



TAHOE PROSPERITY CENTER



March 2022

COMMUNITY REPORT FOR THE TAHOE REGION

CURRENT SOCIAL AND ECONOMIC INFORMATION AND OPINIONS ABOUT LIVING AND WORKING TODAY IN AND AROUND THE BASIN

A second report for Envision Tahoe: Prosperity Plan 2.0, focused on diversifying the Tahoe Basin economy for recovery and resilience

Provided by North Tahoe Business Association. Photo credit: Ryan Salm Photography

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MESSAGE FROM THE CO-CHAIRS

To our Tahoe community –

Since the September publication of the Baseline Report that contained the latest economic and social trends affecting Tahoe, the Envision Tahoe team hasn't stopped gathering information and critical insights from those who live and work here to inform our path forward.

The consultant team at Integrated Communications Strategies (ICS) interviewed three panels of experts on the current state of play on housing, broadband and transportation in the Basin. This fall they interviewed people in four different focus groups in each part of Tahoe to zero in on the key issues and trends affecting our quality of life in the Basin. And, working with the Tahoe Prosperity Center team and its extensive network of partners in January, the Envision Tahoe team surveyed nearly 1,800 residents in Spanish and English on the issues that matter most to them. The results of this survey together with the latest U.S. Census data, is what fills this Community Report, explained in clear, easy-to-understand language, with charts and graphs to punctuate key points.

What you will find inside these covers will confirm what you already witness every day about housing, transportation, the threat of wildfires, as well as our challenges with tourism. Other findings may take you by surprise. Together this data forms a picture of a mountain community that is changing rapidly, with residents, regardless of age, income, or status, largely viewing the challenges confronting Tahoe – and the opportunities – in a similar way. We draw great hope in this news: that common ground exists between us that we can build upon to make a stronger, more resilient Tahoe.




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Provided by North Lake Tahoe Business Association

Since September the work of Envision Tahoe has been guided by an impressive all-volunteer group of private, public, and community leaders carefully selected from all over the Tahoe-Truckee Region for their diverse representation and viewpoints. Each person has agreed to work with their colleagues to inform, propel, and be champions for this change effort. As the co-chairs of this “Catalyst Committee” for Tahoe’s future, we couldn’t be more thrilled to be working with this amazing group of leaders.

We’re excited to present this Community Report to you, and look forward to the opportunity to work together with you in the months and years ahead.

Sincerely,



Ms. Cindy Gustafson
County Supervisor
Placer County
Envision Tahoe Co-Chair



Mr. Chris McNamara
Founder and Editor in Chief
OutdoorGearLab
Envision Tahoe Co-Chair



FOREWARD

The Envision Tahoe Community Report is the second of three planned reports in support of the Envision Tahoe initiative.

The Community Report builds upon the first *Envision Tahoe* report issued in September, 2021: the Tahoe Basin Baseline Report. The Baseline Report utilized the economic analysis and cluster-focused research conducted by Applied Development Economics in 2010 and updated in 2015 and 2017-18 for the Tahoe Prosperity Center (TPC) as foundation. New updates to the original research were then generated by TPC and its consultant firm Integrated Communications Strategies (ICS) using labor market data, job postings, skills and profile analytics, compensation data, and government information sources derived from EMSI, a U.S.-based market data company. Insights were also generated from the U.S. Census's American Community Survey and from published reports from local and regional business and industry trade groups. You can find the 2021 *Envision Tahoe Baseline Report* at www.tahoeprosperity.org/envision-tahoe

The Community Report includes public opinion findings and insights from the recent

2020 U.S. Census as well as labor market data and school district data complements. It has been written to provide a reliable source of trusted information and opinion research to decision makers and the general public to enable the sort of Basin-wide discussion that will lead to joint planning and action to diversify the Basin's economic base. Additional research and in-depth analysis are planned in the coming months based upon areas of opportunity, which will emerge from business leaders and local entrepreneurs, workers, policy makers, long-term residents, government officials, and second homeowners through the *Envision Tahoe* community engagement process.

Special note: The economic, social, and environmental impacts of the pandemic upon the people and institutions in the Basin have been strongly felt, but are not yet fully reflected in government statistics and data reports at the time this report was completed in the winter of 2021. Data references in this report are for the most current data available to the research team. This data lag will require future investigation, incorporation and analysis as progress is made to diversify Tahoe's jobs and business mix for long-term recovery and resiliency.

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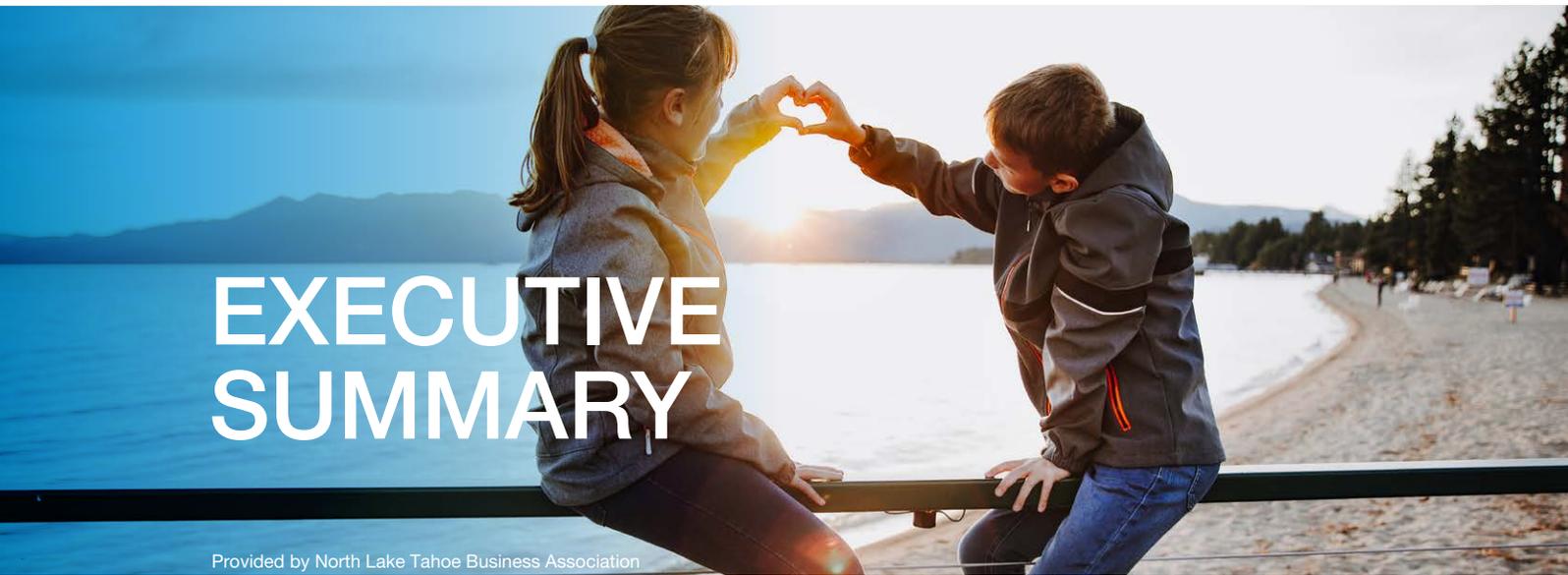
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TAHOE PROSPERITY CENTER



EXECUTIVE SUMMARY

Provided by North Lake Tahoe Business Association

Tahoe residents – regardless of where they live in the region or their individual situations – are unified in their concern that housing, traffic congestion, and other visitor impacts pose the biggest threats to the quality of life in the Tahoe Basin. Unsurprisingly, in the wake of the Caldor Fire, residents also rank wildfires and smoke as among the most significant threats to the Tahoe Region as a whole. And there is a strong consensus across Tahoe over which efforts should be given priority to maintain or improve quality of life for residents and workers.

These and other findings are presented here in the **Envision Tahoe Community Report**, the second report delivered to Tahoe’s leaders, community members, and workforce through *Envision Tahoe: Prosperity Plan 2.0*, an initiative funded by the U.S. Economic Development Administration (EDA) to guide Tahoe’s economic recovery from the pandemic,

increase its resiliency to disruptions, and make Tahoe’s economy more sustainable and inclusive through economic diversification. Envision Tahoe is led by the Tahoe Prosperity Center, the regional community and economic development non-profit for the Tahoe Basin.

“The findings of this new report identify the same housing, traffic and economic disparity issues that Tahoe residents have been struggling with and discussing for years, which is not surprising,” said Heidi Hill Drum, CEO for the Tahoe Prosperity Center. “What is surprising is that updated Census data signals that our economic and housing challenges are persistent and becoming more urgent.”

The Community Report presents the results of extensive qualitative and quantitative research to capture broad and diverse opinions from community members on a wide range of economic and quality-of-life challenges and

opportunities. These included one-on-one interviews with business and community leaders, expert panel discussions on key issue areas, focus groups convened with residents around Lake Tahoe, and an online community survey that generated nearly 1,800 responses.

“One of the imperatives for *Envision Tahoe* was extensive, inclusive engagement with Basin residents to understand their perspectives on our economic and community challenges and how we address them,” said Placer County Supervisor Cindy Gustafson, who serves as a co-chair of the *Envision Tahoe* Catalyst Committee. “We now have input from thousands of residents from diverse walks of life, including parents, young people, employers, workers, community leaders, and others. This feedback will help us link our economic strategies to the needs of our community members.”

“In addition to agreeing on the threats, this survey also shows that residents are unified over what makes Tahoe a great place to live,” said Chris McNamara, owner of OutdoorGearLab, LLC and TechGearLab, and the private sector co-chair of the *Envision Tahoe* Catalyst Committee. “We love the Lake, our outdoor lifestyle, recreation and our connections in the community and solving problems together. These are great building blocks for creating a shared vision for our future.”

The Community Report presents new data that was not available when the *Envision Tahoe* “Baseline Report” was published in Fall 2021. This data shows that Tahoe median home prices have tripled in nine years, from \$345,000 in 2012 to \$950,000 in 2021, while the number of housing units has increased by only 1%. Compared to updated income data, there are zero homes presently listed for sale in Tahoe in a price range that is affordable to a person or couple earning an average median wage of \$53,000 a year.

By late spring 2022, the *Envision Tahoe* initiative will publish a final report with tactical workplans in key activation areas to promote economic resiliency and diversification, as well as efforts to address the housing crisis that underpins much of the region’s challenges.





“Trabajar juntos unidos por un Tahoe mayor.”

– North Lake Tahoe resident on how to improve the quality of life in the Basin. English translation: “Work together united for a better Tahoe.”

THE 2022 TAHOE OPINION SURVEY

“...Creating a welcoming attitude so everyone can work together to keep this place clean, beautiful and sacred.”

– Local resident on how to improve the quality of life in Tahoe

Results in Brief:

- Natural beauty, lifestyle, and recreation make Tahoe a great place to live and work
- Two-thirds of respondents say that things in Tahoe are on the wrong track
- One-quarter of people are struggling to make ends meet
- Lack of housing, traffic, wildfire smoke and vacation rentals threaten residents’ quality of life
- Opinions on how to solve Tahoe’s problems are consistent across the Basin



Methodology

The *Envision Tahoe* team conducted both qualitative and quantitative research to capture broad and diverse opinions from community members in Tahoe and surrounding communities on a wide range of economic and quality-of-life issues.

Between January 5 and January 31, 2022, an online survey was fielded to generate a statistically significant, quantitative measurement of perspectives on what residents love about the Tahoe Basin, what's threatening the quality of life in the Basin, and where resources should be invested to improve or maintain quality of life. Local organizations, news outlets, and the Tahoe Prosperity Center promoted the survey via their own channels and on social media, generating 1,799 survey responses. In addition to observations regarding threats and opportunities in the region, the survey captured demographic data about the survey respondents (e.g., place of residence, homeownership,

education, income levels, and ethnicity) to learn whether responses are statistically distinguishable among different demographic groups.

To develop the survey questions, the *Envision Tahoe* team collected insights from three rounds of qualitative research among community members. These facilitated conversations were important for understanding the issues, experiences and considerations that are shaping current opinions. The qualitative findings also provided a foundation for taking stock of the words and phrases used by people in how they expressed their opinions, and yielded other insights into different communities and their perspectives about how to strengthen and diversify the Basin's economy.

The qualitative research program included the following tactics:

- Between August 11 and August 27, 2021 in-depth interviews were conducted with 15 community leaders throughout the Basin to probe (1) the strengths and weaknesses of the regional economy; (2) the biggest challenges and obstacles confronting communities in the Basin; and (3) areas where new public investments should be directed to strengthen and diversify the regional economy.
- Between October 26 and October 28, 2021 three panel discussions were convened with 17 subject matter experts

in total to assess the state of play in addressing the challenges and barriers in three policy areas: housing, digital access / broadband, and transportation.

- Between December 1 and December 15, 2021 four virtual focus group sessions were conducted with 26 homeowners, government officials, business owners, representatives of nonprofit organizations, and college students who represented communities from the North, South, East, and West shores. These groups discussed opinions and attitudes about the quality of life, community and social dynamics, job and housing markets, transportation issues, and growth in the Basin.



*“Small town chill vibe...the kindness...
the friendliness....”*

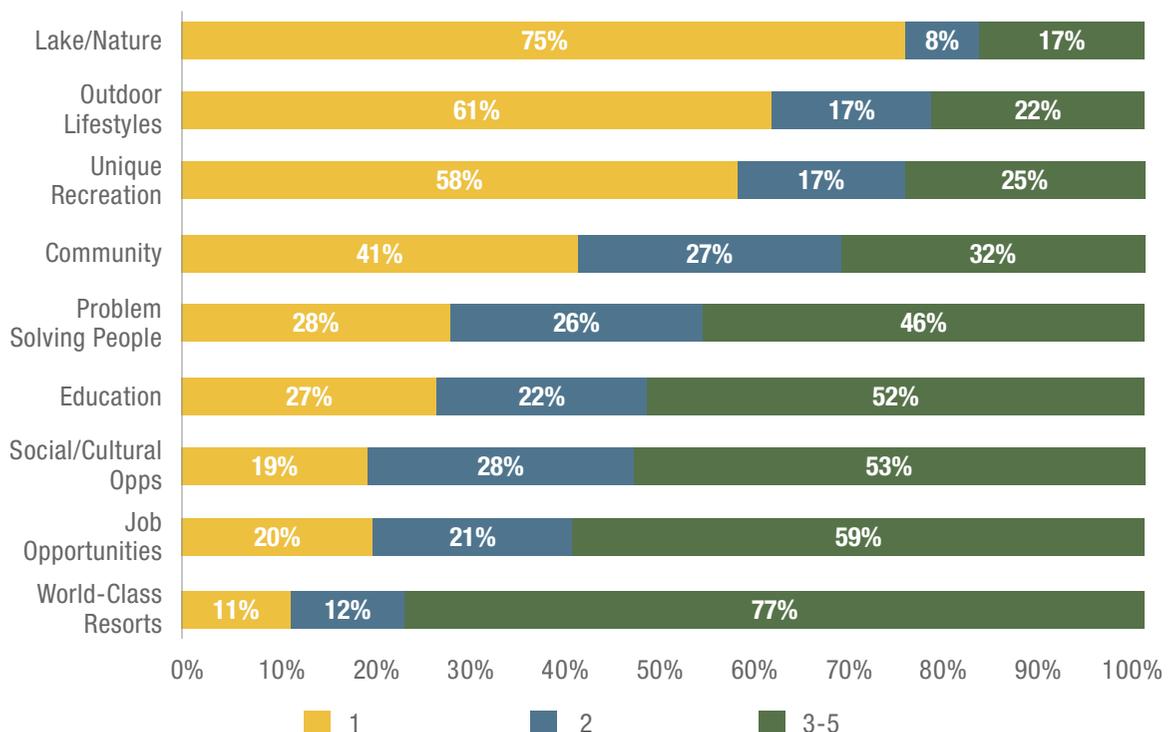
– Tahoe resident, January 2022 on what makes Tahoe a great place to live.

Opinion Survey Results¹

The 1,799 responses to the *Envision Tahoe Community Survey* affirmed that residents remain concerned about the trends that have been troubling the Basin for many years; specifically, housing and traffic congestion. The survey also revealed that residents – regardless of their location, age, income, or gender – are largely unified in their opinions of what makes Tahoe special, what things are threatening the quality of life for residents, and what efforts should be prioritized to maintain or improve quality of life in the Basin.

- Natural Beauty, Lifestyle and Recreation Make Tahoe a Great Place to Live:** Strong majorities of residents cite Tahoe’s natural beauty (75%), its outdoor mountain lifestyle (61%), and unique access to outdoor recreation (58%) as the most important factors that make Tahoe a great place to live. Smaller percentages cited sense of community, education, job opportunities, social/cultural opportunities, and resorts as the most important factor.

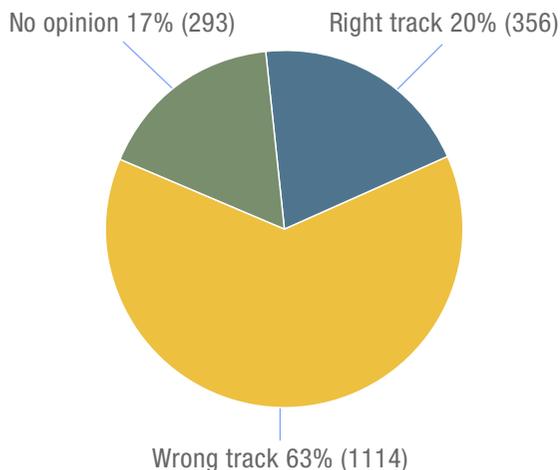
Q7 These are some of the factors that make the Tahoe region a great place to live. Please rank order them with one (1) being the most important factor for you and five (5) being the least important factor for you.



¹ See the Appendix for a more detailed summary of survey results.

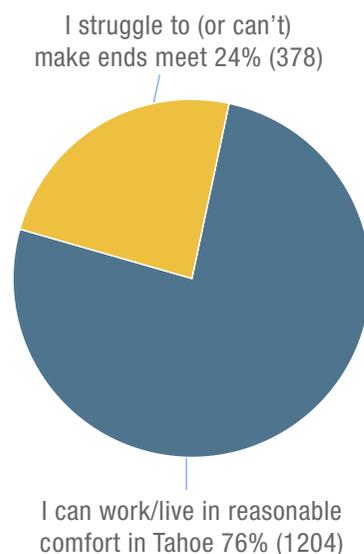
- Tahoe is on the Wrong Track:** 63% of respondents believe that things in the Tahoe Region are “on the wrong track.” Just one in five respondents believe things are on the right track. The amount of respondents who selected “wrong track” may be higher than in previous surveys of Tahoe residents. However, the 63% figure is in line with state and national surveys conducted around the same time as the Envision Tahoe Community Survey. See the appendix for additional background.

Q2 Overall, do you feel things in the Lake Tahoe basin are generally going in the right direction, or do you feel things are on the wrong track?



- One-Quarter of Residents Struggle to Make Ends Meet:** 76% of respondents say they are able to live in “reasonable comfort” in Tahoe, including those who work for a Tahoe-based employer, don’t work, or are self-employed. The remaining 24% said they can barely make ends meet but don’t want to move, must work two or more jobs, or cannot afford to stay in Tahoe and plan to leave. Notably, a higher proportion of homeowners participated in the survey, compared to the percentage of homeowners in the Basin, suggesting that a higher proportion of residents may be struggling to make ends meet than is reflected in these data.

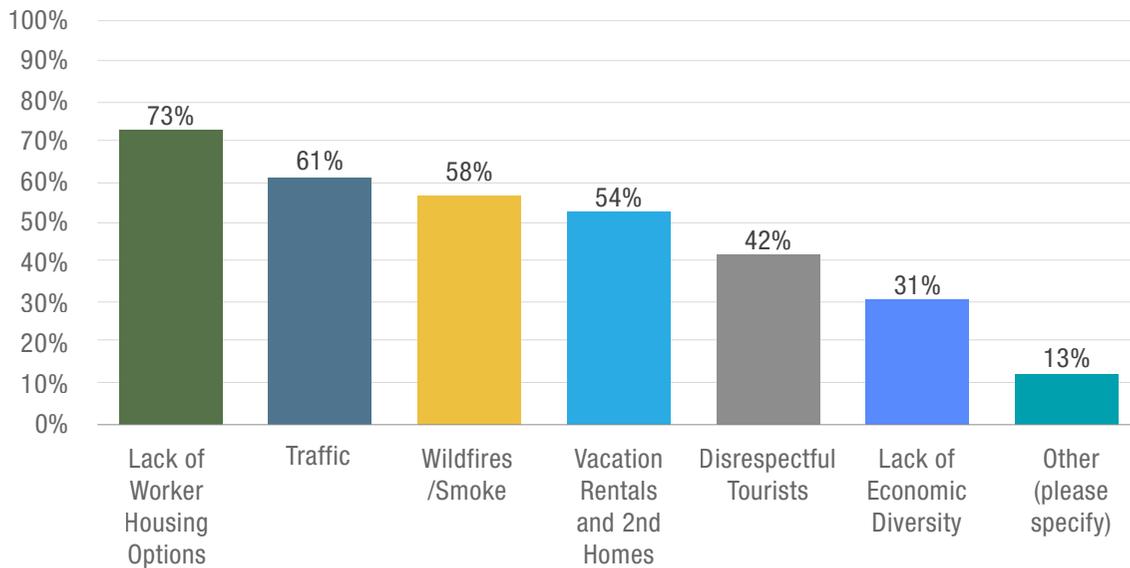
Q6 (Only answer this question if you reside in the Tahoe region full time) Which choice best applies to you?



- Lack of Housing, Traffic Congestion, Wildfire Smoke, and Vacation Rentals Threaten Quality of Life:** 73% of respondents said that lack of stable housing options for workers is the most significant threat to quality of life in the Tahoe Region. From a list of 18 threats, a majority of respondents also selected traffic and lack of transportation options, wildfires and smoke, and too many vacation rentals/second homes as

among the most significant threats to the quality of life in Tahoe. A significant number of respondents also selected disrespectful attitudes among tourists and a lack of economic diversity as key problems. Except for wildfires/smoke, each of the highest-ranking threats relates directly or indirectly to visitor impacts. All other threat options were selected by less than one quarter of respondents as being the most significant.

Q8 These are factors that pose a potential threat to the quality of life in the Tahoe region. Please select no more than five (5) that you believe represent the most significant threats.

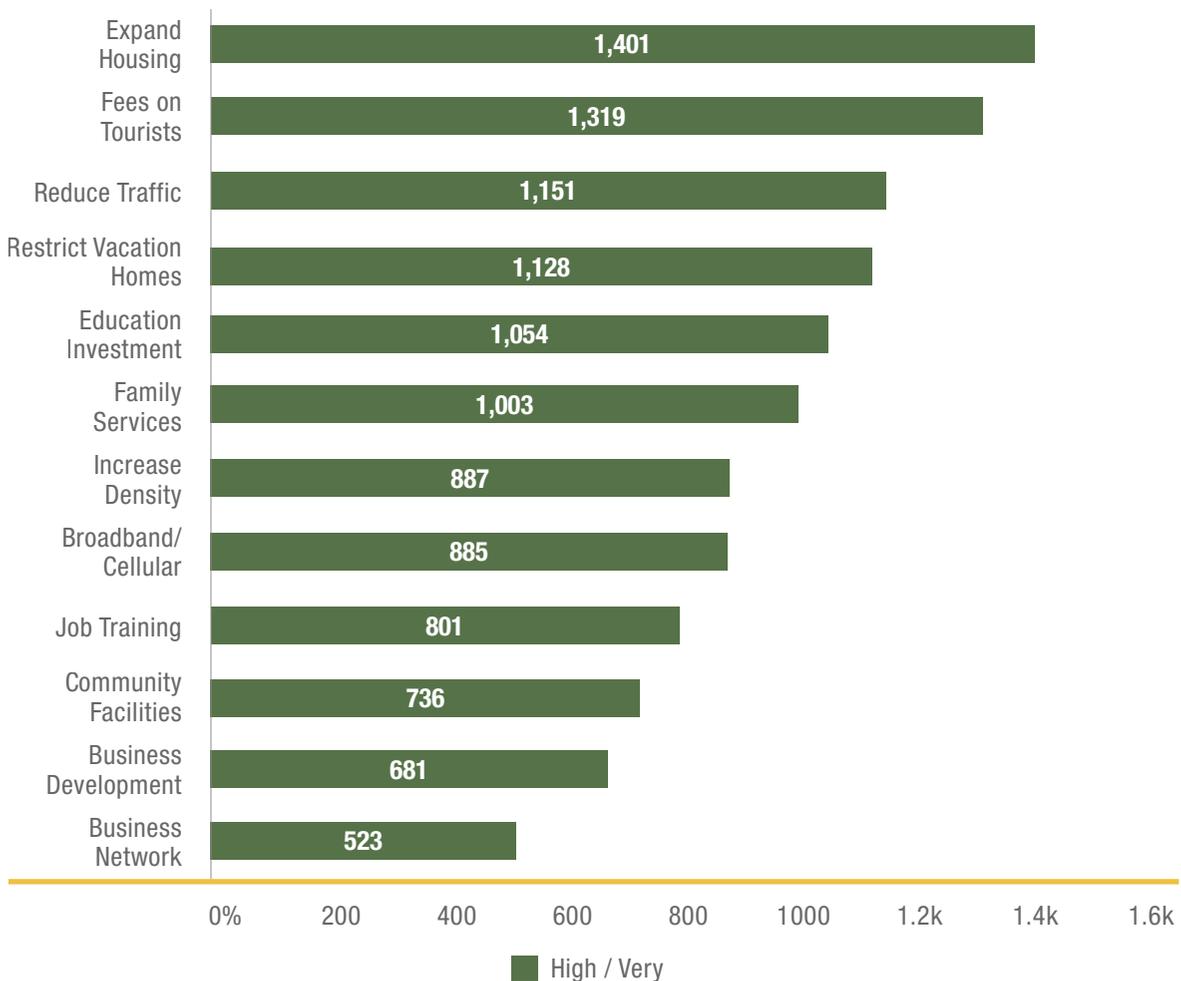


Provided by The League to Save Lake Tahoe

■ **Solutions Should Prioritize Housing, Tourism Fees, Transportation, and Restrictions on Short-Term Rental / Second Homeownership:** From a list of a dozen options, 79% of respondents said that expanding economical housing opportunities for workers should be a “very high” or “high” priority. 75% said a priority should be placed on imposing public access fees on tourists to pay for investments in Tahoe’s environment,

transportation, and community services.² A strong majority of respondents also said “very high” or “high” priority should be placed on developing transportation options/reducing congestion, imposing restrictions on second homeowners and short-term rentals, investing in education, expanding family services, improving broadband/cellular infrastructure, and diversifying housing to include more higher density options.

Q9 Please indicate how you would prioritize efforts to maintain or improve quality of life in the Tahoe Basin (very high, high, somewhat high, medium, or low priority).



² Fees on tourists was presented only in concept. No specific proposal or type of fee was presented in the survey.



When asked an “open-ended” question for suggestions to improve quality of life, respondents most frequently cited the same issues of housing, transportation, tourism management, community infrastructure, short-term rentals, and charges on tourists.

likely to be renters, report lower income, more likely to be women, and less likely to be White. This group was more likely to identify lack of stable housing options as the biggest threat, and more likely to cite too many vacation rentals as a threat to quality of life. This group

“Visitors help support a thriving, diverse and growing community. If we aren’t growing in some form, we digress.” – Tahoe resident, January 2022

■ **Opinions Consistent Throughout Basin and Across Demographics:**

Responses were received from communities throughout the Basin and from residents at all age, education, and income levels, as well as from various ethnic groups (including 36 respondents to a Spanish language version of the survey). Compared to demographics in the Basin, survey respondents were somewhat younger, on average, and more likely to be homeowners. When analyzed by demographic subgroups, survey responses were generally consistent.

One observed difference was among the 24% of respondents who said they were struggling to make ends meet. These respondents were younger, more

was also more likely to assign a “very high” priority on expanding housing and imposing fees on tourists.

Another observed difference was among respondents to the Spanish language survey. These respondents were younger, more likely to be renters, more likely to live in the City of South Lake Tahoe, and report lower income levels. These respondents were more pessimistic about Tahoe’s direction, were more likely to struggle to make ends meet, more likely to cite education and job opportunities as important to Tahoe’s quality of life, and more likely to rate lack of high-paying jobs as a threat to quality of life. When asked to prioritize solutions, these respondents were more likely to cite restrictions on second homeownership and expanding community services for families.

RECENT SOCIAL AND ECONOMIC DATA FOR THE TAHOE BASIN



Photo by: Rachid Dahnoun

Results in Brief:

- Tahoe's 20-year population decline changed direction in 2019 and population growth accelerated in 2020, but is still lower than the population count in year 2000
- Tahoe's population today is less White and more diverse than 10 years ago
- The total number of housing units increased in the Basin 1.35% from 2010 to 2020
- The median average wage in Tahoe is \$53,165 while real estate reports show the median home price in January 2022 has risen to \$950,000
- K-12 public school enrollment data shows an overall decline in student population over the past five years, including the pandemic years

Methodology

For this research update, the Envision Tahoe team gathered and analyzed U.S. Census Data from 2000, 2010, and 2020 to uncover short- and long-term trends and issues. Trends are discussed in the context of other comparator areas in California and Nevada. In addition to Census data, additional facts and figures are used from Economic Modeling Systems, Inc. (EMSI), an international labor market data company, and other reliable sources.

Special note: Because the Tahoe Region encompasses five counties spanning California and Nevada and two metropolitan statistical areas (MSA), great care was taken to ensure the data and charts used here are an accurate representation of the Tahoe Region and its people. Readers should be aware that, due to the impact of COVID 19, the Census Bureau released a limited number of data tables for the nation and states following the official completion of the Census October 2020. Thus, the range of census data traditionally gathered by the Tahoe Prosperity Center was not available at a usable geographic scale for the Tahoe Basin at this time. This limited the scope of this report in several areas.

Important Definitions

Throughout this summary the following terms are defined as follows:

Tahoe Region – The census tracts surrounding Lake Tahoe which are part of five counties that comprise the Tahoe Basin: two counties in California (El Dorado and Placer) and three counties in Nevada (Washoe, Douglas and Carson City).

North Lake Tahoe (or North Shore) – Subset of Placer and Washoe counties within the Tahoe Basin.

South Lake Tahoe (or South Shore) – Subset of Douglas and El Dorado counties, including the City of South Lake Tahoe, within the Tahoe Basin.

Metropolitan Statistical Area (or MSA) – Defined by the U.S. Office of Management and Budget and used by the U.S. Census Bureau and other federal government agencies for statistical purposes. A typical MSA is centered on a large city or metropolitan area with high population at its core and economic ties throughout. There are 392 MSAs in the United States. The Tahoe Region is split between the Reno-Carson City Combined MSA and the Sacramento Combined MSA.

Key Research Findings

The latest U.S. Census figures show that the Tahoe Region has seen significant changes in recent years, influenced by the pandemic. Population counts have increased dramatically since 2019, presumably due to the rise of remote work and as new and previously part-time home owners with vacation properties took up full-time residency in Tahoe. This trend has also dramatically accelerated the rise in home prices, now pegged at \$950,000 for a median priced home in Tahoe, according to Chase International. Census occupancy data shows that the total number of housing units increased by only 1.35 percent from 2010 to 2020, with little change in the occupancy status, which sits around half occupied vs. unoccupied units.

While Tahoe is less White and more diverse than 10 years ago, the Hispanic / Latino population count has declined since 2010, as has the Native American population who call Tahoe home. It is also important to note that the population counts for people who identify as Asian and people who identify as two or more races have increased dramatically.

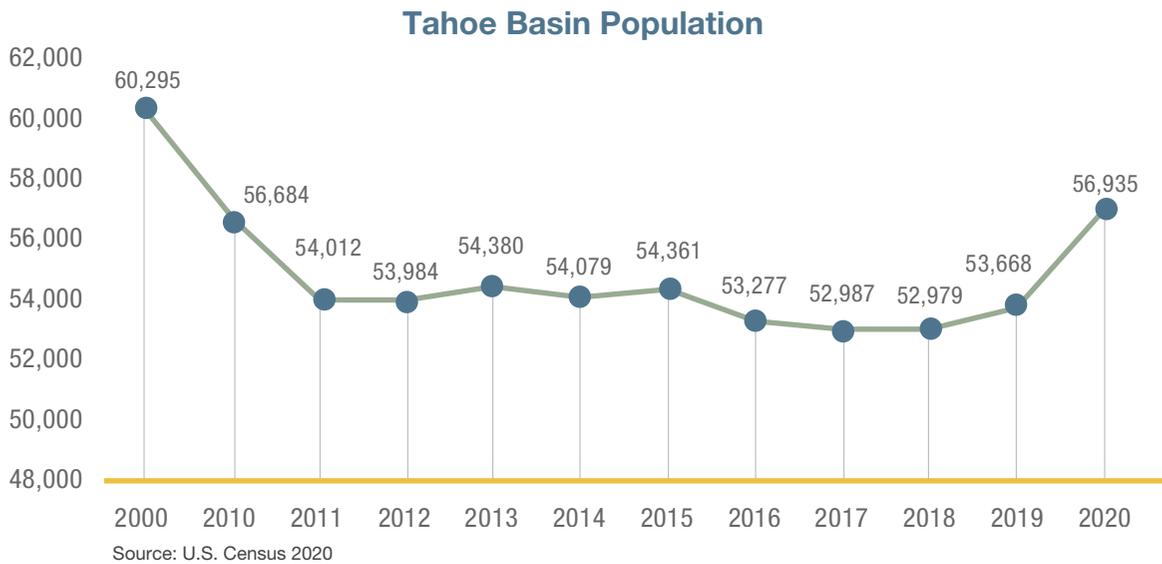
Moreover, although the overall Basin population has increased in recent years, public K-12 student enrollment has declined by four percent over the past five years, with no measurable change during the pandemic years. This decline may suggest that:

- parents with children are leaving Tahoe, or placing them in other education settings, including homeschooling, private schools, and/or
- the population increase in Tahoe is predominantly people without school-age children and/or retirees, and/or
- students graduating out of the school system are not being replaced by younger school-aged children; or
- during the period when the Census was taken, new Tahoe residents may have kept their school-age children enrolled remotely in existing schools outside the region; or
- some other phenomenon.

Key Findings | Demographics

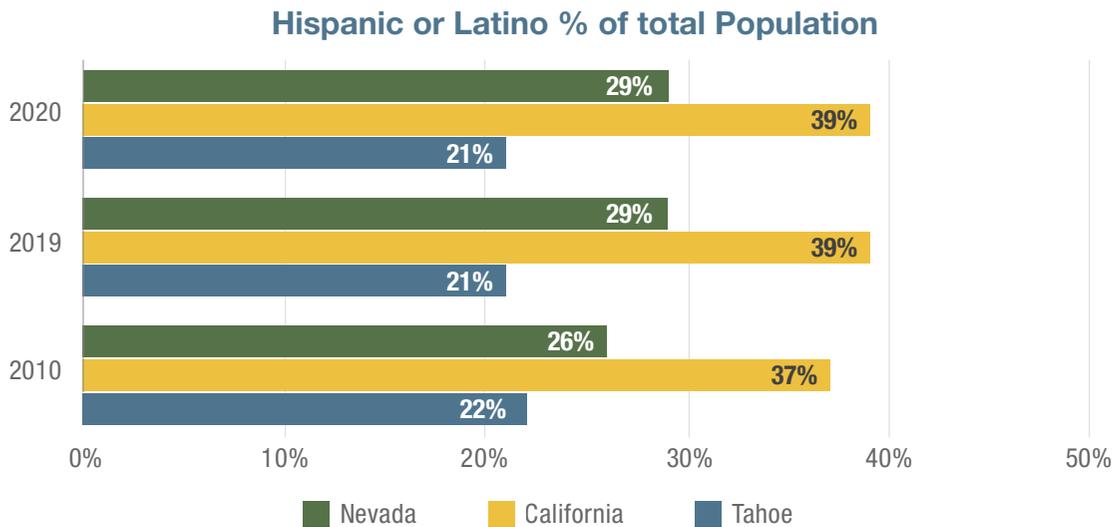
- Tahoe saw a recent reversal in the 20-year trend of population decline, adding 3,267 residents between 2019 and 2020 (a 5.6 percent increase), which may be explained by an influx of people moving to the Tahoe Region and/or transforming their vacation home / rental to their full-time residence in order to take advantage of remote work options during the pandemic. It is unclear if this is a temporary or permanent trend. Still, the region's overall resident population remains 3,360 lower than in the year 2000.

Tahoe has lost population over the past 20 years, but recent trends show a population influx that started in 2018 and picked up in 2020 that some attribute to the rise of remote work.



- The Tahoe Region became more diverse during the last decade. Those who identify as White dropped from an 86 percent share of the population in 2010 to a 72 percent share in 2020. There are 6,059 fewer people in the region who identify as White in 2020 compared to 2010. The number of individuals who identify as two or more races increased dramatically in the same period, from 1,289 in 2010 to 6,803 in 2020.
- While the Hispanic / Latino population grew dramatically between 2010 and 2020 in California (2.12 million net gain) and Nevada (216,360 net gain), the total Hispanic / Latino population in the Tahoe Region fell slightly during the same period, losing 234 individuals to a total of 11,962 in 2020.

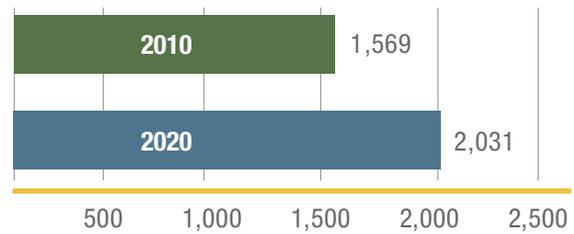
While the Hispanic or Latino population has risen in California and Nevada steadily over the past 10 years, the Tahoe Basin has seen a slight decline in Hispanic or Latino population during the same period.



Source: U.S. Census 2020

- The number of people who identify as American Indian and Alaska Native in the Tahoe Region declined slightly (-51) from 2010 to 2020 to 634 individuals.
- People who identify as Black or African American in the Tahoe Region represent less than one percent of the region’s population base (277 individuals). The Black or African American population rose very slightly (+31) from 2010 to 2020.
- People who identify as Asian saw a notable increase in their population in the Tahoe Region from 1,569 in 2010 to 2,031 in 2020, a 23 percent increase during the period.

Tahoe residents who identify as Asian increased 23 percent from 2010 to 2020.



Source: U.S. Census 2020

Key Findings | Income

- The average median annual earnings in the Tahoe Region for 2020 was \$53,165, according to data compiled by EMSI. Using the three-times-gross-income calculation, a person earning the median income in the region could afford a \$159,495 home or condo; a

couple making this amount could afford a \$318,990 home or condo in or around the region. At present, there are no home or condo listings in the Tahoe basin at this price point based on recent searches using the real estate listing websites Zillow, Redfin, or Realtor.Com, the most visited home and rental listings websites in the U.S.

The average median annual earnings in the Tahoe Basin were \$53,165 in 2020.

2020 Average Median Income in Tahoe by Occupation

Tier	Description	Amount
Top	Healthcare Practitioners and Technical Occupations	\$ 98,793.64
	Legal Occupations	\$ 98,666.80
	Management Occupations	\$ 87,721.41
	Architecture and Engineering Occupations	\$ 84,891.40
	Computer and Mathematical Occupations	\$ 84,729.69
	Life, Physical, and Social Science Occupations	\$ 73,801.45
Middle	Community and Social Service Occupations	\$ 54,506.19
	MEDIAN WAGE IN TAHOE	\$ 53,165.49
	Educational Instruction and Library Occupations	\$ 52,095.66
	Installation, Maintenance, and Repair Occupations	\$ 51,007.87
	Construction and Extraction Occupations	\$ 50,025.03
	Protective Service Occupations	\$ 48,433.27
Lower	Arts, Design, Entertainment, Sports, and Media Occupations	\$ 44,981.32
	Office and Administrative Support Occupations	\$ 39,257.92
	Production Occupations	\$ 38,109.77
	Transportation and Material Moving Occupations	\$ 34,635.24
	Healthcare Support Occupations	\$ 34,422.84
	Sales and Related Occupations	\$ 32,674.43
	Building and Grounds Cleaning and Maintenance Occupations	\$ 32,422.27
	Personal Care and Service Occupations	\$ 29,680.60
	Food Preparation and Serving Related Occupations	\$ 28,003.09
	Military-only occupations	\$ 27,564.21
Farming, Fishing, and Forestry Occupations	\$ 26,413.46	

Source: EMSI, 2022

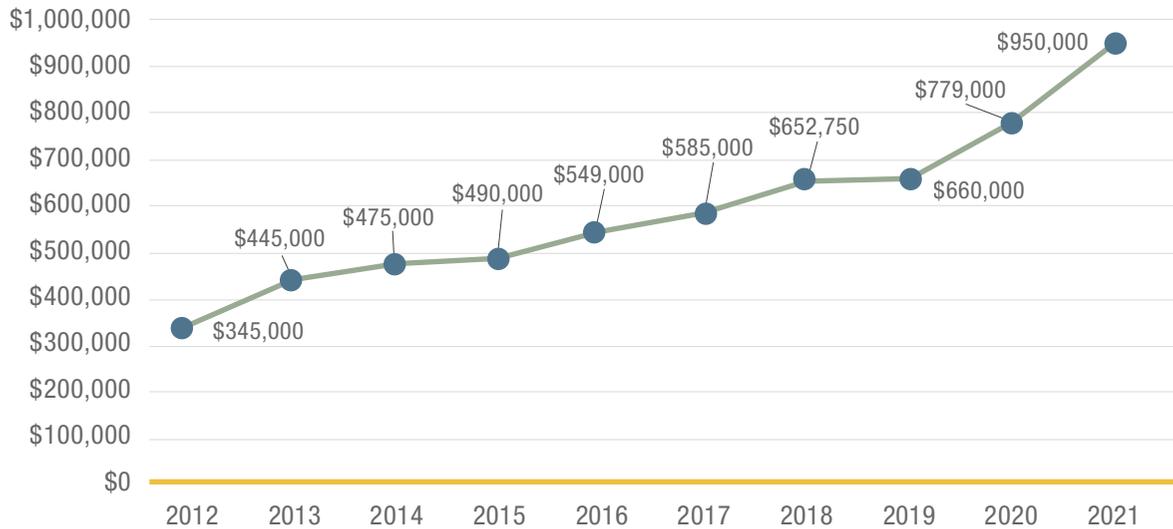
- Professions in the top third of average median annual incomes in 2020 within the Tahoe Region include healthcare practitioners and technical occupations (\$98,794), legal occupations (\$98,667), architecture and engineering professions (\$84,891), computer and mathematical occupations (\$84,730), management professions (\$87,721), life, physical, and social science occupations (\$73,801), and business and financial operations (\$69,969).
- Construction, installation and repair, educational instruction, community and social service occupations, protective services, and arts, design, entertainment, sports, and media occupations fall in the mid-tier of Tahoe Region occupations by median earnings, with an average median annual salary of \$50,175 in 2020.
- In the lower tier, food serving and preparation, building and grounds cleaning and maintenance, personal care, sales, and office administration professions had an average median annual income of \$32,318 in 2020.

Note: Due to the lack of information released in the 2020 Census, the research team utilized **Average Median Wage Data by Occupation (EMSI)**. This data refers to the type of job someone performs, not which industry they perform it in.

Key Findings | Housing

- Census data show that the total number of housing units in the Tahoe Region increased by 661 from 2010 to 2020 (or 1.35 percent) to a total of 49,116 units.
- The percentage of occupied housing units in the Tahoe Region increased by one percent to 51.2 percent of total units from 2010 to 2020. The near 50-50 occupied-to-unoccupied ratio in the region stands in sharp contrast to the statewide averages in California and Nevada. Each state currently hovers above 90 percent occupied vs unoccupied in the 2020 Census, illustrating the dramatic difference in the Tahoe Region given that vacation and second homes are so prevalent there.
- According to Chase International, the 2021 median home price in the Tahoe Region stands at \$950,000, tripling over the last nine years. An individual or couple would need to earn between \$317,000 - \$380,000 in gross income per year to afford the median priced home in the region, using the traditional formula of 2.5 to 3 times annual gross salary to calculate reasonable affordability.

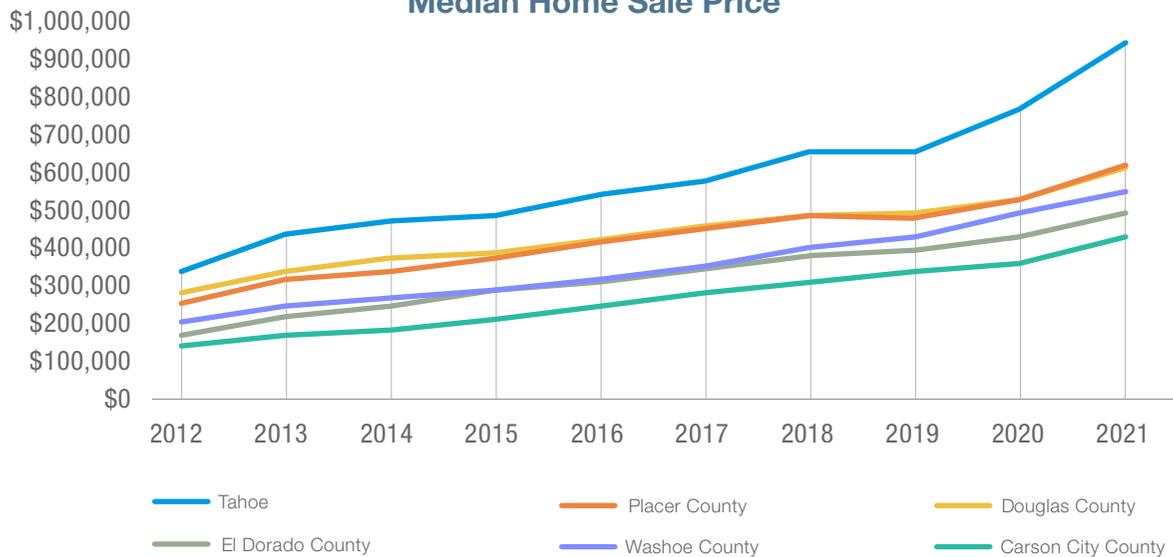
Tahoe Median Home Price



Source: Chase International, 2022

The 2021 median home price in Tahoe is \$950,000, far outpacing median home prices in surrounding counties.

Median Home Sale Price



Source: Chase International, 2022

- The 2021 median price of a condominium in the Tahoe Region is \$713,000, increasing by \$455,000 or 271% since 2012, also according to Chase International.



TAHOE PROSPERITY CENTER

Key Findings | Student Enrollment

- The Tahoe Truckee Unified School District, the Lake Tahoe Unified School District in South Shore, and K12 schools serving Incline Village and Zephyr Cove saw a combined loss of 361 students over the five-year period ending in the 2020-21 school year, down to 9,159 students.
- The largest school district in the region, Tahoe Truckee Unified located on North Shore with more than 4,000 students, experienced a small net gain of students between 2015 and 2021. This growth occurred primarily in the 2016-17 academic year and has remained relatively flat since then.
- The second largest district, Lake Tahoe Unified located on South Shore, has seen its student enrollment decline by seven percent to 3,725 total students from 2015 - 2021.

Overall student enrollment figures in K-12 schools in Tahoe show a decline in enrollment, including in the pandemic years (2019-20). The exception was Creekside and Squaw Valley prep and the Tahoe Expeditionary Academy and Lake Tahoe School.

Place	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Tahoe Truckee Unified SD	4,010	4,153	4,133	4,168	4,193	4,159
Lake Tahoe Unified SD	3,996	3,951	3,906	3,872	3,905	3,725
Creekside and Squaw Valley Prep	199	159	183	192	188	209
Tahoe Expedition Academy and Lake Tahoe School	287	318	319	366	421	430
Incline Village	926	909	848	830	810	805
Zephyr Cove	389	390	312	312	292	261
Public and Private Schools Total	9,807	9,880	9,701	9,740	9,809	9,589

Sources: California, Washoe County, Douglas County, Nevada Report Card, Lake Tahoe School, Tahoe Expedition Academy



ENVISION TAHOE SURVEY: SUMMARY OF TOPLINE RESULTS

(Total Responses = 1,799)

Right Track/Wrong Track

Q2: Overall, do you feel things in the Lake Tahoe Basin are generally going in the right direction, or do you feel things are on the wrong track?

- A large majority (63%) of survey respondents believe that things in the Tahoe Region are “on the wrong track.” By contrast, only one-in-five (20%) survey respondents believe that things are generally going in the right direction.
- For context, national polling firms that asked survey respondents in the U.S. if the country was on the right track or wrong track during the month of January found that between 62% and 72% of survey respondents felt the country was on the wrong track. The average of these five national polls was 66.6%.³

Living Conditions for Residents⁴

Q6: (Only answer this question if you reside in the Tahoe region full time) Which choice best applies to you?

- When asked about their living conditions, approximately three-quarters (76%) of respondents reported that they are able to live in “reasonable comfort” in Tahoe. This group comprises those who work for a Tahoe-based employer (23%), those who do not work (22%), those who own their own company or are self-employed (17%), those who work remotely for a company outside of Tahoe (10%), and those who live in Tahoe but commute to work elsewhere (3%).

³ Sources: Rasmussen survey 1/14 to 1/27, YouGov survey 1/22 to 1/25, Politico survey 1/22 to 1/23, Reuters survey 1/19 to 1/20, and NBC News survey 1/14 to 1/18

⁴ Responses to this question are likely influenced by the high proportion of resident homeowners in the survey sample. Whereas 73% of survey respondents are full- or part-time Tahoe residents who own their home, only 51% of Tahoe residences are occupied and 60% of these units are occupied by owners.



- Approximately one-quarter of respondents (24%) noted that they struggle in some way to live in the Tahoe Region. This group comprises those who say they can barely make ends meet but do not want to move (12%), those who need to work two or more jobs to make ends meet (7%), and those who cannot afford to continue living in Tahoe and plan to move away (6%).

What Makes Tahoe a great place to live

Q7: These are some of the factors that make the Tahoe Region a great place to live. Please rank order them with one (1) being the most important factor for you and five (5) being the least important factor for you.

- When asked to rank the importance of factors that make the Tahoe Region a great place to live on a scale of 1-5 (1 being most and 5 being least important), respondents most frequently applied the highest ranking to the following:
 - the lake and natural beauty of Tahoe’s environment (75% ranked most important),
 - mountain outdoor lifestyle (61% ranked most important),
 - and unique access to outdoor recreational opportunities (58% ranked as most important).⁵
- Fewer than half of the respondents gave the highest ranking of “most important” to the other factors listed in the survey, which included:
 - sense of community/small town feel (41%),
 - people sharing a commitment to solving problems (28%),
 - quality education (27%),
 - job opportunities (20%),
 - social/cultural opportunities (19%), and
 - resorts that attract travelers from all over the world (11%).

⁵ Q7 asked respondents to rank each factor on a scale of 1-5, most to least important. Respondents were not asked to rank the factors against one another; thus, percentages add up to greater than 100%.

Threats to Quality of Life in Tahoe

Q8: These are factors that pose a potential threat to the quality of life in the Tahoe Region. Please select no more than five (5) that you believe represent the most significant threats.

- When asked to select just five factors that pose a risk to the quality of life in the Tahoe Region (out of 18 potential factors), respondents most frequently selected a lack of stable housing options for workers (73%). A majority of respondents also selected:
 - traffic congestion/lack of transportation options (61%),
 - wildfires and smoke (58%),
 - and too many vacation rentals/second homes (54%).
- The most frequent, non-majority responses were:
 - disrespectful attitudes and behavior of tourists (42%) and
 - lack of economic diversity/over-reliance on tourism (31%).
- All other factors presented in this survey question were selected by approximately one quarter of respondents or less as being one of the five most significant threats to the quality of life in the Tahoe Region. These factors included: tourism; declining snowpack; no cohesive community or economic vision; lack of high wage job opportunities; not enough amenities serving local residents; anti-tourist sentiment among residents; anti-progress/anti-development attitudes; lack of skilled workforce; lack of social services; lack of capital investment; lack of career training/upward mobility; and lack of resources for entrepreneurs.

Efforts to Maintain or Improve Quality of Life

Q9: Please indicate how you would prioritize efforts to maintain or improve quality of life in the Tahoe Basin (very high, high, somewhat high, medium, or low priority).

- When asked to prioritize efforts to maintain or improve quality of life in the Tahoe Region, a majority of respondents said that a “very high” priority should be given to two efforts: 1) expand and promote economical housing opportunities for the local workforce (57%), and 2) impose public facility access fees on tourists to pay for environmental cleanup, reduce congestion and increase investment in Tahoe’s communities and people (55%).



- When combining “very high” and “high” priority responses, expanding economical housing opportunities was selected by 79% of respondents, and imposing a public facility access fee was selected by 75% of respondents.
- Combining “very high” and “high” priorities, a majority of respondents indicated that priority should also be given to the following: develop more transportation alternatives to get around Tahoe and reduce congestion (65%); impose restrictions on second homeowners and short-term rentals (64%); invest in K-12 and community college education to focus on future job skills (60%); expand community services to support families (57%); build more reliable, affordable broadband and/or cellular infrastructure (50%); and diversify Tahoe’s housing to include more higher density options (50%).
- Less than a majority of respondents applied a combination of “very high” and “high” priority to the following: expand programs that offer job and skills training for residents to growth their careers and increase wages (45%); expand availability of community facilities and gathering places for residents (42%); expand business development programs to bring more employers to Tahoe and diversity job base (39%); and create a network of business leaders, entrepreneurial incubators and capital sources to help entrepreneurs locate and grow business in Tahoe (30%).
- Efforts that received the highest percentage of “very high” selections generally received the highest weighted average drawn from the five levels of prioritization. One exception to this finding is that imposing restrictions on second homeowners and short-term rentals received more “very high” responses (46%) than developing more transportation alternatives (38%), but a lower weighted average score. Similarly, diversifying Tahoe’s housing to include more high-density options received more “very high” responses (29%) than expanding community services (27%) or broadband/cellular improvement (26%), but a lower weighted average score.

Suggestions to Improve Quality of Life, the Environment, and the Economy

Q10: If you had one suggestion to share that would improve the quality of life, the environment, and the economy at Lake Tahoe, what would it be?

- Respondents were presented with an “open ended” question to offer their suggestions for improving quality of life, the environment and the economy in Tahoe. These comments were categorized to identify common themes. Based on this analysis, the most frequent themes in the 1,721 comments were consistent with responses to the other survey questions and focused on the following:
 - More local housing options (20%)
 - Improve transportation/transit/parking to reduce traffic (17%)
 - Improve tourism management (14%)
 - Improve the environment and community infrastructure (12%)
 - More restrictions on short-term rentals and second homes (12%)
 - Impose charges on tourists/non-full-time residents (9%)
 - Prioritize local residents over tourists (8%)
- Comments were made less frequently, but still common in the following categories:
 - Reduce development and prioritize the environment
 - Reduce anti-tourist sentiment
 - Streamline government processes
 - Diversify the economy
 - Improve outdoor recreation access
 - Create better job opportunities
 - Improve wages/reduce cost of living

Demographics

- Responses were received from the following communities around the Lake Tahoe Basin:
 - Tahoe City/Kings Beach/Tahoe Vista – 11%
 - Truckee – 16%
 - Crystal Bay/Incline Village – 23%
 - West Shore (Homewood/Tahoma) – 3%
 - East Shore (Glenbrook/Zephyr Cove/Roundhill/Stateline) – 6%
 - City of South Lake Tahoe – 19%
 - South Shore (El Dorado County/Meyers/Cascade Lake/Fallen Leaf) – 18%
 - Outside the Tahoe Region – 4%
- Nearly nine in 10 survey respondents (87%) were of working age (18-65). The largest age demographic was 26-45 (37%), followed by 45-65 (29%), and 18-25 (21%). Smaller percentages of responses were received from those between 66-75 (9%), older than 75 (3%), and under 18 (<1%).
- Approximately two-thirds of survey respondents own a home and live in the Tahoe Region full-time (67%). Full-time residents who rent made up 18% of the survey sample. Homeowners who own a home and live in Tahoe a part of the year made up 6% of the respondents. Homeowners who utilize their property solely as a vacation home made up 4%. Visitors made up 3% and those who commute into Tahoe for work made up 2% of the response sample.
- When combined, homeowners who live in full-time or part-time in Tahoe make up 73% of the survey sample. According to U.S. Census data, approximately half of Tahoe housing units are occupied and 60% of these units are occupied by owners, indicating that homeowners are over-represented in the survey responses, compared to their prevalence in the Tahoe region.
- The gender breakdown of survey respondents was 61% female, 32% male, 7% prefer not to say, and 0.2% trans/non-binary.
- More than eight in 10 survey respondents (82%) reported their educational level as college degree, post-graduate, or advanced degree. Thirteen percent (13%) attended some college or trade school, and 3% were high school graduates.



- The largest group of respondents selected White as their race / ethnicity (81%), followed by prefer not to say (12%), then Hispanic or Latino (6%). Respondents who selected Black, Asian, Native American, Native Hawaiian/Pacific Islander were each 2% or less of total responses. Most respondents (98%) identified English as the primary language spoken in their home.
- One third of respondents (33%) reported earning individual income of less than \$95,000 per year. For context, U.S. Census data indicates that 35% of Tahoe households earn less than \$95,000 annually. Within the group earning less than \$95,000, the largest group (21%) earn income between \$50,000 and \$95,000 and 11% of total respondents earn income of less than \$50,000. Roughly half (49%) of respondents reported an annual income of more than \$95,000 and 17% reported income over \$200,000 annually.

Notable Differences in Responses by Respondent Characteristic

- In general, responses were similar across various geographic, age, economic, and other demographics.
- Statistical differences were observed among two groups of survey respondents: 1) those who indicated they were struggling to make ends meet, and 2) those who responded to the Spanish-language version of the survey.

“Struggling to Make Ends Meet” Subgroup (Question 6)

- Statistical differences were observed when evaluating the 24% of respondents who reported that they were struggling in some way to make ends meet (Question 6). Characteristics of this subgroup were as follows:
- Younger than the overall response group, specifically in the 18-25 demographic; this age bracket made up 36% of the subgroup, compared to 22% of the entire survey sample.
 - More than twice as likely to be renters; renters were 47% of this subgroup compared to 18% of the entire sample.
 - More likely to cite the lack of stable housing options for workers as the most significant threat to quality of life in the Tahoe Region; the subgroup selected this option 82% of the time compared to 73% of the entire sample.



- Far more likely to cite too many vacation rentals and second homes as a threat to quality-of-life; this option was selected by 74% of this subgroup compared to 54% of the entire sample.
- More likely to assign “very high” priority for efforts to expand economical housing opportunities (74% vs. 57%), imposing public facility access fees on tourists (68% vs. 56%), and imposing restrictions on second homeowners and short-term rentals (73% vs. 47%).
- Among this subgroup, annual income was far more likely to be below \$95,000 (65% vs. 33% of the entire sample), more likely to be women (68% vs. 61%), less likely to be White (77% vs. 81%), and somewhat less likely to speak English in the home (96% vs. 98%).

Respondents to Spanish-Language Survey

- Differences were observed among the 36 respondents who took the Spanish-language version of the Envision Tahoe Community Survey:
 - More likely to believe things in Tahoe are on the wrong track; 75% of this group responded that Tahoe was on the wrong track, compared to 63% of the entire sample.
 - More likely to reside in the City of South Lake Tahoe; 53% of this group live in S. Lake Tahoe, compared to 18% of the entire sample.
 - More likely to be in the 26-45 age demographic; 69% of this group is between 26-45, compared to 37% of the entire sample.
 - Much more likely to rent; 81% of this group rents and lives in Tahoe full-time, compared to 18% of the entire sample.
 - Much more likely to say they are struggling to make ends meet and cannot afford to live in Tahoe; 86% of this group said they needed to work two jobs, can barely make ends meet or plan to move away, compared to 24% of the entire sample.
 - More likely to cite quality education and job opportunities as important factors that make Tahoe a great place to live; 53% of this group cited quality education as most important, compared to 26% of the entire sample; 50% cited job opportunities, compared to 20% of the entire sample.



- More likely to rate lack of high-paying jobs opportunities as a top threat to quality-of-life in Tahoe; 67% of this group cited lack of job opportunities, compared to 22% of the entire sample.
- More likely to call for the following efforts to be given “very high” or “high” priority, compared to the entire sample:
 - Impose restrictions on second homeownership and short-term rentals (78% vs. 64%)
 - Expand community services to support families (75% vs. 57%)
- Less likely to prioritize imposing fees on tourists; 61% of this group placed very high or high priority on such efforts, compared to 75% of the entire sample.
- More likely to earn less than \$95,000; 86% of this group earned less than \$95,000, compared to 33% of the entire sample.



Provided by California Tahoe Conservancy

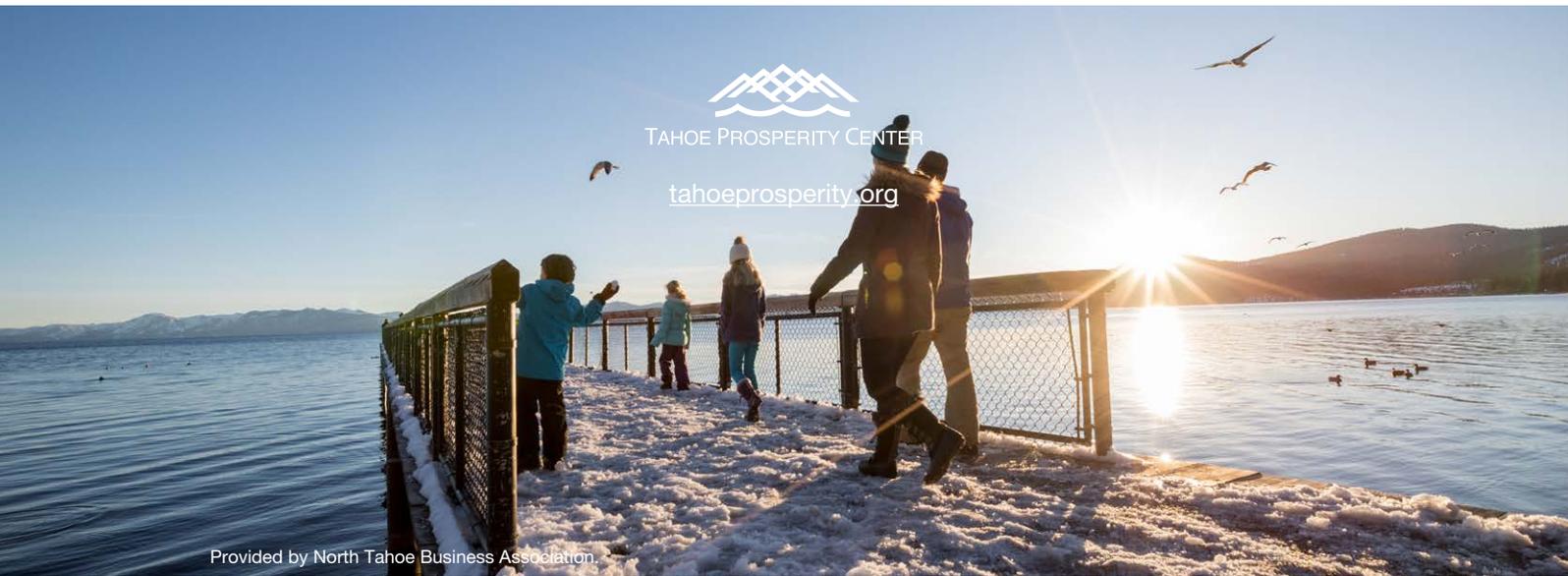
Contributors and Sponsors

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ENVISION TAHOE

A nine-month Basin-wide leadership initiative organized by the Tahoe Prosperity Center and underwritten by the U.S. Economic Development Administration to facilitate an economy recovery and resiliency strategy for the Tahoe Basin emphasizing economic diversification.

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