

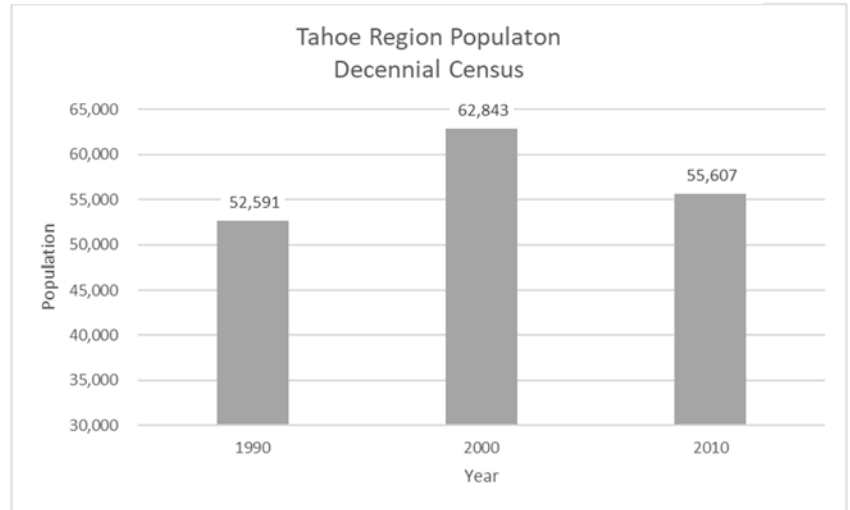
Appendix B: Regional Data Trends Report

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Residential Population

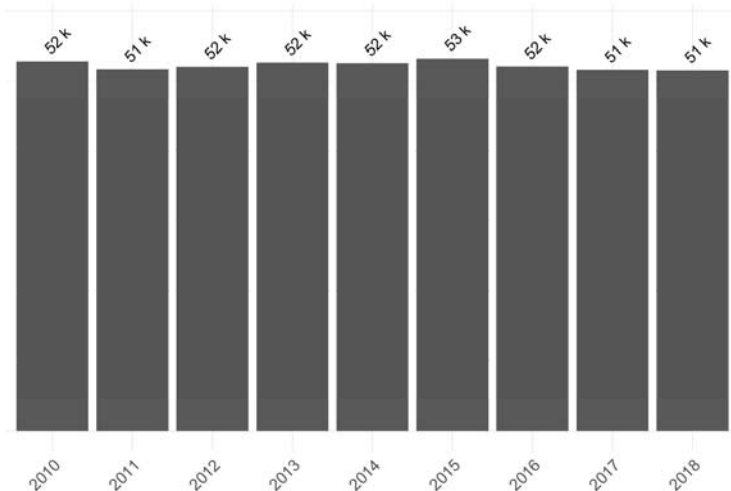
Both California and Nevada have experienced significant population growth in the last 30 years. The population in the Tahoe region has not grown at nearly the same rate. The last three decennial census’ demonstrate the divergence between population trends in the Tahoe Region and the two states as a whole. Between 1990 and 2010, Nevada’s population more than doubled (1.2 to 2.7 million) and California’s population increased by 25% (29.7 to 37.3 million). While the two states added nearly 9 million people, the population of the Tahoe region grew by just 3,016 persons or 6% during this period. The slight increase between the 1990 and 2010 decennial census population masks divergent trends in the last decade of the 20th century and first decade of the 21st; the region’s population grew by almost 20% between 1990 and 2000, before declining by 11.5% between 2000 and 2010.

Figure 1: Tahoe Population (1990-2010)



In more recent years, the 2018 American Community Survey (ACS) 5-year U.S. census estimates suggest that the population for the Region has been relatively flat, having declined only slightly between 2010 and 2018. We rely on these statistics cautiously because the margin of error is larger than the estimated change. The decline in resident population in the Tahoe Region between 2010 and 2018 was in stark

Figure 2: Tahoe Population (ACS 2010-18)



contrast to the growth in the states of California and Nevada.

While the change in Tahoe’s resident population appears to be anomalous in the context of population growth in the two states, it is consistent with declining populations in rural areas throughout the country (USDA 2018). Rural populations nationally began declining in 2010 and have only

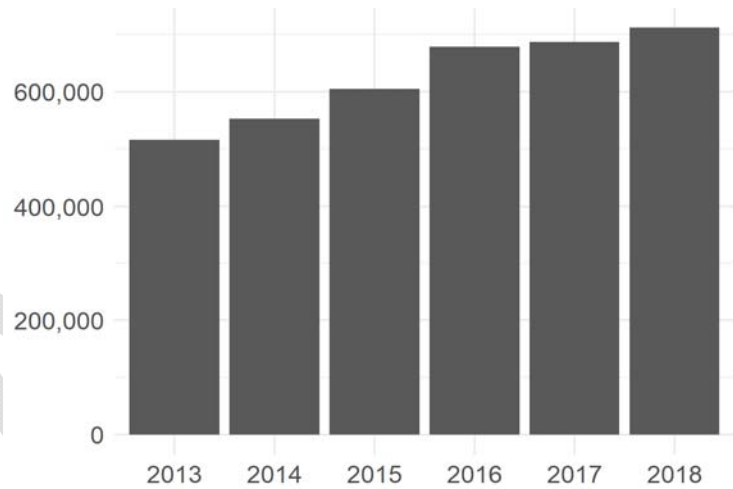
recently shown signs of stabilizing (USDA 2018). The recent stabilization in overall rural populations has driven by population growth in communities with scenic amenities or qualities that make them retirement or recreation destinations (USDA 2018).

Overnight Lodging Occupancy

Overnight lodging occupancy is a key forecast variable, which influences the number of visitors within the forecast.

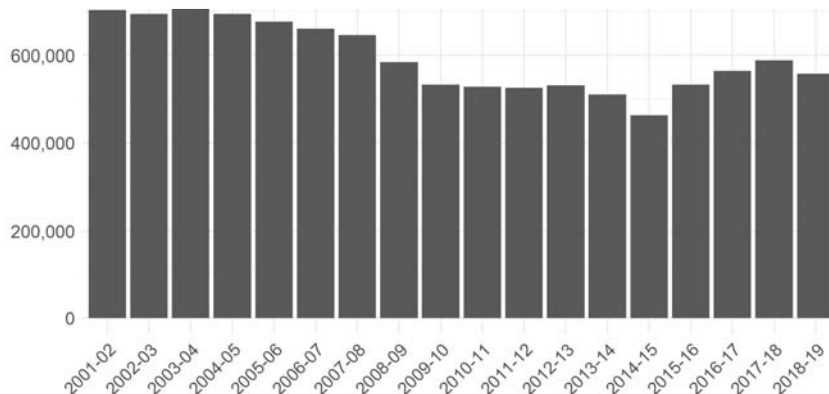
The forecast projects 14.5% increase in occupied lodging units, from 6,190 occupied rooms in 2018 to 7,086 occupied rooms in the year 2045. This increase is the result of an increase in the overall number of overnight lodging units, as well as the impact of Measure T. The forecast assumes that 50% of the visitor parties that would previously stay in STRs within the city limits would now stay in hotels, motels, resorts, or casinos.

Figure 3: CSLT - Hotel/Motel Rooms Rented (2013-18)



This forecast also aligns with recent observed trends in overnight lodging occupancy, which

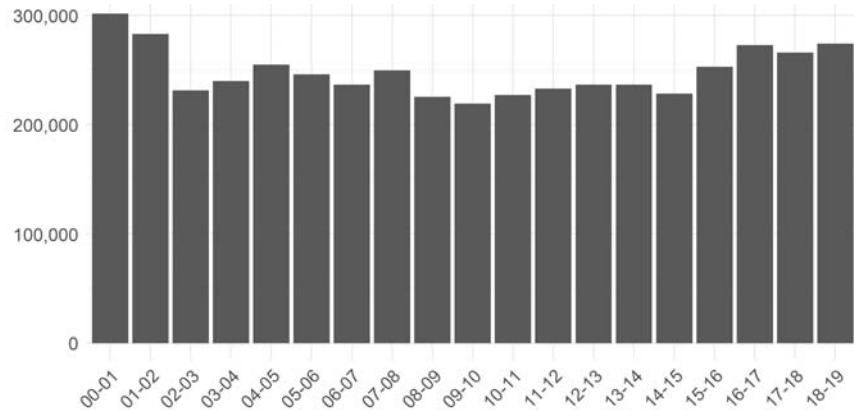
Figure 4: Douglas County (Tahoe) - Casino Rooms Rented



show generally flat or increasing occupancy in recent years, depending on

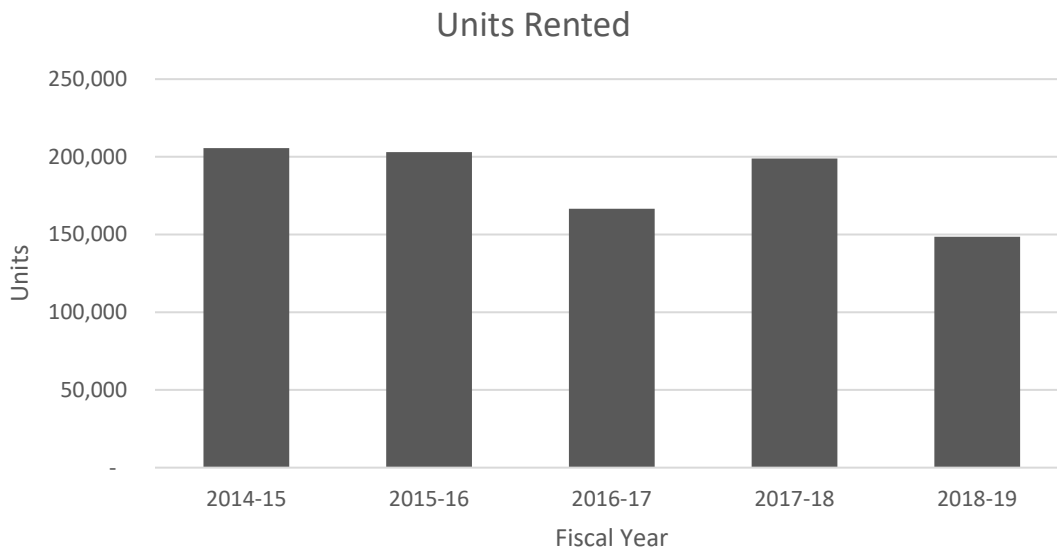
location. Between 2013 and 2018, the number of hotel/motel rooms rented in the city of South Lake Tahoe increased by 37%. On the other hand, Douglas county casino occupancy (South Shore) has declined over the

Figure 5: Washoe County (Tahoe) - Lodging Rooms Rented



last two decades (Douglas County Room Tax Reports, 18-19); total rooms sold in the 2018-2019 fiscal year was 80% of the number sold in 2001-2002. The majority of the decline in Casino occupancy occurred between 2000-2010, and more recently occupancy has been relatively stable. Occupancy in Washoe county has varied between years over the last 20 years but overall is generally flat. The five-year average number of rooms rented between 2000-2005 is just 2% higher than the most recent five-year average 2015-2019.

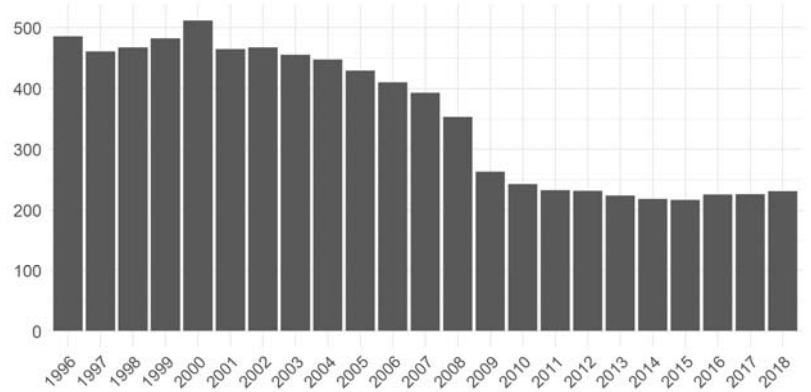
Figure 6: Placer County (Tahoe) – Units Rented



Gaming Revenue

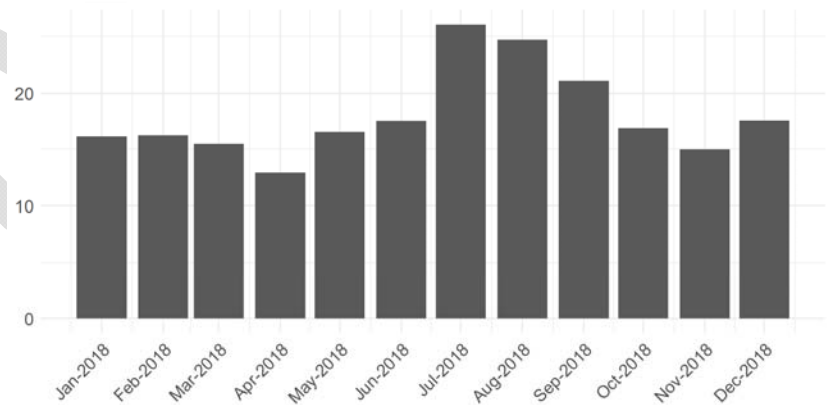
Gaming revenue is an important metric in the Tahoe region because of the historic and present-day attraction of visitors to the casino industry. Although the casinos still attract a large number of visitors traveling to the region, within the last 20 years gaming revenue in Tahoe has declined significantly. Adjusted for inflation, revenue in 2018 was half of what it was during the decade between 1996-2005 (LTVA-NGCB 2019). Gaming revenues steadily declined between 2005 and 2010 but have been relatively stable over the last five years. On average, 90%

Figure 7: Tahoe Casino Gaming Revenue (\$M)



of gaming revenue in the Region is generated on the South Shore and exhibits strong seasonal patterns. Revenue generally peaks during the highest levels of visitation, which occur in July. Over the last five years, monthly average revenue has been \$18 million. Monthly average revenue peaks in July, when it has averaged \$26 million, more than double average revenue in April (\$12.9). Partitioning monthly revenue into quartiles, a distinct high season (July, August, September) can be identified, where revenue averages nearly \$24 million. Monthly revenue remains within a relatively narrow band for six months of year (January, February, May, June, October, December) when revenue average \$16.9 million and varies by less than a million dollars on average. A less distinct low season (March, April, November) is also visible when revenue remains under 16 million and averages \$14.5 million. Employment in the gaming sector has followed the larger trend of gaming revenues of the last 20 years. In 2018, the South Shore casino employed 3,118 people, a 45% decline from the 5,660 employed 15 years earlier (NGCB 2003, 2018).

Figure 8: 2018 Monthly Tahoe Casino Gaming Revenue (\$M)



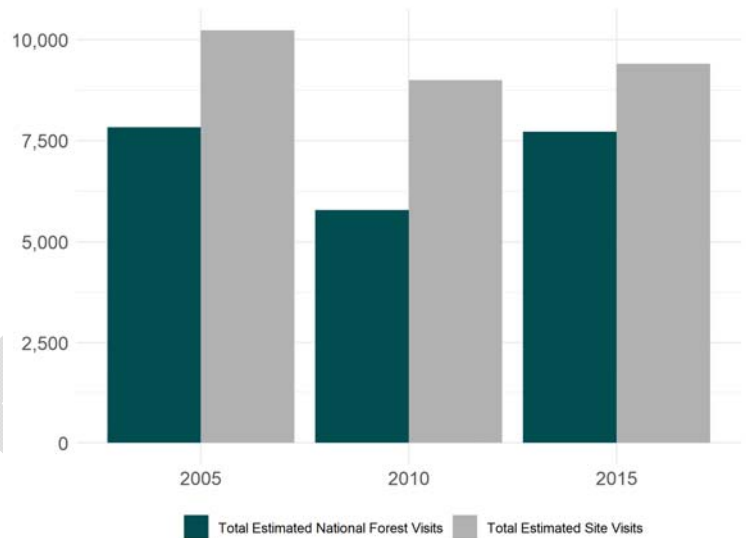
Forest Service Visitation

The U.S.D.A. Forest Service (USFS) owns and manages approximately 78% of the land area in the Tahoe Region, including nearly 155,000 acres of beaches, campgrounds, developed recreation areas and hiking/biking trails. Every five years the USFS conducts its National Visitor Use Monitoring (NVUM), which “provides reliable information about recreation visitors to national forest system managed lands at the national, regional, and forest level.” USFS standardized the NVUM survey methodology in 2005 and three surveys (2005,2010,2015) are available for the Tahoe region (USFS LTBMU 2018, 2019a, 2019b).

USFS does not recommend comparing visitation data collected prior to 2005 to the NVUM data sets. The survey quantifies visitation across a number of dimensions, but to assess overall trends in aggregate visitation in the Tahoe region, two measures stand out for their importance: Total Estimated Site Visits and Total Estimated National Forest Visits. Total Estimated Site Visits count the number of individual visitors to each National Forest site or area to participate in recreation activities in a national forest. Individual visitors that visit multiple sites in the same national forest are counted individually in this measure. Total Estimated National Forest Visits quantifies the total number of visitors to the national forest. Total Estimated Site Visits reflects the number of people estimated to have visited the individual sites (e.g., Nevada Beach, Meeks bay) so is likely to best reflect the experience of visitors to individual forest sites.

Visitation to the LTBMU sites appears relatively stable over the period between 2005 and 2015 (USFS LTBMU 2018, 2019a, 2019b). Both Total Estimated National Forest and Site Visits declined significantly during the recession, as evidenced by the 2010 data (USFS LTBMU 2018, 2019a, 2019b). The 2015 survey revealed that visitation had recovered nearly to pre-recession levels. In 2015, site visits were 8% lower than pre-recession levels, and total number of visitors was just 1.5% lower than in 2005.

Figure 9: Lake Tahoe Basin Management Unit (USFS) Visitation

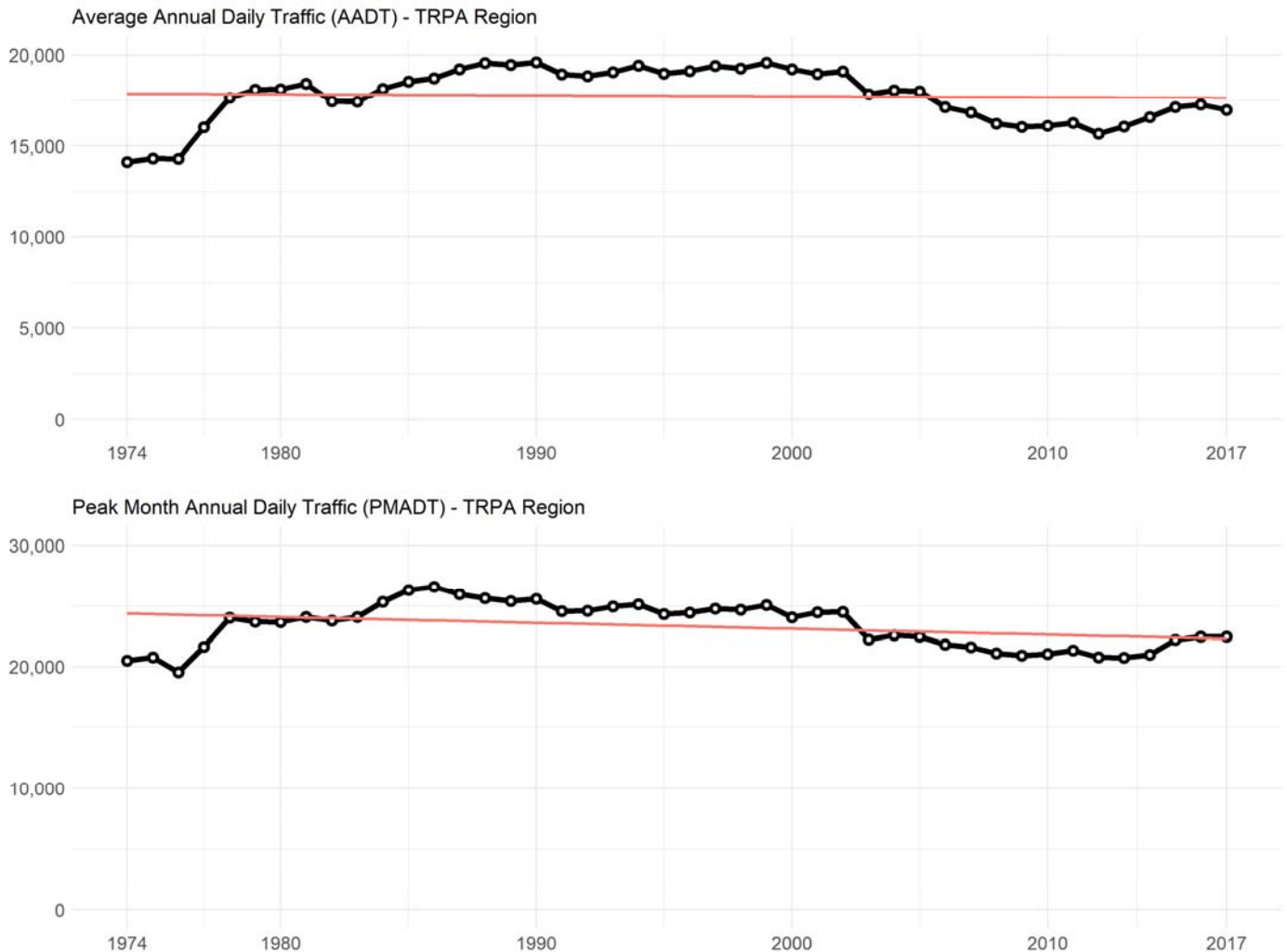


Traffic Volumes

Future year traffic volumes are a key forecast output which help TRPA understand potential future traffic conditions and create appropriate plans and policies. Trends in historic traffic volume will not necessarily continue into the future but can provide an indication of potential visitation and residential travel scenarios. Moreover, historic observations can help ground truth and put the forecasted volumes in perspective.

Historic traffic volume data is available for 20 different permanent traffic count stations that have been maintained by Caltrans and NDOT on highways throughout the Tahoe region for several decades (CalTrans and NDOT). The available data shows an annual average of between 14,000 and 20,000

Figure 10: Average Traffic Volumes Over Time -TRPA Region



Average Annual Daily Traffic (AADT) from as far back as 1974. The highest AADT occurred in 1990 at 19,600, while the most recent year (2017) was estimated at just under 17,000. AADT was the highest during the 1980s and 1990s, fell during the 2000s, and then has generally been on an upward trend during the last 10 years. It is important to note that AADT represents an estimate of daily traffic throughout an entire year. Data for Peak Month Annual Daily Traffic (PMADT) in the region, which represents the typical traffic volumes during the peak travel month, shows a similar flat trend; volumes were the highest during the 1980s and 1990s, fell during the 2000s, and have been generally increasing in the last 10 years.

Although the aggregate trend for all 20 count stations in the region is relatively flat, the trends for different count stations in different areas can vary significantly. There are more count stations with an increasing AADT trend than there are with a decreasing or flat trend. For example, there are a several stations on the North Shore with increasing AADT trends, such as SR 267 and DL Bliss, while several stations on the South Shore show noticeable decreasing trends. For example, AADT on SR 89 at DL Bliss has doubled since the 1970s and SR 267 at North Avenue increased by 119%. On the other hand, AADT at Park Avenue in the Heavenly Village shows the most prominent decreasing trend of any station in the region; counts at this station in 2017 were 23% lower than those in 1974 and 44% lower than the peak year of 1988. Other stations around the South Shore, such as Stateline, Al Tahoe, and Tahoe Keys, show noticeable decreasing trends. Although a handful of sites outside of the South Shore showing increase AADT trends, the decreasing trend in the South Shore influences an overall regional flat pattern in AADT. For the peak travel periods, the trends for PMADT at individual stations are similar but slightly less pronounced; stations on the South Shore show a decreasing trend while stations in other portions of the region show flat or increasing traffic volumes

Figure 11: Traffic Count Stations

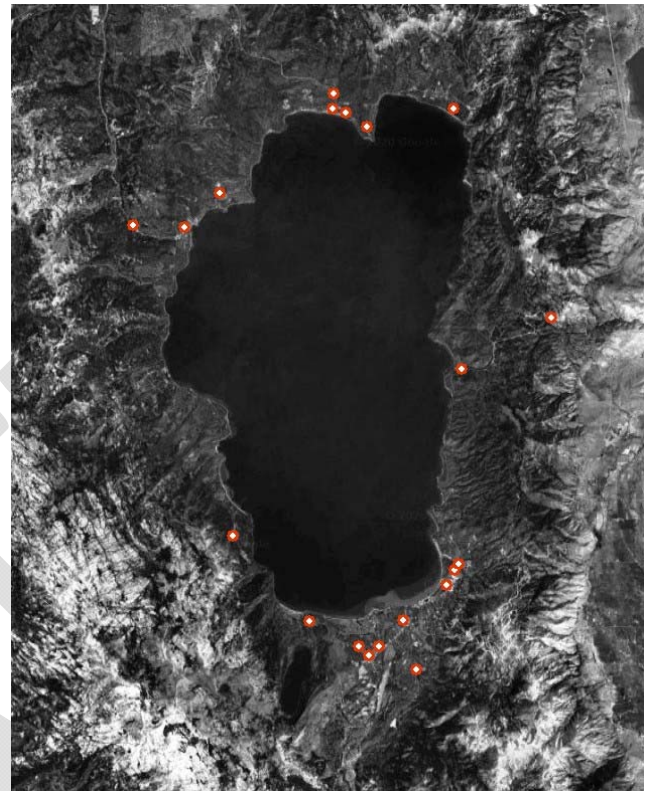


Figure 12: Traffic Station Annual Average Daily Traffic (AADT) Over Time - TRPA Region

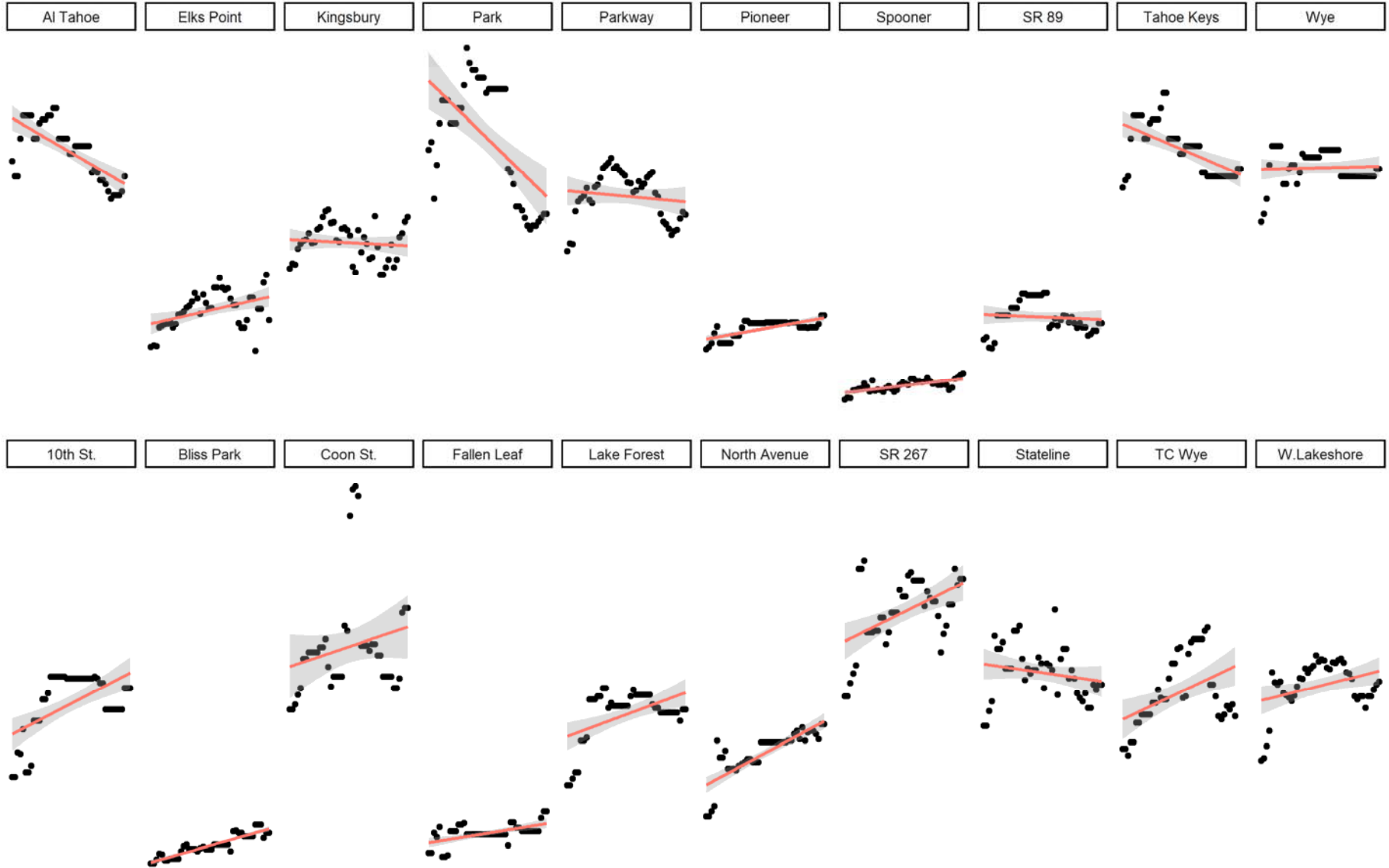
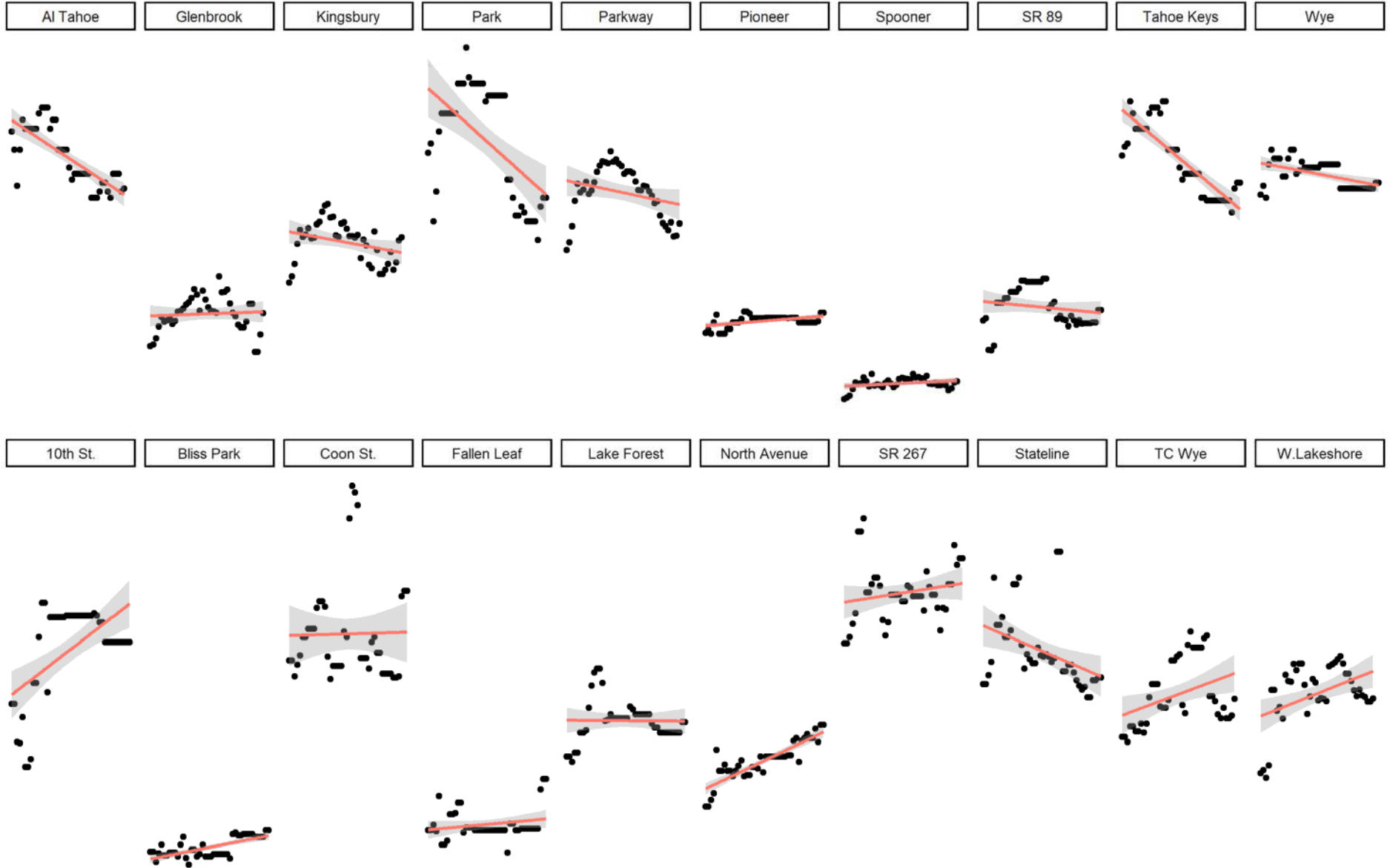


Figure 13: Traffic Station Peak Month Average Daily Traffic (PMADT) Over Time - TRPA Region



Regional Development Trends

The TRPA Lake Tahoe Regional Plan, Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS), and other agency documents must assess their environmental effects. Prior agency documents, including the 2012 Regional Plan and 2017 RTP/SCS took a conservative approach by assuming complete build out (100% utilization of all remaining development rights) by 2035. This methodology assessed environmental impacts if the Basin were to reach maximum development capacity. However, the observed rate of development in the six-year period after the adoption of the 2012 Regional Plan (2013-2018) has significantly lagged behind the rates that were forecasted in both the 2012 Regional Plan and the 2017 RTP/SCS (Table 1).

Table 1: Years to Build Out, Previously Forecasted Rates and Observed Rates of Development

	Remaining Development Rights	Observed Rate	Prior Forecasts		Rate Required to Achieve Build Out by 2035
		Actual Rate of Utilization 2013-2018 (per year)	2012 RP Utilization Rate (per year)	2017 RTP/SCS Utilization Rate (per year)	
CFA	556,796	6,988	25,374	28,475	32,753
TAU	342	0	15	17	20
Residential Allocations	2,234	72	130 (to 2032)	144 (to 2032)	131 (186 by 2032)
Residential Bonus Units	1,609	2	74	87	95

In order to account for full build out of the plan, the 2017 RTP/SCS accelerated the forecasted rate of utilization from the 2012 RP for the remaining development rights. For example, the 2012 Regional Plan assumed that 130 residential allocations would be used each year until the allocation pool would be exhausted in 2032. The 2017 RTP/SCS increased the forecasted rate per year to 144 units through 2032. For the 2020 RTP/SCS, in order to maintain the assumption of full utilization of development rights by 2035, the forecasted rates would have to be accelerated again. For example, to maintain the forecast of utilizing all residential allocations by 2035, we would have to assume a rate of 131 per year for the current RTP/SCS.

1. Build Out Assumptions

The Regional Plan caps development capacity in the Basin using allowable land coverage and the development rights program. As of 2018, the Region is 93% built out (Table 2) relative to these Regional Plan caps.

Table 2: Regional plan development capacity of each development right.

	Existing (includes banked)	Remaining Allocations (Non-TRPA)	TRPA Bonus /Incentive Pools	Total Development Potential
Commercial Floor Area (CFA)	92.0%	5.3%	2.6%	100.0%
Tourist Accommodation Units (TAUs)	97.1%	1.1%	1.8%	100.0%
Residential (RUUs, RBUs and Residential Allocations)	92.5%	4.4%	3.1%	100.0%
All Development Rights	93.1%	4.2%	2.8%	100.0%

Note: Rights expressed as a fraction of total development, that is constructed or banked (existing), remaining in allocation pools held by local jurisdictions, and remaining in TRPA bonus/incentive pools.

The sections below provide a more detailed discussion of the observed utilization rates and the previously forecasted rates by each development right type.

1.1 Residential Allocations

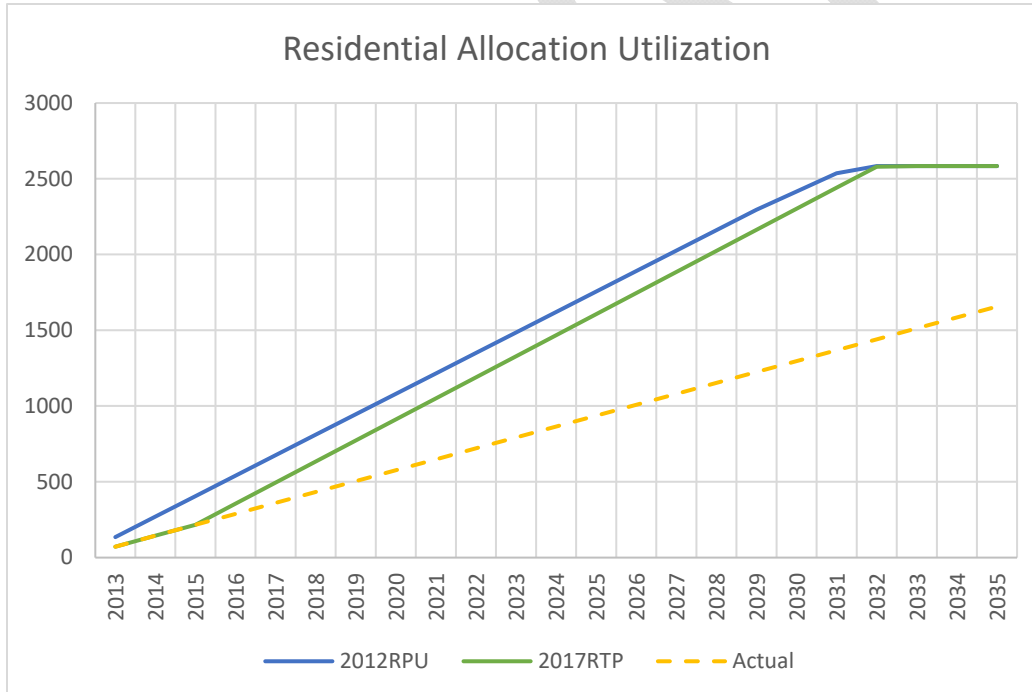
There are currently 2,234 residential allocations remaining that can be constructed for residential development. Every year, TRPA releases 120 residential allocations to the local jurisdiction pools and 10 units are released into the TRPA residential allocation incentive pool. Since 2013, an average of 72 residential units per year have been allocated to projects by TRPA and the local jurisdictions from these pools. The current rate of residential allocation use is 47% lower than was forecast in the 2012 Regional Plan and 32% lower than the 2017 Regional Transportation Plan forecast. The 2017 RTP forecasted that all remaining residential units would be constructed at a rate of 130 per year until the remaining supply was exhausted in 2032. At the rate of utilization over the past six years (72 units per year), the pool would not be exhausted until 2050, 31 years from now. Table 3 shows the historical rate of utilization

for residential allocations, as well as the rates necessary to achieve full use of residential allocations by 2035 and 2045 respectively.

Table 3: Residential Allocations, Previously Forecasted Rates and Observed Utilization Rates

	Observed Rates		Utilization Rates Needed to Reach Full Build-Out	
	1987-2018 Rate	2013-2018 Rate	By 2035	By 2045
Residential Allocations	200 / year	72 / year	131 / year	83 / year

Figure 14: Residential allocation utilization since the adoption of the 2012 Regional Plan, relative to the forecasted rate of utilization in the 2017 Regional Transportation Plan and the 2012 Regional Plan. The ‘actual’ line uses the development rate observed between 2013-2018 to forecast the rate between 2019-2035.



1.2 Residential Bonus Units (RBUs)

Residential bonus units are awarded as an incentive for affordable, moderate-income, achievable, or workforce housing¹ or for the retirement of a sensitive parcel. A total of 10 residential bonus units have been allocated to projects since 2013, a rate of just under two per year. The 2017 RTP forecasted that all remaining residential bonus units would be utilized by 2032, including the utilization of 399 units by 2020. The current rate of utilization is just 3% of the forecast used in the 2017 RTP. There are currently 1,609 residential bonus units remaining in TRPA and local jurisdiction pools.

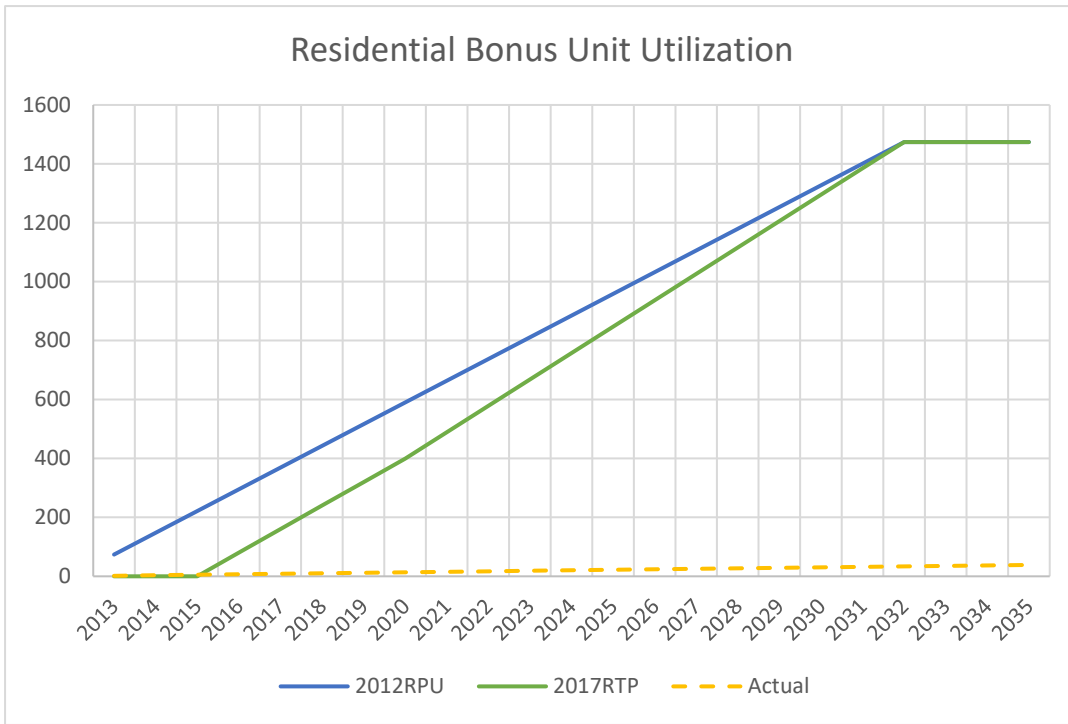
The table below (Table 9) shows the historical rate of utilization for residential bonus units, as well as the rates necessary to achieve full build-out of residential bonus units by 2035 and 2045 respectively.

Table 4: Residential bonus unit utilization between 1987-2018, 2012-2018, and required future rates to utilize all remaining units by 2035 and 2045 respectively.

	Observed Rates		Utilization Rates Needed to Reach Full Build-Out	
	1987-2018	2012-2018	Rate to Utilize All	Rate to Utilize All
	Rate	Rate	Units by 2035	Units by 2045
Residential Bonus Units	16 / year	2 / year	95 / year	60 / year

Figure 15: Residential bonus unit utilization since the adoption of the 2012 Regional Plan, relative to the forecasted rate of utilization in the 2017 Regional Transportation Plan. The ‘actual’ line uses the development rate observed between 2013-2018 to forecast the rate between 2019-2035.

¹ TRPA defines “affordable” homes as for ownership or rental by families who make up to 80% of Area Median Income (AMI), “moderate” as homes that are affordable for ownership or rental by families who make between 80% and 120% of AMI, and “achievable” as a variable percentage based on the area median income, buying power, and the median-priced home for the area.



1.3 Commercial Floor Area (CFA)

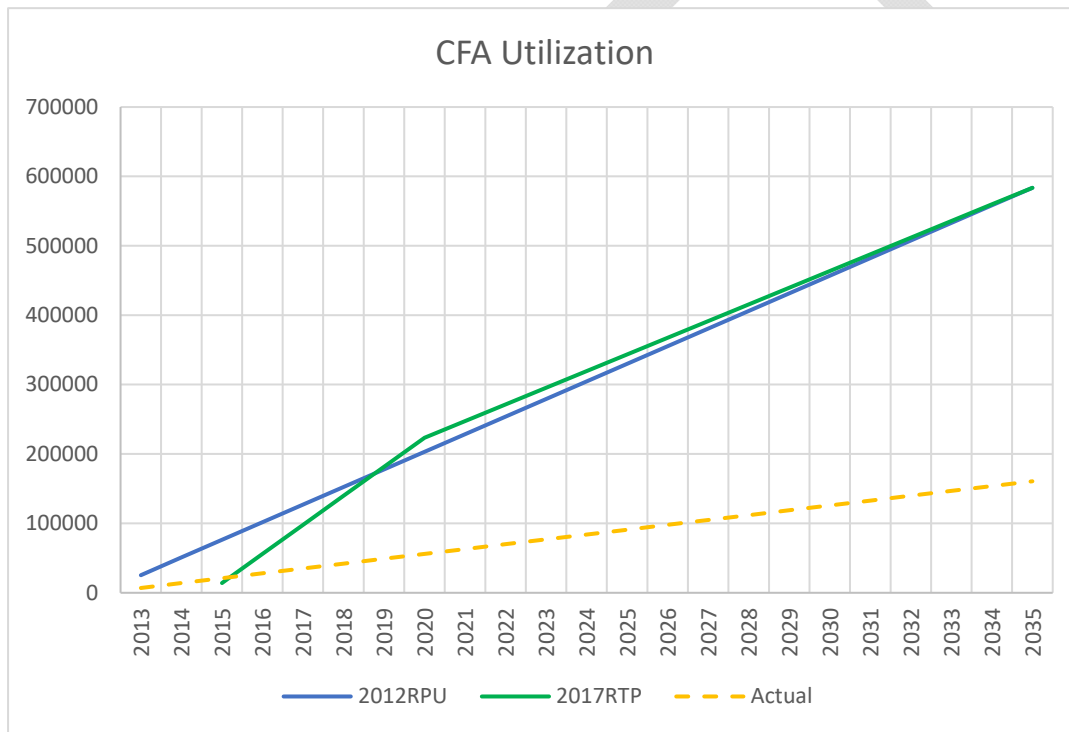
There is currently more than 556,000 square feet of un-used commercial floor area in TRPA and local jurisdiction community/area plan pools. Since 2013, a total of 41,928 square feet of CFA have been allocated to projects; an average rate is 6,988 square feet of CFA per year. The 2017 RTP modeled the complete build-out of all remaining CFA between 2015 and 2035, equivalent to an annual rate of 28,475 sq. ft per year. That allocation rate is more than four times the current allocation rate, and more than double the rate of CFA allocations observed since adoption of the 1987 Regional Plan (14,430 square feet per year). At the current rate of utilization, the remaining CFA would not be completely developed for 80 years. Table 5 shows the historical rate of utilization for commercial floor area, as well as the rates necessary to achieve full use of CFA by 2035 and 2045 respectively.

Table 5: Historical commercial floor area utilization between 1987-2018, 2012-2018, and required future rates to utilize all remaining CFA by 2035 and 2045 respectively

	Observed Rates	Utilization Rates Needed to Reach Full Build-Out

	1987-2018 Rate	2012-2018 Rate	Rate to Utilize All CFA by 2035	Rate to Utilize All CFA by 2045
Commercial Floor Area (sq. ft.)	14,430/ year	6,988 / year	32,753/ year	20,622 / year

Figure 15: CFA utilization since the adoption of the 2012 Regional Plan, relative to the forecasted rate of utilization in the 2017 Regional Transportation Plan. The ‘actual’ line uses the development rate observed between 2013-2018 to forecast the rate between 2019-2035.



1.4 Tourist Accommodation Units (TAU)

No TAUs have been allocated to projects and constructed since adoption of the 2012 Regional Plan², and only 58 TAUs have been allocated since the adoption of the 1987 Regional Plan. The 2017 RTP forecasted full build-out of all TAUs by 2035. The forecast projected that 180 TAUs would be constructed

² Recently constructed tourist accommodation projects at Zalanta and Edgewood Lodge used banked and/or transferred units, and therefore did not receive allocations from TRPA or local jurisdictions.

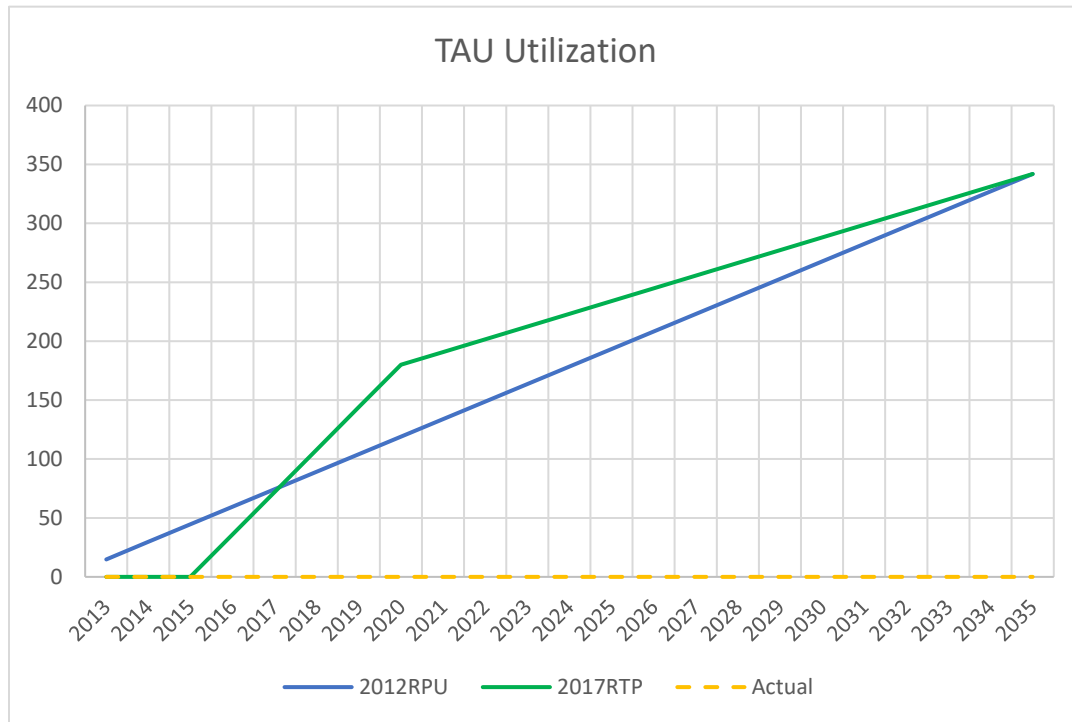
by 2020, and the remaining 162 TAUs would be allocated through the bonus program and constructed by 2035.

Several projects have been approved for TAU allocations, but not yet constructed: Boulder Bay was approved for 50 Tourist Bonus Units allocated from TRPA (in addition to transferred and converted TAUs) and Homewood Mountain Resort was approved for 50 Tourist Bonus Units allocated by TRPA (in addition to transferred TAUs). Table 6 shows the historical rate of utilization for TAUs as well as the rates necessary to achieve full use of TAUs by 2035 and 2045 respectively.

Table 6: Historical tourist accommodation unit utilization between 1987-2018, 2012-2018, and required future rates to utilize all remaining TAUs by 2035 and 2045 respectively.

	Observed Rates		Utilization Rates Needed to Reach Full Build-Out	
	1987-2018 Rate	2012-2018 Rate	Rate to Utilize All Units by 2035	Rate to Utilize All Units by 2045
Tourist Accommodation Units	2 / year	0 / year	20 / year	13 / year

Figure 16: TAU utilization since the adoption of the 2012 Regional Plan, relative to the forecasted rate of utilization in the 2017 Regional Transportation Plan. The ‘actual’ line uses the development rate observed between 2013-2018 to forecast the rate between 2019-2035.



Development Right Conversions and Transfers

Since the last RTP, TRPA adopted significant changes to the development rights program to add flexibility and promote conversions and transfers. Determining whether and how these changes are incorporated into the development forecasts will be key to the future scenarios for land use.

2.1 Transfers

The Regional Plan allows for the transfer of existing development rights and residential allocations provided from one parcel to another. (TRPA Code of Ordinances Section 51.5) The plan also provides incentives to encourage environmentally beneficial transfers that: 1) remove development in environmentally sensitive areas and transfers to less sensitive areas; and 2) relocate development from remote areas into town centers which have more suitable access to infrastructure, services, and transit.

The 2017 RTP included assumptions for the rate of transfers and the location of sending and receiving parcels for each development type. These assumptions were based on utilization of the transfer incentive programs to entice to relocation of development from SEZs, Sensitive Lands, and remote area areas into Centers. No transfers were modeled to reflect transfers to areas outside of town centers. However, observed transfers over the past several years have facilitated the removal of development rights from sensitive lands, but have not centralized development into town centers.

1 Residential

The 2017 RTP forecasted that 143 existing residential units (49 by 2020) and 1,109 residential development rights (367 by 2020) would be transferred into town centers through 2035 and would be awarded residential bonus units (196 and 785 units respectively) as transfer incentives. The forecast assumed that 34 existing residential units would be removed from SEZs, 22 from other sensitive areas and 87 from high-capability lands.

Observed transfers of residential development rights have moved development off SEZ and sensitive lands but have not concentrated development into town centers. Residential transfers between 2013-2018 facilitated the removal of 61 units from Stream Environment Zones. 58 of those units were relocated to non-sensitive lands, and the remaining three units were transferred to other sensitive lands. While the transfers have removed residential units from sensitive areas, they have not centralized development. Residential transfers in the past five years resulted in the net removal of 25 residential units from town centers, transferring 16 to neutral areas (areas within one-quarter mile of town centers) and 9 to remote areas located more than one-quarter mile from town centers.

2.1.2 Commercial Floor Area

The 2017 RTP forecasted that all CFA transfers would leverage the incentives of the Regional Plan and utilize the full TRPA bonus pool of CFA. The RTP forecast also assumed the transfer of more than 120,000 square feet of CFA from SEZ into town centers. The RTP forecast included an overall increase of CFA in town centers of 360,000 square feet by 2035 and no additional CFA was projected to be built outside of town centers.

Observed transfers of CFA have concentrated more CFA in town centers, but have not altered the distribution of CFA between sensitive and non-sensitive lands. Since 2012, nearly 16,000 square feet of CFA have been transferred, and three-quarters of that CFA has been added to town centers, the other quarter was added to remote areas. No CFA has been transferred from SEZ or other sensitive areas to non-sensitive lands.

2.1.3 Tourist Accommodation Units (TAU)

The 2017 RTP forecasted that 54 TAUs would be transferred from SEZs into town centers, adding 162 TAU (with transfer bonus incentives) to town centers. Observed transfers of TAUs have decentralized the distribution of TAUs in the Region. As a result of transfers, 101 TAU have been removed from town centers, five have been removed from neutral areas and 106 added to remote areas³. Transfers have facilitated the removal of 97 TAU from SEZ and relocated to non-sensitive lands. Since the 2017 RTP, additional changes to the transfer of development rights program that should streamline TRPA processes, and facilitate additional transfer activity include (1) removing multi-jurisdictional permitting processes to facilitate transfers between jurisdictions (2) allowing transfers prior to a building project approval.

2.2 Conversions

Conversions provide property owners with flexibility while maintaining the overall cap on development potential in the Tahoe Basin. By allowing conversions between the different types of development rights using environmentally neutral exchange rates, TRPA hopes to encourage more redevelopment. The current conversion ratio is 600 CFA to 2 TAUs to 2 residential to 3 multi-family residential units. Conversions of development rights were not considered in the 2012 Regional Plan forecasts or for the 2017 RTP/SCS forecasts.

The ability to convert between different types of development rights is relatively new. However, a clear trend that has emerged from the conversions to date: a shift from TAUs and CFA to residential development. As a result of the conversions to date, 62 residential units have been added throughout the region, while the number of TAUs has been reduced by 52 and CFA reduced by 4,102 square feet

The total remaining development potential of each kind (with no conversions) is summarized in Table 8. TRPA allocations and bonus units cannot be converted, so they are not included in the conversion potential. Based on the existing conversation ratios, the table shows the maximum amount of development that could result if all development rights were converted to a single type. Based on this analysis, full build out of remaining development would be between 183,654 and 1,265,996 square feet

³ The distribution of tourist accommodation units was lower in town centers and higher in remote areas because of the Edgewood Lodge redevelopment project which constructed 154 tourist accommodation units—including 144 transferred from dated motels previously located in town centers—near the South Stateline resort area but just outside the town center boundary.

of CFA regionally, between 212 and 3,153 TAUs, and 1,609 and 5,904 residential units. Conversions influence the proportion of development of each type, such that the maximum amount of each type listed table 8 cannot be realized for all types simultaneously. Both zoning and land capability influence the potential to construct development on the ground.

Table 7: Remaining development rights inclusive of conversion potential.

	Remaining Allocations in Local Jurisdiction CP/AP Pools	TRPA Allocations / Bonus Units ¹	Conversion Potential ²	Total Remaining - no conversions	Total remaining - max conversions
CFA	373,142	183,654	709,200	556,796	1,265,996
TAU	130	212	2,811	342	3,153
Residential	2,234	1,609	2,601	3,843	5,904

¹The TRPA Allocation and Bonus Unit pools are not eligible for conversion.

²Conversion potential captures the additional amount of the development right if all other development rights were converted to it. Maximum residential build-out requires all CFA and TAU to be converted to multi-family. If all were converted to single family the total number of new residential units would be 1,374.

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