118	140	130	134	126	0%	1%
Source: ADE, based on US Census ZIP Business Patterns (2003-2013). Alpine Meadows, Carnelian Bay, Tahoe City and Squaw Valley ZIP Codes: 96145 and 96146													

Table A-10: Trends in Total Private Sector Jobs: Kings Beach and Tahoe Vista: 2005 through 2015													
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2005-10 Annual Percent Change	2010-15 Annual Percent Change
Kings Beach\Tahoe Vista	1,251	1,315	1,278	1,334	1,137	1,233	1,033	1,069	1,146	1,325	1,302	0%	1%
11 Agriculture	0	0	0	0	0	0	0	0	0	0	0	0%	0%
21 Mining	0	0	0	0	0	0	0	0	0	0	0	0%	0%
22 Utilities	32	33	36	31	33	32	8	2	2	3	2	0%	-43%
23 Construction	199	263	251	198	151	111	151	205	272	328	296	-11%	22%
31 -33 Manufacturing	8	6	4	18	20	16	20	20	16	18	31	15%	14%
42 Wholesale	4	8	10	14	10	11	12	11	8	9	15	22%	6%
44-45 Retail	202	158	181	185	189	344	176	149	158	154	167	11%	-13%
48-49 Warehouse Transportation	2	5	7	4	3	4	4	8	8	6	2	15%	-13%
51 Information	39	21	19	19	4	4	4	4	6	8	4	-37%	0%
52 Finance	22	24	21	21	18	18	14	18	8	10	10	-4%	-11%
53 Real Estate	71	76	78	76	66	62	63	70	68	60	58	-3%	-1%
54 Professional Technical	59	50	78	83	63	52	55	43	49	68	50	-2%	-1%
55 Mgt. of Companies etc.	0	0	0	0	0	0	0	0	0	0	0	0%	0%
56 Waste Mgt. and Admin Services	80	88	80	88	122	109	68	56	63	61	74	6%	-7%
61 Education	6	4	4	0	0	2	4	6	13	14	39	-20%	81%
62 Health	70	74	48	50	40	43	38	28	30	37	36	-9%	-3%
71 Arts, Entertainment, Rec.	46	46	46	48	30	32	34	31	43	54	46	-7%	8%
72 Accommodations and Food	344	402	345	433	328	338	329	349	341	380	367	0%	2%
81 Other services	67	57	70	66	60	55	53	69	61	115	105	-4%	14%
Source: ADE, based on US Census ZIP Business Patterns (2003-2013). Kings Beach and Tahoe Vista ZIP Codes: 96140, 96143, and 96148													

Table A-11: Trends in Private Sector Employment in Visitor-Serving Industries: NAICS 71 (Entertainment, Recreation, and Amusement): Tahoe Basin and Sub-Areas: 2005-2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
Tahoe Basin	**4,174**	**3,170**	**3,824**	**3,337**	**3,134**	**3,888**	**3,865**	**4,754**	**4,971**	**4,251**	**3,442**	**-1%**	**-2%**
NAICS 7111: Performing arts, spectator sports, etc.	144	125	91	86	94	89	81	118	89	73	53	-9%	-10%
NAICS 7121: Museums, historical sites	10	8	7	12	7	7	16	8	9	13	22	-7%	26%
NAICS 7131: Amusement parks and arcades	8	0	0	0	0	0	0	0	0	0	0	-100%	0%
NAICS 7132: Gambling industries (excluding hotels with casinos)	318	176	252	229	199	188	153	351	202	190	169	-10%	-2%
NAICS 7139: Other recreational industries*	3,694	2,861	3,474	3,010	2,834	3,604	3,615	4,277	4,671	3,975	3,198	0%	-2%
01 Incline Village (Washoe Co.)	**453**	**304**	**319**	**329**	**249**	**250**	**203**	**264**	**250**	**239**	**232**	**-11%**	**-1%**
NAICS 7111: Performing arts, spectator sports, etc.	101	95	62	38	46	49	40	44	47	36	25	-13%	-13%
NAICS 7121: Museums, historical sites	2	2	2	0	2	2	2	2	2	6	6	0%	25%
NAICS 7131: Amusement parks and arcades	6	0	0	0	0	0	0	0	0	0	0	-100%	0%
NAICS 7132: Gambling industries (excluding hotels with casinos)	310	169	245	222	184	181	146	171	163	151	156	-10%	-3%
NAICS 7139: Other recreational industries*	34	38	10	69	17	18	15	47	38	46	45	-12%	20%
02 Zephyr Cove\Stateline (Douglas Co.)	**97**	**69**	**63**	**72**	**77**	**59**	**63**	**271**	**83**	**89**	**62**	**-9%**	**1%**
NAICS 7111: Performing arts, spectator sports, etc.	23	19	17	22	23	16	18	51	8	10	8	-7%	-13%
NAICS 7121: Museums, historical sites	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7131: Amusement parks and arcades	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7132: Gambling industries (excluding hotels with casinos)	8	7	7	7	15	7	7	180	39	39	13	-3%	13%
NAICS 7139: Other recreational industries*	66	43	39	43	39	36	38	40	36	40	41	-11%	3%
03 Other - East Shore	**29**	**12**	**8**	**15**	**8**	**14**	**14**	**6**	**6**	**8**	**7**	**-14%**	**-13%**
NAICS 7111: Performing arts, spectator sports, etc.	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7121: Museums, historical sites	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7131: Amusement parks and arcades	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7132: Gambling industries (excluding hotels with casinos)	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7139: Other recreational industries*	29	12	8	15	8	14	14	6	6	8	7	-14%	-13%
03 South Lake Tahoe	**1,245**	**1,050**	**1,051**	**1,105**	**1,073**	**1,091**	**1,078**	**1,079**	**1,091**	**1,114**	**1,118**	**-3%**	**0%**

NAICS 7111: Performing arts, spectator sports, etc.	4	4	6	6	6	6	6	6	18	8	8	8%	6%
NAICS 7121: Museums, historical sites	2	2	2	8	2	2	2	2	2	2	12	0%	43%
NAICS 7131: Amusement parks and arcades	2	0	0	0	0	0	0	0	0	0	0	-100%	0%
NAICS 7132: Gambling industries (excluding hotels with casinos)	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7139: Other recreational industries*	1,237	1,044	1,043	1,091	1,065	1,083	1,070	1,071	1,071	1,104	1,098	-3%	0%
04 Kings Beach\Tahoe Vista	**46**	**46**	**46**	**48**	**30**	**32**	**34**	**31**	**43**	**54**	**46**	**-7%**	**8%**
NAICS 7111: Performing arts, spectator sports, etc.	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7121: Museums, historical sites	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7131: Amusement parks and arcades	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7132: Gambling industries (excluding hotels with casinos)	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7139: Other recreational industries*	46	46	46	48	30	32	34	31	43	54	46	-7%	8%
05 Squaw Val./Alpine Meadows\Carnelian Bay\Tahoe City\Homewood	**2,117**	**1,517**	**2,066**	**1,448**	**1,405**	**2,143**	**2,138**	**2,775**	**3,094**	**2,350**	**1,630**	**0%**	**-5%**
NAICS 7111: Performing arts, spectator sports, etc.	16	7	6	20	19	17	17	17	16	19	12	1%	-7%
NAICS 7121: Museums, historical sites	2	2	2	2	2	2	6	2	2	2	2	0%	0%
NAICS 7131: Amusement parks and arcades	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7132: Gambling industries (excluding hotels with casinos)	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7139: Other recreational industries*	2,099	1,508	2,058	1,426	1,384	2,124	2,115	2,756	3,076	2,329	1,616	0%	-5%
07 Homewood (West Shore)	**187**	**172**	**271**	**320**	**292**	**299**	**335**	**328**	**404**	**397**	**347**	**10%**	**3%**
NAICS 7111: Performing arts, spectator sports, etc.	0	0	0	0	0	1	0	0	0	0	0	0%	-100%
NAICS 7121: Museums, historical sites	4	2	1	2	1	1	6	2	3	3	2	-24%	15%
NAICS 7131: Amusement parks and arcades	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7132: Gambling industries (excluding hotels with casinos)	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 7139: Other recreational industries*	183	170	270	318	291	297	329	326	401	394	345	10%	3%

*See Table A-12 for more detail on this category.

Table A-12: Trends in Private Sector Employment in Visitor-Serving Industries: NAICS 7139 (Other Amusement and Recreation Industries): Tahoe Basin and Sub-Areas: 2005-2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
Tahoe Basin	**3,694**	**2,861**	**3,474**	**3,010**	**2,834**	**3,604**	**3,615**	**4,277**	**4,671**	**3,975**	**3,198**	**0%**	**-2%**
NAICS 71391: Golf courses and country clubs	119	75	72	60	49	71	55	54	45	50	64	-10%	-2%
NAICS 71392: Skiing facilities	3,313	2,522	3,202	2,702	2,620	3,393	3,414	4,047	4,439	3698	2918	0%	-3%
NAICS 71393: Marinas	75	71	73	81	65	57	61	57	71	84	75	-5%	6%
NAICS 71394: Fitness and recreational sports centers	101	108	67	85	53	49	46	67	66	69	71	-13%	8%
NAICS 71395: Bowling centers	0	0	0	0	0	0	0	13	6	13	6	0%	0%
NAICS 71399: All other amusement and recreation industries	86	85	60	82	47	34	39	39	44	61	64	-17%	13%
01 Incline Village (Washoe Co.)	**34**	**38**	**10**	**69**	**17**	**18**	**15**	**47**	**38**	**46**	**45**	**-12%**	**20%**
NAICS 71391: Golf courses and country clubs [a]	0	0	0	2	0	0	0	0	0	0	0	0%	0%
NAICS 71392: Skiing facilities [a]	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71393: Marinas	2	2	5	1	2	3	3	4	4	4	4	8%	6%
NAICS 71394: Fitness and recreational sports centers	30	34	2	29	13	12	12	30	28	29	33	-17%	22%
NAICS 71395: Bowling centers	0	0	0	0	0	0	0	13	6	13	6	0%	0%
NAICS 71399: All other amusement and recreation industries	2	2	3	37	2	3	0	0	0	0	2	8%	-8%
02 Zephyr Cove\Stateline (Douglas Co.)	**66**	**43**	**39**	**43**	**39**	**36**	**38**	**40**	**36**	**40**	**41**	**-11%**	**3%**
NAICS 71391: Golf courses and country clubs	50	36	35	37	35	34	34	34	32	31	31	-7%	-2%
NAICS 71392: Skiing facilities	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71393: Marinas	0	0	0	2	0	0	0	0	0	2	2	0%	0%
NAICS 71394: Fitness and recreational sports centers	8	5	0	0	0	0	0	2	0	0	2	-100%	0%
NAICS 71395: Bowling centers	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71399: All other amusement and recreation industries	8	2	4	4	4	2	4	4	4	7	6	-24%	25%

Table A-12: Trends in Private Sector Employment in Visitor-Serving Industries: NAICS 7139 (Other Amusement and Recreation Industries): Tahoe Basin and Sub-Areas: 2005-2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
03 Other - East Shore	**29**	**12**	**8**	**15**	**8**	**14**	**14**	**6**	**6**	**8**	**7**	**-14%**	**-13%**
NAICS 71391: Golf courses and country clubs	0	0	2	2	2	2	2	1	1	2	1	0%	-13%
NAICS 71392: Skiing facilities	0	0	0	13	6	12	12	5	5	6	6	0%	-13%
NAICS 71393: Marinas	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71394: Fitness and recreational sports centers	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71395: Bowling centers	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71399: All other amusement and recreation industries	29	12	6	0	0	0	0	0	0	0	0	-100%	0%
03 South Lake Tahoe	**1,237**	**1,044**	**1,043**	**1,091**	**1,065**	**1,083**	**1,070**	**1,071**	**1,071**	**1,104**	**1,098**	**-3%**	**0%**
NAICS 71391: Golf courses and country clubs	65	33	31	15	8	31	15	15	8	15	30	-14%	-1%
NAICS 71392: Skiing facilities	1,088	933	931	1,000	1,000	1,000	1,000	1,002	1,012	1013	1002	-2%	0%
NAICS 71393: Marinas	12	12	10	10	8	6	6	8	7	8	8	-13%	6%
NAICS 71394: Fitness and recreational sports centers	53	40	50	44	23	30	26	27	27	31	22	-11%	-6%
NAICS 71395: Bowling centers	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71399: All other amusement and recreation industries	19	26	21	22	26	16	23	19	17	37	36	-3%	18%
04 Kings Beach\Tahoe Vista	**46**	**46**	**46**	**48**	**30**	**32**	**34**	**31**	**43**	**54**	**46**	**-7%**	**8%**
NAICS 71391: Golf courses and country clubs	2	2	2	2	2	2	2	2	2	2	2	0%	0%
NAICS 71392: Skiing facilities	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71393: Marinas	40	40	38	42	23	24	26	25	37	47	40	-10%	11%
NAICS 71394: Fitness and recreational sports centers	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71395: Bowling centers	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71399: All other amusement and recreation industries	4	4	6	4	5	6	6	4	4	5	4	8%	-8%

Table A-12: Trends in Private Sector Employment in Visitor-Serving Industries: NAICS 7139 (Other Amusement and Recreation Industries): Tahoe Basin and Sub-Areas: 2005-2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
05 Squaw Val./Alpine Meadows\Carnelian Bay\Tahoe City\Homewood	**2,099**	**1,508**	**2,058**	**1,426**	**1,384**	**2,124**	**2,115**	**2,756**	**3,076**	**2,329**	**1,616**	**0%**	**-5%**
NAICS 71391: Golf courses and country clubs	2	4	2	2	2	2	2	2	2	0	0	0%	-100%
NAICS 71392: Skiing facilities	2,053	1,430	2,012	1,385	1,335	2,096	2,087	2,728	3,039	2303	1580	0%	-5%
NAICS 71393: Marinas	14	10	10	14	21	13	14	8	8	8	8	-1%	-9%
NAICS 71394: Fitness and recreational sports centers	8	27	14	10	16	6	6	6	8	6	12	-6%	15%
NAICS 71395: Bowling centers	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71399: All other amusement and recreation industries	22	37	20	15	10	7	6	12	19	12	16	-20%	18%
07 Homewood (West Shore)	**183**	**170**	**270**	**318**	**291**	**297**	**329**	**326**	**401**	**394**	**345**	**10%**	**3%**
NAICS 71391: Golf courses and country clubs	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71392: Skiing facilities	172	159	259	304	279	285	315	312	383	376	330	11%	3%
NAICS 71393: Marinas	7	7	10	12	11	11	12	12	15	15	13	9%	3%
NAICS 71394: Fitness and recreational sports centers	2	2	1	2	1	1	2	2	3	3	2	-13%	15%
NAICS 71395: Bowling centers	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71399: All other amusement and recreation industries	2	2	0	0	0	0	0	0	0	0	0	-100%	0%

Source: County Business Patterns
[a] Employment for the golf course and ski area in Incline Village are missing from the data source. It is possible these facilities have been mis-categorized into other NAICS codes.

Table A-13: Trends in Private Sector Employment in Specific Visitor-Serving Industries: Tahoe Basin: 2005-2015													
Tahoe Basin	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
Visitor-Serving Industries	16,457	14,842	15,784	13,543	12,331	12,696	12,984	14,292	14,236	12,862	10,814	**-5%**	**-3.2%**
Lodgings (w/ or w/o casinos)	8,656	8,358	8,902	7,298	6,458	5,948	6,232	6,068	5,658	6,368	4,865	-7%	-4%
Other Recreation	3,694	2,861	3,474	3,010	2,834	3,604	3,615	4,277	4,671	3,581	2,853	0%	-5%
Restaurants and Drinking Places	3,694	3,369	3,078	2,904	2,716	2,861	2,880	3,446	3,599	2,613	2,817	-5%	0%
Social, Culture and Nature	413	254	330	331	323	283	257	501	308	300	279	-7%	0%

Source: Applied Development Economics, based on ZIP Business Patterns (note: lodgings w/ or w/o casino = NAICS 7132 gambling, NAICS 72111 hotels, and NAICS 72112 casino hotels; other recreation = NAICS 7139 other recreation; and restaurants and drinking places = NAICS 7221 [72251 naics 2012] full-service restaurants, NAICS 7222 [72251 naics 2012] limited service restaurants, and NAICS 7224 [72241 naics 2012] Drinking places.

Table A-14: Trends in Private Sector Employment in Specific Visitor-Serving Industries: Tahoe Basin and Sub-Areas: 2005-2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
Visitor-Serving Industries	**16,457**	**14,842**	**15,784**	**13,543**	**12,331**	**12,696**	**12,984**	**14,292**	**14,236**	**13,931**	**11,842**	**-5%**	**-1.4%**
Incline Village	1,983	1,488	1,452	1,714	1,593	1,435	1,592	1,396	1,350	857	850	-6%	-10%
East Shore	68	51	55	45	37	34	34	57	18	23	20	-13%	-10%
Zephyr Cove \ Stateline	4,769	5,327	5,977	4,458	3,646	3,700	3,577	4,258	3,605	3,782	3,166	-5%	-3%
South Lake Tahoe	5,698	4,492	3,664	3,251	3,055	3,101	2,996	3,553	3,729	3,876	3,792	-11%	4%
West Shore	235	214	311	334	304	299	345	340	423	408	361	5%	4%
Alpine Meadows \ Carnelian Bay	3,425	2,943	4,021	3,362	3,414	3,814	4,145	4,314	4,735	4,563	3,248	2%	-3%

Table A-14: Trends in Private Sector Employment in Specific Visitor-Serving Industries: Tahoe Basin and Sub-Areas: 2005-2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
Kings Beach	279	327	304	379	282	313	295	374	376	422	405	2%	5%
Lodgings (w/ or w/o casinos)	**8,656**	**8,358**	**8,902**	**7,298**	**6,458**	**5,948**	**6,232**	**6,068**	**5,658**	**6,368**	**4,865**	**-7%**	**-3.9%**
Incline Village	1,303	1,046	950	1,126	1,116	941	1,029	821	796	350	363	-6%	-17%
East Shore	0	0	0	0	0	0	0	0	0	0	0	0%	0%
Zephyr Cove \ Stateline	4,061	4,782	5,470	3,909	3,307	3,421	3,199	3,586	3,093	3308	2722	-3%	-4%
South Lake Tahoe	2,952	2,151	1,413	990	872	707	797	921	959	1099	781	-25%	2%
West Shore	2	2	0	0	0	0	0	0	0	0	0	-100%	0%
Alpine Meadows \ Carnelian Bay	309	347	1,028	1,202	1,123	833	1,157	694	761	1541	943	22%	3%
Kings Beach	29	30	41	71	40	46	50	46	49	70	56	10%	4%
Other Recreation	**3,694**	**2,861**	**3,474**	**3,010**	**2,834**	**3,604**	**3,615**	**4,277**	**4,671**	**3,975**	**3,198**	**0%**	**-2.4%**
Incline Village	34	38	10	69	17	18	15	47	38	46	45	-12%	20%
East Shore	29	12	8	15	8	14	14	6	6	8	7	-14%	-13%
Zephyr Cove \ Stateline	66	43	39	43	39	36	38	40	36	40	41	-11%	3%
South Lake Tahoe	1,237	1,044	1,043	1,091	1,065	1,083	1,070	1,071	1,071	1104	1098	-3%	0%
West Shore	183	170	270	318	291	297	329	326	401	394	345	10%	3%
Alpine Meadows \ Carnelian Bay	2,099	1,508	2,058	1,426	1,384	2,124	2,115	2,756	3,076	2329	1616	0%	-5%
Kings Beach	46	46	46	48	30	32	34	31	43	54	46	-7%	8%
Restaurants and Drinking Places	**3,694**	**3,369**	**3,078**	**2,904**	**2,716**	**2,861**	**2,880**	**3,446**	**3,599**	**3,288**	**3,500**	**-5%**	**4.1%**
Incline Village	314	219	236	290	255	282	389	321	332	283	261	-2%	-2%
East Shore	27	24	28	6	0	0	0	1	1	2	1	-100%	0%
Zephyr Cove \ Stateline	634	495	461	499	285	236	333	450	435	395	390	-18%	11%
South Lake Tahoe	1,472	1,260	1,169	1,125	1,079	1,272	1,091	1,522	1,652	1631	1860	-3%	8%
West Shore	46	40	40	14	12	1	10	12	19	11	14	-54%	70%
Alpine Meadows \ Carnelian Bay	997	1,080	927	710	873	836	846	843	876	668	671	-3%	-4%

Table A-14: Trends in Private Sector Employment in Specific Visitor-Serving Industries: Tahoe Basin and Sub-Areas: 2005-2015													
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2005-10 Annual Percent Change**	**2010-15 Annual Percent Change**
Kings Beach	204	251	217	260	212	234	211	297	284	298	303	3%	5%
Social, Culture, and Nature	**413**	**254**	**330**	**331**	**323**	**283**	**257**	**501**	**308**	**300**	**279**	**-7%**	**-0.3%**
Incline Village	332	185	256	229	205	194	159	207	184	178	181	-10%	-1%
East Shore	12	15	19	24	29	20	20	50	11	13	12	11%	-10%
Zephyr Cove \ Stateline	8	7	7	7	15	7	7	182	41	39	13	-3%	13%
South Lake Tahoe	37	37	39	45	39	39	38	39	47	42	53	1%	6%
West Shore	4	2	1	2	1	1	6	2	3	3	2	-24%	15%
Alpine Meadows \ Carnelian Bay	20	8	8	24	34	21	27	21	22	25	18	1%	-3%
Kings Beach	0	0	0	0	0	1	0	0	0	0	0	0%	-100%

Source: Applied Development Economics, based on ZIP Business Patterns (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)

GAMING REVENUE

Table A-15: 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	-2.8%
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	3.0%
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	5.4%
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	9.8%
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	-6.7%
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	2.2%
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	-0.3%
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	0.8%
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	-1.7%
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	-0.5%
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	1.6%
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	-9.4%
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	-25.8%
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	-1.9%
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	-5.5%
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	1.6%
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	-2.0%
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	-0.8%
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	-0.7%
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	5.2%

Source: Nevada Gaming Control Board, as provided by the Lake Tahoe Visitors Authority.

Table A-16: Washoe County North Shore Lake Tahoe Gaming Revenue (000's)														
Year	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Seasonal/ Annual	Percent Change
1996						4,949						2,597	7,546	
1997						4,886						3,793	8,679	15.0%
1998						4,940						3,758	8,698	0.2%
1999						3,067						2,691	5,758	-33.8%
2000						3,606						3,427	7,033	22.1%
2001						3,398						3,048	6,446	-8.3%
2002						3,185						2,404	5,589	-13.3%
2003						3,211						2,583	5,794	3.7%
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	16.8%
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	2.4%
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	-3.4%
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	2.2%
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	-17.5%
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	-18.1%
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	-2.5%
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	-7.1%
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	0.2%
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	4.6%
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	-5.6%
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	-3.1%
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	6.2%

Source: ADE, based on Reno-Sparks Convention Visitors Authority (http://bit.ly/1bURRHG), City of South Lake Tahoe (CAFR: many years), Placer County Office of CEO, and Douglas County Finance Department ("Douglas County Room Tax revenue: 10 Year comparison of fiscal year-to-date collections for the combined months of July through April")(http://bit.ly/2sIwvcK)

OVERNIGHT STAYS/TRANSIENT OCCUPANCY TAXES

Table A-17: Hotel Revenues Subject to TOT ($000's)

Community	2007- 2008	2008- 2009	2009- 2010	2010- 2011	2011- 2012	2012- 2013	2013- 2014	2014-2015	2015-2016	Annual Change*: 2007/08 to 2010/11	Annual Change*: 2010/11 to 2015/16
Incline Village	$34,570	$29,085	$27,092	$27,812	$27,515	$30,315	$31,499	$35,603	$41,813	-8.3%	7.1%
Zephyr Cove \ Stateline	$44,322	$37,953	$34,331	$43,183	$44,097	$48,231	$48,244	$65,169	$80,687	-2.3%	11.9%
South Lake Tahoe	$100,471	$82,717	$84,557	$86,700	$88,246	$102,975	$110,347	$124,936	$155,475	-6.2%	10.9%
Alpine Meadows	$1,110	$1,305	$1,267	$1,451	$1,355	$1,586	$1,403	$1,556	$1,923	7.8%	4.4%
Carnelian Bay	$9,419	$5,503	$5,911	$6,002	$6,387	$7,519	$7,648	$7,624	$9,121	-15.2%	7.3%
Kings Beach	$3,982	$3,809	$3,270	$3,210	$3,155	$3,542	$3,432	$3,736	$3,831	-8.3%	2.3%
Squaw Valley	$30,192	$29,477	$27,544	$31,352	$29,296	$31,907	$32,083	$32,002	$40,207	-0.2%	3.7%
Tahoe Vista	$4,709	$5,176	$5,119	$5,526	$5,531	$7,249	$7,541	$9,179	$10,188	3.9%	11.6%
Tahoe City	$13,826	$10,152	$5,661	$9,999	$10,262	$11,816	$11,847	$12,926	$14,757	-11.5%	6.7%
Homewood	$11,544	$11,150	$10,511	$10,463	$10,586	$12,148	$13,425	$14,040	$17,312	-4.6%	9.2%
Total	$254,145	$227,717	$215,567	$225,702	$226,435	$257,292	$267,474	$306,770	$375,314	-5.3%	9.3%

Source: ADE, based on Reno-Sparks Convention Visitors Authority (http://bit.ly/1bURRHG), City of South Lake Tahoe (CAFR: many years), Placer County Office of CEO, and Douglas County Finance Department ("Douglas County Room Tax revenue: 10 Year comparison of fiscal year-to-date collections for the combined months of July through April")(http://bit.ly/2sIwvcK)

Table A-18: Trends in Transient Occupancy Tax (TOT) Revenues ($000's)											
Community	**2007-2008**	**2008-2009**	**2009-2010**	**2010-2011**	**2011-2012**	**2012-2013**	**2013-2014**	**2014-2015**	**2015-2016**	**Annual Change*: 2007/08 to 2010/11**	**Annual Change*: 2010/11 to 2015/16**
Incline Village	$1,037	$3,781	$3,522	$3,616	$3,577	$3,941	$4,095	$4,628	$5,436	51.6%	8.5%
Zephyr Cove \ Stateline	$4,432	$3,795	$3,433	$4,318	$4,409	$4,823	$4,824	$6,517	$8,069	-0.9%	13.3%
South Lake Tahoe	$10,047	$8,271	$8,455	$8,670	$8,824	$10,297	$11,034	$12,494	$15,547	-4.8%	12.4%
Alpine Meadows	$111	$130	$126	$145	$135	$158	$140	$156	$192	9.3%	5.8%
Carnelian Bay	$941	$550	$591	$600	$638	$751	$764	$762	$912	-13.9%	8.7%
Kings Beach	$398	$380	$327	$321	$315	$354	$343	$374	$383	-6.9%	3.6%
Squaw Valley	$3,019	$2,947	$2,754	$3,135	$2,929	$3,190	$3,208	$3,200	$4,021	1.3%	5.1%
Tahoe Vista	$470	$517	$511	$552	$553	$724	$754	$918	$1,019	5.5%	13.0%
Tahoe City	$1,382	$1,015	$566	$999	$1,026	$1,181	$1,184	$1,293	$1,476	-10.3%	8.1%
Homewood	$1,154	$1,115	$1,051	$1,046	$1,058	$1,214	$1,342	$1,404	$1,731	-3.2%	10.6%
Total	$22,991	$22,501	$21,336	$23,402	$23,464	$26,633	$27,688	$31,745	$38,786	0.6%	10.6%

Source: ADE, based on Reno-Sparks Convention Visitors Authority (http://bit.ly/1bURRHG), City of South Lake Tahoe (CAFR: many years), Placer County Office of CEO, and Douglas County Finance Department ("Douglas County Room Tax revenue: 10 Year comparison of fiscal year-to-date collections for the combined months of July through April")(http://bit.ly/2sIwvcK)

REVENUES PER AVAILABLE ROOM

Table A-19: Revenues Per Available Room Trends											
	07-08	**08-09**	**09-10**	**10-11**	**11-12**	**12-13**	**13-14**	**14-15**	**15-16**	**Ann. Per. Change: 07-08 to 10-11**	**Ann. Per. Change: 10-11 to 15-16**
Incline Village	$80	$67	$67	$66	$65	$61	$58	$90	$99	-6.2%	8.6%
Zephyr Cove \ Stateline	$53	$48	$44	$43	$41	$45	$47	$56	$57	-6.7%	5.7%
South Lake Tahoe	$34	$37	$29	$31	$29	$33	$34	$41	$47	-3.0%	8.5%
North Lake Tahoe	$74	$55	$55	$58	$65	$64	$79	$102	$123	-7.8%	16.2%

Source: ADE, Inc., based on City of South Lake Tahoe (Monthly Transient Occupancy Tax Reports), Douglas County (Room Tax Collection and Occupancy Rates Reports), Reno-Sparks Convention and Visitors Authority (Monthly Room Statistics Reports), and Mtrip (Reservations Activity Reports: Section 5A - 12 Month Supporting Data Tables) and DestiMetrics (Custom Quarterly Reservation Activity Report: North Lake Tahoe)

SALES TAX COLLECTIONS

Table A-20: Taxable Sales Revenues Subject to Sales Tax

	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	Annual Per. Change*: 07-08 through 10-11	Annual Per. Change*: 10-11 through 15-16
Incline Village	$45,947,218	$39,659,358	$35,965,194	$36,351,841	$37,197,756	$39,975,636	$42,920,905	$45,304,260	$50,455,406	-7.6%	6.7%
Zephyr Cove\Stateline	$40,033,459	$34,194,538	$31,643,648	$31,169,294	$32,525,794	$34,661,616	$35,134,959	$35,200,101	$35,568,639	-8.0%	2.7%
South Lake Tahoe	$80,712,555	$72,152,026	$63,955,084	$68,741,187	$73,313,368	$78,241,497	$85,277,677	$88,458,671	$100,592,581	-5.3%	7.9%
Alpine Mead.\Squa.Va.	$5,735,669	$4,820,359	$5,612,248	$5,254,097	$5,584,414	$6,164,552	$6,267,724	$6,948,731	$8,095,225	-2.9%	9.0%
Kings Beach/ Carnelian Bay	$5,594,924	$4,281,559	$5,261,779	$5,164,110	$5,460,510	$5,638,910	$5,866,414	$5,335,076	$5,824,123	-2.7%	2.4%
Tahoe Vista	$2,000,924	$1,832,648	$1,871,986	$1,883,366	$2,030,055	$2,321,793	$2,452,483	$2,468,703	$2,591,049	-2.0%	6.5%
Tahoe City	$12,755,738	$10,555,476	$10,797,862	$11,428,469	$11,981,890	$12,809,600	$12,947,310	$12,866,717	$14,144,388	-3.6%	4.3%
Homewood	$3,404,345	$2,745,572	$2,760,248	$3,090,428	$3,085,241	$3,412,648	$3,362,014	$3,644,910	$3,488,911	-3.2%	2.4%
Total	$259,346,177	$224,808,315	$208,772,349	$213,777,122	$224,079,599	$239,599,089	$251,365,031	$263,958,807	$287,213,045	-6.3%	6.0%

Sources: 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.

Table A-21: Trends in Sales Tax Revenues

	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	Annual Percent Change*: 07-08 through 10-11	Annual Percent Change*: 10-11 through 15-16
Incline Village	$3,549,423	$3,063,685	$2,778,311	$2,808,180	$2,873,527	$3,088,118	$3,315,640	$3,499,754	$3,897,680	-9%	5%
Zephyr Cove\Stateline	$2,842,376	$2,427,812	$2,246,699	$2,213,020	$2,309,331	$2,460,975	$2,494,582	$2,499,207	$2,525,373	-8%	3%
South Lake Tahoe	$6,255,223	$5,591,782	$4,627,676	$5,327,446	$4,837,342	$5,130,723	$5,482,899	$6,855,547	$7,795,925	-7%	7%
Alpine Mead.\Squa.Va.	$415,836	$349,476	$406,888	$380,922	$404,870	$446,930	$338,148	$503,783	$586,904	-4%	8%
Kings Beach/Carnelian Bay	$405,632	$310,413	$381,479	$374,398	$395,887	$408,821	$423,282	$386,793	$422,249	-4%	1%
Tahoe Vista	$145,067	$132,867	$135,719	$136,544	$147,179	$168,330	$141,263	$178,981	$187,851	-3%	5%
Tahoe City	$924,791	$765,272	$782,845	$828,564	$868,687	$928,696	$926,596	$932,837	$1,025,468	-5%	3%
Homewood	$246,815	$199,054	$200,118	$224,056	$223,680	$247,417	$209,907	$264,256	$252,946	-5%	1%
Total	$21,919,009	$20,720,089	$19,598,553	$18,745,320	$18,502,382	$19,627,617	$20,659,793	$21,350,266	$23,056,867	-6%	3%

Sources: 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 (incl. Tahoe Douglas Fire Protection District). *Note: annual percentage change is calculated based on uniform $2016 dollar.

TOTAL EMPLOYED/UNEMPLOYED

Table A-22: Trends in Number of Persons in Labor Force

	2008	2009	2010	2011	2012	2013	2014	2015	2016	Annual Per. Change: 2008 - 2011	Annual Per. Change: 2011 - 2016
Incline Village	6,644	6,561	6,377	6,392	6,380	6,390	6,419	6,403	6,535	-1.3%	0.4%
Zephyr Cove \ Stateline	2,710	2,698	2,790	2,803	2,756	2,756	2,699	2,703	2,709	1.1%	-0.7%
South Lake Tahoe	15,000	15,200	15,500	12,000	11,800	11,700	11,700	11,500	11,700	-7.7%	-0.2%
Kings Beach	3,000	3,100	2,500	2,400	2,500	2,400	2,500	2,400	2,500	-5.9%	0.0%
Squaw Valley	1,400	1,400	1,100	1,100	1,100	1,000	1,100	1,100	1,100	-5.0%	-1.7%
Tahoe Vista	1,600	1,700	1,000	1,000	1,000	1,000	1,000	900	900	-17.5%	0.0%
Tahoe City/Homewood	1,900	2,000	1,000	1,000	1,100	1,100	1,100	800	800	-25.0%	0.0%
Dollar Point	1,300	1,400	514	513	511	509	508	700	700	-18.6%	0.0%
Total	33,554	34,059	27,067	27,095	26,736	26,746	26,518	26,506	26,944	-6.9%	-0.1%

Source: ADE, based on California EDD LMID and Nevada Department of Employment, Training and Rehabilitation. Note: The state labor agencies do not track separate data for Alpine Meadows or Carnelian Bay

Note: The American Community Survey five year average data also provides estimates of labor force. The data are provided by County Sub-region, of which there are two in California and two in Nevada in the Tahoe Basin (Carson is excluded to avoid Carson City). For these County Sub-regions, the 2005-2009 ACS data shows 32,508 people in the Civilian and Military labor force and the 2009-2013 dataset shows 30,810 persons. These figures are similar but slightly higher than the EDD figures shown in Tables A-22-A-24. They do, however, confirm the trend of declining labor force numbers in the Basin. EDD provides data for specific Census Designated Places (CDPs) and other census geography but may not count populations dispersed in between established communities. However, the EDD data is deemed more reliable in general since it is based on formal business filings related to workforce while the ACS represents a five year average based on a population sampling methodology.

Table A-23: Trends in Employed Persons in Labor Force											
	2008	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**Annual Per. Change: 2008 - 2011**	**Annual Per. Change: 2011 - 2016**
Incline Village	6,303	6,042	5,779	5,806	5,871	5,953	6,070	6,071	6,226	-2.7%	1.4%
Zephyr Cove \ Stateline	2,501	2,390	2,410	2,434	2,443	2,496	2,489	2,603	2,626	-0.9%	1.5%
South Lake Tahoe	13,900	13,700	10,300	10,200	10,300	10,500	10,600	10,800	11,000	-9.8%	1.5%
Kings Beach	2,800	2,800	2,000	2,100	2,100	2,100	2,200	2,200	2,300	-9.1%	1.8%
Squaw Valley	1,300	1,300	900	900	900	900	900	1,000	1,000	-11.5%	2.1%
Tahoe Vista	1,400	1,400	800	800	800	800	800	800	900	-17.0%	2.4%
Tahoe City/Homewood	1,800	1,800	700	700	700	800	800	800	800	-27.0%	2.7%
Dollar Point	1,200	1,200	660	660	670	670	680	680	690	-18.1%	0.9%
Total	31,204	30,632	23,549	23,600	23,784	24,219	24,539	24,954	25,542	-8.9%	1.6%
Source: ADE, based on California EDD LMID and Nevada Department of Employment, Training and Rehabilitation. Note: The state labor agencies do not track separate data for Alpine Meadows or Carnelian Bay.											

Table A-24: Trends in Unemployed Persons in Labor Force											
	2008	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**Annual Per. Change: 2008 - 2011**	**Annual Per. Change: 2011 - 2016**
Incline Village	341	519	598	586	509	437	349	332	309	19.8%	-12.0%
Zephyr Cove \ Stateline	209	308	380	369	313	260	210	100	83	20.9%	-25.8%
South Lake Tahoe	1,100	1,500	1,600	1,500	1,300	1,100	900	700	700	10.9%	-14.1%
Kings Beach	200	300	400	400	400	300	200	200	200	26.0%	-12.9%
Squaw Valley	100	100	300	300	200	200	200	200	100	44.2%	-19.7%
Tahoe Vista	200	300	100	100	100	100	100	100	50	-20.6%	-12.9%
Tahoe City/Homewood	100	200	100	100	100	100	100	100	50	0.0%	-12.9%
Dollar Point	100	200	40	40	30	30	20	20	10	-26.3%	-24.2%
Total	2,350	3,427	3,518	3,395	2,952	2,527	2,079	1,752	1,502	13.0%	-15.0%
Source: ADE, based on California EDD LMID and Nevada Department of Employment, Training and Rehabilitation. Note: The state labor agencies do not track separate data for Alpine Meadows or Carnelian Bay.											

Table A-25: Trends in Rates of Unemployment									
	2008	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Incline Village	5.1%	7.9%	9.4%	9.2%	8.0%	6.8%	5.4%	5.2%	4.7%
Zephyr Cove \ Stateline	7.7%	11.4%	13.6%	13.2%	11.4%	9.4%	7.8%	3.7%	3.1%
South Lake Tahoe	7.3%	9.9%	13.4%	12.9%	11.2%	9.4%	7.7%	6.3%	5.6%
Kings Beach	6.7%	9.7%	18.0%	16.9%	14.8%	12.3%	10.1%	8.2%	7.2%
Squaw Valley	7.1%	7.1%	22.4%	22.2%	20.5%	18.0%	15.9%	14.0%	13.0%
Tahoe Vista	12.5%	17.6%	13.3%	12.5%	10.9%	8.9%	7.3%	5.8%	5.2%
Tahoe City/Homewood	5.3%	10.0%	14.6%	13.6%	11.9%	9.8%	8.0%	6.5%	5.7%
Dollar Point	7.7%	14.3%	5.6%	5.3%	4.5%	3.7%	3.0%	2.4%	2.1%
Tahoe Basin	7.0%	10.1%	13.0%	12.5%	11.0%	9.4%	7.8%	6.6%	5.6%

Source: ADE, based on California EDD LMID and Nevada Department of Employment, Training and Rehabilitation. Note: The state labor agencies do not track separate data for Alpine Meadows or Carnelian Bay.

ANNUAL INCOME

Table A-26: Per Capita Income, 2010-2015									
Location	**Geography**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**Annual Per. Change 2010-15**	**Annual Per. Change 2013-15**
North	Carnelian Bay CDP, California	$21,249	$29,998	$29,959	$37,568	$36,276	$39,995	13.5%	3.2%
	Dollar Point CDP, California	$40,732	$36,547	$40,461	$36,305	$44,872	$45,209	2.11%	11.6%
	Kings Beach CDP, California	$22,257	$23,607	$19,643	$18,868	$20,677	$21,170	-1.00%	5.9%
	Squaw Valley CDP, California	$25,975	$26,330	$24,307	$27,086	$24,659	$23,168	-2.26%	-7.5%
	Sunnyside-Tahoe City CDP, California	$37,060	$32,055	$35,400	$29,848	$33,019	$30,460	-3.85%	1.0%
	Tahoe Vista CDP, California	$32,430	$32,092	$32,951	$35,709	$27,463	$26,249	-4.14%	-14.3%
	Incline Village CDP, Nevada	$51,172	$54,787	$47,281	$45,159	$47,664	$50,050	-0.44%	5.3%
	Homewood	$44,077	$45,871	$47,498	$48,790	$40,417	$43,348	-0.33%	-5.7%
	Tahoma CDP, California	$38,051	$37,355	$37,146	$36,078	$3 a2,244	$30,576	-4.28%	-7.9%
North Tahoe Basin		**$39,173**	**$40,808**	**$37,055**	**$35,846**	**$36,517**	**$37,121**	**-1.07%**	**1.8%**
South	South Lake Tahoe city, California	$23,448	$22,958	$22,829	$23,224	$23,865	$24,136	0.58%	1.9%
	Stateline CDP, Nevada	$16,645	$15,685	$16,873	$20,612	$17,743	$19,945	3.68%	-1.6%
	Zephyr Cove CDP, Nevada	$86,272	$60,170	$62,704	$62,219	$56,112	$50,870	-10.03%	-9.6%
South Tahoe Basin		**$23,920**	**$23,118**	**$23,222**	**$23,714**	**$24,213**	**$24,462**	**0.45%**	**1.6%**
Tahoe Basin		$31,104	$31,220	$29,604	$29,481	$30,052	$30,516	-0.38%	1.7%
California		$29,188	$29,634	$29,551	$29,527	$29,906	$30,318	0.76%	1.3%
Nevada		$27,589	$27,625	$27,003	$26,589	$26,515	$26,541	-0.77%	-0.1%
Source: ADE, Inc. American Community Survey 5-year Estimates									

Table A-26.1: Median Household Income, 2010-2015									
Location	**Geography**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**Annual Per. Change 2010-15**	**Annual Per. Change 2013-15**
North	Carnelian Bay CDP, California	$27,422	$47,900	$50,875	$62,361	$72,083	$83,750	25.0%	15.9%
	Dollar Point CDP, California	$60,833	$70,673	$82,750	$67,629	$68,892	$68,967	2.5%	1.0%
	Kings Beach CDP, California	$45,991	$40,060	$39,325	$38,026	$39,639	$39,841	-2.8%	2.4%
	Squaw Valley CDP, California	$57,588	$54,219	$51,875	$62,230	$63,629	$64,325	2.2%	1.7%
	Sunnyside-Tahoe City CDP, California	$70,761	$62,470	$82,500	$64,091	$69,330	$59,727	-3.3%	-3.5%
	Tahoe Vista CDP, California	$70,285	$69,145	$70,197	$69,875	$53,068	$47,833	-7.4%	-17.3%
	Incline Village CDP, Nevada	$80,265	$78,375	$66,555	$69,908	$69,984	$73,329	-1.8%	2.4%
	Homewood	$71,250	$69,948	$69,950	$71,607	$64,063	$61,250	-3.0%	-7.5%
	Tahoma CDP, California	$69,063	$64,948	$53,426	$51,750	$50,568	$42,500	-9.3%	-9.4%
North Tahoe Basin		**$66,780**	**$66,089**	**$61,406**	**$61,018**	**$61,470**	**$61,988**	**-1.5%**	**0.8%**
South	South Lake Tahoe city, California	$44,217	$41,685	$41,445	$41,004	$41,380	$39,793	-2.1%	-1.5%
	Stateline CDP, Nevada	$40,144	$41,701	$41,034	$44,220	$42,723	$44,080	1.9%	-0.2%
	Zephyr Cove CDP, Nevada	$61,477	$75,511	$75,380	$76,429	$72,250	$74,659	4.0%	-1.2%
South Tahoe Basin		**$44,108**	**$42,345**	**$41,311**	**$41,819**	**$41,307**	**$40,739**	**-1.6%**	**-1.3%**
Tahoe Basin		$52,775	$50,933	$49,698	$50,308	$50,055	$50,493	-0.9%	0.2%
California		$60,883	$61,632	$61,400	$61,094	$61,489	$61,818	0.3%	0.6%
Nevada		$55,726	$55,553	$54,083	$52,800	$52,205	$51,847	-1.4%	-0.9%
Source: ADE, Inc. US Census American Community Survey 5-year Estimates (various periods) Tables B19013 and S1901									

Table 26.2: Household Distribution by Income Category								
Income Categories	Lake Tahoe Region Based on Places and CDPs: All Households	Incline Village CDP, Nevada	Stateline CDP, Nevada	Zephyr Cove CDP, Nevada	South Lake Tahoe city, California	Tahoma CDP, California	Homewood	Sunnyside-Tahoe City CDP, California
Total	15,648	3,873	459	223	8,452	422	266	601
Less than $10,000	890	163	5	20	579	26	14	10
$10,000 to $14,999	1,031	126	23	0	730	57	9	11
$15,000 to $19,999	734	107	9	10	429	15	27	77
$20,000 to $24,999	958	155	10	0	599	26	9	18
$25,000 to $29,999	1,136	196	68	18	669	21	13	10
$30,000 to $34,999	1,112	165	53	0	809	39	0	19
$35,000 to $39,999	707	83	24	5	424	15	3	19
$40,000 to $44,999	694	76	57	0	359	40	23	16
$45,000 to $49,999	654	229	22	12	241	4	0	36
$50,000 to $59,999	1,102	253	65	14	624	35	35	88
$60,000 to $74,999	1,676	445	42	34	832	22	20	99
$75,000 to $99,999	1,524	444	55	26	775	46	17	68
$100,000 to $124,999	1,138	301	17	24	576	17	26	49
$125,000 to $149,999	701	267	0	18	286	8	22	50
$150,000 to $199,999	862	403	9	25	334	22	18	10
$200,000 or more	729	460	0	17	186	29	30	21
Source: ADE, Inc., based on US Census ACS 5-Year 2011-2015 Sample Tables B19001 and B25095								

MEDIAN HOUSE PRICES

Table A-27: North Tahoe Median Home Prices							
	Community						
Year	**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
Source: Tahoe Sierra Board of Realtors							

Table A-28: South Lake Tahoe Median Home Prices									
AREA	**3/31/2008**	**3/31/2009**	**3/31/2010**	**3/31/2011**	**3/31/2012**	**3/31/2013**	**3/31/2014**	**3/31/2015**	**3/31/2016**
Al Tahoe	$425,000	$425,000	$295,000	$280,000	$223,000	$235,000	$285,500	$300,000	$359,000
Bijou 1	$372,500	$366,250	$262,750	$260,000	$197,200	$229,000	$294,500	$292,500	$298,500
Bijou 2	$390,000	$319,000	$285,000	$223,500	$203,500	$188,500	$271,250	$299,000	$339,000
Black Bart	$375,000	$500,000	$215,000	$240,000	$255,000	$255,000	$250,000	$361,000	$330,000
Christmas Valley 1	$400,000	$512,500	$318,000	$424,500	$251,500	$275,000	$265,750	$337,000	$304,500
Christmas Valley 2	$435,750	$330,000	$316,250	$317,000	$340,000	$235,000	$375,000	$398,475	$390,000
Echo View Estates			$385,000	$350,000	$330,000	$399,000	$458,000	$409,000	$420,000
Country Club Estates	$518,500	$635,000	$389,500	$480,000	$327,000	$325,000	$410,000	$464,500	$386,000
Gardner Mountain	$339,900	$305,000	$290,000	$244,000	$221,900	$230,000	$257,000	$297,000	$319,900
Heavenly Valley	$590,000	$593,000	$442,500	$432,000	$387,500	$327,500	$397,500	$397,500	$500,000
Highland Woods	$402,250	$405,000	$328,500	$267,500	$304,950	$315,000	$377,500	$325,000	$324,500
Highland Woods PUD	$360,000				$156,500	$171,500		$215,000	$249,500
Meyers	$394,500	$330,000	$290,000	$287,000	$185,000	$209,500	$298,000	$325,000	$325,000
Montgomery Estates	$571,500	$450,457	$439,000	$470,000	$395,750	$353,125	$425,000	$485,000	$500,000
N Upper Truckee 1	$522,000	$386,250	$532,900	$337,500	$240,500	$249,000	$425,000	$425,000	$435,000
N Upper Truckee 2	$586,000	$750,000	$340,000	$505,000	$350,000	$520,000	$475,000	$448,500	$532,500
Pioneer Trail	$489,000	$412,500	$310,000	$323,250	$270,500	$265,000	$359,000	$357,000	$379,000
Pioneer Village	$374,000	$350,000	$172,500	$244,950	$168,500	$185,000	$263,000	$327,500	$275,000
Sierra Tract	$297,000	$262,500	$205,000	$188,500	$141,500	$167,500	$213,000	$252,000	$280,000
Sky Meadows			$222,000	$181,250	$185,300	$157,200	$230,000	$255,000	
Stateline	$970,000	$295,000	$270,000	$146,500	$218,000	$139,000	$253,750	$276,500	$253,500
Tahoe Island Drive	$330,000	$342,500	$275,000	$247,000	$225,000	$202,212	$300,000	$326,500	$339,000
Tahoe Island Park	$410,000	$368,000	$290,000	$229,500	$231,000	$247,750	$309,000	$373,000	$350,000
Tahoe Keys	$982,000	$828,750	$697,500	$672,000	$575,500	$633,000	$710,000	$700,000	$839,000
Tahoe Meadows	$504,000		$707,500	$590,000				$451,325	$260,000
Tahoe Paradise	$512,000	$377,500	$350,000	$385,000	$212,000	$297,000	$325,000	$427,500	$384,500
Y Area	$339,000	$317,000	$215,000	$172,500		$210,500	$227,000	$286,000	$301,500
Gross Average	$475,596	$428,748	$340,150	$326,863	$263,864	$270,050	$338,190	$363,400	$372,112

Source: South Tahoe Association of Realtors
The above data is based on a 12 month period, from 03/01 of one year to 02/28 of the following year.

The price statistics are derived from all types of home sales -- new and existing, single-family detached dwellings. Movements in sales prices should not be interpreted as changes in the cost of a standard home. Median prices can be influenced by changes in cost, as well as changes in the characteristics and size of homes sold. Due to the low sales volume in some cities or areas, median price changes may exhibit unusual fluctuation.

APPENDIX B: SOCIAL TRENDS

POPULATION GROWTH AND DECLINE BY AGE

Table B-1: Population Growth/Decline, 2000-2013

Region	Decennial Census 2000	Decennial Census 2010	ACS 2010	ACS 2011	ACS 2012	ACS 2013	ACS 2014	ACS 2015	2000-2010 Ann. Per. Change	2010-2015 Ann. Per. Change
Tahoe Basin	**60,295**	**56,709**	**55,258**	**54,012**	**53,984**	**54,380**	**54,079**	**54,361**	**-0.6%**	**-0.3%**
California	33,871,648	37,253,956	36,637,290	36,969,200	37,325,068	37,659,181	38,066,920	38,421,464	1.0%	1.0%
Nevada	1,998,257	2,700,551	2,633,331	2,673,396	2,704,204	2,730,066	2,761,584	2,798,636	3.1%	1.2%

Source: ADE. Inc., Decennial Census 2000 and 2010, American Community Survey 2010, 2011, 2012, 2013.

Table B-1.1: Population Growth/Decline, 2000-2013, By Community

North Lake	Year 2000 (DEC)	Year 2010 (DEC)	Year 2011 (ACS)	Year 2012 (ACS)	Year 2013 (ACS)	Year 2014 (ACS)	Year 2015 (ACS)	Ann. Percent Change
Homewood	808	709	774	792	817	738	657	-4.1%
Tahoe Pines/ Sunnyside	1,087	961	775	964	915	975	695	-8.6%
Tahoe City	1,058	909	1,031	1,071	981	1,080	973	-1.7%
Lake Forest/Dollar Hill	1,806	1,288	1,115	1,221	1,049	1,140	1,198	-7.9%
Carnelian Bay	1,694	1,352	1,284	1,313	1,186	1,183	1,124	-7.9%
Tahoe Vista	1,931	1,719	1,546	1,470	1,722	1,605	1,708	-2.4%
Kings Beach/ Brockway	3,774	3,510	2,966	3,240	3,355	3,111	3,279	-2.8%
Crystal Bay/ Incline Village	9,952	9,087	8,347	8,127	8,654	8,582	8,973	-2.0%
Subtotal North	**22,110**	**19,535**	**17,838**	**18,198**	**18,679**	**18,414**	**18,607**	**-3.4%**
South Lake								
South Lake Tahoe	23,663	24,343	24,464	24,517	24,230	23,928	23,866	0.2%
Meyers	3,047	2,641	2,767	2,446	2,296	2,340	2,408	-4.6%
Tahoma	1,158	1,015	666	681	628	676	667	-10.4%
Glenbrook	5,535	5,397	5,034	4,889	4,819	4,932	4,834	-2.7%
Kingsbury	2,169	1,601	1,622	1,563	1,722	1,762	2,009	-1.5%
Stateline	2,613	2,152	1,621	1,690	2,005	2,027	1,970	-5.5%
Subtotal South	**38,185**	**37,149**	**36,174**	**35,786**	**35,700**	**35,665**	**35,754**	**-1.3%**
Tahoe Basin	**60,295**	**56,684**	**54,012**	**53,984**	**54,380**	**54,079**	**54,361**	**-2.1%**

Source: ADE. Inc., Decennial Census 2000 and 2010, American Community Survey 2010, 2011, 2012, 2013.
Note: Totals may not add due to rounding.

Table B-2: Population Distribution By Age Group							
Age Groups	**Age 0-17**	**Age 18-24**	**Age 25-44**	**Age 45-64**	**Age 65-84**	**Age 85+**	**Total**
Lake Tahoe Basin 2000	13,431	5,479	19,187	16,226	5,542	430	60,295
Population Distribution 2000	22.3%	9.1%	31.8%	26.9%	9.2%	0.7%	100.0%
Lake Tahoe Basin 2010	10,463	5,160	15,167	18,410	6,883	626	56,709
Population Distribution 2010	18.5%	9.1%	26.7%	32.5%	12.1%	1.1%	100.0%
Lake Tahoe Basin 2010 (ACS)	10,697	5,582	15,128	16,653	6,564	635	55,258
Population Distribution 2010 (ACS)	19.4%	10.1%	27.4%	30.1%	11.9%	1.1%	100.0%
Lake Tahoe Basin 2015	9,147	4,949	14,485	17,399	7,766	614	54,361
Population Distribution 2015	16.8%	9.1%	26.6%	32.0%	14.3%	1.1%	100.0%
California 2000	9,249,829	3,366,030	10,714,403	6,945,728	3,170,001	425,657	33,871,648
Population Distribution 2000	27.3%	9.9%	31.6%	20.5%	9.4%	1.3%	100.0%
California 2010	9,295,040	3,922,951	10,500,587	9,288,864	3,645,546	600,968	37,253,956
Population Distribution 2010	25.0%	10.5%	28.2%	24.9%	9.8%	1.6%	100.0%
California 2010 (ACS)	9,305,872	3,810,278	10,533,221	8,902,861	3,517,180	567,878	36,637,290
Population Distribution 2010 (ACS)	25.4%	10.4%	28.8%	24.3%	9.6%	1.6%	100.0%
California 2015	9,144,308	3,995,832	10,834,853	9,682,209	4,111,097	653,165	38,421,464
Population Distribution 2015	23.8%	10.4%	28.2%	25.2%	10.7%	1.7%	100.0%
Nevada 2000	511,799	179,708	628,572	459,249	201,940	16,989	1,998,257
Population Distribution 2000	25.6%	9.0%	31.5%	23.0%	10.1%	0.9%	100.0%
Nevada 2010	665,008	248,829	770,329	692,026	294,172	30,187	2,700,551
Population Distribution	24.6%	9.2%	28.5%	25.6%	10.9%	1.1%	100.0%
Nevada 2010 (ACS)	658,333	242,266	763,666	666,233	273,866	28,967	2,633,331
Population Distribution	25.0%	9.2%	29.0%	25.3%	10.4%	1.1%	100.0%
Nevada 2015	663,277	251,877	780,819	719,249	344,232	36,382	2,798,636
Population Distribution 2015	23.7%	9.0%	27.9%	25.7%	12.3%	1.3%	100.0%
Source: ADE, Inc. American Community Survey 2010, 2015 and Decennial Census 2000, 2010							

Table B-2.1 2015 Age Distribution by Census Tract												
Census Tract/Community	**Total**		**Age 0-17**		**Age 18-24**		**Age 25-44**		**Age 45-64**		**Age 65+**	
33.09, Incline Village	2,558	100.00%	277	10.8%	338	13.2%	515	20.1%	832	32.5%	597	23.3%
33.08, Incline Village	2,185	100.00%	171	7.8%	107	4.9%	337	15.4%	895	40.9%	676	30.9%
33.07, Incline Village	1,334	100.00%	195	14.6%	234	17.6%	399	29.9%	273	20.5%	233	17.5%
33.06, Incline Village	1,556	100.00%	293	18.8%	143	9.2%	479	30.8%	490	31.5%	151	9.7%
33.05, Incline Village	1,340	100.00%	196	14.6%	94	7.0%	404	30.2%	454	33.9%	192	14.3%
320, Tahoma	667	100.00%	112	16.8%	104	15.6%	86	12.8%	283	42.5%	82	12.2%
316, South Lake Tahoe	3,918	100.00%	650	16.6%	673	17.2%	1,335	34.1%	1,061	27.1%	200	5.1%
305.04, South Lake Tahoe	2,517	100.00%	458	18.2%	214	8.5%	529	21.0%	1,004	39.9%	312	12.4%
305.02, Meyers	2,408	100.00%	403	16.7%	241	10.0%	460	19.1%	1,015	42.1%	289	12.0%
304.02, South Lake Tahoe	3,495	100.00%	737	21.1%	290	8.3%	951	27.2%	965	27.6%	552	15.8%
304.01, South Lake Tahoe	3,874	100.00%	608	15.7%	302	7.8%	1,115	28.8%	1,161	30.0%	689	17.8%
303.02, South Lake Tahoe	2,756	100.00%	558	20.2%	329	11.9%	853	31.0%	765	27.8%	251	9.1%
303.01, South Lake Tahoe	2,184	100.00%	376	17.2%	208	9.5%	453	20.7%	846	38.7%	302	13.8%
302, South Lake Tahoe	5,122	100.00%	1,234	24.1%	451	8.8%	1,567	30.6%	1,347	26.3%	522	10.2%
3, Carson City/Eastshore	3,661	100.00%	520	14.2%	253	6.9%	465	12.7%	1,285	35.1%	1,139	31.1%
223, Homewood	657	100.00%	170	25.8%	16	2.4%	120	18.2%	256	38.9%	97	14.7%
222, Tahoe City	973	100.00%	188	19.4%	80	8.2%	348	35.8%	235	24.2%	121	12.4%
221, Tahoe Pines/Sunnyside	695	100.00%	116	16.7%	31	4.5%	163	23.5%	265	38.1%	120	17.3%
201.07, Kings Beach	3,279	100.00%	594	18.1%	266	8.1%	1,388	42.3%	886	27.0%	144	4.4%
201.06, Tahoe Vista	1,708	100.00%	373	21.8%	174	10.2%	598	35.0%	368	21.5%	195	11.4%
201.05, Carnelian Bay	1,124	100.00%	187	16.6%	125	11.1%	151	13.4%	401	35.7%	261	23.2%
201.04, Dollar Point	1,198	100.00%	165	13.8%	24	2.0%	377	31.4%	427	35.6%	205	17.1%
18, Stateline	2,009	100.00%	346	17.2%	145	7.2%	647	32.2%	577	28.7%	295	14.7%
17, Kingsbury	1,970	100.00%	152	7.7%	79	4.0%	475	24.1%	942	47.8%	323	16.4%
16, Zephyr Cove/ Glen Brook	1,173	100.00%	70	6.0%	29	2.5%	272	23.2%	367	31.3%	434	37.0%
Total	54,361	100.00%	9,147	16.8%	4,949	9.1%	14,485	26.6%	17,399	32.0%	8,381	15.4%

Source: ADE, Inc. American Community Survey 2015. Note: Totals may not add due to rounding.

SCHOOL ENROLLMENTS

Table B-3: Number Of Lake Tahoe Basin Public And Private School Students Who Enrolled In Grades K – 12												
District	**2005-2006**	**2006-2007**	**2007-2008**	**2008-2009**	**2009-2010**	**2010-2011**	**2011-2012**	**2012-2013**	**2013-2014**	**2014-2015**	**2015-2016**	**05-06 to 10-11 Ann. Per. Chg.**	**10-11 to 15-16 Ann. Per. Chg.**
Tahoe Truckee Unified School District Total [a]	2,982	2,882	2,771	2,652	2,564	2,496	2,480	2,351	2,412	2,522	2,542	-3.5%	0.4%
Tahoe City schools [b]	1,135	970	951	973	1,157	1,121	1,114	1,087	1,068	1,075	1,104	-0.2%	-0.3%
Kings Beach Elementary	403	439	460	451	244	261	264	355	375	381	364	-8.3%	6.9%
Lake Tahoe Unified Total	4,235	3,943	3,828	3,708	3,602	3,509	3,480	3,419	3,471	3,484	3,996	-3.7%	2.6%
Creekside and Squaw Valley Prep [c]	---	---	---	---	68	74	75	94	236	240	226	---	---
Incline Village	1,079	1,078	1,031	1,000	950	1,005	941	947	955	950	926	-1.4%	-1.6%
Zephyr Cove	466	411	384	462	454	431	437	436	396	396	389	-1.5%	-2.0%
Public Schools	**10,300**	**9,723**	**9,425**	**9,246**	**9,039**	**8,897**	**8,791**	**8,689**	**8,913**	**9,048**	**9,547**	**-2.9%**	**1.4%**
El Dorado County private schools in Tahoe Basin region	196	184	161	154	108	103	70	70	68	0	0	-12.1%	-100.0%
Placer County private schools in Tahoe Basin region	72	64	57	8	8	12	50	137	164	183	71	-30.1%	42.7%
Washoe County private schools in Tahoe Basin region (Lake Tahoe School)	120	128	136	146	156	146	136	143	149	140	131	4.0%	-2.1%
Private Schools	**388**	**376**	**354**	**308**	**272**	**261**	**256**	**350**	**381**	**323**	**202**	**-7.6%**	**-5.0%**
Total Public and Private Schools	**10,688**	**10,099**	**9,779**	**9,554**	**9,311**	**9,158**	**9,047**	**9,039**	**9,294**	**9,371**	**9,749**	**-3.0%**	**1.3%**

Source: ADE, Inc. , based on 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]), Nevada Department of Education (see http://www.doe.nv.gov/DataCenter/Enrollment/ [enrollment] and http://www.doe.nv.gov/Private_Schools/ [private schools]), and schooldigger.com
Notes: [a] Excluding Tahoe City and Kings Beach Elementary. [b] Tahoe Truckee Unified School District. [c] Public Charter Schools.

FREE AND REDUCED SCHOOL LUNCH PARTICIPATION RATES

Table B-4: Students Receiving Free or Subsidized Lunches as Percent of Total Students													
School District	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Lake Tahoe Unified	47.4%	50.6%	53.2%	52.0%	52.7%	57.2%	59.4%	66.5%	62.0%	61.2%	60.4%	59.2%	53.8%
Tahoe Truckee Joint Unified	59.3%	43.4%	35.4%	40.5%	32.8%	48.2%	46.4%	51.8%	46.0%	47.9%	44.8%	37.7%	37.3%
Subtotal CA	**50.4%**	**48.7%**	**48.8%**	**49.1%**	**45.7%**	**54.9%**	**55.9%**	**62.3%**	**57.6%**	**56.6%**	**56.0%**	**48.3%**	**45.5%**
Zephyr Cove			24.5%	16.1%	19.1%	30.2%	28.1%	36.9%	35.4%	35.0%	37.1%	37.1%	28.7%
Incline Village			16.6%	22.4%	19.2%	28.2%	24.5%	23.3%	26.1%	26.7%	27.7%	27.7%	29.4%
Subtotal NV			**20.3%**	**21.5%**	**19.2%**	**28.6%**	**25.1%**	**25.8%**	**27.6%**	**28.2%**	**29.3%**	29.3%	29.2%
Total			**43.7%**	**44.2%**	**41.1%**	**50.2%**	**50.2%**	**55.2%**	**52.1%**	**52.0%**	**51.3%**	**45.9%**	**43.2%**
Source: California Department of Education: www.cde.ca.gov/ds/sd/sd/files.asp.													

COLLEGE ENROLLMENT

Table B-5: Lake Tahoe Community College Full Time Equivalent Students (FTEs)

Enrollment Categories	School Years									
	2006-07	**2007-08**	**2008-09**	**2009-10**	**2010-11**	**2011-12**	**2012-13**	**2013-14**	**2014-15**	**2015-16**
Credit FTEs	1,383.54	1,648.85	1,807.70	1,900.30	1,741.27	1,796.81	1,445.79	1,577.22	1,663.90	1,285.00
Non Credit FTEs	2.73	31.01	50.36	55.19	51.85	43.46	45.86	48.68	50.66	44.00
NC CDCP FTEs	39.08	52.71	66.39	54.41	29.31	23.42	31.35	32.98	31.02	31.24
Total	**1,425.35**	**1,732.57**	**1,924.45**	**2,009.90**	**1,822.43**	**1,863.69**	**1,523.00**	**1,658.88**	**1,745.58**	**1,360.24**

Source: Lake Tahoe Community College Fact Book (2013-2014 and 2014-2015), and California Community Colleges, "2017 Student Success Scorecard: Lake Tahoe Community College" (http://archive.is/QfcVd).

Table B-6: Sierra Nevada College Enrollments, 2011-2016-17

Undergraduate Headcount	Actual					
	2011-2012	**2012-2013**	**2013-2014**	**2014-2015**	**2015-2016**	**2016-2017**
New First-time	104	84	107	131	95	98
New Transfer	146	104	103	88	87	82
Full-time	577	581	552	574	509	472
Part-time	245	270	292	285	297	295
Total Undergraduate	**822**	**851**	**844**	**859**	**806**	**767**
Student Enrollment - Total	**Actual Projected**					
	FALL 11	**FALL 12**	**FALL 13**	**FALL 14**	**FALL 15**	**FALL 16**
Undergraduate FTE	669	682	669	690	654	597
Graduate FTE	543	446	511	603	630	602
Other Programs FTE	NA	NA	NA	NA	NA	NA
Total FTE	**1,212**	**1,128**	**1,180**	**1,293**	**1,284**	**1,199**

Source: Deborah M. Prout, Special Assistant to the President, Sierra Nevada College (2011-2012 – 2014-2015); Anna Maria Jones, Institutional Analysis, Sierra Nevada College (2015-2016 – 2016-2017).

PAYERS FOR HOSPITAL SERVICES AND ACCESS TO HEALTH CARE SERVICES

Table B-7: Trends in Gross Revenues By Payer Category, Including In-Patient Revenues Per Patient Discharge: Barton Health System (2005-2015)

Revenue Categories	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	05-10 CAGR	10-15 CAGR
Gross Revenues (In-Patient and Out-Patient) By Payer Source (000's)	**$175,589**	**$183,418**	**$201,731**	**$217,078**	**$217,173**	**$226,627**	**$245,205**	**$260,330**	**$277,254**	**$316,701**	**$366,910**	**5%**	**10%**
Medicare	$55,700	$49,803	$63,228	$66,946	$66,225	$69,178	$75,717	$80,830	$89,689	$101,216	$114,548	4%	11%
Medi-Cal	$25,995	$27,891	$28,800	$32,070	$32,180	$35,595	$37,518	$40,380	$40,276	$78,168	$96,540	6%	22%
County Indigent	$11,084	$11,052	$13,077	$15,458	$18,763	$19,984	$18,588	$20,866	$20,416	$0	$0		-100%
Other Third-Parties **	$74,265	$84,710	$84,670	$91,920	$86,408	$88,428	$98,863	$101,998	$108,084	$122,446	$138,284	4%	9%
Other Indigent	$0	$3,096	$4,105	$3,437	$4,773	$4,198	$4,576	$5,543	$3,899	$277	$264		-43%
All Others (incl. self-pay)	$8,546	$6,866	$7,851	$7,248	$8,823	$9,243	$9,944	$10,712	$14,889	$14,594	$17,274	2%	13%
Distrib. Of Gross Revenues													
Medicare	32%	27%	31%	31%	30%	31%	31%	31%	32%	32%	31%		
Medi-Cal	15%	15%	14%	15%	15%	16%	15%	16%	15%	25%	26%		
County Indigent	6%	6%	6%	7%	9%	9%	8%	8%	7%	0%	0%		
Other Third-Parties	42%	46%	42%	42%	40%	39%	40%	39%	39%	39%	38%		
Other Indigent	0%	2%	2%	2%	2%	2%	2%	2%	1%	0.1%	0.1%		
All Others (incl. self-pay)	5%	4%	4%	3%	4%	4%	4%	4%	5%	5%	5%		
In-Patient Revenues Per Patient Discharge	**$26,797**	**$28,366**	**$31,197**	**$36,693**	**$38,961**	**$40,950**	**$43,340**	**$45,832**	**$50,498**	**$56,739**	**$66,995**	**9%**	**10%**
Medicare	$31,833	$33,333	$34,980	$44,168	$44,811	$47,691	$42,295	$41,996	$45,103	$61,795	$70,116	8%	8%
Medi-Cal	$24,482	$26,386	$26,451	$32,223	$33,283	$34,405	$38,259	$38,354	$64,904	$52,927	$59,378	7%	12%
County Indigent	$53,751	$66,806	$75,826	$94,640	$112,214	$83,864	$75,666	$86,817	$45,405	$0	$0		-100%
Other Third-Parties	$23,520	$24,626	$28,162	$31,872	$30,621	$35,252	$43,661	$51,518	$62,609	$53,406	$77,008	8%	17%
Other Indigent	$0	$18,217	$22,904	$18,667	$35,565	$32,677	$42,835	$38,910	$29,591	$0	$32,239		-0.3%
All Others (incl. self-pay)	$15,851	$18,152	$23,362	$18,677	$35,970	$32,461	$43,247	$39,031	$30,016	$68,052	$35,701	15%	2%

Source: Applied Development Economics, based on CA OSHPD (Hospital Annual Financial Data)(https://www.oshpd.ca.gov/HID/Hospital-Financial.asp)(Note*: CAGR = compound annual growth rate)(**Note: "Other Third Parties" divided into "Other Third Parties-Managed Care" (patients covered by managed care plans other than those funded by Medicare, Medi-Cal, or a county; and patients enrolled in the Healthy Families program are reported here) and "Other Third Parties - Traditional" (all other forms of health coverage excluding managed care plans: examples include Short-Doyle, CHAMPUS, IRCA/SLIAG, California Children's Services, indemnity plans, fee-for-service plans, and Workers' Compensation. This category was previously reported in the Other Third Parties category); "Other Payers" includes all patients who do not belong in the other nine OSHPD payer categories, such as those designated as self-pay.

Table B-8: Trends in Gross Revenues By Payer Category, Including In-Patient Revenues Per Patient Discharge: Tahoe Forest Hospital District (2005-2015)													
Revenue Category	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**05-10 CAGR**	**10-15 CAGR**
Gross Revenues (In-Patient and Out-Patient) By Payer Source (000's)	**$83,432**	**$93,122**	**$109,993**	**$120,265**	**$135,034**	**$141,031**	**$138,088**	**$144,822**	**$163,498**	**$174,319**	**$191,759**	**11%**	**6%**
Medicare	$24,153	$25,723	$29,928	$32,760	$40,006	$42,593	$44,315	$47,765	$54,077	$59,938	$68,620	12%	10%
Medi-Cal	$8,733	$9,518	$13,656	$14,345	$16,953	$17,478	$17,444	$20,936	$21,224	$24,203	$35,790	15%	15%
County Indigent	$340	$474	$590	$197	$612	$361	$827	$969	$4,759	$2,440	$0	1%	-100%
Other Third-Parties **	$39,630	$47,041	$56,962	$63,530	$67,199	$69,579	$66,412	$65,523	$71,863	$77,565	$80,704	12%	3%
Other Indigent	$0	$0	$0	$1,825	$1,477	$1,740	$1,328	$623	$604	$6,641	$524		-21%
All Others (incl. self-pay)	$10,575	$10,365	$8,857	$7,607	$8,787	$9,280	$7,761	$9,005	$10,971	$3,533	$6,120	-3%	-8%
Distrib. Of Gross Revenues													
Medicare	29%	28%	27%	27%	30%	30%	32%	33%	33%	34%	36%		
Medi-Cal	10%	10%	12%	12%	13%	12%	13%	14%	13%	14%	19%		
County Indigent	0%	1%	1%	0%	0%	0%	1%	1%	3%	1%	0%		
Other Third-Parties	48%	51%	52%	53%	50%	49%	48%	45%	44%	44%	42%		
Other Indigent	0%	0%	0%	2%	1%	1%	1%	0%	0%	4%	0%		
All Others (incl. self-pay)	13%	11%	8%	6%	7%	7%	6%	6%	7%	2%	3%		
In-Patient Revenues Per Patient Discharge	**$22,938**	**$23,340**	**$24,866**	**$26,967**	**$30,876**	**$33,537**	**$31,609**	**$35,469**	**$37,164**	**$37,668**	**$40,447**	**8%**	**4%**
Medicare	$27,673	$25,112	$26,824	$33,597	$39,328	$42,246	$37,703	$39,951	$38,705	$35,524	$40,502	9%	-1%
Medi-Cal	$25,314	$29,692	$27,982	$30,694	$36,239	$34,626	$31,869	$38,396	$39,596	$44,906	$46,888	6%	6%
County Indigent	$12,880	$18,110	$24,525	$76,287	$170,780	$100,247	$180,216	$41,178	$42,238	$34,590	$0	51%	-100%
Other Third-Parties	$18,713	$20,354	$22,603	$25,308	$30,813	$33,584	$34,988	$31,714	$34,508	$36,936	$38,578	12%	3%
Other Indigent	$0	$0	$0	$16,535	$11,836	$17,450	$10,890	$29,385	$29,957	$39,141	$25,305		8%
All Others (incl. self-pay)	$28,279	$26,730	$24,656	$16,332	$11,243	$17,070	$11,263	$32,401	$38,452	$36,684	$25,682	-10%	9%

Source: Applied Development Economics, based on CA OSHPD (Hospital Annual Financial Data)(https://www.oshpd.ca.gov/HID/Hospital-Financial.asp)(Note*: CAGR = compound annual growth rate)(**Note: "Other Third Parties" divided into "Other Third Parties-Managed Care" (patients covered by managed care plans other than those funded by Medicare, Medi-Cal, or a county; and patients enrolled in the Healthy Families program are reported here) and "Other Third Parties - Traditional" (all other forms of health coverage excluding managed care plans: examples include Short-Doyle, CHAMPUS, IRCA/SLIAG, California Children's Services, indemnity plans, fee-for-service plans, and Workers' Compensation. This category was previously reported in the Other Third Parties category); "Other Payers" includes all patients who do not belong in the other nine OSHPD payer categories, such as those designated as self-pay.

Table B-9: Barton Health Systems: Number of Patient Discharges By Expected Payer Source												
	2010			2011			2012			2013		
Revenue Category	Nos.	Per.	CA Per	Nos.	Per.	CA Per	Nos.	Per.	CA Per	Nos.	Per.	CA Per
Medicare	854	31%	32%	716	27%	33%	748	28%	33%	659	26%	33%
Medi-Cal	704	25%	26%	727	27%	26%	816	30%	26%	811	32%	26%
Other Government	122	4%	2%	121	5%	2%	83	3%	2%	79	3%	2%
Private Coverage	918	33%	32%	917	35%	32%	871	32%	31%	807	32%	31%
Self Pay	108	4%	4%	84	3%	4%	109	4%	4%	160	6%	4%
Other payer	20	1%	3%	39	1%	3%	22	1%	3%	6	0%	3%
Workers' Compensation	37	1%	1%	49	2%	1%	43	2%	1%	32	1%	1%
Total	**2,763**	**100%**	**100%**	**2,653**	**100%**	**100%**	**2,692**	**100%**	**100%**	**2,554**	**100%**	**100%**

	2014			2015			2010-2015	
	Nos.	Per.	CA Per	Nos.	Per.	CA Per	BHS CAGR	Ca CAGR
Medicare	750	31%	32%	687	31%	33%	-4%	-0.2%
Medi-Cal	687	28%	31%	658	29%	31%	-1%	3%
Other Government	94	4%	2%	93	4%	2%	-5%	-2%
Private Coverage	714	30%	30%	690	31%	30%	-6%	-2%
Self Pay	146	6%	3%	97	4%	2%	-2%	-10%
Other payer	0	0%	1%	0	0%	1%	-100%	-19%
Workers' Compensation	25	1%	0%	14	1%	0%	-18%	-5%
Total	**2,416**	**100%**	**100%**	**2,239**	**100%**	**100%**	**-4%**	-0.7%

Source: California Office of Statewide Health Planning & Development (Patient Discharge Pivot Profiles)(https://www.oshpd.ca.gov/HID/IP-Discharges-Pivot.asp)

Table B-10: Tahoe Forest Hospital District												
	2010			2011			2012			2013		
Revenue Category	Number	Percent	CA Per	Number	Percent	CA Per	Number	Percent	CA Per	Number	Percent	CA Per
Medicare	508	23%	32%	520	25%	33%	516	26%	33%	536	26%	33%
Medi-Cal	520	23%	26%	484	23%	26%	408	20%	26%	463	22%	26%
Other Government	12	1%	2%	14	1%	2%	48	2%	2%	74	4%	2%
Private Coverage	1,089	48%	32%	971	46%	32%	921	46%	31%	814	39%	31%
Self Pay	125	6%	4%	127	6%	4%	125	6%	4%	171	8%	4%
Other payer		0%	3%		0%	3%		0%	3%	2	0%	3%
Worker's Comp		0%	1%		0%	1%		0%	1%	25	1%	1%
Total	**2,254**	**100%**	**100%**	**2,116**	**100%**	**100%**	**2,018**	**100%**	**100%**	**2,085**	**100%**	**100%**
	2014			2015			2010-2015					
Medicare	Number	Percent	CA Per	Number	Percent	CA Per	BHS CAGR			Ca CAGR		
Medi-Cal	641	32%	32%	627	30%	33%	4%			-0.2%		
Other Government	495	24%	31%	493	24%	31%	-1%			3%		
Private Coverage	12	1%	2%	5	0%	2%	-16%			-2%		
Self Pay	776	38%	30%	836	40%	30%	-5%			-2%		
Other payer	76	4%	3%	78	4%	2%	-9%			-10%		
Worker's Comp	5	0%	1%	2	0%	1%				-19%		
Total	17	1%	0%	33	2%	0%				-5%		
	2,022	**100%**	**100%**	**2,074**	**100%**	**100%**	**-2%**			**-0.7%**		
Source: California Office of Statewide Health Planning & Development (Patient Discharge Pivot Profiles)(https://www.oshpd.ca.gov/HID/IP-Discharges-Pivot.asp)												

VOTER PARTICIPATION

Table B-11.1: Voter Participation Rates by Community, Special and Primary Elections								
Community/ Election Type	Special Elections		Primary Elections					
	2009	2011	2006	2008	2010	2012	2014	2016
South Lake Tahoe	22.6%		31.1%	34.0%	27.7%	26.7%	30.0%	43.5%
Homewood	45.0%		41.8%	60.3%	48.1%	*	*	*
Tahoe City	38.2%		34.7%	55.9%	34.5%	38.3%	29.7%	53.4%
Alpine Meadows/ Squaw Valley	51.7%		52.9%	70.9%	53.1%	57.3%	43.7%	55.6%
Dollar Point	40.2%		45.6%	64.8%	47.6%	41.6%	28.9%	54.0%
Carnelian Bay			33.8%	57.3%	34.8%	46.6%	31.0%	55.5%
Kings Beach	41.1%		29.4%	55.5%	32.6%	43.2%	27.9%	46.2%
Incline Village		75.0%	34.0%		34.7%	29.4%	24.8%	25.4%
Glenbrook		45.5%	40.4%	29.5%	49.5%	30.7%	25.4%	32.0%
Zephyr Cove		36.7%	31.7%	24.7%	36.8%	26.0%	21.0%	22.4%
Source: ADE, Inc. County Election Departments and University of California Statewide Database (Note: Data for Stateline was not available. *Includes Homewood and Tahoe City)								

Table B-11.2: Voter Participation Rates by Community, General Elections							
Community/ Election Type	General Elections						
	2004	2006	2008	2010	2012	2014	2016
South Lake Tahoe	70.8%	49.7%	72.4%	54.2%	66.6%	44.0%	73.5%
Homewood		66.7%	86.5%	75.4%	*	*	
Tahoe City		64.3%	85.0%	66.0%	81.1%	29.7%	82.9%
Alpine Meadows/ Squaw Valley		76.5%	90.2%	79.7%	86.3%	43.7%	84.3%
Dollar Point		68.9%	83.1%	70.0%	81.6%	28.9%	83.6%
Carnelian Bay		65.1%	87.4%	67.3%	80.6%	31.0%	80.1%
Kings Beach		65.5%	88.5%	63.6%	79.7%	27.9%	80.5%
Incline Village	61.0%	59.2%	74.5%	64.7%	76.7%	54.0%	79.2%
Glenbrook	91.1%	74.6%	94.3%	82.5%	88.6%	59.8%	89.9%
Zephyr Cove	93.0%	69.4%	91.7%	70.6%	91.3%	60.9%	89.1%
Source: ADE, Inc. County Election Departments and University of California Statewide Database (Note: Data for Stateline was not available. *Includes Homewood and Tahoe City)							

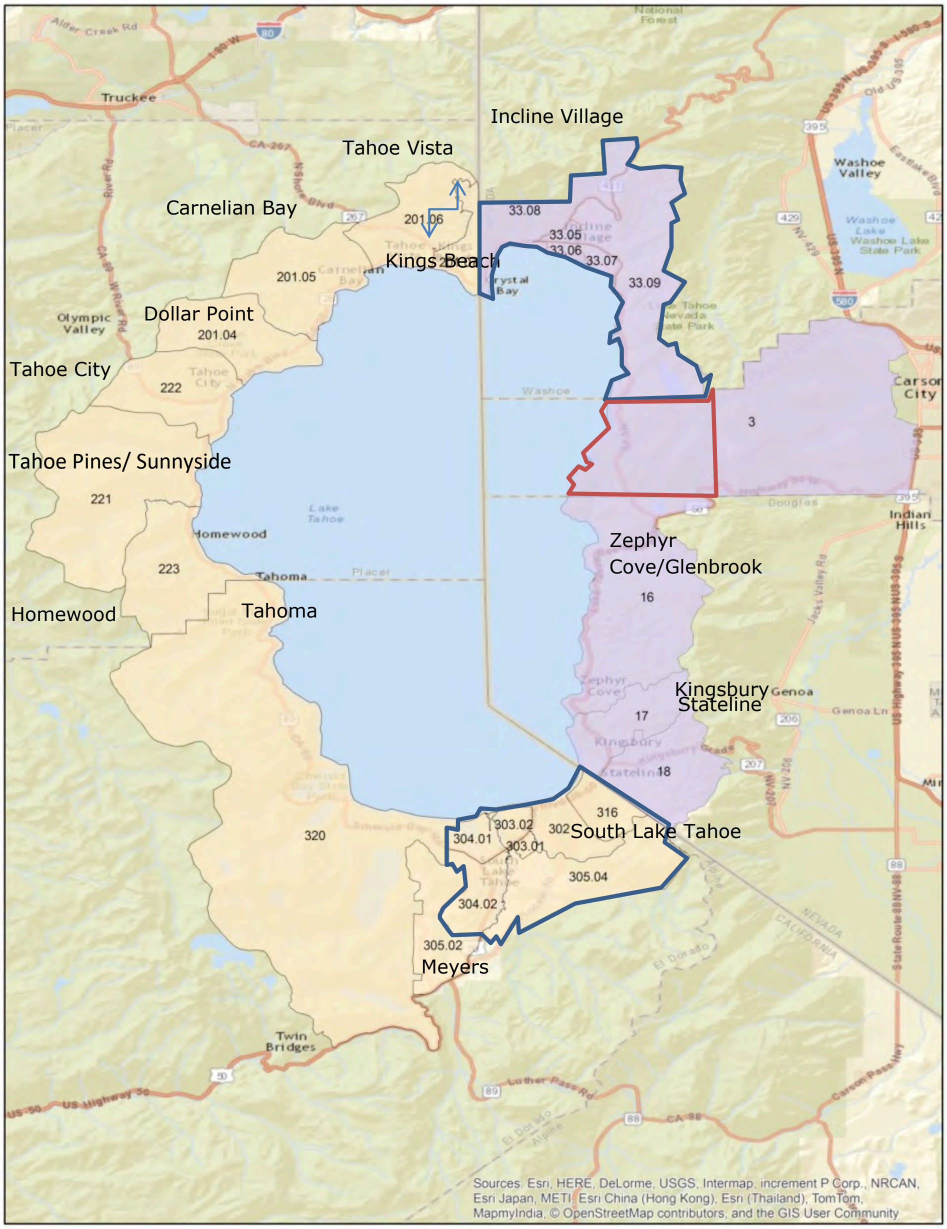
CRIME RATES

Table B-12: Selected Crime Rates for North Lake Tahoe and Incline Village											
Year	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
North Lake Tahoe											
Part I Crime	594	586	464	508	433	464	343	347	306	290	256
Population	12,223	12,087	11,951	11,815	11,679	11,228	11,599	12,008	12,431	12,869	13,322
Crime rate per 1,000	48.6	48.5	38.8	43.0	37.1	41.3	29.6	28.9	24.6	22.5	19.2
Incline Village/ Crystal Bay											
Part I Crime	200	220	169	166	160	181	164	181	126	119	122
Population	9,095	9,095	9,095	9,095	9,095	9,095	9,095	9,095	9,095	9,095	9,095
Crime rate per 1,000	22	24.2	18.6	18.3	17.6	19.9	18	19.9	13.9	13.1	13.5
US. Average	38.1	37.7	37.3	35.4	34.7	34.2	34.1	32.6	29.7	28.7	--NA

Source: ADE, Inc. based on Placer County Sheriff Office (contact: Crime Analyst Barbara Beverly) and Washoe County Sheriff Department (contact: Supervisor Charles Palian)(According to Supervisor Palian, there were 69 Part I crimes in 2015 in Incline Village, and 71 in 2016. Based on the 2015 Incline Village\Crystal Bay incidence of 119, we estimated 2016 Incline Village\Crystal Bay at 122.

APPENDIX C: TAHOE BASIN GEOGRAPHY

TAHOE BASIN CENSUS TRACTS



Census Tract 3 was not included in the analysis since it includes part of Carson City demographic counts. The Red boundary presents the block group we have included in the analysis instead.

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.			