MEASURING FOR PROSPERITY

The Tahoe Prosperity Center is uniting Tahoe's communities to strengthen regional prosperity.

Prosperity is defined as the condition of being successful or thriving, especially economic well-being. In order to ensure prosperity in the Lake Tahoe Basin, we must first understand where we are and where we are heading. Measuring for Prosperity does just that.

TAHOE PROSPERITY CENTER

tahoeprosperity.org

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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

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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 higher wages. 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 inaugural **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).
- **Community Revitalization** – getting rid of blight and promoting environmental redevelopment so that Tahoe is a thriving place to live – not just to visit.
- **Connected Tahoe** – expanding high-speed internet access and cell phone coverage.
- **Workforce Tahoe** – ensuring Tahoe businesses and residents are prepared for the changing jobs, regional influences and education needs in the new global economy.

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TAHOE MOUNTAIN RESORTS FOUNDATION

The Measuring for Prosperity Report was generously funded by the Tahoe Mountain Resorts Foundation and the Parasol Tahoe Community Foundation. The Tahoe Prosperity Center appreciates the support of these two foundations that recognize the importance of creating a community and economic indicators report specific to the Tahoe Basin. The Tahoe Prosperity Center also looks forward to expanding the indicators in this report in the future. Public input on this report is encouraged so that this report continues to reflect the needs of our Tahoe Basin communities.

parasol
TAHOE COMMUNITY FOUNDATION

TABLE OF CONTENTS

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. The report 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 key trends highlighted by the indicators fall into three main topic areas: Jobs and income; demographics; and social conditions. Taken as a whole, the indicator trends suggest the relative health of the Tahoe Basin economy is poor but improving.

JOBS AND INCOME

The Lake Tahoe Basin lost more than 5,000 jobs in the ten years between 2003 and 2013. Since 2008, the region has lost 6,500 workers from the labor force. While the statistics show more jobs than workers in 2013, many of the jobs are part time and for many workers, the wages are too low to afford housing so they commute from outside the Basin to work. Unemployment rates in the Basin have remained higher than state averages and incomes across the region have continued to decline since 2010 in most communities. Housing prices dipped during the recession but have tended to increase back toward pre-recession levels, driven in part by increasing rates of second home ownership, which contribute to a lack of housing affordability for local workers.

- Tourism related employment accounted for 50 percent of all jobs in the Basin in 2003, but had declined to 44 percent by 2013. The job declines in this sector as well as many other parts of the economy were exacerbated by the Great Recession, but accommodations and food, real estate and financial and professional services have not recovered since the end of the recession.[1] Ski area employment has been increasing in recent years, but may be threatened by continued drought. Skier days and winter hotel revenues dropped in 2014. However, ski areas and other recreation businesses are making investments to increase summer time attractions and summer lodging revenues have been on the upswing for several years now.

- Gaming revenues have declined steadily since 2000, and dramatically since 2006. These trends are much steeper in the Tahoe Basin than in Nevada overall, and reflect comparative underinvestment and changing market competition.

- Some of these overall trends mask the fact that newer hotel, restaurant and retail projects have had excellent success in the past couple of years and additional new projects are now in the imminent development stage as a result. There are clear indications that consumers are

[1] Throughout this report, a number of indicators are described as having recovered or not recovered from the Great Recession. This is not to say that pre-recession economic levels in the Lake Tahoe Basin were necessarily satisfactory, but simply to acknowledge the need to move beyond the enormous impact of the recession in order to achieve true economic progress.

responding very positively to the strategy to improve the quality of commercial services and attractions, through "environmental redevelopment" as encouraged in the 2012 TRPA Regional Plan.

- Other business types such as information services, administrative services and management have not recovered, but have stabilized their employment between 2009 and 2013. Manufacturing and warehousing have shown recent positive jobs trends. These sectors, combined with professional, scientific and technical services, currently total less than nine percent of jobs in the Basin, but represent an opportunity to diversify the regional economy in the future.

- Unemployment has improved since 2010, but remains above state averages for both California and Nevada. Labor force levels in 2013 are still below 2010 levels as workers leave the region or give up looking for work.

- Despite improvement in the jobs market, per capita incomes have declined 5.6 percent, not accounting for inflation, between 2010 and 2013.

- 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. New home construction is beginning to accelerate, but mostly at the upper price levels, driven by second home investors. Second home ownership rates are increasing in the region and there is little market momentum currently for additional workforce housing. However, even in 2010, TRPA reported that housing affordability in the Tahoe Basin was more challenged than in the San Francisco Bay Area, primarily due to lower wages in relation to housing prices. The more recent trends have widened the affordability gap.

- Student participation in the free or reduced price school lunch program have 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 the rates have stabilized, but at higher rates than before the recession. For example, in the Lake Tahoe Unified School District in South Lake Tahoe, 47.4% of students participated in the program in 2004, increasing to 66.5% in 2011. More recently the rate was 60.4% in 2014. The statewide average in California for the 2014-15 school years was 58.6 percent, while in Nevada it was 55 percent. The school districts in Incline Village and Zephyr Cove both have rates well below the state average, despite recent increases.

DEMOGRAPHICS

Due to long term economic decline, the Lake Tahoe Basin has seen a steady loss of population since about 2000, until very recently when the population began to show a small increase. Even with recent stabilization of the population, however, the trends in age demographics illustrate a rapid loss in the labor force as mentioned above. Both younger student age groups and prime working age adults from 25 to 44 years are declining as a proportion of the total population while older age groups are increasing. Young people find many impediments to remaining in the region in terms of high housing costs and lack of full time, living wage jobs. Declining school enrollments and lower patient levels create stress on both the local school and health care systems.

- The population and the labor force have both declined since 2000, although 2013 marked the first year when the regional population started to increase again, reaching about 54,400 people. It should be noted that the visitor population, estimated at more than 3 million per year, dramatically increases the Basin population, particularly during peak holiday seasons.

- School enrollments have generally followed population trends, with declines through 2010 but more stable levels since then.

- 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.

- Enrollments at Lake Tahoe Community College rose steadily between 2006-07 and 2009-2010, but then declined the next two years before rising again in 2013-14. This trend has been affected by economic conditions as unemployed workers returned to school to increase or improve their technical skills.

- 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.

SOCIAL CONDITIONS

The high rates of second home ownership in the region reduce social cohesion and support for local services, which impacts lake communities on many levels. Voter participation rates have declined in many communities in recent years. 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.

- The Sustainability Measures report (2010) indicated that voter participation rates had increased during the 2000's in the Basin, but viewing more recent data, 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.

- 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.

- 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. In 2013 and 2014, more than half of the commercial permits issued by the Tahoe Regional Planning Agency (TRPA) have been in community centers, while 85 percent of residential permits have been outside of centers. A similar result has occurred in the City of South Lake Tahoe and El Dorado and Douglas counties, although the statistics are skewed a bit by the fact that some recent improvements at Heavenly Ski Resort are on the mountain and not within the urban center.

ECONOMIC AND SOCIAL TRENDS IN THE LAKE TAHOE BASIN

INTRODUCTION

This report is the inaugural edition of the Tahoe Prosperity Center's Measuring for Prosperity Report. Following on earlier data analysis in the Watershed Sustainability Measures Report and the Lake Tahoe Basin Prosperity Plan both published in 2010, providing updated trends for a number of key indicators as well as new indicators for future monitoring. 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. The report then discusses a number of social indicators such as age demographics, health conditions, college enrollments, crime rates and development patterns. The narrative is intended to highlight key trends for the region and identify any shifts in economic or social conditions since 2006-2008 when most of the prior data was published. 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

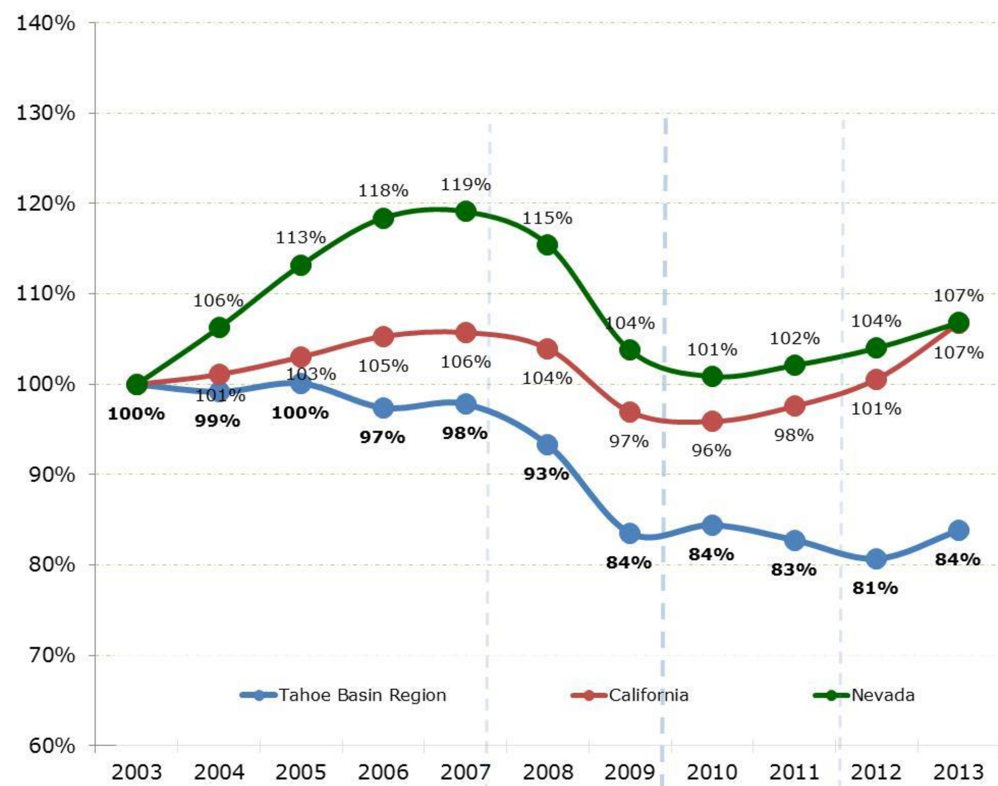
INTRODUCTION

The past five or six years have been a turbulent economic time throughout the nation with the occurrence of the Great Recession. The trends in jobs, income, real estate, visitor spending and related revenues all reflect these national economic conditions to some extent. However, it is important to identify where local trends in the Tahoe Basin deviate from the general economic decline and recovery experienced throughout California and Nevada as well as other areas of the country. Along these same lines, although inflation has been at historic lows for a number of years now, consumer prices in the San Francisco Bay Area have nonetheless risen nearly 40 percent since the year 2000 and about 13 percent since 2008. It is estimated that inflation in Reno has been about seven percent between 2008 and 2014 (see Table A-1 and related discussion in the Appendix). While per capita incomes and housing prices may have stabilized in portions of the Lake Tahoe Basin since the recession, in most cases they have not kept pace with inflation and are losing real dollar value.

JOBS AND UNEMPLOYMENT

As a result of the Great Recession, jobs levels in both California and Nevada began declining in 2008 and did not hit bottom until 2010 (Figure 1). Growth rates in California have been accelerating and by 2013 had fully recovered to their pre-recession levels. However, Nevada had been on a steeper job growth trend prior to the recession and has not yet recovered to 2007 levels. In the Tahoe Basin, a different trend has occurred, with jobs starting to decline since at least 2003, accelerating with the beginning of the recession. Job levels recovered slightly in 2010 but then continued to decline in 2011 and 2012 before making a modest recovery in 2013. Overall, the Tahoe Basin lost 5,500 jobs, or 16 percent, between 2003 and 2013.

Figure 1
CHANGE IN TOTAL PRIVATE SECTOR JOBS INDEXED TO 2003

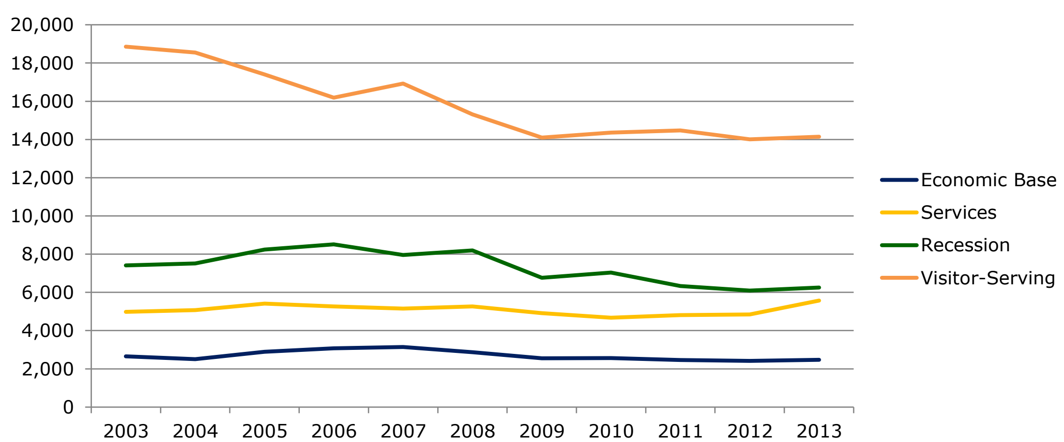


Sources: Nevada Employment Training and Rehabilitation (http://bit.ly/1cQAcAv), California EDD LMID (http://bit.ly/1B8saPb), and ZIP Business Patterns.

Clearly the longer term jobs trends in the Tahoe Basin have been affected by other factors than the recession, although that accelerated the ongoing decline. In order to understand these employment trends, it is useful to categorize business sectors into several major groups (Figure 2). 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 Technology (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 Indicators Report utilizes a broader industry grouping as shown in Figure 2 (more detailed data is also provided in Table 1). 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 2). However, the tourism sector has lost jobs continuously over the past decade and by 2013 was reduced to 44 percent of total jobs. During this time, 5,000 tourism jobs were lost, representing more than 80 percent of total job loss in the Basin. As discussed further below, the long term decline in tourism activity is 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]

Figure 2
Industry Sector Jobs Change



Source: ADE, based on US Census ZIP Business Patterns (2003-2013)

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

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 are labeled "Recession" in Figure 2, with a loss of about 2,000 jobs between 2008 and 2013. The construction industry, in particular, is a major component of the green business cluster. However, as noted above, increased investment in visitor serving and other properties in the Basin will provide opportunities to incorporate green building techniques more widely.

One sector that has begun to rebound more rapidly is the service sector, led by administrative services but also including health care, education, personal and business services. Growth in this sector would suggest that consumer and business spending in the region is beginning to increase, even though job growth has not yet widely occurred throughout the economy. The Health and Wellness cluster is a large share of services employment but has not seen much employment growth recently. The population decline in the Basin between 2000 and 2010 has certainly affected both health care and education in terms of patient and student levels. Increased connections, though, with the Visitor Services cluster in terms of wellness and recreation programs as well as environmental education could be a successful strategy in helping to broaden the client base for these two very important sectors.

There has also been a slightly increasing trend in information services (which may include some software development), and company management, which suggests there may be some economic diversification occurring, although the financial and professional services sectors continue to show downward trends. A number of these businesses are also potentially part of the Environmental Innovation cluster, and the 2014 Economic Development Strategy recommends strategies to promote entrepreneurship and innovation as a means to facilitate business expansion and job growth. These types of businesses are classified as the non-visitor serving "economic base" component of the regional economy in Figure 2, in that their markets are potentially outside the region and they can help to draw income and wealth into the Tahoe Basin. The economic base also includes small amounts of manufacturing and warehousing, which have had mixed trends but overall steady jobs levels.

Table 1 Tahoe Basin Job Change by Sector													
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**Annual Per. Change: 03-09**	**Annual Per. Change: 09-13**
Tahoe Basin	33,912	33,632	33,946	33,032	33,172	31,640	28,327	28,631	28,068	27,369	28,433	-3%	0%
Visitor Serving Sectors													
72 Accommodations and Food	14,813	14,431	13,232	13,014	13,108	12,276	11,245	10,752	10,919	9,566	9,560	-4%	-4%
71 Arts, Entertainment, Rec.	4,044	4,120	4,174	3,170	3,824	3,033	2,855	3,603	3,550	4,442	4,588	-6%	13%
Other Sectors Most Affected by the Recession													
44-45 Retail	3,205	3,336	3,437	3,287	3,218	3,174	2,844	3,103	2,757	2,626	2,663	-2%	-2%
23 Construction	2,232	2,090	2,364	2,882	2,726	2,551	1,808	1,831	1,561	1,468	1,819	-3%	0%
53 Real Estate	1,286	1,357	1,618	1,564	1,364	1,854	1,553	1,591	1,522	1,465	1,268	3%	-5%
52 Finance	692	725	816	776	643	617	561	518	488	535	499	-3%	-3%
Service Sectors													
56 Waste Mgt. and Admin Services	1,280	1,565	1,748	1,584	1,606	1,595	1,471	1,300	1,342	1,669	2,397	2%	13%
62 Health	1,796	1,915	1,921	1,980	1,805	1,941	1,814	1,735	1,777	1,680	1,660	0%	-2%
61 Education (private)	487	306	349	393	415	362	361	428	505	375	379	-5%	1%
81 Other services	1,289	1,167	1,280	1,193	1,228	1,240	1,169	1,115	1,112	1,068	1,081	-2%	-2%
22 Utilities	120	108	104	105	85	83	85	86	63	48	43	-6%	-16%
11, 21 Other	10	10	16	15	14	43	15	8	8	8	8	7%	-2%
Other Economic Base Sectors													
51 Information	469	446	580	495	467	411	355	306	306	328	371	-5%	1%
54 Professional Technical	1,330	1,345	1,483	1,492	1,461	1,467	1,467	1,512	1,355	1,301	1,309	2%	-3%
48-49 Warehouse Transportation	205	195	195	426	667	445	263	196	140	96	225	4%	-4%
55 Mgt. of Companies	124	93	104	143	69	59	62	149	141	188	213	-11%	36%
42 Wholesale	313	235	331	298	287	296	259	260	383	175	191	-3%	-7%
31 -33 Manufacturing	217	188	194	215	185	193	140	138	139	329	159	-7%	3%

Source: ADE, based on US Census ZIP Business Patterns (2003-2013)

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. Figure 3 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 peaked in 2005 with about 5,600 jobs and reached a low point in 2010 with an estimated 4,327 jobs. Since then, it has added over 300 jobs, with large gains in construction and administrative services. This area did lose a number of firms classified as management establishments.

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 2009, it has gained back only 300-400 of those jobs. Most of the lost jobs were in Accommodations and Food services with very little recovery. Also, Wholesale/ Warehouse/ Transportation jobs had grown from 99 jobs in 2003 to 556 in 2007, but by 2013 were back down to 99.[4] Some job growth has occurred recently in the Administrative Services sector, which may be occurring through temp agencies.

South Lake Tahoe: Unlike the areas discussed above, South Lake Tahoe has seen steady job declines since at least 2003, losing more than 3,000 jobs by 2013. Most of these declines have occurred in the tourism sectors of Accommodations, Food, and Recreation. More recently, there has been a slight uptick in Construction jobs, Warehouse/Transportation, Information Services and Company Management, which may signify some economic diversification although the numbers are small compared to tourism.

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. Overall, this area has lost less than ten percent of its jobs between 2003 and 2013.

Tahoe City/Other North Shore: By 2013, the remaining North Shore areas had regained jobs back to 2003 levels, although the area remains about 400 jobs, or six percent, below peak 2008 levels. The jobs recovery has been mainly fueled by growth at the ski areas, while Construction, Retail and Accommodations/ Food Services have not recovered well from the recession.

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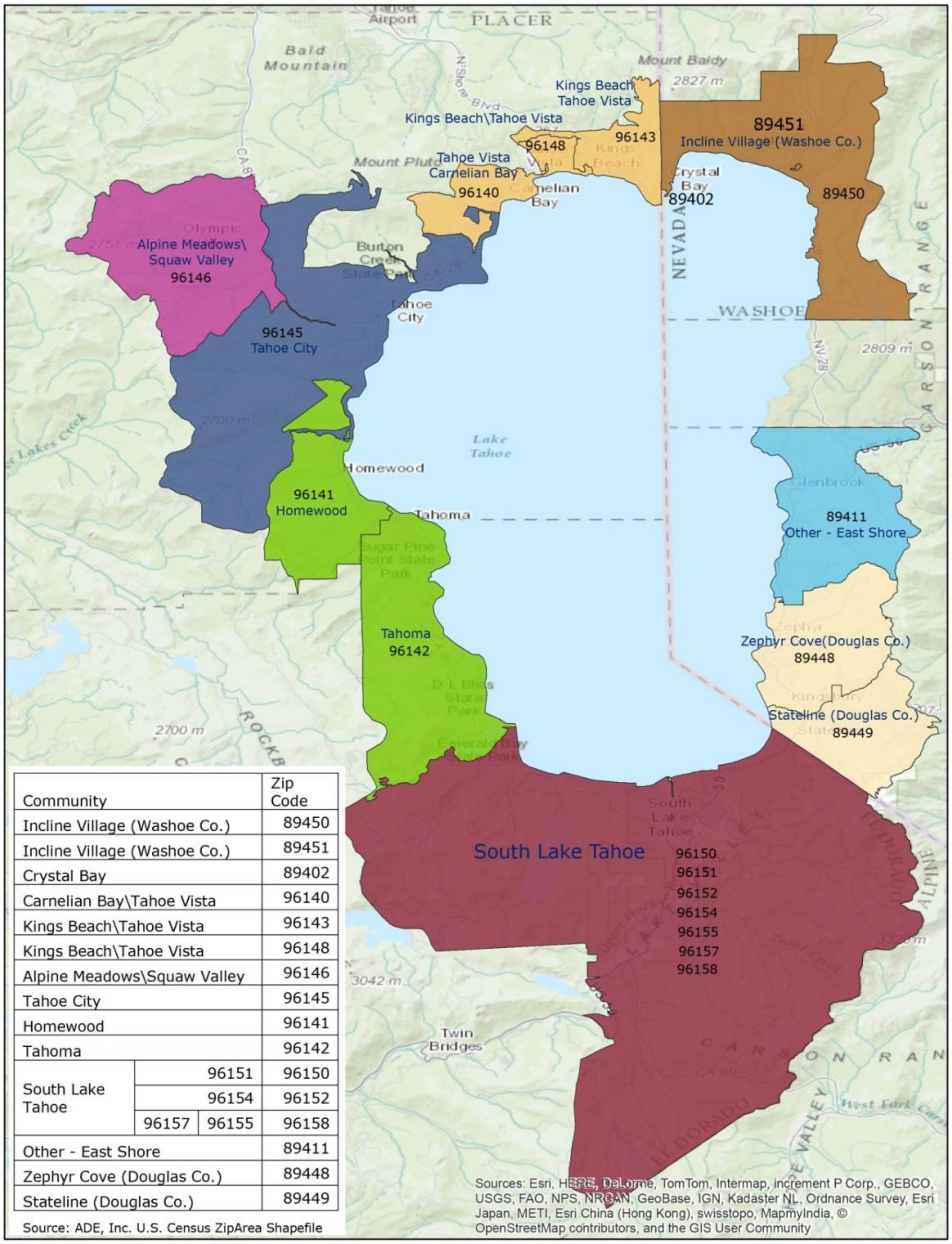
[3] The community level employment data in this report is obtained from Zip Business Patterns from the US Census, which only provides private sector employment. Thus, for example, jobs in educational services reflect private education facilities only. A separate estimate of public sector employment has 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.

[4] The change in employment in warehousing/transportation is due to the expansion and then decline of primarily two establishments out of 8 or 9 in this area. Since the data source only provides employment estimates in ranges (i.e., 250-499 employees per establishment) the actual job changes are estimates based on the methodology developed by CSU Chico for the 2010 Sustainability Measures Report. Thus, the actual change in jobs may have been less dramatic than suggested by the estimates. Also, it should be noted that the employment figures are as of March of each year, rather than annual averages, and therefore may be subject to some changes in seasonality from year to year.

Figure 3

TAHOE BASIN COMMUNITIES AND ZIP CODES



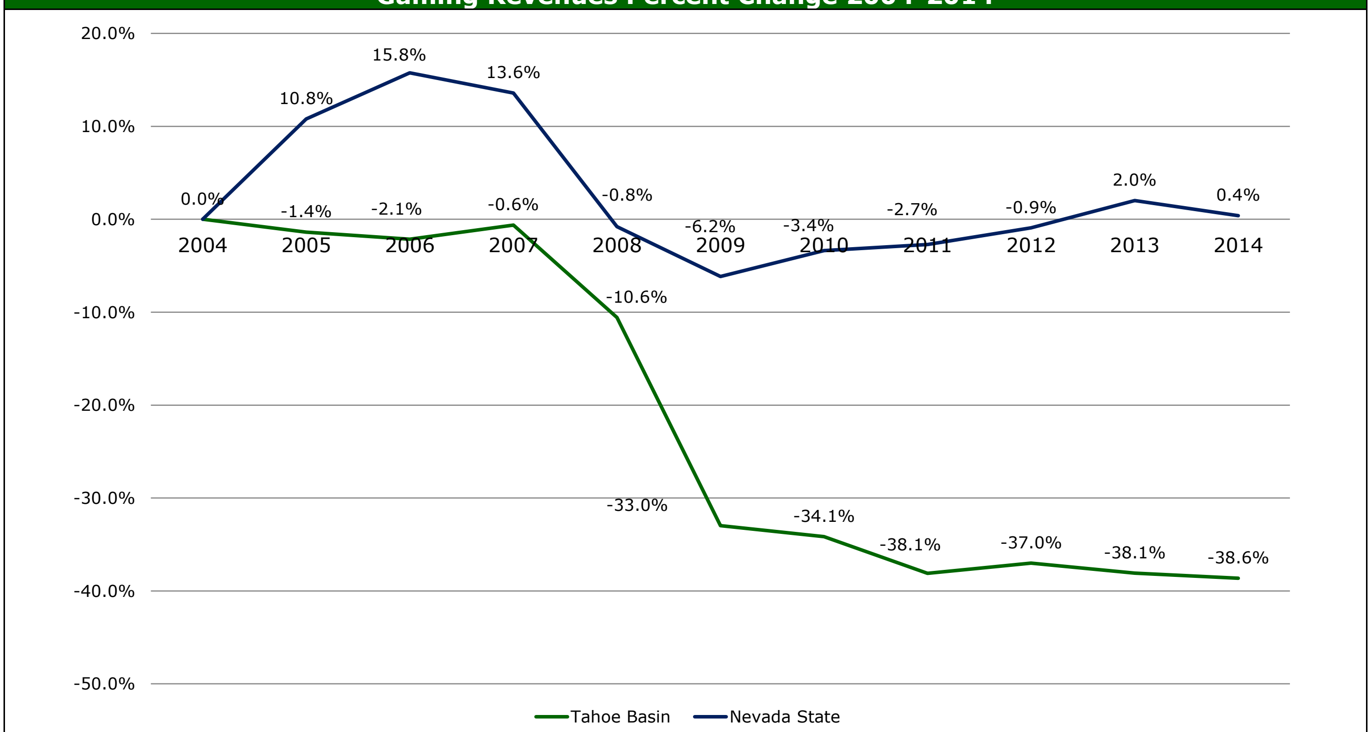
Community			Zip Code
Incline Village (Washoe Co.)			89450
Incline Village (Washoe Co.)			89451
Crystal Bay			89402
Carnelian Bay\Tahoe Vista			96140
Kings Beach\Tahoe Vista			96143
Kings Beach\Tahoe Vista			96148
Alpine Meadows\Squaw Valley			96146
Tahoe City			96145
Homewood			96141
Tahoma			96142
South 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

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 4, this trend is quite different than the trend in gaming revenues for the State of Nevada as a whole (upper line in Figure 4). Nevada had seen significant annual increases in revenue until 2006. During the recession, statewide gaming revenues dropped about 22 percent, but then have shown a modest recovery and by 2014 were back to levels last seen in 2004. In contrast, the Tahoe casinos had peaked in about 2000, and then suffered nearly a 40 percent drop through the recession, from which they have not recovered at all. 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. As discussed in the Prosperity Plan, this trend would be difficult to reverse, given the substantial investments that would be needed to upgrade or replace existing casinos in South Lake Tahoe. This also highlights the need to develop other kinds of recreation and entertainment attractions to restore overall visitor levels in the Tahoe Basin.

Figure 4
Gaming Revenues Percent Change 2004-2014



Source: Nevada Gaming Control Board

Recreation and Lodging

Coming out of the recession, recreation has begun to rebound, led by the ski areas, but the accommodations and food services sector has continued to decline. A number of the ski areas are repositioning themselves as year round recreation attractions and have invested in new facilities to support that direction. (Tables A-11 to A-14 provide an extensive breakdown of jobs in the tourism sector by community.)

More recently, the drought has had an effect on winter tourism. As shown in Table 2, the number of skier-days peaked in 2009-2010 and then dropped significantly in 2011-12 and again in 2013-14, with a slight reprieve in 2012-13. Looking at monthly hotel revenue data for the South Shore areas, we see below average revenues for the winter months in both those years, although the more recent 2014-15 winter season was above the average for the past five years (See Figures 5-7 below). Summer hotel revenues in South Lake Tahoe have been above the five year average since 2012. This trend is not as noticeable in the Stateline/Zephyr Cove Area. For the North Shore, data are provided quarterly, showing also that the winters

TABLE 2

TAHOE SKIER-DAYS, 2008-09 TO 2013-14

YEAR	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Skier-Days	3,569,000	4,628,000	4,556,000	3,254,000	4,001,000	2,886,000
Annual % Change		29.7%	-1.6%	-28.6%	23.0%	-27.9%

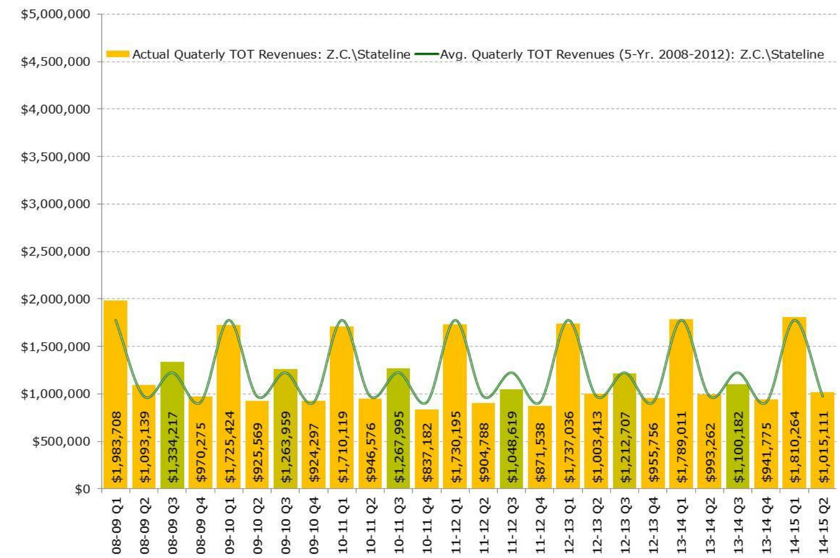
Source: Bob Roberts, California Ski Industry Assn. Includes the following ski areas: North Lake Tahoe: Alpine Meadows, Boreal/Soda Springs, Diamond Peak, Mt. Rose, Northstar, Ski Homewood, Squaw Valley, Sugar Bowl, Tahoe Donner. South Lake Tahoe: Heavenly, Kirkwood, Sierra-at-Tahoe

Hotel revenues in the Basin overall declined through the 2009-2010 season, but had recovered to pre-recession levels by the end of the 2014 season, by a slim margin of 1.8 percent (see Tables A-17 to A-19 in the Appendix). Annual growth from the bottom in 2009-10 to 2013-14 was 5.5 percent per year. All of the communities have showed positive growth since 2009-10. The communities with large gains since the beginning of the recession included Alpine Meadows (26.4 percent), Tahoe Vista (60.2 percent) and Homewood (16.3 percent). However, Incline Village, Zephyr Cove/Stateline, Carnelian Bay, Kings Beach, and Tahoe City had still not fully recovered by 2013-14. Due in part to increases in Transient Occupancy Tax rates, the tax revenues from room revenues have increased at a 6.9 percent rate since 2009-10 and are 7.3 percent above 2007-08 levels for the Basin overall. Hotel revenues per available room (REVPAR) have had more modest increases of 1.1 percent in North Lake Tahoe and 0.1 percent in South Lake Tahoe. Zephyr Cove/Stateline and Incline Village have experienced declines in REVPAR of two percent and five percent, respectively.

During the period from 2010 to 2014 when hotel revenues in the Tahoe Basin were increasing about 5.5 percent annually, lodging revenues statewide were increasing by 9 percent and the mountain resorts in Colorado were seeing growth of 7.6 percent per year.[5] Dean Runyan estimates that hotel revenues throughout the High Sierra were increasing 4.5 percent per year during this period, while the Gold Country saw visitation growth of 6.8 percent per year, further suggesting that lack of snow has dampened Tahoe's tourism growth.

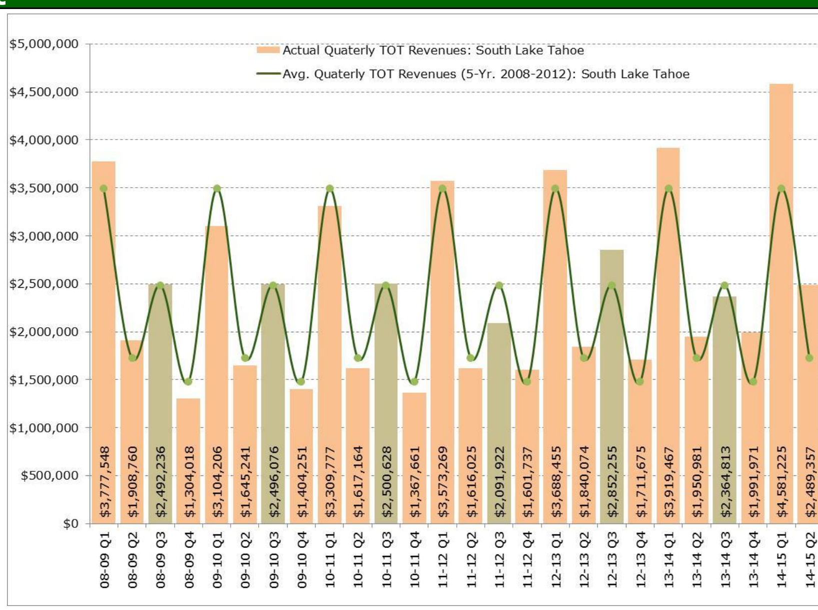
[5] Dean Runyan Associates, State Tourism Impact Reports for California and Colorado, 2014.

FIGURE 5
QUARTERLY TRANSIENT OCCUPANCY TAXES FOR ZEPHYR COVE AND STATELINE



Source: Tahoe Douglas Visitors Authority

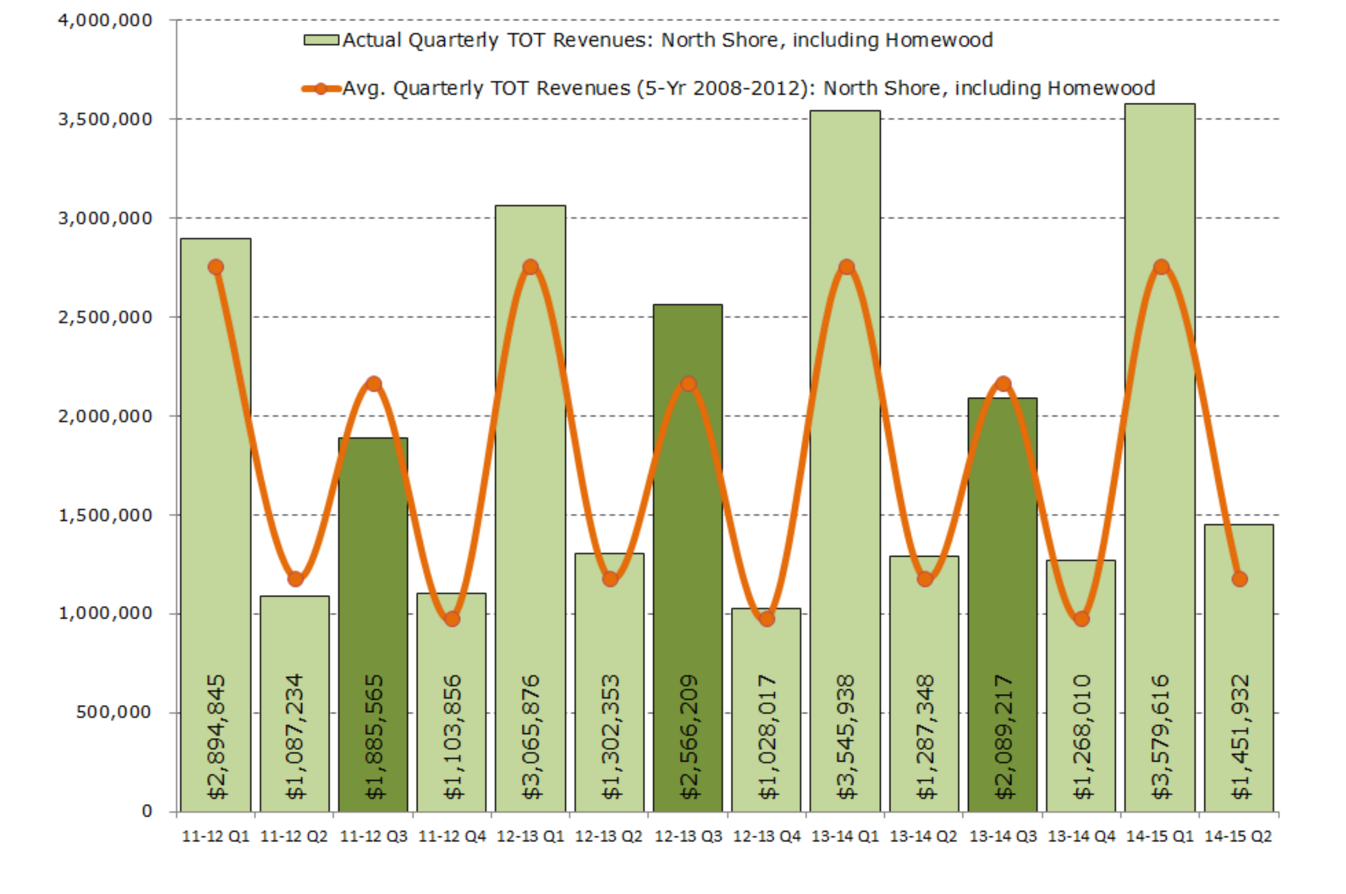
FIGURE 6
QUARTERLY TRANSIENT OCCUPANCY TAXES FOR SOUTH LAKE TAHOE



Source: City of South Lake Tahoe

Figure 7

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

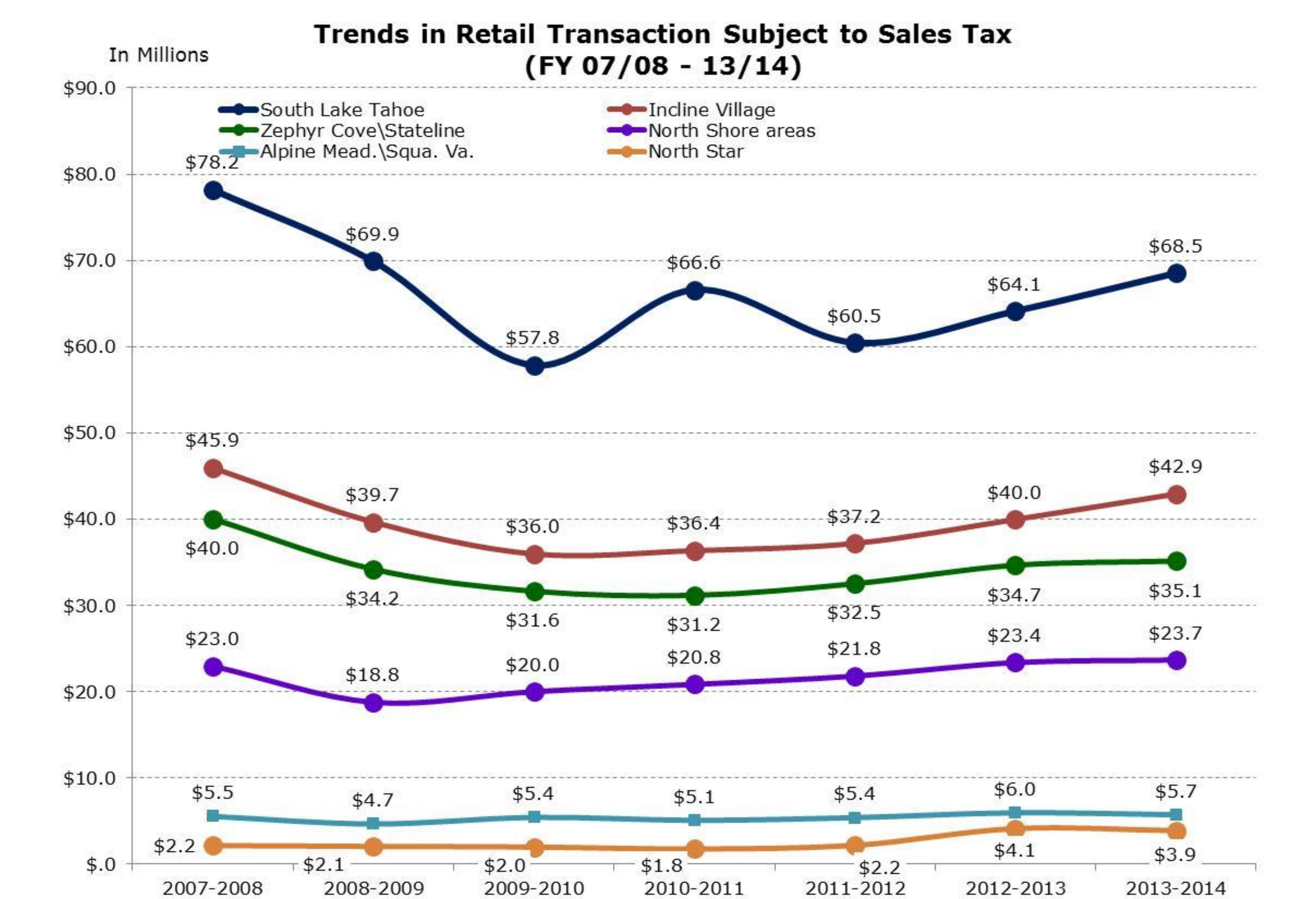
** Quarter One corresponds with July, August, and September*

RETAIL SALES

Sales Tax revenues, reflecting retail spending, also began to recover from the recession by 2009-10, but as of 2014 had not reached pre-recession levels in several of the larger jurisdictions such as South Lake Tahoe, Incline Village and Stateline/Zephyr Cove (Figure 8). In contrast, areas that have made new additions to the retail mix, such as Northstar and Squaw Valley, have been able to increase retail sales beyond pervious levels. Even in South Lake Tahoe, the newer Heavenly Village retail development has seen excellent sales growth in the past two 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. The retail development will be complemented by 90 new residential units as well. These sales increases are not apparent in the citywide figures, which are heavily weighted with older retail developments. But the performance of this area near Stateline is a good indication that consumer demand is present when suitable shopping opportunities are presented. In addition, these newer developments meet all the new environmental guidelines that serve to reduce run-off into the lake.

FIGURE 8

TRENDS IN RETAIL TRANSACTION SUBJECT TO SALES TAX (FY 07/08 - 13/14)



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

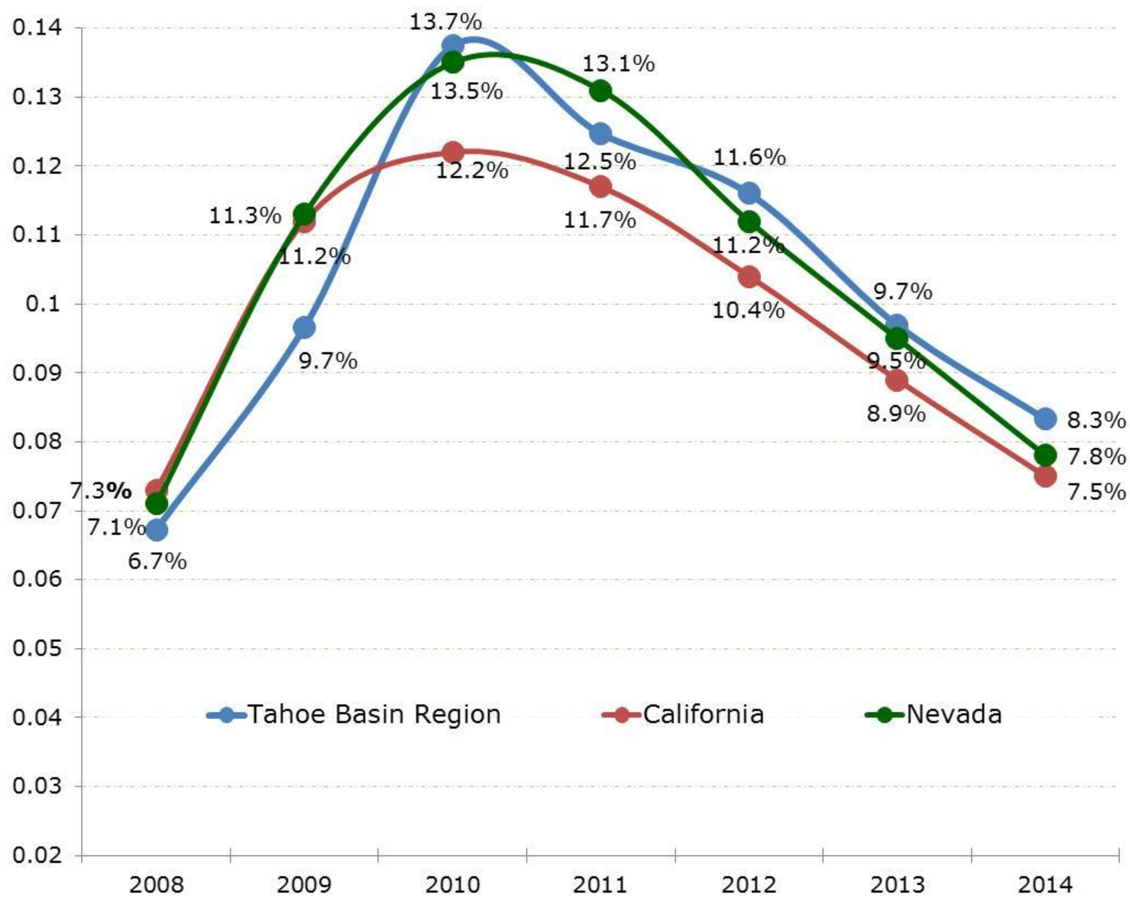
The unemployment rate in the Basin has shown a similar trend to the state averages between 2008 and 2013, although it was slightly below the statewide levels going into the recession, but has remained slightly above state levels coming out of the recession (Figure 9). In addition, a number of communities 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. For example, the labor force in South Lake Tahoe declined from 15,000 in 2008 to 11,700 in 2014, while Kings Beach declined from 3,000 to

2,500, Tahoe Vista declined from 1,900 to 1,100 and Dollar Point from 1,300 to 508 (see Tables A-22 to A-25 in the Appendix for more detailed labor force and unemployment data).

Among the communities, South Lake Tahoe, Kings Beach and Tahoe Vista all remain above the Basin-wide average for unemployment as of 2014 (Figure 10). These areas are typically communities where seasonal workers are able to find housing. In addition, Squaw Valley has experienced exceptionally high unemployment rates, reaching more than 27 percent between 2010 and 2012 and still remaining as high as 18 percent in 2014 (Figure 11). It is likely that the highly seasonal nature of the workforce in Squaw Valley is contributing to this result. 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 9

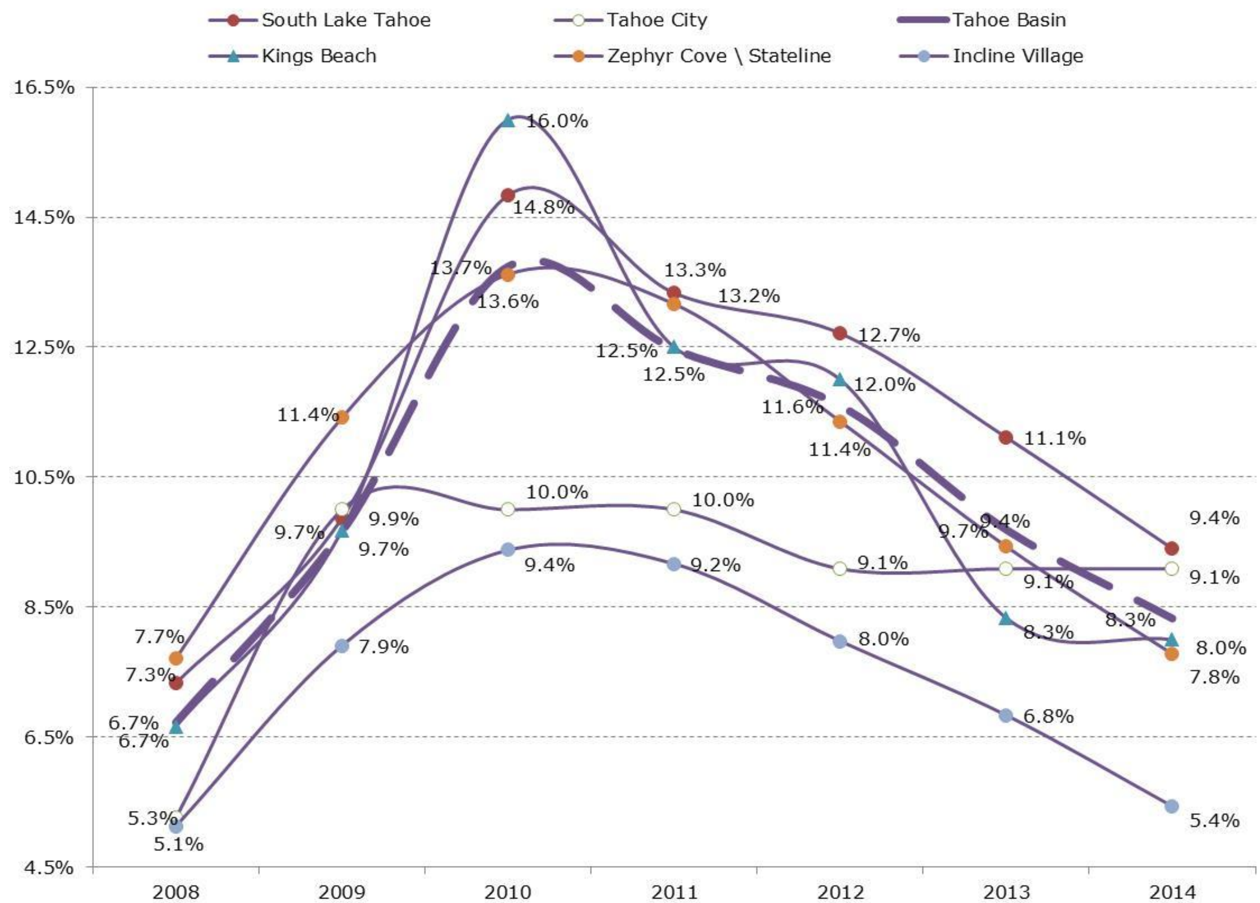
UNEMPLOYMENT RATES FOR THE TAHOE BASIN, CALIFORNIA AND NEVADA, 2008-2013



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

FIGURE 10

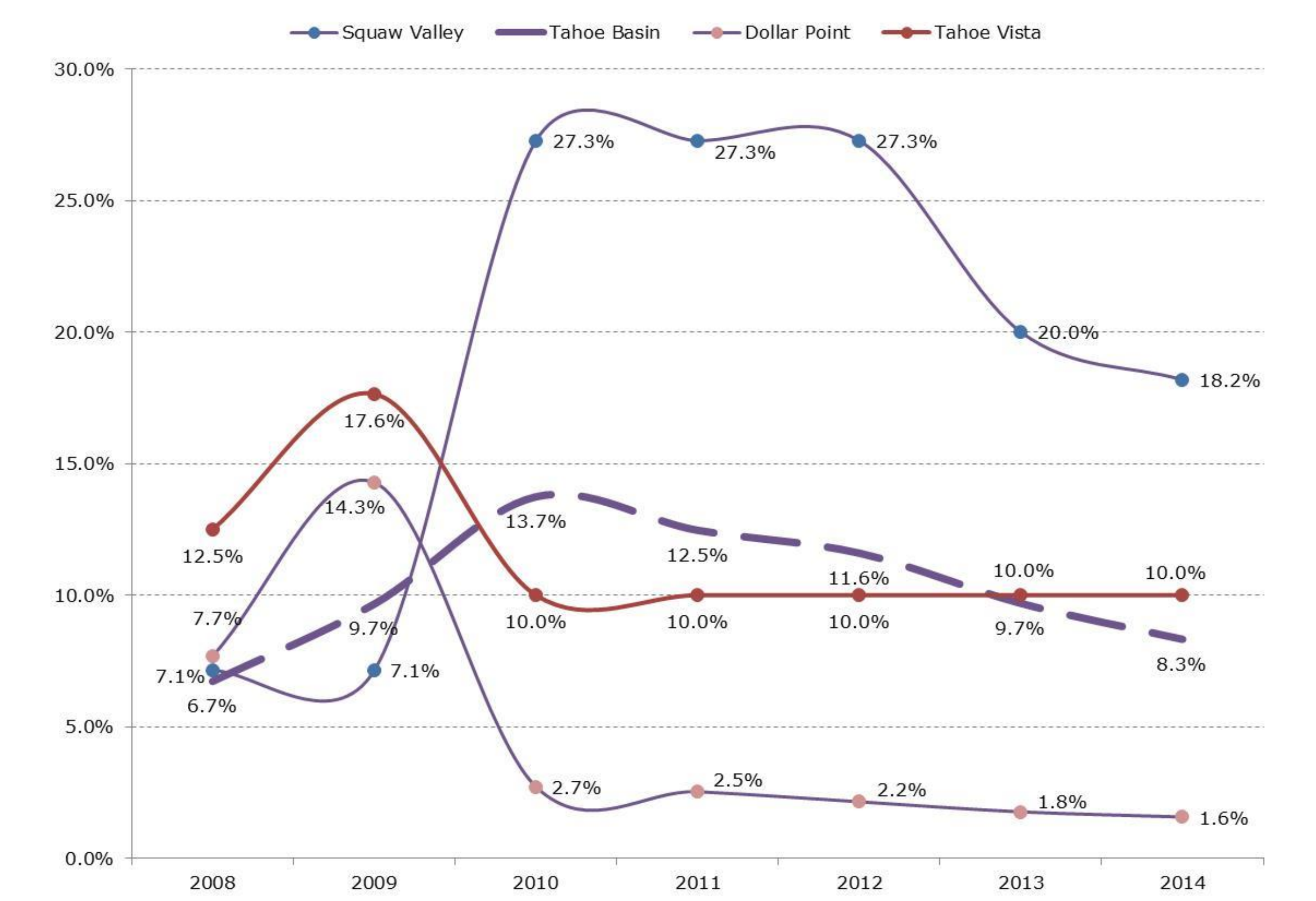
UNEMPLOYMENT TRENDS BY COMMUNITIES (EXCEPT DOLLAR POINT, SQUAW VALLEY, AND TAHOE VISTA) IN THE TAHOE BASIN, 2008-2013



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

FIGURE 11

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.

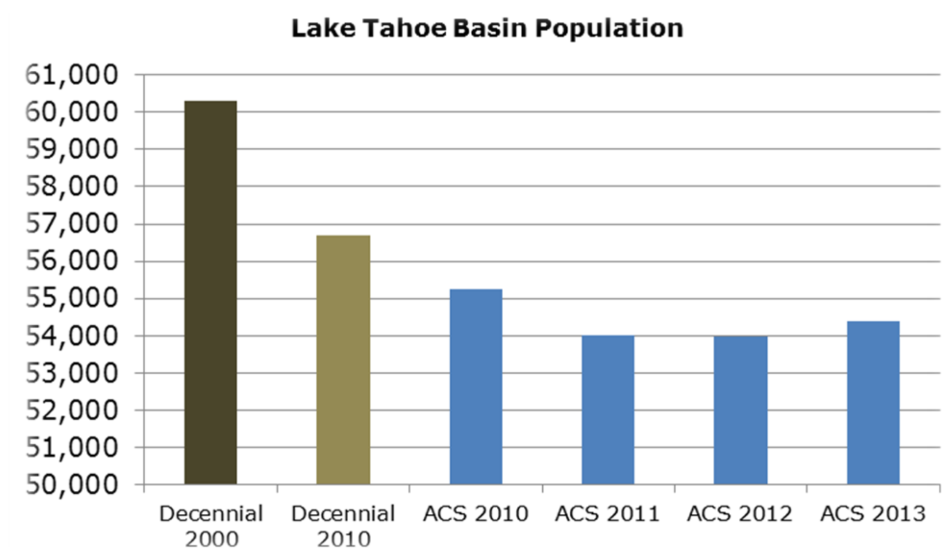
POPULATION AND SCHOOL ENROLLMENT

The loss in job opportunities has had an effect on regional population levels as well. The Basin as a whole experienced a significant decline in population from 60,295 in 2000 to 56,709 in 2010, a reversal of the prior ten year trend in which the basin had increased from 52,591 in 1990 (TRPA). While annual population estimates for the Basin are not available, the 2010 indicators report and more recent CA Department of Finance data suggests that the City of South Lake Tahoe population peaked in about 2001.[6] Since 2010, the region's population continued to decline slightly in 2011 and 2012 but then increased in 2013 (Figure 12 below and Table B-1 in the Appendix). It should also be noted that visitors substantially increase the population in the Basin, particularly during peak holiday seasons. Visitors are estimated to number 2.5 million per year in South Lake Tahoe and 1.3 million in North Shore Placer County.[7]

TRPA reports that despite overall population decline, persons of Hispanic origin have been increasing in the Tahoe Basin, similar to trends in both Nevada and California. There is some concern that this group may not be fully counted in census figures, leading to overall undercounts of population in the census.

FIGURE 12

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.

6 *Sustainability Measures Lake Tahoe Watershed, Nevada and California*, February 2010. p. 11.

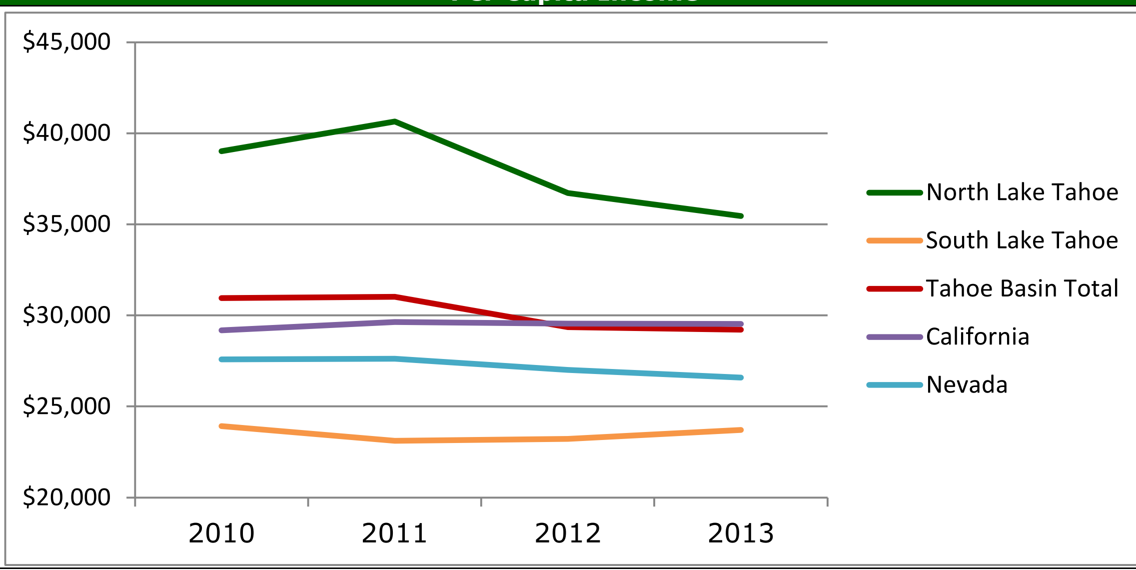
7 Estimates provided by Lake Tahoe Visitors Association for South Lake Tahoe and Dean Runyan Associates, 2012, for Placer County.

School enrollments have followed population decline, with nearly a 22 percent loss between 2003-04 and 2013-14, although the declines have stabilized since 2010. Tahoe Truckee Unified, serving the North Lake area, declined nearly 24 percent while the Lake Tahoe Unified School District declined about 18 percent (See Table B-3 in the Appendix).

INCOME

Although jobs levels in the Basin have stabilized and the unemployment rate has declined, per capita income declined 5.6 percent between 2010 and 2013. This exceeded the trend in Nevada, which saw a decline of 3.6 percent during this period, while California per capita income increased 1.2 percent (Figure 13). Generally, the North Lake Tahoe area declined 9.1 percent, led by Tahoe City at -19.5 percent and Kings Beach at -15.2 percent. In contrast, Carnelian Bay showed a 76.8 percent increase, from $21,249 in 2010 to $37,568 in 2013. In the South Shore area, the overall decline was -0.9 percent, similar to the rate for the City of South Lake Tahoe at -1.0 percent, but there is a general upward trend since 2011. However, the data indicate that Zephyr Cove declined 27.9 percent while Stateline increased 23.8 percent. For reference, the San Francisco Bay Area Consumer Price Index increased 7.7 percent during this period. Only Carnelian Bay, Tahoe Vista, Homewood and Stateline showed real income growth by exceeding this rate of inflation (See Table A-26 in the Appendix).

Figure 13
Per Capita Income



Source: American Community Survey.

HOME PRICES

Across the region, home prices have been increasing but are still substantially below the levels prior to the recession (Figures 14 and 15). On the North Shore of Lake Tahoe, median home prices declined steadily for four years between 2008 and 2012. In most communities in the north, prices then began to increase in 2013 and 2014. In Homewood/Tahoma, Alpine/Squaw and Kings Beach, the increases were fairly rapid and 2014 prices exceeded 2008 prices in nominal terms, although not when factoring in inflation (See Table A-27 in the Appendix).

In the South Shore area, prices continued to drop into 2013 for about half the communities. By the first quarter of 2015, prices in nearly all communities had begun to rise, but none had reached 2008 levels (See Table A-28 in the Appendix). The trend for this area as a whole shows a steady increase since 2013, but the average median home price in 2015 (mid-year) remains $363,400, or 23.6 percent, below the 2008 median price.

In Incline Village, housing prices for both single family units and condos flattened out between 2013 and 2014, while single family home prices in the East Shore area overall actually declined between 2013 and 2014. Comparing mid-year figures for 2015 with the similar period in 2014, single family home prices in Incline Village are down about four percent and condo prices are down about 16 percent, even though prices for the East Shore overall are up between mid-year 2014 and mid-year 2015. Such price fluctuations may reflect a weakening market but may also simply reflect differences in product quality on the market from one time period to the next.

TRPA has documented the issues with housing affordability in the Tahoe Basin. As of 2010, the median housing price in the region was 1007 percent of the median household income, compared to figures of 530 percent to 838 percent for Reno-Sparks and San Francisco, respectively.[8] This trend had been increasing since 1990, but was exacerbated in the run up to the recession in 2008. The high percentage of second home ownership, as discussed below, also drives prices out of reach for local residents in the workforce. With per capita incomes remaining flat since then, while housing prices are recovering, the Tahoe Basin remains a difficult market to both live and work. New housing projects, including the 90 units mentioned above in South Lake Tahoe, are generally priced for the upper end second home investor market and there have been few if any proposals for new workforce housing. The loss of redevelopment in California has reduced the feasibility of building affordable housing, although a couple such projects have moved forward in South Lake Tahoe and Tahoe City. Businesses interviewed for this study indicate that labor is readily available, but many workers commute in from the Carson Valley or the Truckee area. The Reno/Sparks area is projected to see rapid job growth in the near future, which could severely reduce the labor pool available for businesses in the Tahoe Basin. Policy

The Tahoe Prosperity Center has identified income, jobs and housing as one area of this report that it would like to expand in a future edition to better understand these trends. Comparing wages and housing prices to those in other similar sized tourist communities, researching jobs in more detail (six digit NAICs codes) and analyzing the trends will be considered as this report evolves. It is clear that policy makers need to consider a wider array of options to produce workforce housing, including public/private partnerships and permitting second units on existing developed lots.

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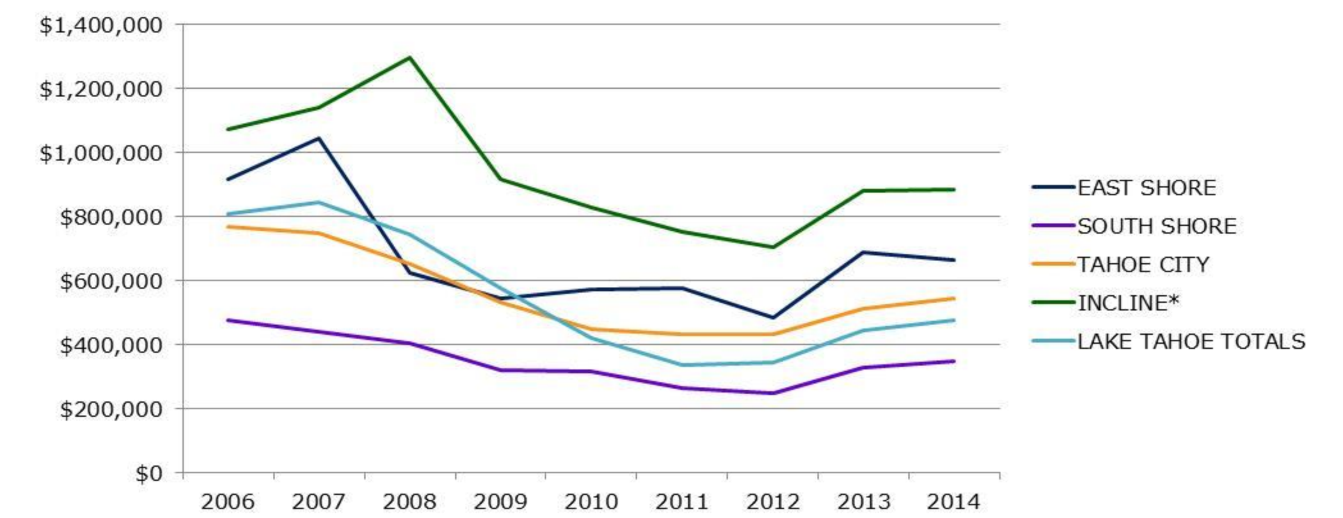
[8] TRPA, Lake Tahoe Basin Census Trends Report 1990-2000-2010. August 2013. Pp. 24-26.

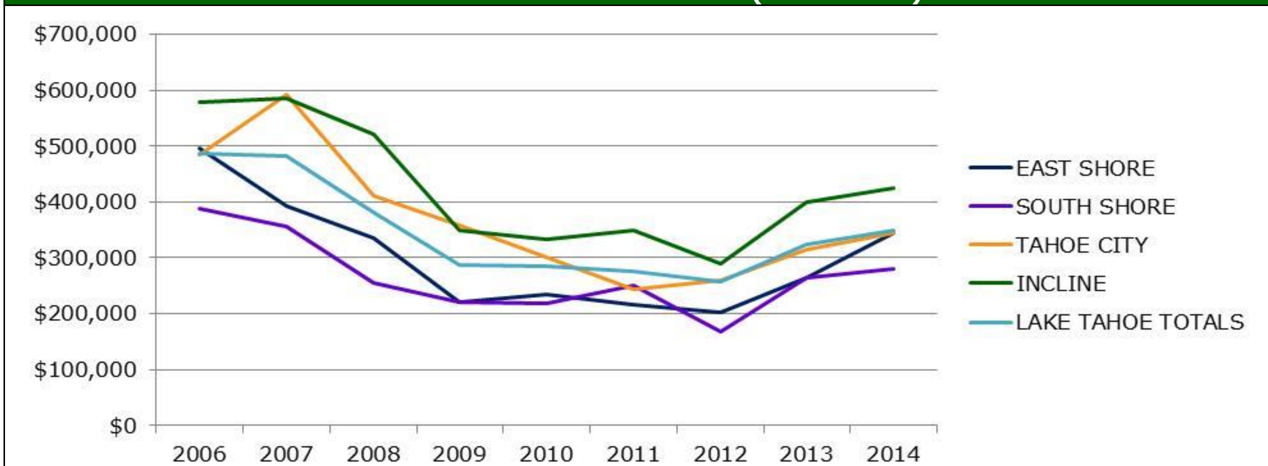
Figure 14
Single Family Median Prices (2006-2014)



Sources: Chase International

**Includes Planned Unit Developments.*

Figure 15
Condominium Median Prices (2006-2014)



Sources: Chase International

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 increased in three of four counties, which is consistent with the loss of Basin population during the 2000's. 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 3

SECOND HOME OWNERSHIP

COUNTY	PERCENT OWNED BY NON-RESIDENTS	
	2003	2015
Douglas	49%	54%
El Dorado	55%	78%
Placer	65%	59%
Washoe	55%	60%

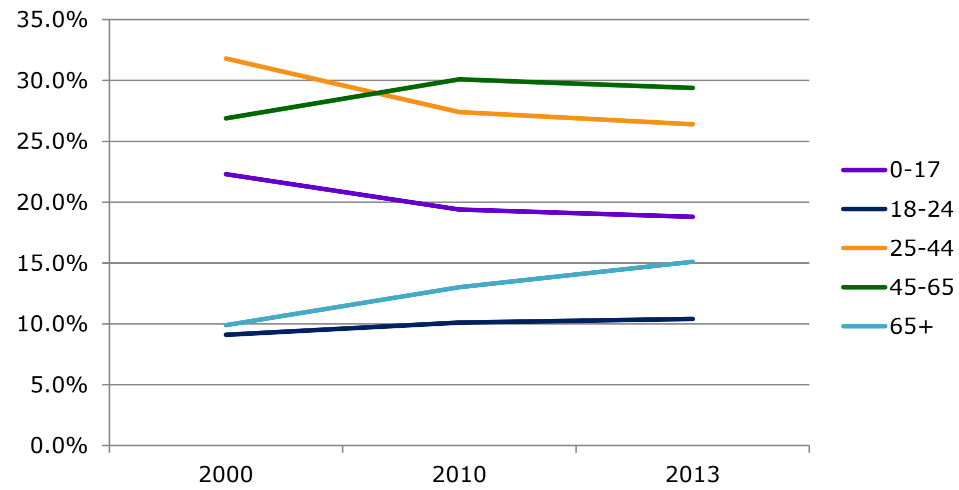
Source: 2003 data: TRPA as reported in the Lake Tahoe Basin Prosperity Plan; 2015 data: supplied by County Assessors.

COMMUNITY SOCIAL INDICATORS

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 16), 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 25.0 percent by 2013. In the Tahoe Basin, this age group had a more modest shift but the 65-84 age group increased from 9.2 percent in 2000 to 13.8 percent by 2013. During the same time, the 0-17 age group declined to 18.8 percent. This trend, along with the overall population decline in the Basin, is likely contributing to the reductions in school enrollment discussed earlier. These trends also have implications for the workforce in the Basin, as the prime working age groups of 25-64 have been declining in numbers. The high cost of housing and the lack of jobs constitute impediments to younger workers remaining in the area.

Figure 16
Tahoe Basin Age Demographics (2000-2014



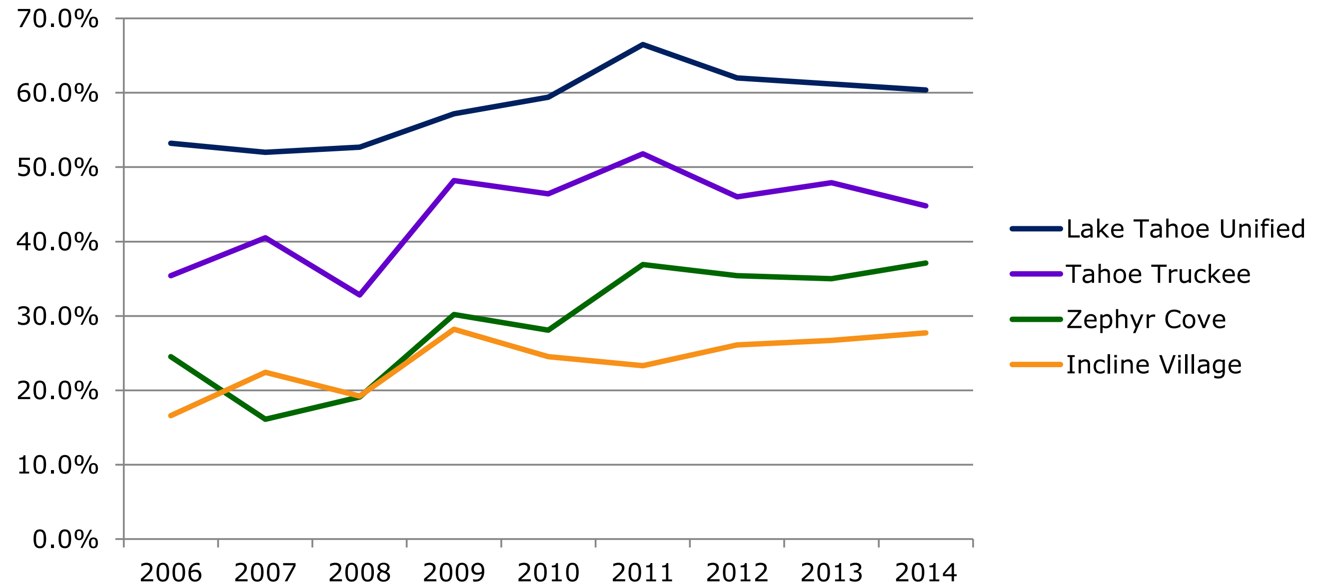
Source: US Census and American Community Survey.

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. In the two school districts in the California side of the Basin, 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. More recently the rates have gradually declined to 56.0 percent in 2014, although there is a big difference between the districts, with the rate at 60.4 percent for Lake Tahoe Unified and 44.8 percent for Tahoe Truckee Joint Unified. The California statewide rate for 2014/15 is 58.6 percent.

Data for the school districts in Nevada are only available beginning in 2009, but the participation rates in Zephyr Cove show a dramatic upward trend from 30.2 percent in 2009 to 37.1 percent in 2014. This likely correlates to the drop in real income during this period. In Incline Village the rate was 28.2 percent in 2009 but then dropped to 23.3 percent two years later. Since then it has increased back up to 27.7 percent in 2014 (See Figure 17 below and Table B-4 in the Appendix).

Figure 17
Free/Reduced Price Lunch Participation



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

COLLEGE ENROLLMENTS

Enrollments at the Lake Tahoe Community College (LTCC) rose steadily between 2006-07 and 2009-2010, but then declined in 2010-11 and again in 2012-13. The latest full school year, 2013-14, showed a nine percent increase over the previous year (See 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. Also, as incomes decline during periods of recession, some students may choose Community College over four year colleges to save costs.

At Sierra Nevada College, which is a private 4-year institution, undergraduate enrollments have been slightly increasing over the past several years, while graduate students declined in 2012 but have been increasing since. 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 56 percent in 2006 to 61 percent in 2013. At the same time, private health insurance declined from 38 percent to 32 percent. These data may reflect California patients only. Other data provided directly by Barton indicate that government payment sources declined from 48 percent in June of 2012 to 36 percent by the end of 2013, but shot up again to 47 percent through all of 2014.

Similarly for the Tahoe Forest Hospital District, which serves the North Shore Lake Tahoe area, California reports that government payment sources increased from 41 percent in 2007 to 52 percent in 2013. Private insurance coverage and self-paying patients declined from 58 percent to 47 percent during this same period. More recently, Tahoe Forest reports that Medicare payments increased from 24 percent to 28 percent between 2013 and 2014, while the percentage of MediCal payments remained constant.

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.

Recent stakeholder surveys for both Barton and Tahoe Forest Health Systems have identified mental health and substance abuse as major community issues. As shown in Table 4, 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 4

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 2012 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 then their rates dropped off significantly in 2014. South Lake Tahoe has generally lower voter participation rates, ranging from a high of 72.4 percent in the 2008 General Election to a low of about 44 percent in 2014.

CRIME

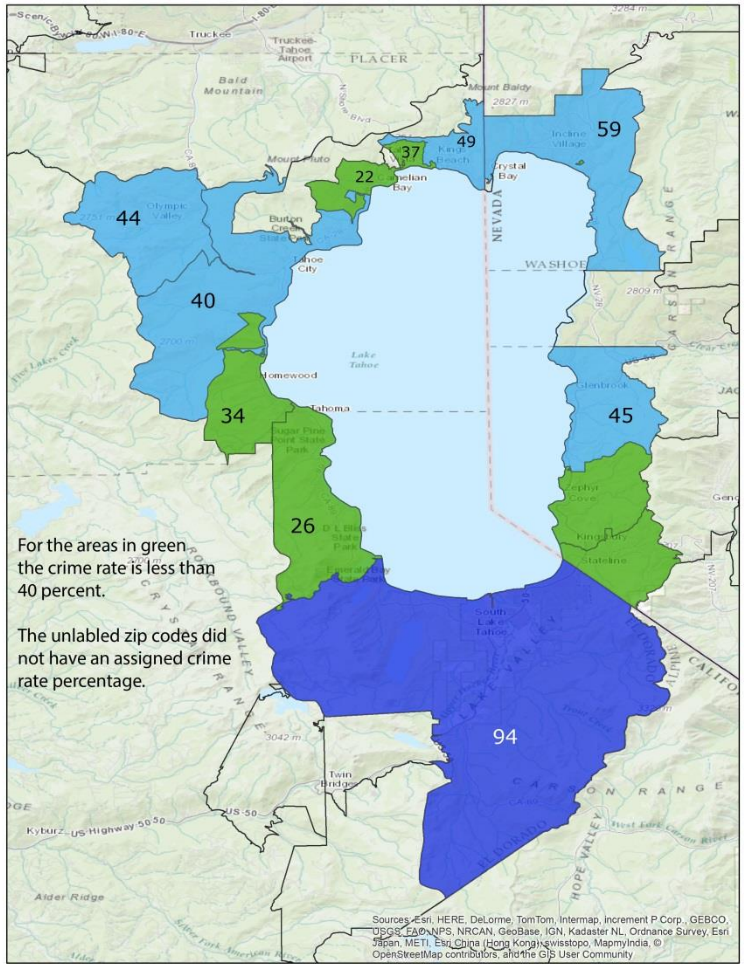
The U.S. crime rate has generally been declining since 2005. In North Lake Tahoe and Incline Village, the rate peaked in 2007 and has since declined most years with a major improvement in 2014 (See Table B-12 in the Appendix). While time series data has not been available in other Tahoe Basin communities, the crime rates generally compare favorably to national rates (Figure 11).

FIGURE 11

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 5, TRPA issued only one new commercial building permit and 12 permits for additions, modifications or rebuilds between 2013 and 2014. Eight out of the total 13 commercial permits were located in community centers. Most of these were located in the South Lake Tahoe area, both in Nevada and in California. However, three commercial permits were located in Tahoe Vista and Tahoe City on the North Shore. There were substantially more residential permits issued in these two years, but 85 percent of these permits were outside community centers.

Table 5 **Number of TRPA Permits by Location Category, 2013 & 2014**				
Project Type/ Location	**2013**		**2014**	
	New	**Additions/ Modifications/ Rebuilds**	**New**	**Additions/ Modifications/ Rebuilds**
Commercial Total	0	6	1	6
Centers	0	3	1	4
Neutral	0	0	0	0
Outside	0	3	0	2
Residential Total	22	80	25	110
Centers	1	4	0	0
Neutral	4	6	8	12
Outside	17	70	17	98

Source: TRPA

One important note from this report is that retail sales numbers (as reported in the Retail Sales section/Figure 8) 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 and Douglas County. In El Dorado County, some permits have been issued in Meyers which is a designated community center, but a number of the other permits relate to improvements made by Heavenly Ski Resort outside the urban area, although connected to the urban center by the gondola (Table 6).

Table 6 **Number of Local Development Permits in El Dorado County, 2013 & 2014**				
Project Type/ Location	**2013**		**2014**	
	New	**Additions/ Modifications/ Rebuilds**	**New**	**Additions/ Modifications/ Rebuilds**
Commercial Total	5	15	2	17
Centers	1	0	0	2
Neutral	0	0	0	2
Outside	4	15	2	13
Residential Total	63	471	105	934
Centers	0	0	0	2
Neutral	4	32	15	102
Outside	59	439	90	830

Source: El Dorado County

In the City of South Lake Tahoe, three of seven permits for new commercial development and 80 percent of commercial modifications were within community centers or neutral locations. As with the other jurisdictions, residential development is more dispersed.

Table 7
Number of Local Development Permits in the City of South Lake Tahoe, 2013 & 2014

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

Source: City of South Lake Tahoe

For Douglas County, the community center is the South Shore Plan Area. However, in viewing the location of other permits, many appear to be in existing subdivisions or smaller community areas (Table 8).

Table 8
Number of Local Development Permits in Douglas County, 2013 & 2014

Project Type/ Location	2013-2014
	All Permits
Commercial Total	17
Centers	3
Neutral	2
Outside	12
Residential Total	261
Centers	4
Neutral	21
Outside	236

Source: Douglas County

APPENDIX A: ECONOMIC TRENDS

INFLATION

Table A-1: Selected Consumer Price Indexes (CPI)

Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
San Francisco Bay Area															
CPI	180.2	189.9	193.0	196.4	198.8	202.7	209.2	216.0	222.8	224.4	227.5	233.4	239.7	245.0	252.0
Annual Percent 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%	2.9%
Cumulative Percent Change		5.4%	7.1%	9.0%	10.3%	12.5%	16.1%	19.9%	23.6%	24.5%	26.2%	29.5%	33.0%	36.0%	39.8%
Cumulative 2008-2014										0.7%	2.1%	4.8%	7.6%	10.0%	13.1%
Western Region Urban Areas 50,000 to 1,500,000 Population															
CPI									133.3						142.7
Cumulative 2008-2014															7.0%
All Urban Consumers, US City Average															
CPI									215.3						236.7
Cumulative 2008-2014															9.9%

Source: US Bureau of Labor Statistics (BLS). For SF Region, as reported by ABAG from BLS data.

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 13.1 percent since 2008, while the smaller cities index has shown inflation of about 7 percent. For comparison, all urban consumers nationally have experienced 9.9 percent inflation during the 2008-2014 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-2: Ten-Year Trends in Total Number of Private Sector Jobs: 2003 through 2013															
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**Annual Percent Change 03-09**	**Annual Percent Change 09-13**	**Annual Average 2005-2007**	**Annual Average 2008-2010**	**Annual Average 2011-2013**
Tahoe Basin Region	33,912	33,632	33,946	33,032	33,172	31,640	28,327	28,631	28,068	27,369	28,433	-3.0%	0.1%	33,383	29,533	27,957
01 Incline Village (Washoe Co.)	4,991	5,487	5,606	5,512	4,955	4,768	4,471	4,327	4,462	4,241	4,663	-1.8%	1.1%	5,358	4,522	4,455
02 Zephyr Cove\Stateline (Douglas Co.)	8,673	8,297	8,572	8,637	9,311	7,658	6,368	6,532	6,379	6,735	6,534	-5.0%	0.6%	8,840	6,853	6,549
03 Other - East Shore	99	129	165	104	167	119	111	92	91	77	48	1.9%	-18.9%	145	107	72
03 South Lake Tahoe	12,001	11,766	11,940	11,195	10,232	10,320	9,481	9,302	8,887	8,662	8,942	-3.9%	-1.5%	11,122	9,701	8,830
04 Kings Beach\Tahoe Vista	1,256	1,270	1,251	1,315	1,278	1,334	1,137	1,233	1,033	1,069	1,146	-1.6%	0.2%	1,281	1,235	1,083
05 Squaw Val./ Alpine Meadows\Carnelian Bay\Tahoe City\Homewood	6,416	6,180	5,933	5,798	6,756	6,897	6,314	6,709	6,697	6,090	6,477	-0.3%	0.6%	6,162	6,640	6,421
07 Homewood (West Shore)	476	503	479	471	473	544	445	436	519	495	623	-1.1%	8.8%	474	475	546

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) (note: ZIP Code 89402 added to Incline Village, and ZIP Codes 89703 and 89705 removed from East Shore)

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Table A-3: Estimated Public Sector Jobs - 2003-2011										
Zip Code	**Community**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
89411	Other - East Shore									
	Public Administration	1	0	0	0	88	91	85	95	0
89448	Zephyr Cove (Douglas Co.)									
	Public Administration	136	137	143	138	145	152	143	118	140
89449	Stateline (Douglas Co.)									
	Public Administration	11	8	9	13	10	10	6	9	13
89451	Incline Village (Washoe Co.)									
	Public Administration	6	0	0	0	0	0	2	1	3
	Educational Services							9		
	Health Care and Social Asst.							1		
96140	Carnelian Bay\Tahoe Vista									
	Public Administration	0	0	0	0	0	0	0	12	11
	Educational Services	12	9	24	20	13	15	29	30	20
	Health Care and Social Asst.	7	7	4	0	11	10	38	23	0
96141	Homewood									
	Public Administration	5	11	10	11	13	12	12	23	0
96142	Tahoma									
	Public Administration	0	0	0	0	0	2	0	0	39
96143	Kings Beach\Tahoe Vista									
	Public Administration	0	0	0	0	0	0	0	0	7
	Educational Services	64	62	58	53	69	79	59	42	45
	Health Care and Social Asst.								2	1
96145	Tahoe City									
	Public Administration	56	52	91	87	87	98	112	118	145
	Educational Services	145	135	122	116	147	165	144	162	153
	Health Care and Social Asst.	7						2	2	1
96146	Alpine Meadows\Squaw Valley									
	Public Administration	0	0	0	0	0	1	2	1	15
	Educational Services						4	1	19	0
96150	South Lake Tahoe									
	Public Administration	0	0	0	0	0	2	0	0	39
	Educational Services	1,078	1,037	977	925	970	1,016	1,023	892	875
	Health Care and Social Asst.						7		1	
Total		1,528	1,458	1,438	1,363	1,553	1,664	1,668	1,550	1,507
	Public Administration	215	208	253	249	343	368	362	377	412
	Educational Services	1,299	1,243	1,181	1,114	1,199	1,279	1,265	1,145	1,093
	Health Care and Social Asst.	14	7	4	0	11	17	41	28	2
Source: ADE, based on US Census, Longitudinal Household and Employment Data, OnTheMap.										

Table A-4: Trends in Total Private Sector Jobs: Incline Village: 2003 through 2013													
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2003-09 Annual Percent Change**	**2009-13 Annual Percent Change**
Incline Village (Washoe Co.)	4,991	5,487	5,606	5,512	4,955	4,768	4,471	4,327	4,462	4,241	4,663	-2%	1%
11 Agriculture	0	0	0	0	0	2	0	0	0	0	0	0%	0%
21 Mining	0	0	0	0	0	0	0	0	0	0	0	0%	0%
22 Utilities	31	28	26	14	15	11	12	17	15	13	13	-15%	2%
23 Construction	467	506	566	905	855	686	429	304	321	322	487	-1%	3%
31 -33 Manufacturing	32	32	40	53	46	38	26	27	26	180	29	-3%	3%
42 Wholesale	111	94	94	85	65	69	75	62	62	53	61	-6%	-5%
44-45 Retail	359	432	430	325	365	288	293	338	306	262	274	-3%	-2%
48-49 Warehouse Transportation	12	14	8	11	10	5	10	13	7	6	38	-3%	40%
51 Information	127	134	142	136	113	86	122	108	103	83	78	-1%	-11%
52 Finance	221	245	219	269	201	210	180	181	158	213	207	-3%	4%
53 Real Estate	318	419	403	437	223	200	182	201	270	238	230	-9%	6%
54 Professional Technical	457	527	471	547	516	552	604	622	547	526	443	5%	-7%
55 Mgt. of Companies etc.	69	55	54	83	23	19	20	22	16	12	16	-19%	-5%
56 Waste Mgt. and Admin Services	312	570	724	493	511	415	431	446	416	471	972	6%	23%
61 Education	377	206	187	212	227	203	199	280	335	218	209	-10%	1%
62 Health	144	141	136	111	133	139	131	120	153	169	157	-2%	5%
71 Arts, Entertainment, Rec.	136	320	453	304	319	329	249	250	203	264	250	11%	0%
72 Accommodations and Food	1,634	1,578	1,454	1,340	1,120	1,317	1,307	1,138	1,319	1,011	993	-4%	-7%
81 Other services	184	186	199	187	213	199	201	198	205	200	206	1%	1%
Source: Applied Development Economics, based on ZIP Business Patterns (note: Incline Village = 89402, 89450, 89451, and 89453)													

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Table A-5: Trends in Total Private Sector Jobs: Zephyr Cove and Stateline: 2003 through 2013													
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2003-09 Annual Percent Change**	**2009-13 Annual Percent Change**
Zephyr Cove\Stateline (Douglas Co.)	8,636	8,324	8,546	8,620	9,280	7,614	6,326	6,564	6,405	6,770	6,534	-5.1%	0.8%
11 Agriculture	0	0	0	0	0	0	0	0	0	0	0	0.0%	0.0%
21 Mining	2	2	2	9	10	34	4	2	2	4	2	12.2%	-15.9%
22 Utilities	9	4	5	8	6	10	10	6	6	9	8	1.8%	-5.4%
23 Construction	235	177	296	275	246	272	189	375	215	153	133	-3.6%	-8.4%
31 -33 Manufacturing	23	20	42	45	15	24	22	22	26	49	46	-0.7%	20.2%
42 Wholesale	82	83	146	130	115	125	106	128	253	72	66	4.4%	-11.2%
44-45 Retail	356	360	417	323	346	347	318	335	354	302	316	-1.9%	-0.2%
48-49 Warehouse Transportation	17	16	32	202	441	232	45	45	39	22	33	17.6%	-7.5%
51 Information	122	117	226	143	105	102	103	105	99	134	153	-2.8%	10.4%
52 Finance	121	146	279	192	158	132	121	125	112	99	99	0.0%	-4.9%
53 Real Estate	249	233	496	390	369	473	316	298	346	270	243	4.1%	-6.4%
54 Professional Technical	353	352	462	358	315	326	342	388	310	282	359	-0.5%	1.2%
55 Mgt. of Companies etc.	40	14	29	40	38	21	36	56	49	90	49	-1.7%	8.0%
56 Waste Mgt. and Admin Services	184	164	195	169	144	182	251	168	300	636	892	5.3%	37.3%
61 Education	36	30	53	38	35	6	11	6	11	13	30	-17.9%	28.5%
62 Health	130	186	212	197	183	163	158	131	133	115	122	3.3%	-6.3%
71 Arts, Entertainment, Rec.	286	231	85	62	58	67	71	57	59	254	78	-20.7%	2.4%
72 Accommodations and Food	6,106	5,926	5,209	5,739	6,416	4,788	3,925	4,047	3,820	4,003	3,650	-7.1%	-1.8%
81 Other services	285	263	360	300	280	310	298	270	271	263	255	0.7%	-3.8%
Source: ADE, based on US Census ZIP Business Patterns (2003-2013): Zephyr Cove and Stateline ZIPs: 89448 and 89449													

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Table A-6: Trends in Total Private Sector Jobs: East Shore: 2003 through 2013													
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2003-09 Annual Percent Change**	**2009-13 Annual Percent Change**
Incline Village (Washoe Co.)	99	129	165	104	167	119	111	92	91	77	48	2%	-19%
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	8	8	39	8	12	2	2	2	4	2	3	-21%	11%
31 -33 Manufacturing	0	0	0	0	0	0	0	0	0	0	0	0%	0%
42 Wholesale	6	6	6	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	2	2	1	2	2	2	2	2	2	2	0%	0%
51 Information	2	2	2	6	36	21	24	10	12	7	6	51%	-29%
52 Finance	6	8	10	7	8	6	6	4	4	2	2	0%	-24%
53 Real Estate	11	24	20	10	8	10	8	7	8	14	8	-5%	0%
54 Professional Technical	11	9	5	5	15	10	8	7	5	4	4	-5%	-16%
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	20	25	28	31	31	25	25	23	0	23%	-100%
61 Education	0	0	0	1	2	2	2	2	2	1	1	100%	-16%
62 Health	2	2	3	3	10	4	6	5	5	8	3	20%	-16%
71 Arts, Entertainment, Rec.	12	24	29	12	8	15	8	14	14	6	6	-7%	-7%
72 Accommodations and Food	28	30	29	25	30	8	6	6	2	2	7	-23%	4%
81 Other services	2	2	0	1	8	8	8	8	8	6	6	26%	-7%
Source: Applied Development Economics, based on ZIP Business Patterns (note: Other - East Shore = 89413													

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Table A-7: Trends in Total Private Sector Jobs: South Lake Tahoe: 2003 through 2013													
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2003-09 Annual Percent Change	2009-13 Annual Percent Change
South Lake Tahoe	12,013	11,781	11,962	11,195	10,232	10,320	9,481	9,302	8,887	8,662	8,942	-3.9%	-1.5%
11 Agriculture	2	2	2	0	0	2	2	2	2	2	2	0.0%	0.0%
21 Mining	6	6	12	6	0	0	0	0	0	0	0	-100.0%	0.0%
22 Utilities	37	36	31	37	25	25	25	29	30	16	15	-6.3%	-12.0%
23 Construction	610	482	522	662	659	662	458	380	324	330	419	-4.7%	-2.2%
31 -33 Manufacturing	84	74	64	58	79	54	34	28	34	28	27	-14.0%	-5.6%
42 Wholesale	79	34	41	41	46	63	44	50	37	33	46	-9.3%	1.1%
44-45 Retail	1,602	1,724	1,757	1,848	1,751	1,696	1,515	1,566	1,479	1,469	1,482	-0.9%	-0.5%
48-49 Warehouse Transportation	136	128	115	155	157	159	166	111	81	50	128	3.4%	-6.3%
51 Information	148	111	97	121	141	137	78	63	70	78	108	-10.1%	8.5%
52 Finance	249	206	176	199	173	169	158	131	136	143	121	-7.3%	-6.5%
53 Real Estate	392	385	341	378	403	778	716	729	578	622	441	10.6%	-11.4%
54 Professional Technical	247	224	246	285	314	200	238	230	212	209	216	-0.6%	-2.4%
55 Mgt. of Companies etc.	6	20	18	14	4	17	3	6	10	75	139	-10.9%	160.9%
56 Waste Mgt. and Admin Services	341	359	404	413	439	546	500	430	428	326	329	6.6%	-9.9%
61 Education	33	26	51	62	77	82	84	91	105	87	70	16.8%	-4.5%
62 Health	1,307	1,383	1,354	1,454	1,325	1,486	1,391	1,353	1,368	1,278	1,271	1.0%	-2.2%
71 Arts, Entertainment, Rec.	1,348	1,341	1,243	1,050	1,051	1,105	1,073	1,091	1,078	1,079	1,091	-3.7%	0.4%
72 Accommodations and Food	4,842	4,759	5,027	3,945	3,128	2,680	2,582	2,581	2,490	2,474	2,645	-9.9%	0.6%
81 Other services	544	481	461	467	460	459	414	431	425	363	392	-4.4%	-1.4%
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													

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Table A-8: Trends in Total Private Sector Jobs: Homewood: 2003 through 2013													
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2003-09 Annual Percent Change	2009-13 Annual Percent Change
Homewood (West Shore)	476	503	479	471	473	544	445	436	519	495	623	-1.1%	8.8%
11 Agriculture	0	0	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%	0.0%
22 Utilities	4	4	4	4	2	3	2	2	4	8	4	-10.9%	18.9%
23 Construction	101	103	110	125	79	89	45	46	72	76	102	-12.6%	22.7%
31 -33 Manufacturing	0	0	0	0	0	0	1	1	2	6	5	0.0%	49.5%
42 Wholesale	7	7	7	2	5	8	7	3	6	2	3	0.0%	-19.1%
44-45 Retail	49	39	37	36	25	28	22	37	24	20	29	-12.5%	7.2%
48-49 Warehouse Transportation	0	0	0	0	0	0	0	0	0	0	0	0.0%	0.0%
51 Information	0	0	12	12	0	0	0	0	0	0	0	0.0%	0.0%
52 Finance	0	2	2	0	0	1	1	1	2	0	0	0.0%	-100.0%
53 Real Estate	6	5	9	8	2	10	5	8	12	9	17	-3.0%	35.8%
54 Professional Technical	6	8	12	10	18	22	17	4	9	9	6	19.0%	-22.9%
55 Mgt. of Companies etc.	0	0	0	0	0	0	0	0	0	0	0	0.0%	0.0%
56 Waste Mgt. and Admin Services	8	14	9	12	4	12	7	6	9	11	13	-2.2%	16.7%
61 Education	2	2	2	2	1	2	1	1	2	2	3	-10.9%	31.6%
62 Health	0	0	0	0	0	0	0	0	0	0	0	0.0%	0.0%
71 Arts, Entertainment, Rec.	174	186	187	172	271	320	292	298	335	328	404	9.0%	8.5%
72 Accommodations and Food	85	100	68	68	54	34	32	16	28	16	27	-15.0%	-4.2%
81 Other services	34	33	20	20	12	15	13	12	14	8	10	-14.8%	-6.3%
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: 2003 through 2013													
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2003-09 Annual Percent Change**	**2009-13 Annual Percent Change**
	6,403	6,184	5,936	5,798	6,756	6,897	6,314	6,711	6,695	6,093	6,481	-0.2%	0.7%
11 Agriculture	0	0	0	0	4	4	8	4	4	4	4	0.0%	-15.9%
21 Mining	0	0	0	0	0	0	0	0	0	0	0	0.0%	0.0%
22 Utilities	4	5	4	8	0	2	2	0	0	0	0	-10.9%	-100.0%
23 Construction	548	578	584	620	606	622	522	569	447	366	388	-0.8%	-7.1%
31 -33 Manufacturing	54	43	32	47	38	55	35	43	30	45	33	-7.0%	-1.5%
42 Wholesale	7	5	22	22	36	6	6	3	4	2	6	-2.5%	0.0%
44-45 Retail	591	534	512	573	525	605	483	469	401	412	385	-3.3%	-5.5%
48-49 Warehouse Transportation	26	29	26	28	10	23	32	19	6	8	14	3.5%	-18.7%
51 Information	39	40	40	45	47	40	16	14	16	20	16	-13.8%	0.0%
52 Finance	62	80	74	68	66	65	65	52	56	56	58	0.8%	-2.8%
53 Real Estate	187	183	216	233	256	285	240	261	223	226	244	4.2%	0.4%
54 Professional Technical	144	137	185	213	179	250	172	196	203	214	214	3.0%	5.6%
55 Mgt. of Companies etc.	3	2	0	0	0	0	0	61	63	6	6	-100.0%	0.0%
56 Waste Mgt. and Admin Services	329	352	282	366	384	305	110	108	83	113	89	-16.7%	-5.2%
61 Education	27	34	40	69	65	65	64	45	45	46	50	15.5%	-6.0%
62 Health	88	82	95	124	91	88	78	77	75	78	70	-2.0%	-2.7%
71 Arts, Entertainment, Rec.	2,073	2,004	2,205	1,517	2,066	1,448	1,405	2,264	2,259	2,852	3,197	-6.3%	22.8%
72 Accommodations and Food	2,099	1,965	1,498	1,733	2,227	2,876	2,926	2,404	2,662	1,505	1,577	5.7%	-14.3%
81 Other services	122	111	121	132	156	158	150	122	118	140	130	3.5%	-3.5%
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													

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Table A-10: Trends in Total Private Sector Jobs: Kings Beach and Tahoe Vista: 2003 through 2013													
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2003-09 Annual Percent Change**	**2009-13 Annual Percent Change**
Kings Beach\Tahoe Vista	1,256	1,270	1,251	1,315	1,278	1,334	1,137	1,233	1,033	1,069	1,146	-1.6%	0.2%
11 Agriculture	0	0	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%	0.0%
22 Utilities	32	30	32	33	36	31	33	32	8	2	2	0.5%	-50.4%
23 Construction	213	212	199	263	251	198	151	111	151	205	272	-5.6%	15.9%
31 -33 Manufacturing	15	17	8	6	4	18	20	16	20	20	16	4.9%	-5.4%
42 Wholesale	6	4	4	8	10	14	10	11	12	11	8	8.9%	-5.4%
44-45 Retail	160	176	202	158	181	185	189	344	176	149	158	2.8%	-4.4%
48-49 Warehouse Transportation	4	2	2	5	7	4	3	4	4	8	8	-4.7%	27.8%
51 Information	16	37	39	21	19	19	4	4	4	4	6	-20.6%	10.7%
52 Finance	12	22	22	24	21	21	18	18	14	18	8	7.0%	-18.4%
53 Real Estate	76	77	71	76	78	76	66	62	63	70	68	-2.3%	0.7%
54 Professional Technical	65	62	59	50	78	83	63	52	55	43	49	-0.5%	-6.1%
55 Mgt. of Companies etc.	0	0	0	0	0	0	0	0	0	0	0	0.0%	0.0%
56 Waste Mgt. and Admin Services	68	71	80	88	80	88	122	109	68	56	63	10.2%	-15.2%
61 Education	4	4	6	4	4	0	0	2	4	6	13	-100.0%	100.0%
62 Health	78	69	70	74	48	50	40	43	38	28	30	-10.5%	-6.9%
71 Arts, Entertainment, Rec.	53	52	46	46	46	48	30	32	34	31	43	-9.0%	9.4%
72 Accommodations and Food	390	378	344	402	345	433	328	338	329	349	341	-2.8%	1.0%
81 Other services	64	57	67	57	70	66	60	55	53	69	61	-1.1%	0.4%
Source: ADE, based on US Census ZIP Business Patterns (2003-2013). Kings Beach and Tahoe Vista ZIP Codes: 96140, 96143, and 96148													

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Table A-11: Trends in Private Sector Employment in Visitor-Serving Industries: NAICS 71 (Entertainment, Recreation, and Amusement): Tahoe Basin and Sub-Areas: 2003-2013												
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2003-09 Annual Percent Change	2009-13 Annual Percent Change
Tahoe Basin	**3,961**	**4,012**	**4,030**	**3,045**	**3,733**	**2,947**	**2,761**	**3,514**	**3,469**	**4,324**	**4,499**	**-6%**	**13%**
NAICS 7121: Museums, historical sites	14	12	10	8	7	12	7	7	16	8	9	-11%	6%
NAICS 7131: Amusement parks and arcades	12	13	8	0	0	0	0	0	0	0	0	-100%	0%
NAICS 7132: Gambling industries (excluding hotels with casinos)	237	343	318	176	252	229	199	188	153	351	202	-3%	0%
NAICS 7139: Other recreational industries*	3,698	3,644	3,694	2,861	3,474	3,010	2,834	3,604	3,615	4,277	4,671	-4%	13%
01 Incline Village (Washoe Co.)	**72**	**236**	**352**	**209**	**257**	**291**	**203**	**201**	**163**	**220**	**203**	**19%**	**0%**
NAICS 7121: Museums, historical sites	6	6	2	2	2	0	2	2	2	2	2	-17%	0%
NAICS 7131: Amusement parks and arcades	12	13	6	0	0	0	0	0	0	0	0	-100%	0%
NAICS 7132: Gambling industries (excluding hotels with casinos)	38	183	310	169	245	222	184	181	146	171	163	30%	-3%
NAICS 7139: Other recreational industries*	16	34	34	38	10	69	17	18	15	47	38	1%	22%
02 Zephyr Cove\Stateline (Douglas Co.)	**313**	**245**	**74**	**50**	**46**	**50**	**54**	**43**	**45**	**220**	**75**	**-25%**	**9%**
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)	199	160	8	7	7	7	15	7	7	180	39	-35%	27%
NAICS 7139: Other recreational industries*	114	85	66	43	39	43	39	36	38	40	36	-16%	-2%
03 Other - East Shore	**12**	**24**	**29**	**12**	**8**	**15**	**8**	**14**	**14**	**6**	**6**	**-7%**	**-7%**
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*	12	24	29	12	8	15	8	14	14	6	6	-7%	-7%

Table A-11: Trends in Private Sector Employment in Visitor-Serving Industries: NAICS 71 (Entertainment, Recreation, and Amusement): Tahoe Basin and Sub-Areas: 2003-2013													
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2003-09 Annual Percent Change	2009-13 Annual Percent Change
03 South Lake Tahoe	**1,340**	**1,331**	**1,241**	**1,046**	**1,045**	**1,099**	**1,067**	**1,085**	**1,072**	**1,073**	**1,073**	**-4%**	**0%**
NAICS 7121: Museums, historical sites	4	2	2	2	2	8	2	2	2	2	2	-11%	0%
NAICS 7131: Amusement parks and arcades	0	0	2	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*	1,336	1,329	1,237	1,044	1,043	1,091	1,065	1,083	1,070	1,071	1,071	-4%	0%
04 Kings Beach\Tahoe Vista	**53**	**52**	**46**	**46**	**46**	**48**	**30**	**32**	**34**	**31**	**43**	**-9%**	**9%**
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*	53	52	46	46	46	48	30	32	34	31	43	-9%	9%
05 Squaw Val./Alpine Meadows\Carnelian Bay\Tahoe City\Homewood	**1,997**	**1,938**	**2,101**	**1,510**	**2,060**	**1,428**	**1,386**	**2,126**	**2,121**	**2,758**	**3,078**	**-6%**	**22%**
NAICS 7121: Museums, historical sites	2	2	2	2	2	2	2	2	6	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*	1,995	1,936	2,099	1,508	2,058	1,426	1,384	2,124	2,115	2,756	3,076	-6%	22%
07 Homewood (West Shore)	**174**	**186**	**187**	**172**	**271**	**320**	**292**	**298**	**335**	**328**	**404**	**9%**	**8%**
NAICS 7121: Museums, historical sites	2	2	4	2	1	2	1	1	6	2	3	-11%	32%
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*	172	184	183	170	270	318	291	297	329	326	401	9%	8%

*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: 2003-2013													
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2003-09 Annual Percent Change**	**2009-13 Annual Percent Change**
Tahoe Basin	**3,698**	**3,644**	**3,694**	**2,861**	**3,474**	**3,010**	**2,834**	**3,604**	**3,615**	**4,277**	**4,671**	**-4%**	**13%**
NAICS 71391: Golf courses and country clubs	105	81	119	75	72	60	49	71	55	54	45	-12%	-2%
NAICS 71392: Skiing facilities	3,305	3,281	3,313	2,522	3,202	2,702	2,620	3,393	3,414	4,047	4,439	-4%	14%
NAICS 71393: Marinas	83	77	75	71	73	81	65	57	61	57	71	-4%	2%
NAICS 71394: Fitness and recreational sports centers	133	127	101	108	67	85	53	49	46	67	66	-14%	6%
NAICS 71395: Bowling centers	0	0	0	0	0	0	0	0	0	13	6	0%	100%
NAICS 71399: All other amusement and recreation industries	72	78	86	85	60	82	47	34	39	39	44	-7%	-2%
01 Incline Village (Washoe Co.)	**16**	**34**	**34**	**38**	**10**	**69**	**17**	**18**	**15**	**47**	**38**	**1%**	**22%**
NAICS 71391: Golf courses and country clubs [a]	0	0	0	0	0	2	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	2	2	5	1	2	3	3	4	4	0%	19%
NAICS 71394: Fitness and recreational sports centers	12	30	30	34	2	29	13	12	12	30	28	1%	21%
NAICS 71395: Bowling centers	0	0	0	0	0	0	0	0	0	13	6	0%	100%
NAICS 71399: All other amusement and recreation industries	2	2	2	2	3	37	2	3	0	0	0	0%	-100%
02 Zephyr Cove\Stateline (Douglas Co.)	**114**	**85**	**66**	**43**	**39**	**43**	**39**	**36**	**38**	**40**	**36**	**-16%**	**-2%**
NAICS 71391: Golf courses and country clubs	82	69	50	36	35	37	35	34	34	34	32	-13%	-2%
NAICS 71392: Skiing facilities	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71393: Marinas	0	0	0	0	0	2	0	0	0	0	0	0%	0%
NAICS 71394: Fitness and recreational sports centers	2	6	8	5	0	0	0	0	0	2	0	-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	30	10	8	2	4	4	4	2	4	4	4	-29%	0%

Table A-12: Trends in Private Sector Employment in Visitor-Serving Industries: NAICS 7139 (Other Amusement and Recreation Industries): Tahoe Basin and Sub-Areas: 2003-2013													
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2003-09 Annual Percent Change**	**2009-13 Annual Percent Change**
03 Other - East Shore	**12**	**24**	**29**	**12**	**8**	**15**	**8**	**14**	**14**	**6**	**6**	**-7%**	**-7%**
NAICS 71391: Golf courses and country clubs	0	0	0	0	2	2	2	2	2	1	1	100%	-16%
NAICS 71392: Skiing facilities	12	0	0	0	0	13	6	12	12	5	5	-11%	-4%
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	0	24	29	12	6	0	0	0	0	0	0	0%	0%
03 South Lake Tahoe	**1,336**	**1,329**	**1,237**	**1,044**	**1,043**	**1,091**	**1,065**	**1,083**	**1,070**	**1,071**	**1,071**	**-4%**	**0%**
NAICS 71391: Golf courses and country clubs	9	8	65	33	31	15	8	31	15	15	8	-2%	0%
NAICS 71392: Skiing facilities	1,210	1,224	1,088	933	931	1,000	1,000	1,000	1,000	1,002	1,012	-3%	0%
NAICS 71393: Marinas	19	11	12	12	10	10	8	6	6	8	7	-13%	-3%
NAICS 71394: Fitness and recreational sports centers	74	63	53	40	50	44	23	30	26	27	27	-18%	4%
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	24	23	19	26	21	22	26	16	23	19	17	1%	-10%
04 Kings Beach\Tahoe Vista	**53**	**52**	**46**	**46**	**46**	**48**	**30**	**32**	**34**	**31**	**43**	**-9%**	**9%**
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	41	39	40	40	38	42	23	24	26	25	37	-9%	13%
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	10	11	4	4	6	4	5	6	6	4	4	-11%	-5%

Table A-12: Trends in Private Sector Employment in Visitor-Serving Industries: NAICS 7139 (Other Amusement and Recreation Industries): Tahoe Basin and Sub-Areas: 2003-2013													
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2003-09 Annual Percent Change	2009-13 Annual Percent Change
05 Squaw Val./Alpine Meadows\Carnelian Bay\Tahoe City\Homewood	**1,995**	**1,936**	**2,099**	**1,508**	**2,058**	**1,426**	**1,384**	**2,124**	**2,115**	**2,756**	**3,076**	**-6%**	**22%**
NAICS 71391: Golf courses and country clubs	12	2	2	4	2	2	2	2	2	2	2	-26%	0%
NAICS 71392: Skiing facilities	1,922	1,884	2,053	1,430	2,012	1,385	1,335	2,096	2,087	2,728	3,039	-6%	23%
NAICS 71393: Marinas	14	18	14	10	10	14	21	13	14	8	8	7%	-21%
NAICS 71394: Fitness and recreational sports centers	43	26	8	27	14	10	16	6	6	6	8	-15%	-16%
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	6	22	37	20	15	10	7	6	12	19	16%	17%
07 Homewood (West Shore)	**172**	**184**	**183**	**170**	**270**	**318**	**291**	**297**	**329**	**326**	**401**	**9%**	**8%**
NAICS 71391: Golf courses and country clubs	0	0	0	0	0	0	0	0	0	0	0	0%	0%
NAICS 71392: Skiing facilities	161	173	172	159	259	304	279	285	315	312	383	0%	0%
NAICS 71393: Marinas	7	7	7	7	10	12	11	11	12	12	15	8%	8%
NAICS 71394: Fitness and recreational sports centers	2	2	2	2	1	2	1	1	2	2	3	-11%	32%
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	2	2	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: 2003-2013													
Tahoe Basin	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	03-09 Annual Per. Chg.	09-13 Annual Per. Chg.
Visitor-Serving Industries	18,421	17,119	16,044	14,588	15,454	13,212	12,008	12,413	12,727	13,791	13,928	-7%	4%
Lodgings (w/ or w/o casinos)	10,229	10,119	8,656	8,358	8,902	7,298	6,458	5,948	6,232	6,068	5,658	-7%	-3%
Other Recreation	3,698	3,644	3,694	2,861	3,474	3,010	2,834	3,604	3,615	4,277	4,671	-4%	13%
Restaurants and Drinking Places	4,494	3,356	3,694	3,369	3,078	2,904	2,716	2,861	2,880	3,446	3,599	-8%	7%

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: 2003-2013													
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2003-09 Annual Percent Change	2009-13 Annual Percent Change
Visitor-Serving Industries	**18,421**	**17,119**	**16,044**	**14,588**	**15,454**	**13,212**	**12,008**	**12,413**	**12,727**	**13,791**	**13,928**	**-7%**	**4%**
Incline Village	1,578	1,688	1,651	1,303	1,196	1,485	1,388	1,241	1,433	1,189	1,166	-2%	-4%
East Shore	38	50	56	36	36	21	8	14	14	7	7	-23%	-3%
Zephyr Cove \ Stateline	6,118	5,769	4,761	5,320	5,970	4,451	3,631	3,693	3,570	4,076	3,564	-8%	0%
South Lake Tahoe	5,980	5,380	5,661	4,455	3,625	3,206	3,016	3,062	2,958	3,514	3,682	-11%	5%
West Shore	246	271	231	212	310	332	303	298	339	338	420	4%	9%
Alpine Meadows \ Carnelian Bay	4,026	3,614	3,405	2,935	4,013	3,338	3,380	3,793	4,118	4,293	4,713	-3%	9%
Kings Beach	435	347	279	327	304	379	282	312	295	374	376	-7%	7%
Lodgings (w/ or w/o casinos)	**10,229**	**10,119**	**8,656**	**8,358**	**8,902**	**7,298**	**6,458**	**5,948**	**6,232**	**6,068**	**5,658**	**-7%**	**-3%**
Incline Village	1,237	1,325	1,303	1,046	950	1,126	1,116	941	1,029	821	796	-2%	-8%
East Shore	0	0	0	0	0	0	0	0	0	0	0	0%	0%
Zephyr Cove \ Stateline	5,360	5,246	4,061	4,782	5,470	3,909	3,307	3,421	3,199	3,586	3,093	-8%	-2%
South Lake Tahoe	2,809	2,753	2,952	2,151	1,413	990	872	707	797	921	959	-18%	2%
West Shore	2	2	2	2	0	0	0	0	0	0	0	-100%	0%
Alpine Meadows \ Carnelian Bay	776	748	309	347	1,028	1,202	1,123	833	1,157	694	761	6%	-9%

Table A-14: Trends in Private Sector Employment in Specific Visitor-Serving Industries: Tahoe Basin and Sub-Areas: 2003-2013													
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2003-09 Annual Percent Change**	**2009-13 Annual Percent Change**
Kings Beach	45	45	29	30	41	71	40	46	50	46	49	-2%	5%
Other Recreation	**3,698**	**3,644**	**3,694**	**2,861**	**3,474**	**3,010**	**2,834**	**3,604**	**3,615**	**4,277**	**4,671**	**-4%**	**13%**
Incline Village	16	34	34	38	10	69	17	18	15	47	38	1%	22%
East Shore	12	24	29	12	8	15	8	14	14	6	6	-7%	-7%
Zephyr Cove \ Stateline	114	85	66	43	39	43	39	36	38	40	36	-16%	-2%
South Lake Tahoe	1,336	1,329	1,237	1,044	1,043	1,091	1,065	1,083	1,070	1,071	1,071	-4%	0%
West Shore	172	184	183	170	270	318	291	297	329	326	401	9%	8%
Alpine Meadows \ Carnelian Bay	1,995	1,936	2,099	1,508	2,058	1,426	1,384	2,124	2,115	2,756	3,076	-6%	22%
Kings Beach	53	52	46	46	46	48	30	32	34	31	43	-9%	9%
Restaurants and Drinking Places	**4,494**	**3,356**	**3,694**	**3,369**	**3,078**	**2,904**	**2,716**	**2,861**	**2,880**	**3,446**	**3,599**	**-8%**	**7%**
Incline Village	325	329	314	219	236	290	255	282	389	321	332	-4%	7%
East Shore	26	26	27	24	28	6	0	0	0	1	1	-100%	100%
Zephyr Cove \ Stateline	644	438	634	495	461	499	285	236	333	450	435	-13%	11%
South Lake Tahoe	1,835	1,298	1,472	1,260	1,169	1,125	1,079	1,272	1,091	1,522	1,652	-8%	11%
West Shore	72	85	46	40	40	14	12	1	10	12	19	-26%	12%
Alpine Meadows \ Carnelian Bay	1,255	930	997	1,080	927	710	873	836	846	843	876	-6%	0.10%
Kings Beach	337	250	204	251	217	260	212	234	211	297	284	-7%	8%

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%

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	27,171	----
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	27,709	2.0%
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	26,708	-3.6%
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	27,008	1.1%
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	22,177	-17.9%
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	18,765	-15.4%
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	18,386	-2.0%
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	16,522	-10.1%
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	17,143	3.8%
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	17,411	1.6%
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	17,068	-2.0%
2015	1,994	1,762	1,530	1,331										
Source: Nevada Gaming Control Board														

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	Total Change 2007/08 to 2013/14	Annual Change: 2009/10 to 2013/14
Incline Village	$34,570	$29,085	$27,092	$27,812	$27,515	$30,315	$31,499	-8.90%	3.80%
Zephyr Cove \ Stateline	$44,322	$37,953	$34,331	$43,183	$44,097	$48,231	$48,244	-16.30%	2.00%
South Lake Tahoe	$100,471	$82,717	$84,557	$86,700	$88,246	$102,975	$110,347	9.80%	6.90%
Alpine Meadows	$1,110	$1,305	$1,267	$1,451	$1,355	$1,586	$1,403	26.40%	2.60%
Carnelian Bay	$9,419	$5,503	$5,911	$6,002	$6,387	$7,519	$7,648	-18.80%	6.60%
Kings Beach	$3,982	$3,809	$3,270	$3,210	$3,155	$3,542	$3,432	-13.80%	1.20%
Squaw Valley	$30,192	$29,477	$27,544	$31,352	$29,296	$31,907	$32,083	6.30%	3.90%
Tahoe Vista	$4,709	$5,176	$5,119	$5,526	$5,531	$7,249	$7,541	60.20%	10.20%
Tahoe City	$13,826	$10,152	$5,661	$9,999	$10,262	$11,816	$11,847	-14.30%	20.30%
Homewood	$11,544	$11,150	$10,511	$10,463	$10,586	$12,148	$13,425	16.29%	2.55%
Total	$254,145	$227,717	$215,567	$225,702	$226,435	$257,292	$267,474	5.24%	0.86%

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

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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	Total Change 2007/08 to 2013/14	Annual Change: FY 2009/10 to 2013/14
Incline Village	$3,457	$2,908	$2,709	$2,781	$2,751	$3,031	$3,149	-8.90%	3.80%
Zephyr Cove \ Stateline	$4,432	$3,795	$3,433	$4,318	$4,409	$4,823	$4,824	8.80%	8.90%
South Lake Tahoe	$10,047	$8,271	$8,455	$8,670	$8,824	$10,297	$11,034	9.80%	6.90%
Alpine Meadows	$111	$130	$126	$145	$135	$158	$140	26.40%	2.60%
Carnelian Bay	$941	$550	$591	$600	$638	$751	$764	-18.80%	6.60%
Kings Beach	$398	$380	$327	$321	$315	$354	$343	-13.80%	1.20%
Squaw Valley	$3,019	$2,947	$2,754	$3,135	$2,929	$3,190	$3,208	6.30%	3.90%
Tahoe Vista	$470	$517	$511	$552	$553	$724	$754	60.20%	10.20%
Tahoe City	$1,382	$1,015	$566	$999	$1,026	$1,181	$1,184	-14.30%	20.30%
Homewood	$1,154	$1,115	$1,051	$1,046	$1,058	$1,214	$1,342	16.25%	2.54%
Total	$25,411	$22,772	$21,557	$23,866	$23,966	$27,176	$28,195	10.95%	1.75%

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

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AVERAGE DAILY HOTEL RATES

Table A-19: Revenues Per Available Room Trends								
	07-08	08-09	09-10	10-11	11-12	12-13	13-14	Ann. Per. Change: 07-08 to 13-14
Incline Village	$80	$67	$67	$66	$65	$61	$58	-5.0%
Zephyr Cove \ Stateline	$53	$48	$44	$43	$41	$45	$47	-2.0%
South Lake Tahoe	$34	$37	$29	$31	$29	$33	$34	0.1%
North Lake Tahoe	$74	$55	$55	$58	$65	$64	$79	1.1%
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)								

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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	Annual Per. Change: 07-08 through 13-14
Incline Village	$45,947,218	$39,659,358	$35,965,194	$36,351,841	$37,197,756	$39,975,636	$42,920,905	-1%
Zephyr Cove\Stateline	$40,033,459	$34,194,538	$31,643,648	$31,169,294	$32,525,794	$34,661,616	$35,134,959	-2%
South Lake Tahoe	$78,190,288	$69,897,275	$57,845,950	$66,593,075	$60,466,775	$64,134,038	$68,536,238	-2%
Alpine Mead.\Squa.Va.	$5,544,480	$4,659,680	$5,425,173	$5,078,960	$5,398,267	$5,959,067	$4,508,640	-3%
Kings Beach/ Carnelian Bay	$5,408,427	$4,138,840	$5,086,387	$4,991,973	$5,278,493	$5,450,947	$5,643,753	1%
Tahoe Vista	$1,934,227	$1,771,560	$1,809,587	$1,820,587	$1,962,387	$2,244,400	$1,883,507	-0.4%
Tahoe City	$12,330,547	$10,203,627	$10,437,933	$11,047,520	$11,582,493	$12,382,613	$12,354,620	0.03%
Homewood	$3,290,867	$2,654,053	$2,668,240	$2,987,413	$2,982,400	$3,298,893	$2,798,760	-3%
Total	$192,679,511	$167,178,931	$150,882,112	$160,040,664	$157,394,365	$168,107,210	$172,706,122	-2%
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.								

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Table A-21: Trends in Sales Tax Revenues								
	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	Annual Per. Change: 07-08 through 13-14
Incline Village	$3,549,423	$3,063,685	$2,778,311	$2,808,180	$2,873,527	$3,088,118	$3,315,640	-1%
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%
South Lake Tahoe	$6,255,223	$5,591,782	$4,627,676	$5,327,446	$4,837,342	$5,130,723	$5,482,899	-2%
Alpine Mead.\Squa.Va.	$415,836	$349,476	$406,888	$380,922	$404,870	$446,930	$338,148	-3%
Kings Beach/Carnelian Bay	$405,632	$310,413	$381,479	$374,398	$395,887	$408,821	$423,282	1%
Tahoe Vista	$145,067	$132,867	$135,719	$136,544	$147,179	$168,330	$141,263	-0.4%
Tahoe City	$924,791	$765,272	$782,845	$828,564	$868,687	$928,696	$926,596	0.03%
Homewood	$246,815	$199,054	$200,118	$224,056	$223,680	$247,417	$209,907	-3%
Total	$14,785,162	$12,840,362	$11,559,735	$12,293,130	$12,060,503	$12,880,010	$13,251,673	-2%

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.

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TOTAL EMPLOYED/UNEMPLOYED

Table A-22: Trends in Number of Persons in Labor Force								
	2008	2009	2010	2011	2012	2013	2014	Annual Per. Change: 2008 - 2014
Incline Village	6,644	6,561	6,377	6,392	6,380	6,390	6,419	-0.6%
Zephyr Cove \ Stateline	2,710	2,698	2,790	2,803	2,756	2,756	2,699	-0.1%
South Lake Tahoe	15,000	15,200	15,500	12,000	11,800	11,700	11,700	-4.1%
Kings Beach	3,000	3,100	2,500	2,400	2,500	2,400	2,500	-3.0%
Squaw Valley	1,400	1,400	1,100	1,100	1,100	1,000	1,100	-3.9%
Tahoe Vista	1,600	1,700	1,000	1,000	1,000	1,000	1,000	-7.5%
Tahoe City/Homewood	1,900	2,000	1,000	1,000	1,100	1,100	1,100	-8.7%
Dollar Point	1,300	1,400	514	513	511	509	508	-14.5%
Total	33,554	34,059	30,781	27,208	27,147	26,855	27,026	-3.5%

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

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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	Annual Per. Change: 2008 - 2014
Incline Village	6,303	6,042	5,779	5,806	5,871	5,953	6,070	-0.6%
Zephyr Cove \ Stateline	2,501	2,390	2,410	2,434	2,443	2,496	2,489	-0.1%
South Lake Tahoe	13,900	13,700	13,200	10,400	10,300	10,400	10,600	-4.4%
Kings Beach	2,800	2,800	2,100	2,100	2,200	2,200	2,300	-3.2%
Squaw Valley	1,300	1,300	800	800	800	800	900	-5.9%
Tahoe Vista	1,400	1,400	900	900	900	900	900	-7.1%
Tahoe City/Homewood	1,800	1,800	900	900	1,000	1,000	1,000	-9.3%
Dollar Point	1,200	1,200	500	500	500	500	500	-13.6%
Total	31,204	30,632	26,589	23,840	24,014	24,249	24,759	-3.8%

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.

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Table A-24: Trends in Unemployed Persons in Labor Force

	2008	2009	2010	2011	2012	2013	2014	Annual Per. Change: 2008 - 2014
Incline Village	341	519	598	586	509	437	349	0.4%
Zephyr Cove \ Stateline	209	308	380	369	313	260	210	0.1%
South Lake Tahoe	1,100	1,500	2,300	1,600	1,500	1,300	1,100	0.0%
Kings Beach	200	300	400	300	300	200	200	0.0%
Squaw Valley	100	100	300	300	300	200	200	12.2%
Tahoe Vista	200	300	100	100	100	100	100	-10.9%
Tahoe City/Homewood	100	200	100	100	100	100	100	0.0%
Dollar Point	100	200	14	13	11	9	8	-34.4%
Total	2,350	3,427	4,192	3,368	3,133	2,606	2,267	-0.6%

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.

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Table A-25: Trends in Rates of Unemployment							
	2008	2009	2010	2011	2012	2013	2014
Incline Village	5.1%	7.9%	9.4%	9.2%	8.0%	6.8%	5.4%
Zephyr Cove \ Stateline	7.7%	11.4%	13.6%	13.2%	11.4%	9.4%	7.8%
South Lake Tahoe	7.3%	9.9%	14.8%	13.3%	12.7%	11.1%	9.4%
Kings Beach	6.7%	9.7%	16.0%	12.5%	12.0%	8.3%	8.0%
Squaw Valley	7.1%	7.1%	27.3%	27.3%	27.3%	20.0%	18.2%
Tahoe Vista	12.5%	17.6%	10.0%	10.0%	10.0%	10.0%	10.0%
Tahoe City/Homewood	5.3%	10.0%	10.0%	10.0%	9.1%	9.1%	9.1%
Dollar Point	7.7%	14.3%	2.7%	2.5%	2.2%	1.8%	1.6%
Tahoe Basin	7.0%	10.1%	13.6%	12.4%	11.5%	9.7%	8.4%
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.							

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ANNUAL PER CAPITA INCOME

Table A-26: Per Capita Income, 2010-2013						
Location	Geography	2010	2011	2012	2013	% Change 2010-13
North	Carnelian Bay CDP, California	$21,249	$29,998	$29,959	$37,568	76.8%
	Dollar Point CDP, California	$40,732	$36,547	$40,461	$36,305	-10.9%
	Kings Beach CDP, California	$22,257	$23,607	$19,643	$18,868	-15.2%
	Squaw Valley CDP, California	$25,975	$26,330	$24,307	$27,086	4.3%
	Sunnyside-Tahoe City CDP, California	$37,060	$32,055	$35,400	$29,848	-19.5%
	Tahoe Vista CDP, California	$32,430	$32,092	$32,951	$35,709	10.1%
	Incline Village CDP, Nevada	$51,172	$54,787	$47,281	$45,159	-11.8%
	Homewood	$40,298	$43,917	$44,171	$47,068	16.8%
	Tahoma CDP, California	$38,051	$37,355	$37,146	$36,078	-5.2%
North Tahoe Basin		**$39,016**	**$40,641**	**$36,718**	**$35,457**	**-9.1%**
South	South Lake Tahoe city, California	$23,448	$22,958	$22,829	$23,224	-1.0%
	Stateline CDP, Nevada	$16,645	$15,685	$16,873	$20,612	23.8%
	Zephyr Cove CDP, Nevada	$86,272	$60,170	$62,704	$62,219	-27.9%
South Tahoe Basin		**$23,920**	**$23,118**	**$23,222**	**$23,714**	**-0.9%**
Tahoe Basin		$30,947	$31,024	$29,355	$29,214	-5.6%
California		$29,188	$29,634	$29,551	$29,527	1.2%
Nevada		$27,589	$27,625	$27,003	$26,589	-3.6%
Source: ADE, Inc. American Community Survey 5-year Estimates						

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

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
Tahoe Basin	**60,295**	**56,709**	**55,258**	**54,012**	**53,984**	**54,380**
California	33,871,648	37,253,956	36,637,290	36,969,200	37,325,068	37,659,181
Nevada	1,998,257	2,700,551	2,633,331	2,673,396	2,704,204	2,730,066
Source: ADE. Inc., Decennial Census 2000 and 2010, American Community Survey 2010, 2011, 2012, 2013.						

Link: P:\Tahoe Indicators 2015\05_Population\Population Summary
File: Lake Tahoe Basin 2013_10_Population Totals
Tab: ACS 2010_11_12_13

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)**	**Percent Change**
Homewood	808	709	774	792	817	1.1%
Tahoe Pines/ Sunnyside	1,087	961	775	964	915	-15.8%
Tahoe City	1,058	909	1,031	1,071	981	-7.3%
Lake Forest/Dollar Hill	1,806	1,288	1,115	1,221	1,049	-41.9%
Carnelian Bay	1,694	1,352	1,284	1,313	1,186	-30.0%
Tahoe Vista	1,931	1,719	1,546	1,470	1,722	-10.8%
Kings Beach/ Brockway	3,774	3,510	2,966	3,240	3,355	-11.1%
Crystal Bay/ Incline Village	9,952	9,087	8,347	8,127	8,654	-13.0%
Subtotal North	**22,110**	**19,535**	**17,838**	**18,198**	**18,679**	-15.5%
South Lake						
South Lake Tahoe	23,663	24,343	24,464	24,517	24,230	2.4%
Meyers	3,047	2,641	2,767	2,446	2,296	-24.6%
Tahoma	1,158	1,015	666	681	628	-45.8%
Glenbrook	5,535	5,397	5,034	4,889	4,819	-12.9%
Kingsbury	2,169	1,601	1,622	1,563	1,722	-20.6%
Stateline	2,613	2,152	1,621	1,690	2,005	-23.3%
Subtotal South	**38,185**	**37,149**	**36,174**	**35,786**	**35,700**	-6.5%
Tahoe Basin	**60,295**	**56,684**	**54,012**	**53,984**	**54,380**	**-9.8%**
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 2013	10,209	5,640	14,344	15,973	7,529	685	54,380
Population Distribution 2013	18.8%	10.4%	26.4%	29.4%	13.8%	1.3%	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 2013	9,226,499	3,954,214	10,619,889	9,414,795	3,803,577	640,206	37,659,181
Population Distribution 2013	24.5%	10.5%	28.2%	25.0%	10.1%	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 2013	663,406	251,166	772,609	701,627	311,228	32,761	2,732,796
Population Distribution 2013	24.3%	9.2%	28.3%	25.7%	11.4%	1.2%	100.0%
Source: ADE, Inc. American Community Survey 2010, 2013 and Decennial Census 2000, 2010							

Table B-2.1 2013 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	2,504	100.0%	174	7.0%	427	17.1%	496	19.8%	842	33.6%	565	22.6%
33.08, Incline Village	2,102	100.0%	293	13.9%	86	4.1%	402	19.1%	749	35.6%	572	27.2%
33.07, Incline Village	1,084	100.0%	189	17.4%	173	15.9%	292	26.9%	236	21.7%	195	18.0%
33.06, Incline Village	1,652	100.0%	334	20.2%	206	12.5%	562	34.0%	387	23.4%	162	9.8%
33.05, Incline Village	1,312	100.0%	244	18.6%	103	7.9%	393	29.9%	398	30.3%	174	13.3%
320, Tahoma	628	100.0%	111	17.7%	92	14.7%	199	31.7%	138	22.1%	88	13.9%
316, South Lake Tahoe	4,026	100.0%	792	19.7%	777	19.3%	1,190	29.6%	1,081	26.9%	187	4.6%
305.04, South Lake Tahoe	2,737	100.0%	490	17.9%	257	9.4%	600	21.9%	986	36.0%	403	14.7%
305.02, Meyers	2,296	100.0%	527	22.9%	218	9.5%	428	18.6%	852	37.1%	271	11.8%
304.02, South Lake Tahoe	3,450	100.0%	777	22.5%	288	8.3%	868	25.2%	958	27.8%	559	16.2%
304.01, South Lake Tahoe	4,204	100.0%	705	16.8%	452	10.8%	1,035	24.6%	1,165	27.7%	848	20.2%
303.02, South Lake Tahoe	2,838	100.0%	594	20.9%	308	10.8%	950	33.5%	638	22.5%	347	12.2%
303.01, South Lake Tahoe	2,004	100.0%	249	12.4%	304	15.2%	366	18.3%	825	41.2%	260	13.0%
302, South Lake Tahoe	4,971	100.0%	1,329	26.7%	438	8.8%	1,578	31.7%	1,205	24.2%	420	8.5%
3, Carson City/Eastshore	3,813	100.0%	705	18.5%	303	8.0%	566	14.8%	1,195	31.3%	1,045	27.4%
223, Homewood	817	100.0%	171	21.0%	44	5.4%	139	17.0%	312	38.2%	150	18.3%
222, Tahoe City	981	100.0%	270	27.5%	89	9.0%	412	42.0%	134	13.7%	77	7.8%
221, Tahoe Pines/Sunnyside	915	100.0%	205	22.4%	35	3.8%	210	22.9%	334	36.5%	130	14.3%
201.07, Kings Beach	3,355	100.0%	764	22.8%	453	13.5%	1,321	39.4%	731	21.8%	86	2.6%
201.06, Tahoe Vista	1,722	100.0%	313	18.2%	201	11.7%	619	36.0%	412	24.0%	176	10.2%
201.05, Carnelian Bay	1,186	100.0%	204	17.2%	72	6.0%	180	15.2%	366	30.9%	364	30.7%
201.04, Dollar Point	1,049	100.0%	175	16.7%	90	8.6%	279	26.6%	327	31.2%	177	16.9%
18, Stateline	2,005	100.0%	234	11.7%	155	7.8%	532	26.5%	774	38.6%	310	15.5%
17, Kingsbury	1,722	100.0%	287	16.7%	49	2.8%	516	30.0%	540	31.4%	330	19.2%
16, Zephyr Cove/ Glen Brook	1,006	100.0%	72	7.2%	20	2.0%	211	21.0%	385	38.3%	317	31.5%
Total	54,380	100.0%	11,494	18.6%	6,051	9.8%	15,680	25.4%	18,457	29.9%	10,031	16.3%
Source: ADE, Inc. American Community Survey 2010, 2013 and Decennial Census 2000, 2010. 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	**2003-04**	**2004-05**	**2005-06**	**2006-07**	**2007-08**	**2008-09**	**2009-10**	**2010-11**	**2011-12**	**2012-13**	**2013-14**	**2014-15**	**Percent Change**
Tahoe Truckee Total	5,083	4,771	4,520	4,291	4,182	4,076	3,965	3,878	3,858	3,793	3,855	3,881	(23.6%)
Incline Village	1,183	1,101	1,079	1,078	1,031	1,000	950	1,005	941	947	955	-	(19.3%)
Zephyr Cove	268	261	235	190	180	199	225	199	-	-	-	-	(25.7%)
Tahoe City	1,246	1,157	1,135	970	951	973	1,157	1,121	1,114	1,087	1,068	1,075	(13.7%)
Kings Beach Elementary	446	423	403	439	460	451	244	261	264	355	375	381	(14.6%)
Lake Tahoe Unified Total	4,237	4,771	4,235	3,943	3,828	3,708	3,602	3,509	3,480	3,419	3,471	3,484	(17.8%)
Total	12,463	12,484	11,607	10,911	10,632	10,407	10,143	9,973	9,657	9,601	9,724	8,821	(29.2%)
Source: ADE, Inc.													

Link: P:\Tahoe Indicators 2015\10_Schools-Colleges
File: EnrollmentSummary

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**
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%
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%
Subtotal CA	**50.4%**	**48.7%**	**48.8%**	**49.1%**	**45.7%**	**54.9%**	**55.9%**	**62.3%**	**57.6%**	**56.6%**	**56.0%**
Zephyr Cove			24.5%	16.1%	19.1%	30.2%	28.1%	36.9%	35.4%	35.0%	37.1%
Incline Village			16.6%	22.4%	19.2%	28.2%	24.5%	23.3%	26.1%	26.7%	27.7%
Subtotal NV			**20.3%**	**21.5%**	**19.2%**	**28.6%**	**25.1%**	**25.8%**	**27.6%**	**28.2%**	**29.3%**
Total			**43.7%**	**44.2%**	**41.1%**	**50.2%**	**50.2%**	**55.2%**	**52.1%**	**52.0%**	**51.3%**
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**
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
Non Credit FTEs	2.73	31.01	50.36	55.19	51.85	43.46	45.86	48.68
NC CDCP FTEs	39.08	52.71	66.39	54.41	29.31	23.42	31.35	32.98
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**
Source: Lake Tahoe Community College Fact Book, 2013-2014.								

P:\Tahoe Indicators 2015\10_Schools Colleges\Enrollmentsummary.xlsx

Table B-6: Sierra Nevada College Enrollments, 2011-2016-17						
	Actual				**Projected**	
Undergraduate Headcount	**2011-2012**	**2012-2013**	**2013-2014**	**2014-2015**	**2015-2016**	**2016-2017**
New First-time	104	84	107	131	126	130
New Transfer	146	104	103	88	104	108
Full-time	577	581	552	574	572	575
Part-time	245	270	292	285	300	300
Total Undergraduate	**822**	**851**	**844**	**859**	**872**	**875**
	Actual				**Projected**	
Student Enrollment - Total	**FALL 11**	**FALL 12**	**FALL 13**	**FALL 14**	**FALL 15**	**FALL 16**
Undergraduate FTE	669	682	669	690	690	695
Graduate FTE	543	446	511	603	615	623
Other Programs FTE	NA	NA	NA	NA	NA	NA
Total FTE	**1,212**	**1,128**	**1,180**	**1,293**	**1,305**	**1,318**

Source: Deborah M. Prout, Special Assistant to the President, Sierra Nevada College.

PAYERS FOR HOSPITAL SERVICES AND ACCESS TO HEALTH CARE SERVICES

Table B-7: Barton Health Services Payers for Hospital Service						
Payer	**6/30/2012**	**12/31/2012**	**6/30/2013**	**12/31/2013**	**6/30/2014**	**12/31/2014**
Government	48%	44%	45%	36%	47%	47%
Commercial/Other	39%	44%	45%	54%	45%	43%
Self-Pay	13%	12%	10%	10%	8%	10%

Table B-8: Tahoe Forest Hospital District Payers for Hospital Service		
Payer	**2013**	**2014**
Medicare	24%	28%
Medi-Cal	16%	16%
Self Pay	29%	17%
Commercial/Other	31%	39%
Total	100%	100%

Table B-9: Barton Health Systems														
	2007		2008		2009		2010		2011		2012		2013	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Medicare	1,102	29%	890	26%	852	28%	854	31%	716	27%	748	28%	659	26%
Medi-Cal	941	24%	910	26%	797	26%	704	25%	727	27%	816	30%	811	32%
Other Government	113	3%	115	3%	114	4%	122	4%	121	5%	83	3%	79	3%
Private Coverage	1,467	38%	1,328	38%	19	1%	918	33%	917	35%	871	32%	807	32%
Self Pay	159	4%	131	4%	1,079	36%	108	4%	84	3%	109	4%	160	6%
Other payer	0	0%	8	0%	119	4%	20	1%	39	1%	22	1%	6	0%
Worker's Comp	62	2%	68	2%	58	2%	37	1%	49	2%	43	2%	32	1%
Total	**3,844**	**100%**	**3,450**	**100%**	**3,038**	**100%**	**2,763**	**100%**	**2,653**	**100%**	**2,692**	**100%**	**2,554**	**100%**
Source: California Office of Statewide Health Planning & Development														

Table B-10: Tahoe Forest Hospital District														
	2007		2008		2009		2010		2011		2012		2013	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Medicare	505	20%	523	22%	515	23%	508	23%	520	25%	516	26%	536	26%
Medi-Cal	532	21%	519	22%	475	21%	520	23%	484	23%	408	20%	463	22%
Other Government	9	0%	8	0%	2	0%	12	1%	14	1%	48	2%	74	4%
Private Coverage	1,273	51%	1,196	50%	1,107	50%	1,089	48%	971	46%	921	46%	814	39%
Self Pay	164	7%	135	6%	131	6%	125	6%	127	6%	125	6%	171	8%
Other payer		0%		0%		0%		0%		0%		0%	2	0%
Worker's Comp		0%		0%		0%		0%		0%		0%	25	1%
Total	**2,483**	**100%**	**2,381**	**100%**	**2,230**	**100%**	**2,254**	**100%**	**2,116**	**100%**	**2,018**	**100%**	**2,085**	**100%**
Source: California Office of Statewide Health Planning & Development														

VOTER PARTICIPATION

Table B-11: Voter Participation Rates by Community													
Community/ Election Type	Special Elections		Statewide Primary Elections					Statewide Direct General Elections					
	2009	2011	2006	2008	2010	2012	2014	2004	2006	2008	2010	2012	2014
South Lake Tahoe	22.64%		31.13%	34.04%	27.70%	26.73%	29.99%	70.80%	49.72%	72.42%	54.21%	66.58%	43.97%
Homewood	45.0%		41.8%	60.3%	48.1%	*	*		66.7%	86.5%	75.4%	*	*
Tahoe City	38.2%		34.7%	55.9%	34.5%	38.3%	29.7%		64.3%	85.0%	66.0%	81.1%	29.7%
Alpine Meadows/Squaw Valley	51.7%		52.9%	70.9%	53.1%	57.3%	43.7%		76.5%	90.2%	79.7%	86.3%	43.7%
Dollar Point	40.2%		45.6%	64.8%	47.6%	41.6%	28.9%		68.9%	83.1%	70.0%	81.6%	28.9%
Carnelian Bay			33.8%	57.3%	34.8%	46.6%	31.0%		65.1%	87.4%	67.3%	80.6%	31.0%
Kings Beach	41.1%		29.4%	55.5%	32.6%	43.2%	27.9%		65.5%	88.5%	63.6%	79.7%	27.9%
Incline Village		75.0%	34.0%		34.7%	29.4%	24.8%	61.0%	59.2%	74.5%	64.7%	76.7%	54.0%
Glenbrook		45.5%	40.4%	29.5%	49.5%	30.7%	25.4%	91.1%	74.6%	94.3%	82.5%	88.6%	59.8%
Zephyr Cove		36.7%	31.7%	24.7%	36.8%	26.0%	21.0%	93.0%	69.4%	91.7%	70.6%	91.3%	60.9%
Note: Data for Stateline was not available. *Includes Homewood and Tahoe City													
Source: ADE, Inc. County Election Departments													

P:\Tahoe Indicators 2015\03_Election

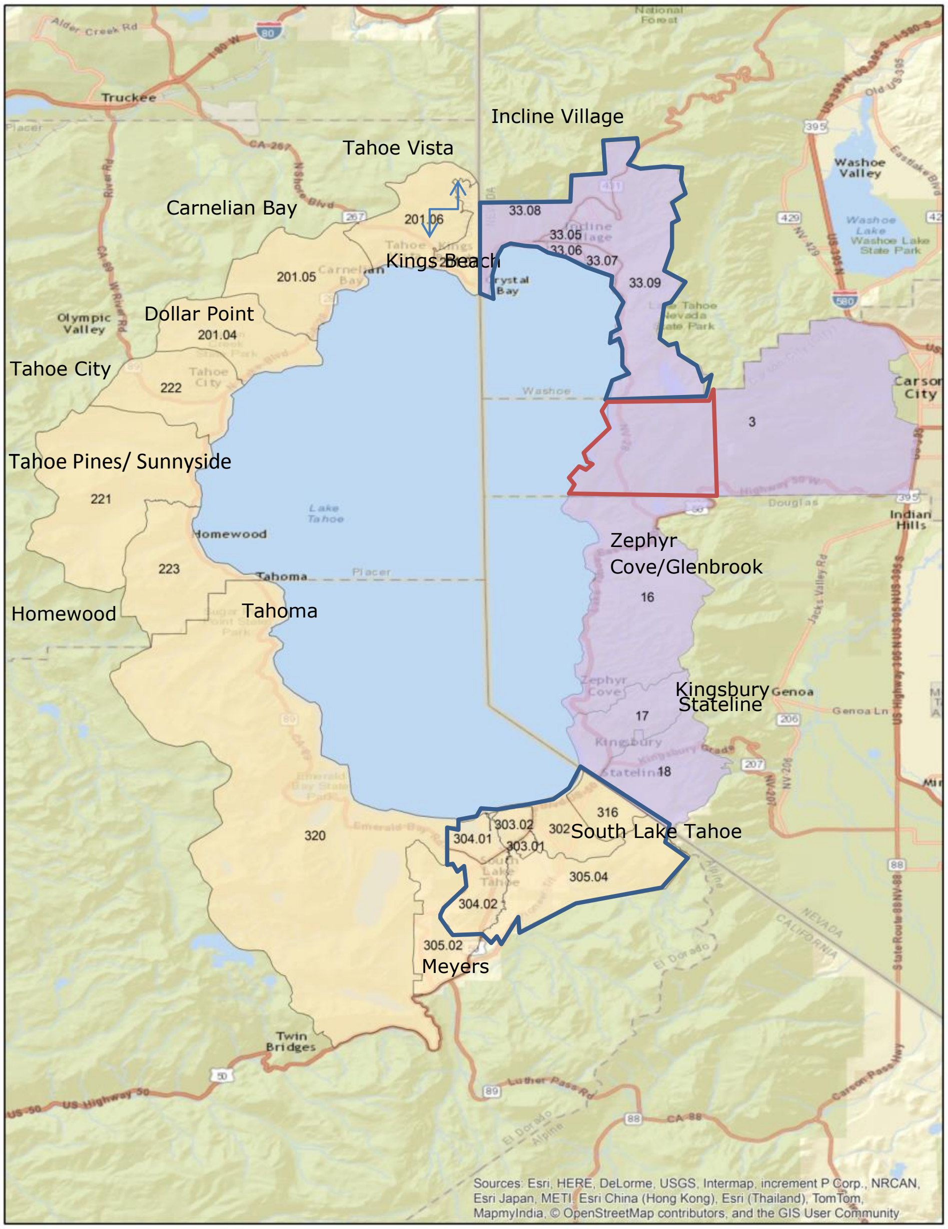
CRIME RATES

Table B-12: Selected Crime Rates for North Lake Tahoe and Incline Village										
Year	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
North Lake Tahoe										
Total Crime			917	769	756	616	654	529	557	460
Population			12,087	11,951	11,815	11,679	11,228	11,599	12,008	12,431
Crime rate			75.9	64.3	64.0	52.7	58.2	45.6	46.4	37.0
Incline Village/ Crystal Bay										
Part I Crime	173	200	220	169	166	160	181	164	181	126
Population	9,095	9,095	9,095	9,095	9,095	9,095	9,095	9,095	9,095	9,095
Crime rate	19.0	22.0	24.2	18.6	18.3	17.6	19.9	18.0	19.9	13.9
US. Average	38.5	38.1	37.7	37.3	35.4	34.7	34.2	34.1	32.6	NA

Source: Placer County Sheriff and Washoe County Sheriff

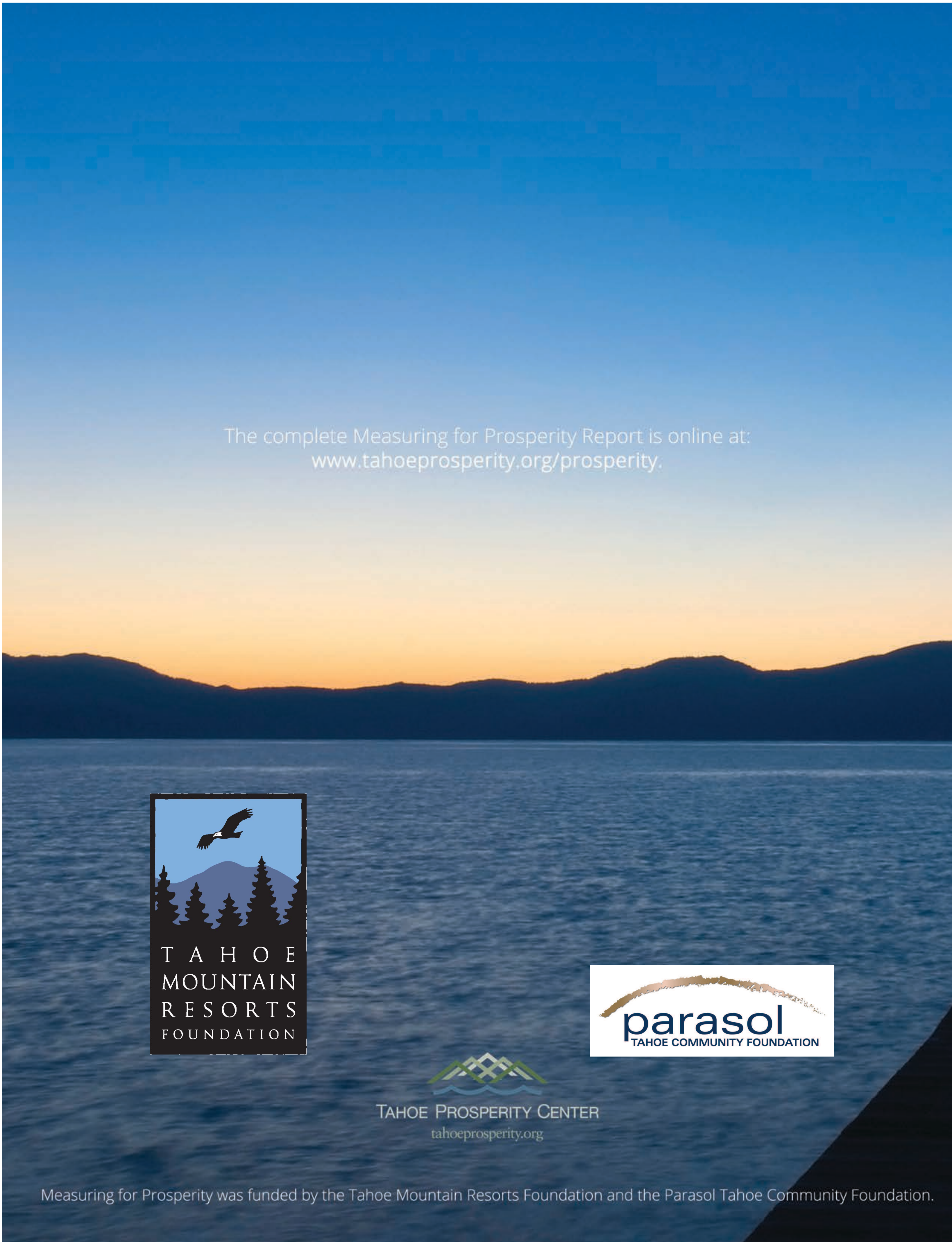
APPENDIX C: TAHOE BASIN GEOGRAPHY

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.			



The complete Measuring for Prosperity Report is online at:
www.tahoeprosperity.org/prosperity.

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