



County of El Dorado

330 Fair Lane, Building A
Placerville, California
530 621-5390
FAX 622-3645
www.edcgov.us/bos/

MEETING AGENDA

Strategic Economic Enhancement Development Committee

Members:

Carl Ribaldo, Chair - President/Chief Strategist, SMG Consulting

*David Spaur, Vice Chair - Retired City Manager, Consultant, S2
Consulting, LLC*

*Les Heinsen - Owner/President Credence Corp. dba Element 79
Vineyards*

Perry McLain - Businessman, PMC Aquatics, LLC

Christine Noonan - General Manager/Owner Delfino Farms

Vacant (2)

Thursday, May 21, 2026

3:00 PM

<https://us06web.zoom.us/j/81122443087>

2850 Fairlane Ct., Building C Lobby Conference Room, Placerville, CA

PUBLIC PARTICIPATION INSTRUCTIONS: The Committee meeting room will be open to the public. The meeting will be live-streamed via Zoom. By participating in this meeting, you acknowledge that you are being recorded.

Although the County strives to offer remote participation, be advised that remote Zoom participation is provided for convenience only. In the event of a technological malfunction, the only assurance of live comments being received by the Commission is to attend in person. Except for a noticed teleconference meeting, the Commission reserves the right to conduct the meeting without remote access if there is a malfunction.

Members of the public may address the Committee in-person or via Zoom to make a public comment. The public should call into 530-621-7603 or 530-621-7610. The Meeting ID is 811 2244 3087. Please note you will not be able to join the live-stream until the posted meeting start time.

To observe the live stream of the Committee meeting go to <https://us06web.zoom.us/j/81122443087>.

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PROTOCOLS FOR PUBLIC COMMENT: Speakers will be limited to 3 minutes or as otherwise provided by the Committee Chair. By participating in this meeting, you acknowledge that you are being recorded.

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The SEED Committee is concerned that written information submitted to the Committee the day of the committee meeting may not receive the attention it deserves. The Economic Development staff cannot guarantee that any email, or mail received the day of the meeting will be delivered to the Committee prior to action on the subject matter. Written information or public comments may be submitted to: Economic.Development@edcgov.us.

ROLL CALL

ADOPTION OF THE AGENDA AND APPROVAL OF CONSENT CALENDAR

CONSENT CALENDAR

1. [26-0758](#) Economic Development Division recommending the Committee approve the SEED Meeting Minutes from April 16, 2026.

END OF CONSENT CALENDAR

OPEN FORUM

[26-0939](#)

Open Forum is an opportunity for members of the public to address the Committee on subject matter that is not on their meeting agenda and within their jurisdiction. Public comments during Open Forum are limited to three minutes per person. The Committee Chair may limit public comment during Open Forum.

AGENDA ITEMS

2. [26-0756](#) Receive and file a presentation from Maya Kitt with Civitas Advisors.

3. [26-0918](#) Discussion and Recommendation on GSEC Membership.
4. [26-0757](#) Discussion and Update on the Pending Presentation to the Board of Supervisors.

ADJOURNMENT



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Master Report

File Number: 26-0758

***File ID #:** 26-0758

Agenda Item Type:

Status: Consent Calendar

Version: 1

Reference:

Gov Body: Strategic Economic Enhancement Development Committee

Department: Planning and Building

Created: 04/21/2026

Agenda Title: 5-21-2026 SEED Meeting

Final Action:

Title: Economic Development Division recommending the Committee approve the SEED Meeting Minutes from April 16, 2026.

Notes:

Code Sections:

Agenda Date: 05/21/2026

Agenda Number: 1.

Sponsors:

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Attachments: Minutes

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Contact: Ben Wehrle

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History of Legislative File

| Version: | Acting Body: | Date: | Action: | Sent To: | Due Date: | Return Date: | Result: |
|----------|--------------|-------|---------|----------|-----------|--------------|---------|
| | | | | | | | |

Text of Legislative File 26-0758

Economic Development Division recommending the Committee approve the SEED Meeting Minutes from April 16, 2026.



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Minutes

Strategic Economic Enhancement Development Committee

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Consulting*

*David Spaur, Vice Chair - Retired City Manager, Consultant, S2
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*Les Heinsen - Owner/President Credence Corp. dba Element 79
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Perry McLain - Businessman, PMC Aquatics, LLC

*Christine Noonan - General Manager/Owner Delfino Farms
Vacant (2)*

Thursday, April 16, 2026

3:00 PM

<https://us06web.zoom.us/j/83080532362>

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ROLL CALL

Present: 4 - McLain, Noonan, Chair Ribaldo and Vice Chair Spaur

Absent: 1 - Heinsen

ADOPTION OF THE AGENDA AND APPROVAL OF CONSENT CALENDAR

A motion was made by Member McLain, seconded by Member Spaur, to adopt the agenda and approve the consent calendar with no changes.

Yes: 4 - McLain, Noonan, Chair Ribaldo and Vice Chair Spaur

Absent: 1 - Heinsen

CONSENT CALENDAR

26-0691 Economic Development Division recommending the Committee approve the SEED Meeting Minutes from March 19, 2026.

This item was approved on the consent calendar.

END OF CONSENT CALENDAR

OPEN FORUM

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AGENDA ITEMS

26-0692 Agricultural Lodging update with Director of Planning & Building Karen L Garner.

Public Comment: L. Boeger; M. Ranalli; Gordon

Planning and Building Director, Karen L. Garner gave a presentation on agricultural lodging and took questions.

ADJOURNMENT

Chair Ribaldo adjourned the meeting at 4:51 PM.



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Master Report

File Number: 26-0939

***File ID #:** 26-0939

Agenda Type: Agenda Item

Status: Agenda Item

Version: 1

Reference:

Gov Body: Strategic Economic
Enhancement
Development
Committee

Department: Planning and Building

Created: 05/20/2026

Agenda Title: 05-21-26 SEED Open Forum

Final Action:

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|---------------|
| Title: |
|---------------|

Notes:

Code Sections:

Agenda Date: 05/21/2026

Agenda Number:

Sponsors:

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Attachments: Public Comment: L. Boeger

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Contact: Rhiannon Guilford

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History of Legislative File

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|---------------|--------------|-------|---------|----------|-----------|-----------------|---------|
|---------------|--------------|-------|---------|----------|-----------|-----------------|---------|

Text of Legislative File 26-0939


Public Comment for SEED meeting 5-21-26

From Lexi Boeger <lexi@ouregg.org>

Date Wed 5/20/2026 3:59 PM

To BOS-Clerk of the Board <edc.cob@edcgov.us>; Planning Department <planning@edcgov.us>

Cc Ribaldo Carl <carl@smgonline.net>; Dspaur <davidspaur@comcast.net>; Heinsen Les <les@element79vineyards.com>; Karen L. Garner <Karen.L.Garner@edcgov.us>

 1 attachment (2 MB)

EDC_Tourism_Comparison.pdf;

This Message Is From an External Sender

This message came from outside your organization.

Report Suspicious

Dear Clerk, Please see the attached document for Open Forum public comment at the 5-21-26 SEED meeting.

Dear SEED Committee members and Director Garner,
Thank you for your continued work on El Dorado County's local tourism economic issues. We look forward to the Civitas presentation and the other items on Thursday's agenda. Our special report, attached here, relates to several topics you are covering. We hope it will add to the discussion. The fundamental impetus for our special report was to investigate the notion that tourism foot traffic, visitation and overnight stays (TOT) are down due to regional, statewide or macro reasons beyond our influence. After some research and a comparison of our neighboring county's tourism numbers that does not seem to be the case. The good news is that we may be able to take actions here at home to move the needle- many of which your committee is actively working on. Thank you for that good work!

Best,
Lexi

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Lexi Boeger

Co-founder [Our EGG](#)

Economic Generator and Germination for El Dorado

People-Powered and Rurally Rooted



Comparative Regional Analysis: Aligning El Dorado County Tourism Trends and Lodging Revenues for Long-Term Fiscal Resilience

*A Special Economic Briefing by the El Dorado Economic Generator & Germination Fund
Published: May 20th, 2026*

EXECUTIVE SUMMARY

Recent contractions in Transient Occupancy Tax (TOT) revenues require careful evaluation, and a close review of comparative regional data provides a clear, nuanced perspective on our current trajectory.

A comprehensive evaluation of statewide travel patterns, paired with a direct fiscal comparison of immediate neighbors—Placer, Nevada, and Amador counties—reveals that El Dorado County's revenue trajectory has diverged from the surrounding region. While neighboring areas report record visitor spending, stable lodging tax baselines, or projected incremental growth, El Dorado County faces more pronounced, multi-year contractions in discretionary TOT.

This briefing analyzes the structural factors driving these differing regional trends, reviews shifting consumer preferences toward specialized visitor experiences, and explores collaborative opportunities to build long-term fiscal resilience.



About the El Dorado Economic Generator & Germination Fund (Our EGG): Our EGG is an innovation engine for community and economic development, founded in 2025 to *GERMINATE* and *GENERATE* a resilient local economy that uplifts people and keeps our land thriving in El Dorado County.

1. THE FOUNDATION: EL DORADO COUNTY'S TOURISM ECONOMY

Tourism and hospitality represent a foundational cornerstone of El Dorado County's economic framework, driving employment, business vitality, and critical public services.

- **Job Creation:** According to the *California Travel Impacts* report (released May 2026 by Visit California and prepared by Dean Runyan Associates), travel-related spending directly supports **over 9,000 local jobs**, accounting for approximately **17% of all employment** countywide. Furthermore, an El Dorado Water Agency valuation study indicates that outdoor recreation in the upper American River watershed alone supports wages for **2,500 jobs**.
- **Economic Impact:** Total travel-related **spending in the county reached \$1.1 billion**, representing approximately **17% of total taxable sales** (*California Travel Impacts*, Dean Runyan Associates, May 2026).
- **Tax Revenue Generation: Tax Revenue Generation & Fiscal Trends:** Tourism directly funds county operations through the Transient Occupancy Tax (TOT). While the county's total Discretionary TOT (DTOT) budget allocation baseline reached **\$14.6 million** for the 2024–25 fiscal year, official ledgers show that actual, newly generated annual revenue from overnight stays was **\$8.75 million**, with the remaining balance composed of multi-year pandemic-era carryover cushions. Following successive contractions and a **3.4% year-over-year decline** in actual receipts, the baseline for new annual discretionary generation has normalized to **\$8.5 million** for the current cycle. These true single-year revenues flow directly into the county's general fund to support road maintenance, public safety, law enforcement, and wildfire mitigation.

2. THE STATEWIDE CONTEXT & THE EXPERIENTIAL TRAVEL SHIFT

Data from the *Economic Impact of Travel in California* report (released May 2026 by Visit California and prepared by Dean Runyan Associates) indicates that statewide travel spending has not experienced a downward trend, but rather a significant structural rebalancing toward specific high-yield niches:

- **Record Top-Line Spending:** Total travel spending across California reached a record **\$158.9 billion** in 2025, up **1.7%** from \$156.2 billion in 2024.

- **The Experience and Accommodations Surge:** Visitors staying overnight in hotels, motels, and short-term rentals spent a combined **\$83 billion** statewide in 2025—a **2.7% increase** year-over-year. Correspondingly, visitor spending on food services climbed to **\$38.5 billion** (a **4.6% increase**), and arts, entertainment, and recreation spending reached **\$17.4 billion**.
- **Shifting Consumer Intentions:** Major national travel studies mirror this shift toward purposeful, high-yield niches. Editorial forecasts from Condé Nast Traveler highlight that modern travelers are actively building itineraries around "experiential travel," seeking out unique cultural connections, historical properties, and immersive activities. Similarly, comprehensive market insights from Hilton and Expedia Group reveal that a significant majority of consumers are planning travel around specific "emotional intentions"—such as deep renewal, wellness, and connection—prioritizing immersive, slow-travel properties over traditional, activity-dense vacations.
- **The Rise of Wellness & Nature Tourism:** Consumer sentiment has evolved beyond passive sightseeing. Today's high-yield traveler views **nature as a canvas for personal wellness**. Travelers are actively seeking out "forest bathing," agricultural immersion, dark-sky viewing, and mindful disconnection. Economic data demonstrates that visitors looking for therapeutic, land-based experiences stay longer and spend significantly more per day than the average tourist.
- **The Power of Consumer "Pairings":** Modern traveler trends show that economic growth is heavily concentrated in destinations that seamlessly pair overnight accommodations with hands-on, experiential tourism—specifically agritourism, culinary experiences, localized farm stays, and wellness-focused outdoor retreats.
- **The Day-Tripper Dynamic:** *Regions relying heavily on high volumes of un-paired day-trippers absorb infrastructure, road maintenance, and emergency service demands without fully capturing the higher-margin overnight lodging premiums that fund the general fund.*

3. THE REGIONAL MATRIX: DATA-BACKED TRAJECTORIES

Lodging tax performance varies significantly across county lines, showing that El Dorado's current contraction is localized rather than regional:

| County | TOT / Visitor Revenue Trajectory | Market Dynamics & Policy Context |
|------------------|--|---|
| Placer County | Record Growth (+4.1% to +5.6%) | Unified TOT-TBID framework; predictable short-term rental caps that stabilized premium inventory. |
| Amador County | Steady, Incremental Growth (+2.0%) | Consistent, predictable foothill agritourism and wine-country baseline; insulated from alpine weather shocks. |
| Nevada County | Stabilized Leveling (Beating Baselines) | 12% base TOT matched with voter-approved dedicated measures; active use of TTbIDs to protect mountain revenues. |
| El Dorado County | Absolute Decline (-3.4%) | Multi-year revenue contractions as post-pandemic travel levels out. Regulatory uncertainty from shifting short-term rental (STR) caps and geographic boundaries. High climate vulnerability due to two-thirds of revenue being concentrated in one geographic area (Heavy reliance on Tahoe vs. diversification across the West Slope.) |

- **Placer County:** According to the *Placer County Economic Development Division Annual Visitor Spending Report* (April 2026), total visitor spending reached a **record-breaking \$1.57 billion** (+4.1% year-over-year), driving a **5.6% surge** in lodging tax revenue by stabilizing premium overnight options paired with their western slope wine, beer, and recreation corridors.
- **Amador County:** Independent of an alpine ski economy, Amador jurisdictions model a **steady, conservative 2% annual growth rate** for TOT by maintaining a consistent destination framework for their historic corridors and wine regions.
- **Nevada County:** Shares El Dorado's structural West Slope/East Slope layout. To manage the post-pandemic market leveling, Nevada County and the Town of Truckee paired a 12% baseline TOT with a voter-approved 2% measure (Measure K) for workforce housing and wildfire preparation, allowing actual collections to regularly outperform conservative budgetary baselines (*Nevada County / Town of Truckee Annual Financial Reports*).
- **El Dorado County:** The *El Dorado County Adopted Budget* (FY 2025–2026) noted that Discretionary TOT receipts came in **3.4% lower** than the previous year, following a prior cycle where the recommended discretionary TOT budget was adjusted downward by **24%**.

4. UNDERSTANDING LOCAL STRUCTURAL VULNERABILITIES

The data indicates that El Dorado's current fiscal trajectory presents an ideal opportunity to optimize our structural and regulatory design. Three primary areas offer clear pathways to enhance local revenue:

- **I. Short-Term Rental Predictability and Market Dynamics:** While local revenue contractions are occasionally attributed to an overall market decline, national benchmarks show a sector that is stabilizing and growing. According to **AirDNA** and **Key Data** (2026 outlooks), macro trends reflect steady, mature growth: national STR demand is projected to rise **4.1% year-over-year**, Average Daily Rates (ADRs) are up **1.5%**, and a minor **1%** ease in occupancy is simply due to supply growth (+4.6%) distributing bookings across a wider pool. Restoring long-term regulatory predictability gives local operators the confidence to invest in property optimization and market their stays long-term.
- **II. West Slope Overnight Conversion:** The West Slope features exceptional natural assets, historic towns, and vibrant agricultural regions. Expanding and streamlining the permit inventory for diverse, boutique lodging types will allow the county to convert existing high-volume day-trippers into overnight, TOT-paying guests who support local merchants.
- **III. Geographic Revenue Balancing:** Building an independent, weatherproof visitor economy on the West Slope provides a vital fiscal anchor for the county's general fund. Cultivating year-round, land-based tourism corridors balances out alpine climate cycles, protecting public service funding from seasonal winter or wildfire fluctuations in the Lake Tahoe Basin.

5. STRATEGIC PATHWAYS TO LONG-TERM FISCAL RESILIENCE

To bridge the revenue gap and expand our taxable lodging base, El Dorado County can utilize four unified policy mechanisms:

- **A. Streamline and Diversify Rural Lodging Options** Modernize land-use ordinances to support a wider array of small-scale, low-impact overnight options, unlocking immediate economic potential for local landowners. Simplifying paths to include smaller rural parcels in agricultural areas expands our agritourism inventory. Furthermore, because current county code restricts traditional TOT to physical platform structures rather than tents on the ground, the county is missing a massive segment of California's high-yield travel market. By formally opting into California AB 518 (The Low-Impact Camping Areas Act), the county can leverage a ready-made statutory framework for rural parcels of two or more acres. This allows the county to systematically capture alternative revenue streams—via standardized infrastructure, fee assessment districts, and specialized fire mitigation fees—without needing to amend its baseline TOT ordinance, while automating revenue remittance and directly funding local wildfire safety.

- **B. Engage and Support an Industry-Led Stewardship & Data Workgroup** Following the discontinuation of visitors authority funding in 2025, the county should actively support and engage with local stakeholders to establish a robust, industry-led destination management workgroup (with potential for future seed funding as viable frameworks emerge). This collaborative body will focus on data-driven destination management, explicitly underscoring stewardship as a core value to ensure travel benefits the entire community. By bringing local economic organizations and industry leaders to the table, the workgroup will leverage existing data and mapping tools to attract high-yield visitors while protecting our rural way of living and ensuring growth never strains localized infrastructure or safety capacity.
- **C. Unify Lodging Workstreams into a Cohesive Strategy** Consolidate siloed efforts—like the Agriculture Lodging Ad Hoc, the VHR Ad Hoc, and Budget Ad Hoc work on lodging—into a single, transparent lodging framework with robust industry engagement. Viewing traditional vacation rentals, boutique hotels, agritourism, and low impact camping as an interconnected web ensures policy cohesion, eliminates regulatory friction, and creates a predictable environment for private investment.
- **D. Partner with Local Groups for Smarter Economic Data** Leverage data insights, robust stakeholder/industry feedback and mapping tools already compiled by local economic development organizations to better inform and support effective frameworks. Collaborative workshops and data-sharing will allow leadership to pinpoint exactly where tourism growth makes the most sense without wasting internal county resources.

CONCLUSION

The data demonstrates that El Dorado County's current TOT challenges are unique to our local structure rather than an unavoidable regional reality. While our neighbors have successfully insulated their budgets through diversified lodging options, data-backed marketing, and predictable regulatory frameworks, El Dorado County has an untapped opportunity to achieve similar structural stability. By exploring sensible land-use options, updating regulatory predictability, and participating in collaborative, data-sharing partnerships with local organizations, county leadership, staff, and community stakeholders can work together to protect local landscapes, empower rural landowners, and build a stable, high-yield lodging economy for the future.

Data Sources and References:

- *The Economic Impact of Travel in California (May 2026) and California Travel Impacts by County, prepared by Dean Runyan Associates for Visit California.*
- *Condé Nast Traveler (Global Features/Trends Report), May 2026.*
- *Hilton annual travel intent survey and Expedia Group Traveler Value Index, 2026.*
- *Placer County Economic Development Division Annual Visitor Spending Report (April 2026).*
- *El Dorado County Adopted Budget and Discretionary Revenue Forecasts (FY 2025–2026).*
- *Value of Outdoor Recreation in the Upper American River Watershed Study, El Dorado Water Agency.*
- *Nevada County / Town of Truckee Transient Occupancy Tax & Measure K Annual Financial Reports.*
- *U.S. Short-Term Rental Outlook Report (2026), AirDNA.*
- *Vacation Rental Industry Outlook Report (2026), Key Data Dashboard.*



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Master Report

File Number: 26-0756

| | | |
|---|---------------------------------|---|
| *File ID #: 26-0756 | Agenda Type: Agenda Item | Status: Agenda Item |
| Version: 1 | Reference: | Gov Body: Strategic Economic Enhancement Development Committee |
| Department: Planning and Building | | Created: 04/21/2026 |
| Agenda Title: 5-21-2026 SEED Meeting | | Final Action: |
| Title: Receive and file a presentation from Maya Kitt with Civitas Advisors. | | |

Notes:

Code Sections:

Agenda Date: 05/21/2026

Agenda Number: 2.

Sponsors:

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Attachments: A - Presentation

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Contact: Karen L. Garner

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History of Legislative File

| Ver- sion: | Acting Body: | Date: | Action: | Sent To: | Due Date: | Return Date: | Result: |
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Text of Legislative File 26-0756

Receive and file a presentation from Maya Kitt with Civitas Advisors.

El Dorado County SEED Committee

May 20, 2026



30 YEARS OF LEADERSHIP

26
States

TID/BID Legislation
Drafted

200+
Projects

TID/BID Formation
Projects Worldwide

\$3.6B



Generated for
clients globally.

We are passionate about raising stable,
dependable funding for destination
promotion.



Property & Business Improvement Districts and Business

Improvement districts are stable funding sources for organizations of business and property owners working to improve their business districts. Owners within the district work together to make significant improvements, attract consumers and new businesses, and activate their commercial area.

The top 15 cities in the U.S. benefit from \$600 million a year through BID assessments.

ITEMS OF DISCUSSION

01 Business Improvement District (BID)

An assessment placed on the business

02 Hotel Improvement District (HID)

An assessment placed on room night stays

03 Property Business Improvement District (PBID)

An assessment placed on the property owner

District Comparison

| | BID | HID | PBID |
|-----------------------------|---|--|--|
| Typical Services | Increased traffic to businesses through marketing, special events, decorations, beautification | Sales & Marketing, Visitor Center services, Destination Development | Increased beauty and safety within the district through Clean & Safe, security patrol, capital improvement |
| Assessment Basis | Type of business, Annual revenue, Occupancy/Capacity, Number of employees; <u>typically raise less money than a PBID</u> | Flat fee per occupied room night \$1 fee = \$114k \$2 fee = \$225k \$3 fee = \$337k \$4 fee = \$456k | Lot size, Built square footage, Frontage linear footage, Use code/zoning |
| Collection | Collected with renewal/issuance of business licenses or by sending invoices | Collected in tandem with Transient Occupancy Tax (TOT) | Collected w/ property taxes, efficient process to collect & enforce |
| Average Time to Form | 6-10 months | 6-10 months | 10-12 months |

Improvement Districts



**Business or Property
Owner pay an
assessment**

**Collected by the
government**

**And managed
by non-profit**

- Level playing field—no free riders
- Transparency
- Reliability

Improvement Districts are Assessments, Not Taxes

Taxes

No defined term

Government managed and imposed

No requirement of benefitting the paying businesses

Funds may be diverted at government discretion

VS



Assessments

Specific term and plan

Payor managed and approved

Based on benefit to paying businesses

Legal accountability to district plan - funds cannot be diverted

STEPS TO FORMATION

01 Outreach & Consensus Building

- Open House & Surveys
- One-on-one meetings
- Educational material

02 Management District Plan (MDP)

Legal framework of the district

- Boundary
- Services
- Budget
- Term
- Assessment
- Governance

03 Petition Drive

Signed petitions weighting 50%+ based on assessment

04 Hearings

1. Resolution of Intention
2. Public Meeting (or Ballot – see 4.a)
3. Resolution of Formation

04.a Ballot

In a PBID, a ballot is sent to all assessed property owners during the hearing process

Amador County, CA

Established: May 2025

Assessment: 2%

Budget: \$200,000

Includes Short-Term Rentals

Through tireless outreach and strong partnerships with the lodging community and local businesses, they established a stable funding source that promises a prosperous future for tourism and economic stability.

Supporting Programs Such As:

- Online and traditional media advertising
- Trade shows, sales efforts, and FAM tours
- Collateral development, including maps and brochures
- Hospitality education and training
- Community grants to support events that draw visitors



Amador Country Wine Heritage District

- Estimated Budget: \$342,000
- 1% Assessment gross direct-to-consumer sales revenue on winery sales
- Approx 85 wineries

Funds Used For:

- Marketing & Brand Awareness
- Signage
- Events
- Educational programs to establish excellence and leadership in the industry

Lake County, CA

Established: 2019

Assessment: 2.5%

Budget: Approx. \$573k

Supporting Programs Such As:

- Digital Marketing
- Extended PR Efforts
- Destination Branding
- Visitors Map & Additional Collateral

Mammoth Lakes, CA

Established: 2013

Budget: \$6.5M

Assessment:

| Business Type | Annual Rate |
|---------------------|-------------------|
| Lodging | 1.0% revenue |
| Ski Resorts/Golf | 2.5% ticket sales |
| Retail – Tier 1 | 1.5% gross income |
| Retail – Tier 2 | \$500/year |
| Retail – Tier 3 | \$50/year |
| Restaurant – Tier 1 | 1.5% gross income |
| Restaurant – Tier 2 | \$500/year |
| Restaurant – Tier 3 | \$50/year |

Programs:

- Media Relations
- Air Service Marketing and Subsidy
- Education of Tourism Businesses
- Research



Palisades Tahoe, CA

Olympic Valley Alpine Meadows Micro Transit District

Established: 2018

Budget: \$1.1M

Assessment Structure : 1.5% on

- Olympic Valley Alpine Meadows lodging including short-term rentals
- Palisades Tahoe daily lift tickets
- Palisades Tahoe pack products

Programs:

- Micro mass transit service to provide transportation services to assessed lodging and ski resort businesses and other riders.

At a Glance: Rural California Districts

| District | Year | Annual Budget | Rate | Key Takeaway |
|-----------------|------|---------------|-------|-------------------------------|
| Amador County | 2025 | \$200,000 | 2% | Neighbor — achievable scale |
| Feather River | 2020 | \$240,000 | 2% | Micro Zone Marketing model |
| Lake County | 2019 | \$386,000 | 2.5% | Similar industry mix |
| Mariposa County | 2008 | \$2,440,000 | 1.5% | Long-term upside |
| Mammoth Lakes | 2013 | \$6,511,000 | Multi | Multi-sector, one district |
| Olympic Valley | 2018 | \$1,073,000 | 1.5% | Transportation infrastructure |

What the data shows:

- Rural counties are forming these districts right now — Amador just last year.
- Even small assessment bases (\$200K–\$400K) fund professional, dedicated tourism operations.
- A single district can serve multiple industries (Mammoth Lakes) and fund infrastructure (Olympic Valley).



Benefits to the County

01 Tourism Promotion Resumes

Dedicated funding without general fund expenditure

02 Drives TOT Revenue

More visitors + longer stays = more lodging tax collected by the county

03 Less County Overhead

Private-sector-led DMO reduces administrative burden on county staff

04 Infrastructure Framework

Structured funding for traffic management, shuttle services, visitor infrastructure

Benefits to Industry

01 Predictable Funding

Controlled by the businesses paying in — not subject to county budget politics

02 Organizational Structure

Creates capacity where none exists across wine, agriculture, and recreation sectors

03 Collaboration Framework

Brings historically siloed groups to the same table with a shared stake

04 Direct Investment

Grant programs and sector-specific funding back into industry needs

Creates what El Dorado County desperately needs: a collaborative process and an organized voice.

THANK YOU!



Maya Kitt
Account Manager
mkitt@civitasadvisors.com



Stay
Connected!



County of El Dorado

330 Fair Lane, Building A
Placerville, California
530 621-5390
FAX 622-3645
www.edcgov.us/bos/

Master Report

File Number: 26-0918

| | | |
|---|---------------------------------|---|
| *File ID #: 26-0918 | Agenda Type: Agenda Item | Status: Agenda Item |
| Version: 1 | Reference: | Gov Body: Strategic Economic Enhancement Development Committee |
| Department: Planning and Building | | Created: 05/18/2026 |
| Agenda Title: 05-21-26 SEED GSEC | | Final Action: |
| Title: Discussion and Recommendation on GSEC Membership. | | |

Notes:

Code Sections:

Agenda Date: 05/21/2026

Agenda Number: 3.

Sponsors:

::

Attachments: A - EDC-Community Visit, B - El Dorado County EDDT ROI FY24.25, C - El Dorado County Locates, D - City of Davis Market Velocity Presentation, E - Loomis Market Velocity

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Contact: Karen L. Garner

::

History of Legislative File

| Ver- sion: | Acting Body: | Date: | Action: | Sent To: | Due Date: | Return Date: | Result: |
|------------|--------------|-------|---------|----------|-----------|--------------|---------|
|------------|--------------|-------|---------|----------|-----------|--------------|---------|

Text of Legislative File 26-0918

Discussion and Recommendation on GSEC Membership.



**GREATER SACRAMENTO
ECONOMIC COUNCIL**

Greater Sacramento

California, unlocked.

2026

Who. What. Why.

WHO is GSEC?

A public-private partnership of **50 CEOs** and **22 communities** determined to drive economic **growth** in Greater Sacramento

WHAT does GSEC do?

Brings CEOs and public leaders together to create one regional economic strategy, with an emphasis on elevating the region's global **competitiveness**

WHY does GSEC's work matter?

Growing tradable-sector industries is the key to building a **sustainable** and **equitable** economy, changing the lives of individuals

An elite organization working for your business

GSEC's impact: 2015-2025

135
companies

\$17.5B
economic output

36.5K+
jobs

\$676M +
incentives

IEDC **#1** economic development
organization in the world

Board of Directors leadership



GSEC's complimentary business services



Real estate selection assistance



State and local incentive identification



Custom research and analytics



Connections to partners and service providers



Hiring support

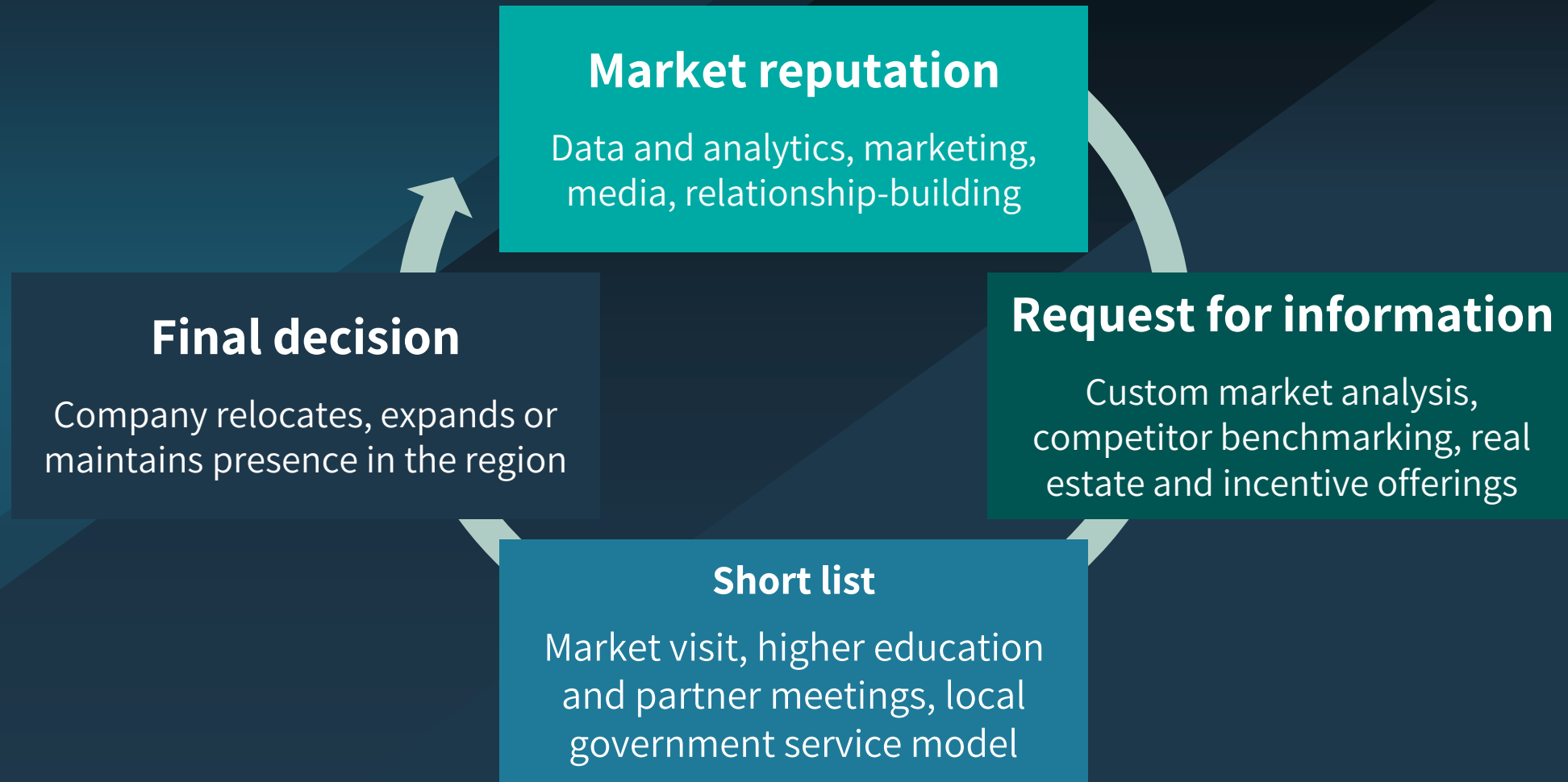


Comprehensive project management



Public relations and marketing

The cycle of investment decisions



One marketplace: communities drive and share the economy

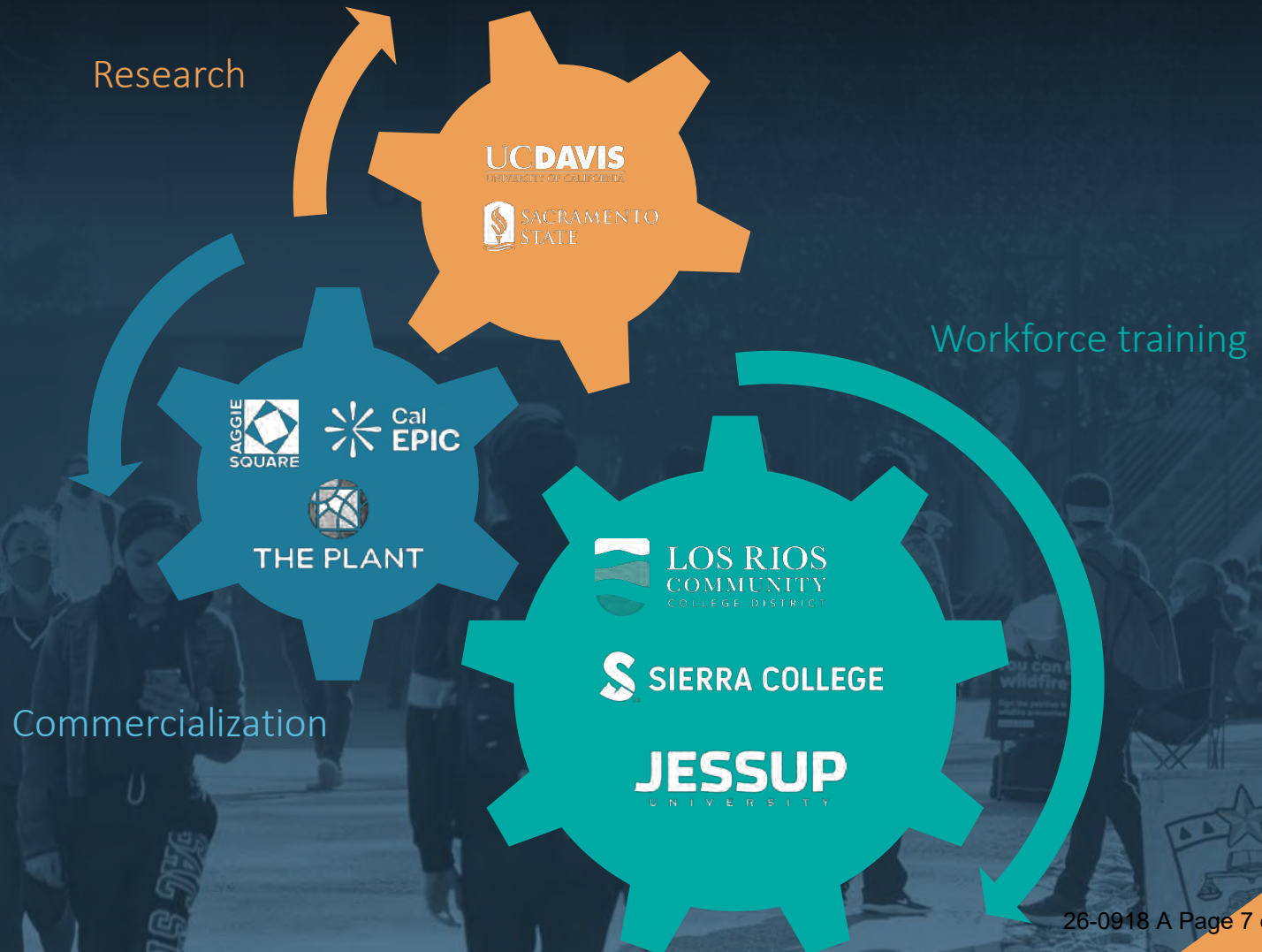
On average, communities only produce 37% of their jobs.

| Community | Jobs produced |
|------------------------|---------------|
| City of Auburn | 44.5% |
| City of Citrus Heights | 29.2% |
| City of Davis | 45.9% |
| City of Elk Grove | 39.2% |
| City of Folsom | 52.9% |
| City of Galt | 26.8% |
| City of Lincoln | 35.8% |
| Town of Loomis | 36.8% |
| City of Marysville | 29.6% |

| Community | Jobs produced |
|-------------------------|---------------|
| City of Rancho Cordova | 39.2% |
| City of Rocklin | 39.5% |
| City of Roseville | 53.2% |
| City of Sacramento | 60.9% |
| City of West Sacramento | 40.9% |
| City of Woodland | 46.8% |
| City of Yuba City | 50.9% |
| El Dorado County | 66.9% |
| Placer County | 70.3% |
| Sacramento County | 82.7% |
| Sutter County | 58.0% |
| Yolo County | 69.4% |
| Yuba County | 44.5% |

Higher education sets the market's agenda

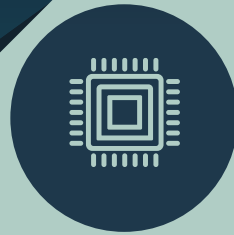
Higher education systems lead the cycle of competitiveness, driving new business creation and attraction.



Industries shaping Greater Sacramento's future

Semiconductors

Home to 9 of the world's largest semiconductor companies



Life science

#1 in employment growth among emerging markets



Precision manufacturing

89.4K + cleantech, aerospace & defense and mobility jobs



Food-to-health and agri-food tech

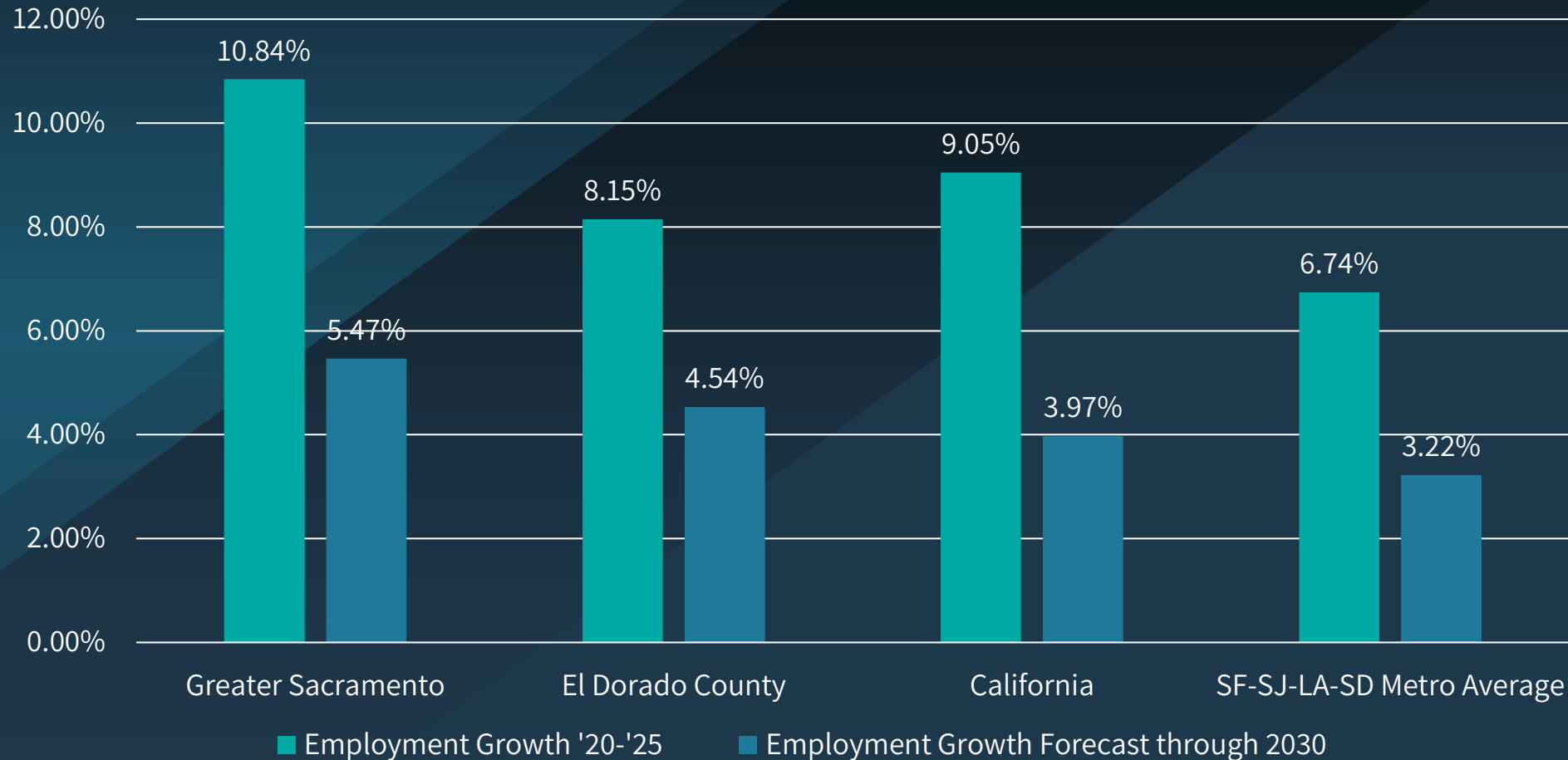
UC Davis is #1 in U.S. for ag and vet medicine; ready to capitalize on \$1T food accommodation industry for GLP-1s



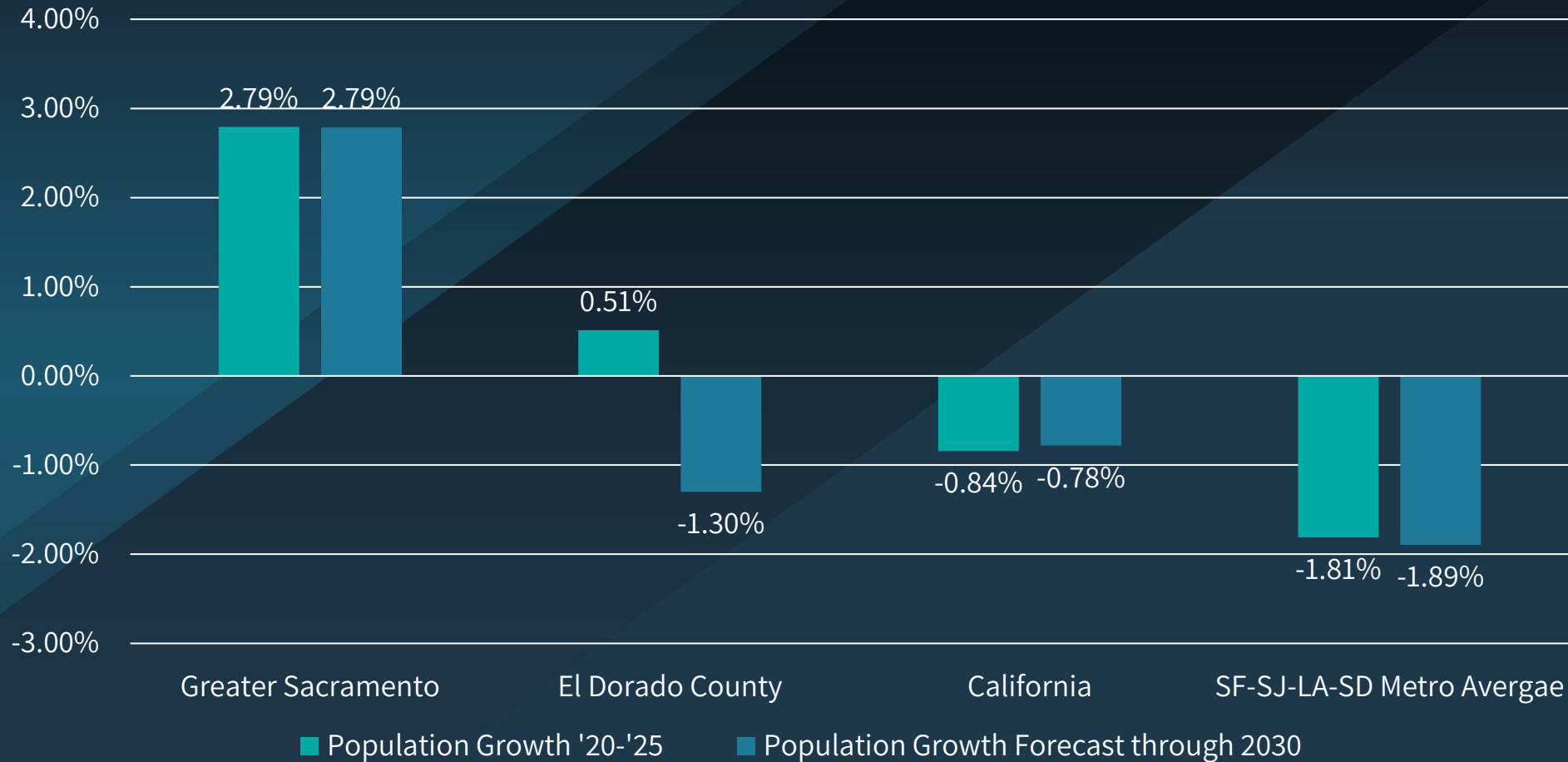


Community and regional impact

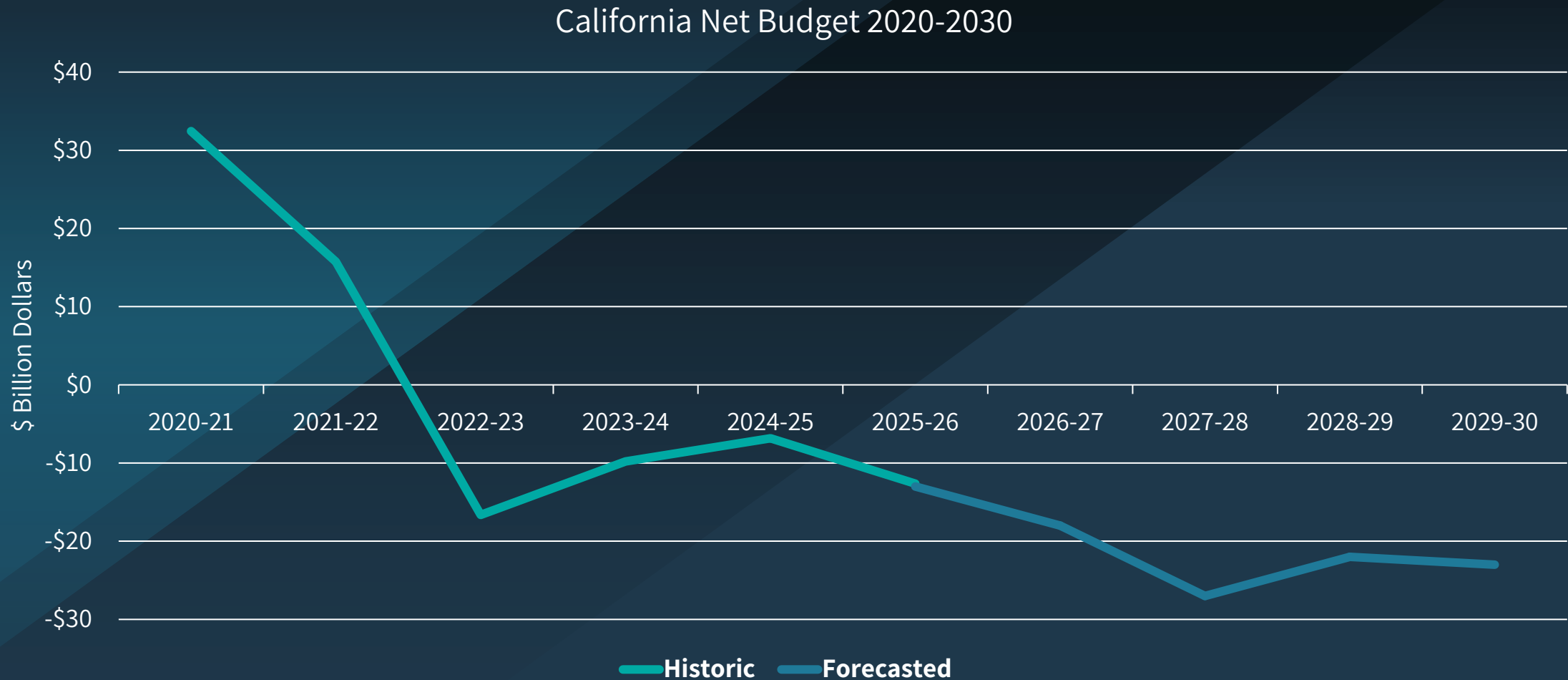
Regional employment growth in Greater Sacramento driving local area job growth



Negative 2030 population forecast for El Dorado County, eroding local tax base



California budget outlook negative through 2030



Local and regional efforts, one mission

Local community

- ◇ Development services (site selection support, incentives, permitting assistance)
- ◇ Business assistance (startup, workforce development)
- ◇ Local project management and coordination
- ◇ Strengthen commercial growth
- ◇ Local strategic planning and initiatives
- ◇ Housing and quality of life

Stronger together

Collaboration drives sustainable growth.

GSEC

- ◇ National brand visibility & investor interest
- ◇ Site selector relationships & corporate recruitment expertise
- ◇ Regional project management and coordination
- ◇ Research assistance (models, custom support, public and private data, technical analysis)
- ◇ Regional strategic initiatives



2015-2025: A decade of determination

National leader in equitable economic growth by Brookings

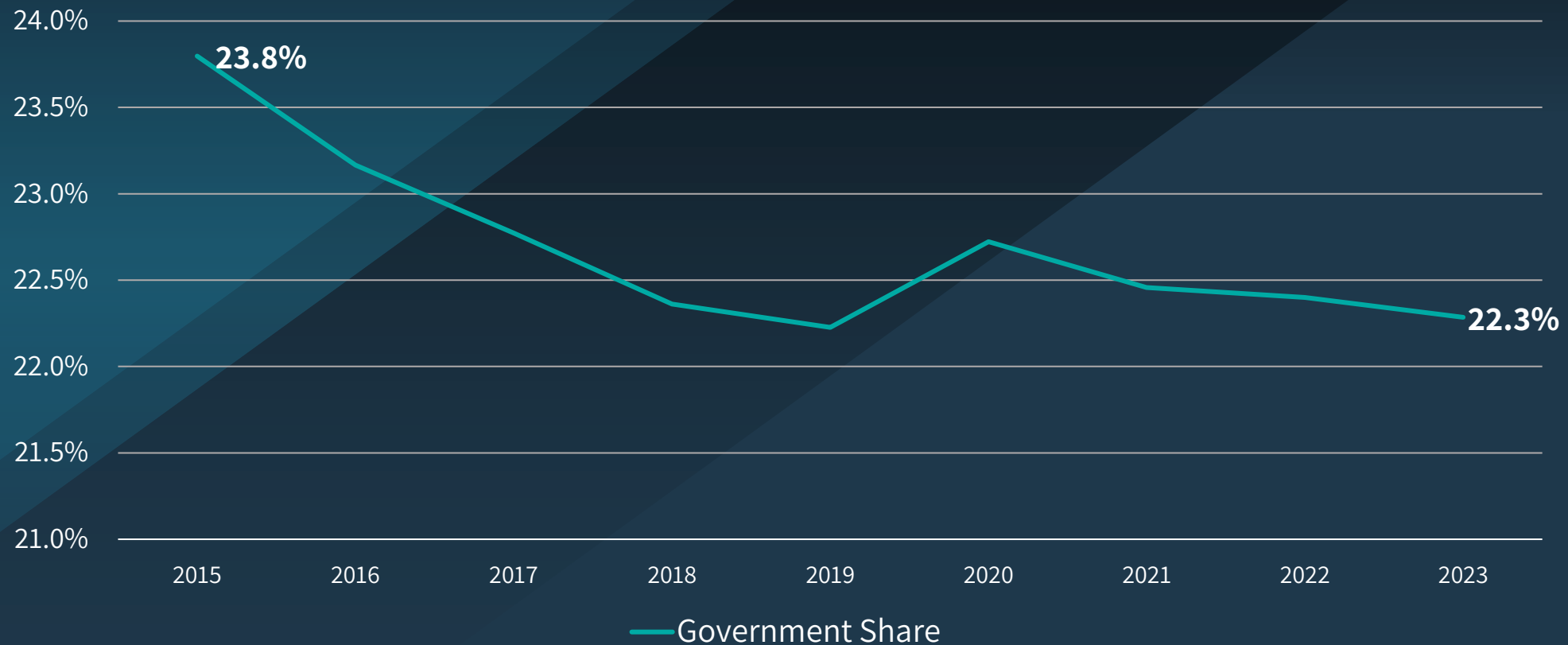
#5 in entrepreneurship

| Brookings Metro Monitor | 2017 | 2024 | 2025 | 2026 |
|-------------------------|------------------|------------------|------------------|------------------|
| Growth | 66 th | 15 th | 10 th | 12 th |
| Prosperity | 72 nd | 17 th | 20 th | 28 th |
| Inclusion | 80 th | 4 th | 7 th | 11 th |
| Racial Inclusion | n/a | 9 th | 34 th | 5 th |
| Geographic Inclusion | n/a | 3 rd | 3 rd | 3 rd |



Share of government jobs have declined since GSEC inception

Percent share of government jobs in Greater Sacramento





31 Total research cases completed

El Dorado County

10-year local economic impact



\$560,438
investment



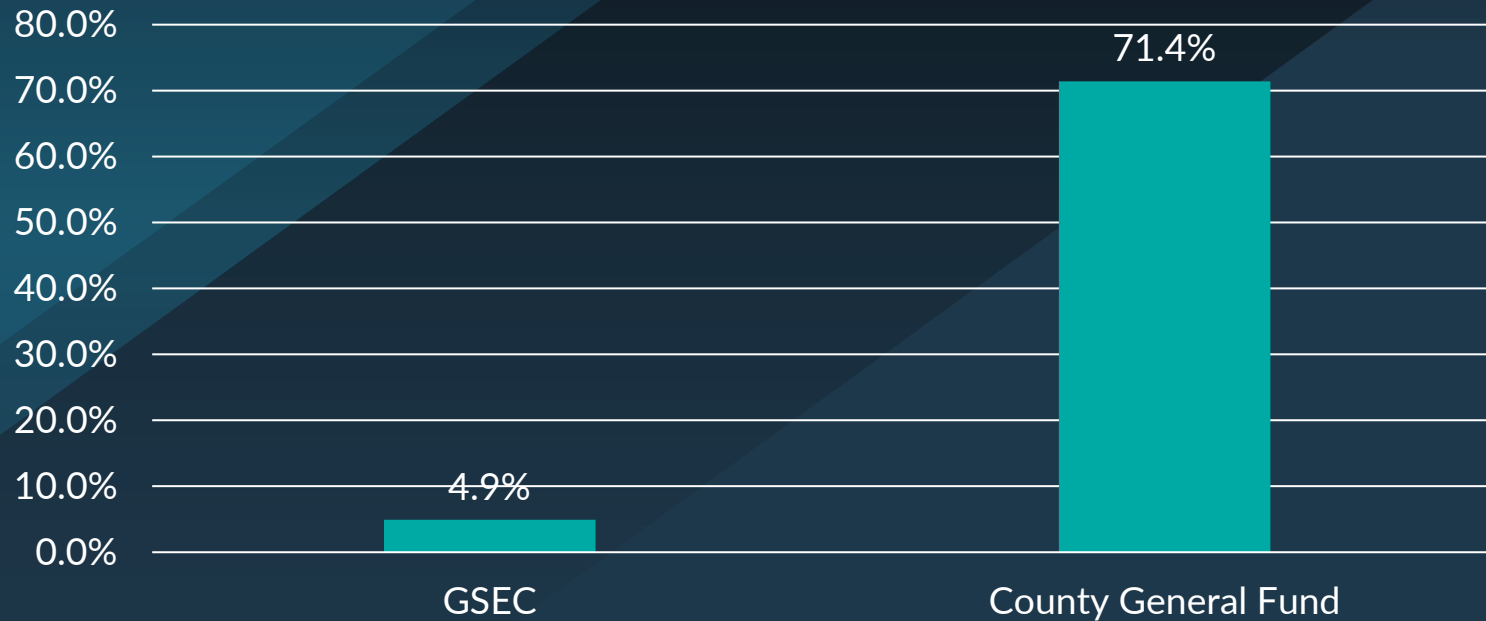
\$10,089,077
local tax revenue



18:1
ROI

GSEC delivering exceptional value

Percent Change in County Contribution to GSEC vs County General Fund
2015-16 to 2023-2024



Market momentum

Industries of the future



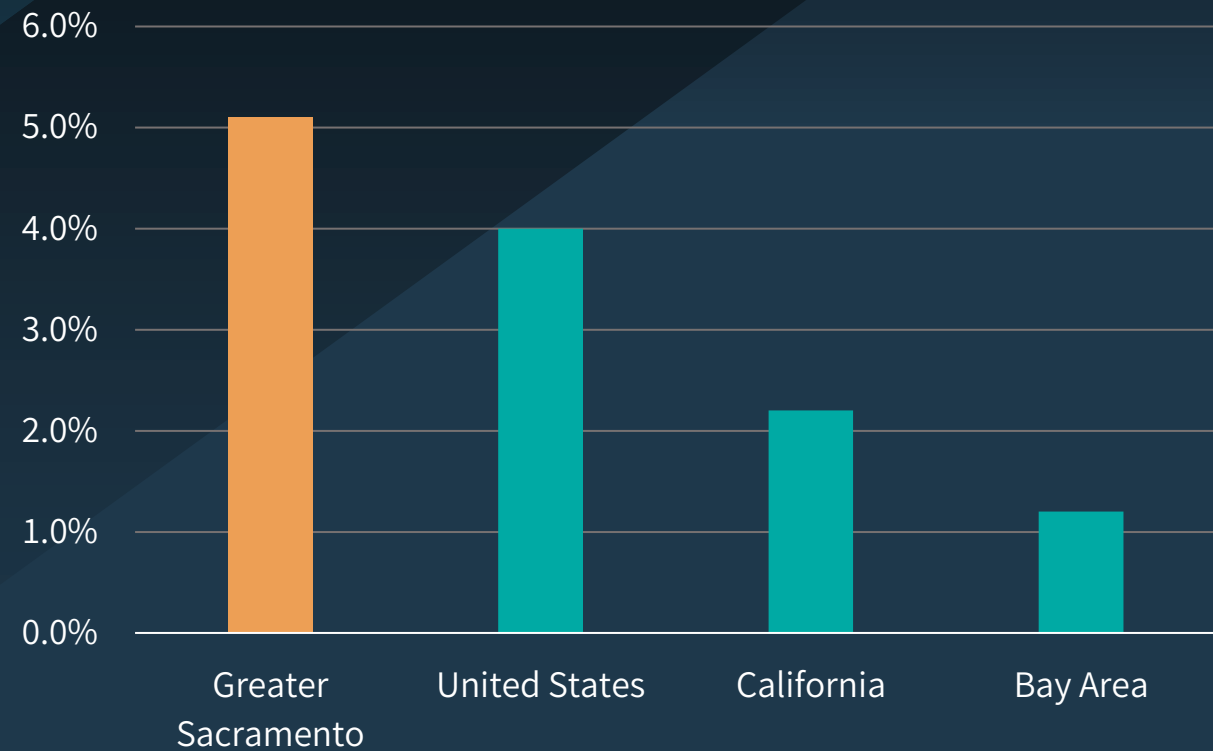
California's fastest-growing semiconductor market

40% of U.S.-based SiC device production will be in the region

26x more concentrated semiconductor growth capital than the U.S. average

37% of the region's computer hardware & architecture scholarly articles are commercially translated

Five-year forecast semiconductor job growth





What's next: Leveling up

Driving economic transformation

- ◇ Secure a direct transatlantic flight, continue engaging Lufthansa
- ◇ Maximizing FDI opportunities in Germany and South Korea
- ◇ Position the region as the next MLB expansion team market
- ◇ Support MLS bid
- ◇ *Be More. Do Greater Sacramento.* regional brand
- ◇ Semiconductor/EV battery value chain playbook with Newmark
- ◇ Semiconductor/advanced manufacturing site readiness
- ◇ Life science playbook with TEconomy
- ◇ The Plant with UCANR
- ◇ Food and Health Angels with UC Davis
- ◇ Opportunities Sacramento
- ◇ Market velocity to support local communities' strategies



We're not leaving California, we're leading it.

Greater Sacramento is accelerating.

#2 western region for job growth
(#1 in CA)

#8 fastest growing region for
educational attainment

#2 region for life science growth

#2 region for tech growth

California is stagnating.

#3 highest unemployment rate

#44 for GDP growth 2023-2024

\$12 billion budget deficit remedied
with one-time fixes



#1 EDO in the world Est. 2015

Executive



Barry Broome
President & CEO



Brittany Jones
Chief Performance
Officer



Matthew Miller
Chief Strategy
Officer



Anna Campbell
Senior Vice President,
Business Development &
Community Relations

Marketing & Communications



Jasmine Ward
Vice President,
Marketing
& Communications



Hugo Martinez
Creative Director



Brianna Buda
Communications Manager

Administration & Engagement



Danea Thomas
Director of Finance



Danish Sharma
Events & Engagement
Coordinator



Isabel Drapela
Investor Engagement
Coordinator

Business Development



Rachel Olson
Vice President,
Business Development



Mackenzie Riley
Director of Business
Development



Nick Guptil
Business Development
Project Manager



DaSean Spencer
Associate Business
Development Project
Manager

Research & Strategy



Joe Figueroa
Manager of Research



Lucy Lu Roberts
Research Analyst

El Dorado County



El Dorado County ROI

GSEC's work attracting companies into the region has spurred job growth and economic activity amounting to the below.

Total investment
amount over 10 years:
\$560,438



10-year ROI
on local tax revenue:
\$10,089,077

10-year ROI
on local tax revenue:
\$18.00 : \$1

Research requests 2023-2025:

31

RFIs submitted 2023-2025:

6

El Dorado County locates



GSEC activities

- Market Velocity report: real estate and industry analysis of El Dorado Business Park.
- Convened meeting with county officials and business leaders to discuss business park improvements.
- Water Agency impact analysis.
- El Dorado County industry sector reports: transportation & warehousing, agriculture, mining, retail and arts & entertainment.
- El Dorado County occupation reports: production, transportation & material movers, construction, farming, office & administration, business & financial and computer & mathematical.
- Chaired the Economic Development Directors Taskforce (EDDT).
- Representative of GSEC's Board of Directors.
- PR and media highlights for Blaize AI, a semiconductor company based in El Dorado Hills that raised a \$1.2 billion IPO through SPAC.
- Hosted and lead engagED forum in El Dorado County.

El Dorado County Locates

This document provides an overview of Greater Sacramento Economic Council locates in El Dorado County including jobs, average wages, capital investment, and a company description.

Visiontec - 4821 Golden Foothill Pkwy Ste 230, El Dorado Hills, CA 95762

- Jobs: 4
- Average wages: >\$200,000
- Capital investment: \$1.3 million
- Company description:
 - Formerly the Electronic Measurement System Department of Matsushita Technology, a member of Panasonic Group, Visiontec has extensive experience designing, developing, and deploying electronic measurement and inspection systems for photovoltaic and semiconductor industries.

Volektra – 5175 Hillsdale Circle, El Dorado Hills, CA 95762

- Jobs: 6
- Average wages: >\$40,000
- Capital investment: \$362,000
- Company description:
 - Volektra is an electric mobility company whose Virtual Magnet technology replaces traditional permanent, rare-earth-based, magnets with a smart control architecture, enabling magnet-free motors that deliver uncompromising torque, efficiency, and compactness.

BiOCHOSEN - El Dorado Hills, California 95762, US

- Jobs: 6
- Average wages: >\$158,000
- Capital investment: \$130,000
- Company description:
 - Sustainable biomaterials for consumer goods packaging

Ansync Labs - 5090 Robert J Matthews PKWY STE 1, El Dorado Hills, California 95762, US

- Jobs: 11
- Average wages: ~\$65,000
- Capital investment: \$1.0 million
- Company description:
 - Ansync Labs is a research and development firm, specializing in product design and manufacturing. We're uniquely experienced in motors and automation, medical and IOT devices, touch-screen and kiosks, LED systems, PCB prototyping, and x-ray inspection.

OnSight Technology – acquired, relocated

- Jobs: 60
- Average wages: ~\$65,000
- Capital investment: \$1.3 million
- Company description:
 - OnSight Technology is an autonomous and tele-operated unmanned ground vehicle with a radiometric thermal imaging camera and an optical zoom camera that uses AI visual learning to detect, report, and observe issues and anomalies on utility scale solar farms.



GREATER SACRAMENTO
ECONOMIC COUNCIL

City of Davis

Market Velocity

September 2, 2025

Who. What. Why.

WHO is GSEC?

A public-private partnership of **50 CEOs** and **22 communities** determined to drive economic **growth** in Greater Sacramento

WHAT does GSEC do?

Brings CEOs and public leaders together to create one regional economic strategy, with an emphasis on elevating the region's global **competitiveness**

WHY does GSEC's work matter?

Growing tradable-sector industries is the key to building a **sustainable** and **equitable** economy, changing the lives of individuals

#1 economic development organization in the world

Board of Directors leadership



GSEC's impact: 2015-2024

118 companies

\$15.2B economic output

33.4K+ jobs

THE WALL STREET JOURNAL.



One marketplace: communities drive and share the economy

On average communities produce 48% of their jobs.

| Community | Jobs produced |
|------------------------|---------------|
| City of Auburn | 48.8% |
| City of Citrus Heights | 32.9% |
| City of Davis | 39.9% |
| City of Elk Grove | 38.6% |
| City of Folsom | 49.1% |
| City of Galt | 27.0% |
| City of Lincoln | 32.1% |
| Town of Loomis | 38.1% |
| City of Marysville | 27.7% |

| Community | Jobs produced |
|-------------------------|---------------|
| City of Rancho Cordova | 40.0% |
| City of Rocklin | 32.3% |
| City of Roseville | 56.9% |
| City of Sacramento | 61.6% |
| City of West Sacramento | 38.9% |
| City of Woodland | 47.8% |
| City of Yuba City | 60.0% |
| El Dorado County | 64.0% |
| Placer County | 70.0% |
| Sacramento County | 83.0% |
| Sutter County | 64.8% |
| Yolo County | 71.3% |
| Yuba County | 47.8% |

Market Velocity overview



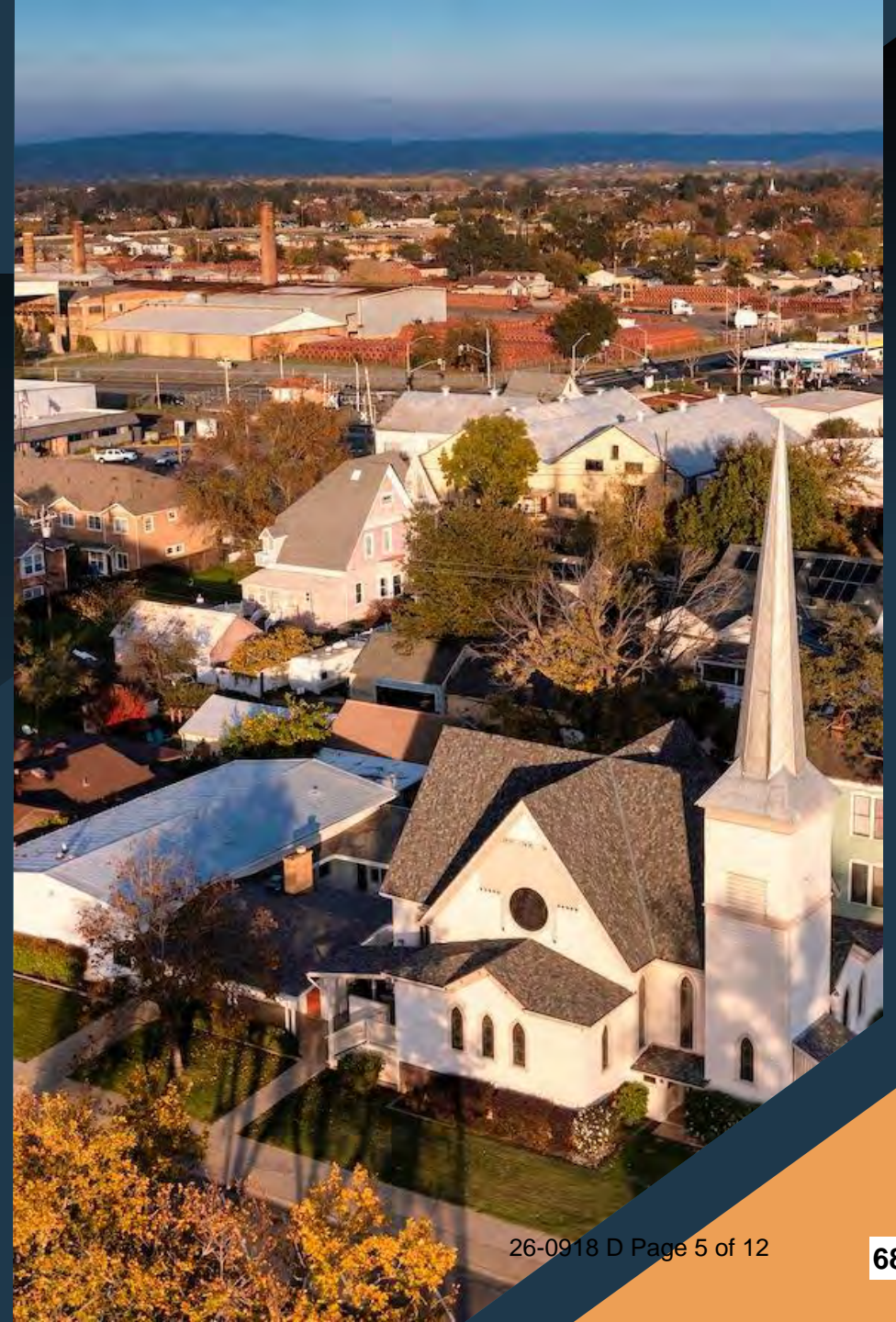
GSEC strategic initiative to assist all 22 member communities in advancing their local economic development agendas



Provide economic analysis, competitiveness research and identifying best practices in economic development



Leverage the expertise of staff, the Competitiveness Council, member investors and third-party experts



City of Davis Market Velocity



Economic indicator comparative analysis



Regional clusters and Davis targets analysis



Defining and promoting sustainable industries

Key takeaways and recommendations

Economic Indicators

- While the City of Davis is highly educated, it lags major Yolo County communities in population and job growth
- Median household income is lower in Davis compared to Greater Sacramento, yet home prices are nearly 50 percent higher

Tradable Sector Targets

- Davis and regional cluster alignment with precision manufacturing, life sciences, agri-food-tech; R&D and technical services
- City's real estate mix support and reinforce its strengths in regional clusters but additional analysis is necessary

Sustainable Industries

- Sustainable practices promoted through scorecards, performance contracts, traditional economic development tools (grants, tax abatements, etc.)
- Performance contract milestones could include quality job creation, community benefits and alignment with local climate action and adaptation plans

Methodology

Economic Indicators

- Comparison between Davis, Woodland, West Sacramento, Yolo County, Greater Sacramento and California
- Sources: U.S. Bureau of the Census, American Community Survey; JobsEQ labor market research database

Tradable Sector Targets

- Location Quotient (LQ) analysis
- Comparison of industries with GSEC targets, We Prosper Together/California Jobs First target sectors
- Davis alignment with job clusters along workforce and real estate capabilities

Sustainable Industries

- Case study analysis of various city policies
 - Sustainable PGH in Pittsburgh
 - City of Austin Business Expansion Program
 - Green Cost Share in Minneapolis
 - San Diego's Business Incentive program
 - Property tax abatement for energy transition and resilience in Houston

Market Velocity Uses

Use cases



Regional context

Local strategies, plans, and policies

- Local strategies
 - Tax and regulatory, infrastructure, land-use, workforce, innovation policies and programs
- Each community uniquely contributes
- Market Velocity designed to support local efforts

Regional strategy and alignment

- Regional strategy to align on cluster/target sector driven approach; coordinate execution of strategy
- Clusters drive regional performance
 - Marshall (1920)
 - Porter (1989)
 - Moretti (2012)

Economies are regional; drive state and national GDP

- 91% of national GDP comes from regions
- U.S. Department of Commerce strategy to support *regionalism*
- California Jobs First takes *regional* approach



Thank you

GreaterSacramento.com

Market Velocity

Town of Loomis

About Market Velocity - **DRAFT**

Market Velocity is a strategic initiative of the Greater Sacramento Economic Council (“GSEC”) that will assist all 22 member communities with economic analysis, competitiveness research, and in identifying and supporting the implementation of best practices in economic development. GSEC intends to leverage the expertise of staff, the Competitiveness Council, member investors, and third-party experts as needed in formulating analyses and recommendations. GSEC staff will engage eight member communities each fiscal year.

Overview

This report includes the following analysis:

- ◆ Jobs and sector trends and employment concentration analysis
- ◆ Analysis of the real estate to accommodate tradable sector growth
- ◆ Hotel market feasibility considerations
- ◆ Case studies of entertainment zones experiences

Key takeaways and recommendations



- ◆ Job growth in the Town of Loomis was robust from 2019 to 2024, outpacing the national average.
- ◆ Job growth over the next five years will be much more limited (0.02 percent versus about 11.0 percent in the previous five-year period).
- ◆ Construction is the largest sector in terms of growth, share of total jobs, and concentration, comprising about 37.0 percent of all jobs. Construction, however, is a local-serving, cyclical industry.
- ◆ Manufacturing; Professional, Scientific, and Technical Services; and Wholesale Trade present opportunities to develop tradable sector industries in alignment with local and regional sector strengths.
- ◆ Additional analysis should be developed to uncover possible local subsector and industry strengths that could be missed in aggregated sector data.
- ◆ There are nearly no vacancies in the Loomis industrial and office submarkets and lease rates for remaining vacancies are notably higher than the regional markets.
- ◆ Very low levels of vacancies have existed for several years.
- ◆ To be competitive for tradable sector industries, the Town needs to have a larger supply of real estate or greenfields that can be activated quickly.
- ◆ A comprehensive feasibility analysis is needed to determine the hotel chain segment(s) for which the Town of Loomis could compete.
- ◆ Several factors including market gaps, proximate demand capture, population base, industry base, and development costs make upper-upscale/boutique hotel development in Loomis unlikely.
- ◆ Data from San Francisco’s Entertainment Zones and anecdotal evidence from other states’ communities’ “social zones” show positive economic benefits of increased event turnout, increased retail investment, and high frequency retail shopping and sales.
- ◆ Risks related to public health and safety, family-orientation of community areas, and administrative costs should be considered in any cost/benefit analysis of establishing an Entertainment Zone.
- ◆ A comprehensive economic development strategic planning analysis should be undertaken to assess the community’s assets; strengths, weaknesses, opportunities, and threats; local tradable sector industries, etc. and how they align with the community’s goals for growth.

Job and employment concentration analysis



GSEC utilized Lightcast/EMSI, a leading database of labor market and economic data, to analyze the Town of Loomis' current economic conditions. Federal statistics measure labor, establishment, and other data at ZIP code, county, metropolitan area, and state levels. To approximate the town's boundaries, the following analysis uses data for ZIP Code 95650. While the ZIP code's boundaries exceed the town's boundaries, it does not include other trade areas; it includes largely residential and undeveloped areas of Placer County.

The tables in this section analyze North American Industry Classification System ("NAICS") codes. The codes organize employment by industry similarities. Groupings of similar industries are called sectors. By grouping similar industries into sectors, GSEC can also analyze the relative concentration of economic activity in the Town compared to national concentration levels. A statistic, called a "Location Quotient" or "LQ," is used to analyze the relative concentration. According to the U.S. Bureau of Economic Analysis, an LQ "measures a region's industrial specialization relative to a larger geographic (usually the nation). An LQ is computed as an industry's share of a regional total for some economic statistics (earnings, GDP by metropolitan area, employment, etc.) divided by the industry's share of the national total for the same statistic." An LQ >1.0 indicates a higher concentration of local employment in a sector versus the nation, suggesting industrial specialization like clustering or other agglomerative advantages. An LQ < 1.0 indicates a lower concentration of activity and no specialization.

LQ analysis alone will not substantiate the existence of clusters or agglomerative advantages. Comprehensive economic development planning that incorporates a variety of qualitative and quantitative analyses are needed. However, LQ analysis is a necessary step to discovering a community's economic strengths.

Job trends

From 2019 to 2024, jobs in the 95650 ZIP code increased by 10.5 percent from 6,238 to 6,895 (see Chart 1). This change outpaced the national growth rate of 4.4 percent by 6.1 percentage points. Growth is forecast to continue through 2029, rising from 6,238 job to 7,524. According to Table 1, Construction will remain the largest sector with 259 added jobs for a total of 2,801 jobs. Government and Professional, Scientific, and Technical services round out the top three largest sectors for employment. Job growth is expected to increase only 0.02 percent over the period.

Chart 1: Job trend in ZIP 95650

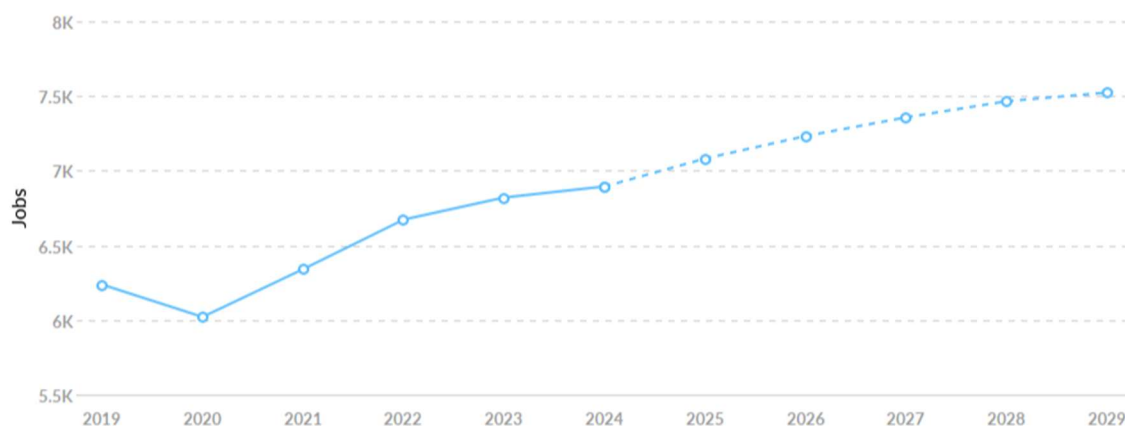


Table 1: Job growth by sector in ZIP 95650

| NAICS | Description | 2024 Jobs | 2029 Jobs | Change | % Change |
|-------|--|-----------|-----------|--------|----------|
| 11 | Agriculture, Forestry, Fishing and Hunting | <10 | <10 | 0 | - |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | 0 | 0 | 0 | - |
| 22 | Utilities | 104 | 128 | 24 | 1.18% |
| 23 | Construction | 2,542 | 2,801 | 259 | 0.04% |
| 31 | Manufacturing | 361 | 418 | 57 | 0.32% |
| 42 | Wholesale Trade | 419 | 439 | 20 | 0.25% |
| 44 | Retail Trade | 414 | 435 | 21 | 0.25% |
| 48 | Transportation and Warehousing | 144 | 155 | 11 | 0.75% |
| 51 | Information | <10 | <10 | 0 | - |
| 52 | Finance and Insurance | 65 | 64 | -1 | 1.51% |
| 53 | Real Estate and Rental and Leasing | 79 | 89 | 10 | 1.43% |
| 54 | Professional, Scientific, and Technical Services | 422 | 494 | 72 | 0.28% |
| 55 | Mgmt. of Companies and Enterprises | 37 | 42 | 5 | 3.07% |
| 56 | Admin., Support, Waste Management, Remediation Svcs. | 292 | 296 | 4 | 0.35% |
| 61 | Educational Services | 280 | 313 | 33 | 0.40% |
| 62 | Health Care and Social Assistance | 290 | 334 | 44 | 0.40% |
| 71 | Arts, Entertainment, and Recreation | 39 | 44 | 5 | 2.89% |
| 72 | Accommodation and Food Services | 348 | 396 | 48 | 0.33% |
| 81 | Other Services (except Public Administration) | 400 | 417 | 17 | 0.26% |
| 90 | Government | 641 | 643 | 2 | 0.16% |
| 99 | Unclassified Industry | <10 | 0 | 0 | - |
| Total | | 6,895 | 7,524 | 629 | 0.02% |

Source: Lightcast/EMSI.

Projected job growth versus historical job growth

Table 2 shows the recent history of growth in the town. From 2019 to 2024, the ZIP code 95650 grew from 6,238 jobs to 6,895 jobs or about 11.0 percent. Growth over this period was primarily driven by Construction (+337 jobs, growing about 15.0 percent), Education Services (+101 jobs, growing about 56.0 percent), Manufacturing (+99 jobs, growing about 38.0 percent), Accommodation and Food Services (+76 jobs, growing 28.0 percent), and Wholesale Trade (+66 jobs, growing about 19.0 percent).

A few sectors declined over the period. The largest declining sector was Professional, Scientific, and Technical Services (-65 jobs, declining about -13.0 percent), Transportation and Warehousing (-22 jobs, declining about 13.0 percent), and Real Estate and Rental and Leasing (-6 jobs, declining about 7.0 percent), and Retail Trade (-6 jobs, declining about 1.0 percent).

While the Tabel 1 shows all sectors growing, the sectors, according to Table 2, will not experience the same levels of growth compared to the most recent five-year historical period.

Table 2: Job growth from 2019 to 2024 in ZIP 95650

| NAICS | Description | 2019 Jobs | 2024 Jobs | '19-'24 Change | '19-'24 %Change |
|-------|--|-----------|-----------|----------------|-----------------|
| 22 | Utilities | 74 | 104 | 30 | 40% |
| 55 | Mgmt. of Companies and Enterprises | 35 | 37 | 2 | 6% |
| 52 | Finance and Insurance | 64 | 65 | 0 | 1% |
| 90 | Government | 637 | 641 | 4 | 1% |
| 23 | Construction | 2,206 | 2,542 | 337 | 15% |
| 54 | Professional, Scientific, and Technical Services | 486 | 422 | -65 | -13% |
| 53 | Real Estate and Rental and Leasing | 85 | 79 | -6 | -7% |
| 42 | Wholesale Trade | 353 | 419 | 66 | 19% |
| 48 | Transportation and Warehousing | 166 | 144 | -22 | -13% |
| 62 | Health Care and Social Assistance | 289 | 290 | 1 | 0% |
| 31 | Manufacturing | 262 | 361 | 99 | 38% |
| 56 | Admin., Support, Waste Mgmt., Remediation Svcs. | 254 | 292 | 38 | 15% |
| 81 | Other Services (except Public Administration) | 401 | 400 | 0 | 0% |
| 44 | Retail Trade | 420 | 414 | -6 | -1% |
| 71 | Arts, Entertainment, and Recreation | 20 | 39 | 18 | 90% |
| 72 | Accommodation and Food Services | 272 | 348 | 76 | 28% |
| 61 | Educational Services | 179 | 280 | 101 | 56% |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | 0 | 0 | 0 | 0% |
| 51 | Information | <10 | <10 | Insf. Data | Insf. Data |
| 99 | Unclassified Industry | 0 | <10 | Insf. Data | Insf. Data |
| 11 | Agriculture, Forestry, Fishing and Hunting | 27 | <10 | Insf. Data | Insf. Data |
| | | 6,238 | 6,895 | 657 | 11% |

Source: Lightcast/EMSI, 2025.

Sector employment concentration

Table 3 provides granular detail on the concentration of sectors, their current share of employment, average wages, and economic output.

Highlighted sectors are the most highly concentrated. Construction is the most concentrated sector at 6.35X the national average for employment (535.0 percent higher), it is the largest sector by total employment accounting for about 37.0 percent of total employment and contributes \$346 million in economic output to the regional economy. Construction, however, is typically thought to be a cyclical local-serving industry, not a tradable sector industry. Utilities and Education Services are also considered local-serving. Both industries contribute substantially less to total employment. Education services are also lower-wage on average.

Sectors traditionally thought to be tradable, like Manufacturing, Professional, Scientific, and Technical Services, Transportation and Warehousing, and subsectors of Health Care and Social Assistance and Finance and Insurance, have LQs lower than 1.0. For example, Manufacturing's LQ of 0.70 means employment concentration in this sector is 30.0 percent lower than the national employment concentration.

Table 3: Sector employment concentration in ZIP 95650

| NAICS | Description | 2024 Jobs | Share | LQ | Avg. Wage | 2024 GRP* |
|---------------------|--|--------------|------------|-------------|------------------|----------------------|
| 11 | Agriculture, Forestry, Fishing and Hunting | - | - | 0.11 | Insf. Data | \$2,850,836 |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | 0 | 0% | 0.00 | \$0 | \$0 |
| 22 | Utilities | 104 | 2% | 4.36 | \$209,820 | \$77,505,527 |
| 23 | Construction | 2,542 | 37% | 6.35 | \$95,885 | \$346,198,006 |
| 31 | Manufacturing | 361 | 5% | 0.70 | \$68,615 | \$45,932,115 |
| 42 | Wholesale Trade | 419 | 6% | 1.70 | \$85,116 | \$85,909,829 |
| 44 | Retail Trade | 414 | 6% | 0.65 | \$54,671 | \$54,139,126 |
| 48 | Transportation and Warehousing | 144 | 2% | 0.48 | \$77,198 | \$17,901,316 |
| 51 | Information | - | - | 0.06 | Insf. Data | \$5,237,654 |
| 52 | Finance and Insurance | 65 | 1% | 0.23 | \$128,400 | \$24,029,252 |
| 53 | Real Estate and Rental and Leasing | 79 | 1% | 0.65 | \$87,797 | \$27,767,106 |
| 54 | Professional, Scientific, and Technical Services | 422 | 6% | 0.87 | \$90,093 | \$64,707,789 |
| 55 | Mgmt. of Companies and Enterprises | 37 | 1% | 0.36 | \$142,819 | \$7,528,801 |
| 56 | Admin., Support, Waste Management, Remediation Svcs. | 292 | 4% | 0.72 | \$61,204 | \$22,745,003 |
| 61 | Educational Services | 280 | 4% | 1.60 | \$30,604 | \$9,372,005 |
| 62 | Health Care and Social Assistance | 290 | 4% | 0.31 | \$70,155 | \$27,468,352 |
| 71 | Arts, Entertainment, and Recreation | 39 | 1% | 0.31 | \$37,816 | \$2,886,508 |
| 72 | Accommodation and Food Services | 348 | 5% | 0.61 | \$34,148 | \$20,986,726 |
| 81 | Other Services (except Public Administration) | 400 | 6% | 1.17 | \$54,781 | \$29,803,975 |
| 90 | Government | 641 | 9% | 0.64 | \$111,237 | \$78,459,977 |
| 99 | Unclassified Industry | - | - | 0.32 | Insf. Data | Insf. Data |
| Totals and averages | | 6,895 | 100% | - | \$83,112 | - |

Source: Lightcast/EMSI, 2025.

* Contribution to Gross Regional Product

Additional analysis is needed to uncover subsector and industry drivers of the sector concentration LQs and to qualitatively assess specialization. For example, Wholesale Trade concentration could be the result of unique assets, businesses, or locational advantages that support the disproportionately large concentration of Construction sector activity. Similarly, Manufacturing and Professional, Scientific, and Technical Services may have subindustry specializations that are missed by aggregating data for sector analysis.

Real estate analysis



Using CoStar, a leading provider of commercial real estate data and intelligence, GSEC analyzed the Town's industrial and office real estate submarkets to determine local capacity to serve tradable sectors.

According to Table 4, the office submarket in Loomis has just over 171,000 square feet of inventory. A small amount of space (474 square feet) was absorbed over the year to drop the vacancy rate to 0.5 percent, well below the regional vacancy rate of 11.3 percent. The lease rate, likely determined in significant part by the vacancy rate, is \$35.17 – more than \$8.00 higher than the office lease rate found across the region. Chart 2 shows the trend in office vacancies in Loomis since the late 1990s. Vacancy rates have hovered near 0.5 percent since 2018.

The industrial submarket in Loomis is much larger with more than 1.14 million square feet, though it is still a small share of the broader regional industrial market. Like the office submarket, there was no industrial construction. Also like the office submarket, a small amount of space was absorbed (7,561 square feet) and the vacancy was low (1.1 percent) and below the region's vacancy rate of 6.7 percent. The lease rate is \$13.20 per square foot per year, \$1.52 higher than the regional lease rate of \$11.68. Chart 3 shows the trend in industrial vacancy in Loomis since the late 1990s. Except for the COVID-19 pandemic-induced recession, the lease rate has hovered around 1.0 percent since 2014.

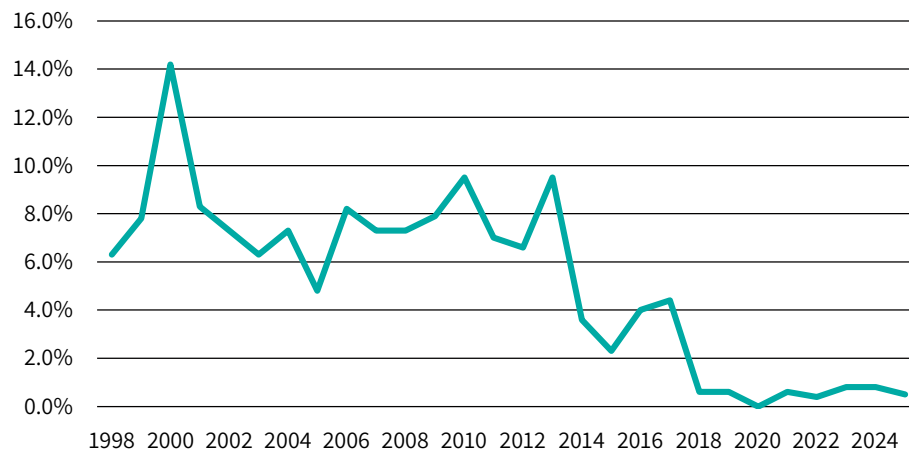
Limited tradable sector real estate will hinder the Town's ability to grow and attract tradable and local-serving sectors.

Table 4: Town of Loomis and Greater Sacramento industrial and office market

| Metric | Office | | Industrial | |
|----------------|----------------|--------------------|----------------|--------------------|
| | Town of Loomis | Greater Sacramento | Town of Loomis | Greater Sacramento |
| Inventory | 171,729 | 112,226,798 | 1,141,389 | 196,345,459 |
| Construction | 0 | 324,142 | 0 | 1,277,153 |
| Net Absorption | 474 | 351,973 | 7,561 | -708,466 |
| Vacancy Rate | 0.5% | 11.3% | 1.1% | 6.7% |
| Lease Rate | \$35.17 | \$27.10 | \$13.20 | \$11.68 |

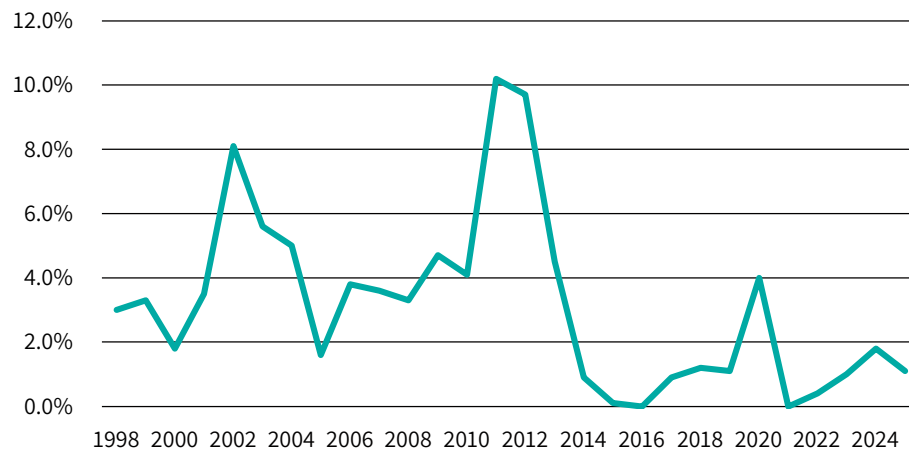
Source: CoStar, June 2025

Chart 2: Town of Loomis office vacancy rate



Source: CoStar, June 2025

Chart 3: Town of Loomis industrial vacancy rate



Source: CoStar, June 2025

Hotel market feasibility considerations



In addition to analyzing market conditions, GSEC was asked to discuss feasibility considerations for a boutique or upper-upscale hotel. This section sketches how market feasibility is considered for hotel development.

Hotel market segmentationⁱ

The hotel industry uses a standardized classification system developed by Smith Travel Research (STR), now part of CoStar. The classification system is the standard that investors, developers, lenders, appraisers, etc. use. Table 5 lists the classes. The brands associated with the classes are based on average daily rates (ADR) where ADR = room revenue / rooms sold.

Table 5: STR hotel chain segments

| Segment | Example Chains |
|----------------|---|
| Luxury | Ritz-Carlton, Four Seasons, St. Regis, Waldorf Astoria |
| Upper Upscale | Marriott Hotels, Hilton Hotels & Resorts, Hyatt Regency, Westin, InterContinental |
| Upscale | Courtyard Marriott, Hilton Garden Inn, Hyatt Place, DoubleTree |
| Upper Midscale | Hampton Inn, Holiday Inn Express, Fairfield Inn |
| Midscale | La Quinta, Best Western |
| Economy | Super 8, Motel 6, Days Inn |
| Independent | Unaffiliated hotels, tracked separately |

Defining upper upscale^{ii iii}

Upper-scale hotels typically have a mix of mostly king-size rooms and club-level rooms, offering at least one full-service three-meal restaurant plus a bar or lounge. They provide function spaces and business centers (a minimum of 3 seats per key), fitness rooms, swimming pools, and may have a spa. In practical terms, upper-upscale sits just below luxury—offering high-quality amenities and service at a somewhat lower price point. Upper upscale maintains high occupancy rates (around 74%) with ADR around \$172, representing a notable drop-off from luxury's \$313 ADR but still commanding premium pricing.

While STR's chain classification doesn't formally subdivide upper-scale, the industry uses several additional dimensions to further segment properties: full-service vs select-service, product type (e.g., convention/group hotels, transient-focused hotels, resort hotels), demand segment (e.g., group, transient, contract), by location, and lifestyle/boutique variations (e.g., contemporary, design-forward hotels like Hyatt Centric, Tempo by Hilton, Kimpton, etc.).

Market feasibility evaluation^{iv}

To evaluate upper-upscale hotel development opportunities, the Town of Loomis would need to conduct a market feasibility analysis to determine if the perceived market value exceeds the costs of development. The analysis typically includes the following:

- ◆ Market analysis
 - ◆ Economic and demographic drivers
 - ◆ Demand generators (e.g., corporate headquarters, convention centers, airports, universities, etc.)
 - ◆ Historical performance by segment
 - ◆ Seasonality patterns
- ◆ Supply analysis
 - ◆ Existing competitive set inventory
 - ◆ Construction pipeline data (e.g., construction in progress, final planning, early planning, etc.)
 - ◆ Properties closing or being repositioned
 - ◆ Competitive positioning and quality
- ◆ Demand analysis
 - ◆ Segment-specific trends (e.g., group vs transient demand, group demand for upper upscale, etc.)
 - ◆ Market share to be capture/market penetration potential
 - ◆ Unaccommodated demand during peak periods
- ◆ Financial projections
 - ◆ Operating cost pro formas
 - ◆ Development cost estimates
 - ◆ Return analysis (e.g., NOI, ROI, IRR, payback period, etc.)

Local market factors that could impact upper-upscale development^{v vi}

Several factors could make development of an upper-upscale hotel in the Loomis area difficult including:

- ◆ Market gap

There are no upper-upscale or full-service hotels within the immediate market area. The competitive set consists of limited-service and select-service in the upper midscale to upscale segments.

- ◆ Proximate demand capture

Thunder Valley Casino, a AAA Four Diamond resort, and several upper midscale to upscale segment hotels proximate to major employers, retail centers, and institutions of higher education in the Roseville area capture demand. Opportunities could exist for extended-stay or leisure subsegments (e.g., due to construction projects or tourists enroute to Tahoe, though unlikely to demand upper-upscale)

- ◆ Population base

The population base, while growing, is small.

- ◆ Industry base

The industry base, while growing, is small and concentrated in sectors that do not support upper-upscale hotel demand (e.g., construction, government).

- ◆ Development costs

Upper-upscale hotel development costs are harder to recover in secondary suburban markets without significant demand drivers.

While the Town is growing, nearby competition and a lack of demand drivers, including a limited tradable sector economic base, are likely to make development of upper-upscale hotels difficult in the near term. By conducting a formal feasibility study, the Town will be able to identify the hotel markets in which it can compete.

Entertainment Zones

The third element of the scope for Loomis' Market Velocity project is a review of the state's expanded Entertainment Zone legislation. GSEC reviewed the experiences of communities from San Francisco and around the country that have implemented similar programs and summarized the findings.



Brief legislative history, definition, and establishment

San Francisco became the first community to create Entertainment Zones under Senate Bill 76 that went into effect in 2024. Effective January 1, 2025, Senate Bill 969 allows cities and counties across the state to model San Francisco's strategy to designate Entertainment Zones. An Entertainment Zone is a defined public area (e.g., a public roadway, sidewalk, etc.) within a local jurisdiction that allows for the open consumption of specified alcoholic beverages during specified days and hours. Entertainment Zones are established by a city, county, or city and county ordinance.

Requirements under Senate Bill 969^{vii viii}

Licensees who would like to participate must be either a licensed beer manufacturer, a licensed winegrower, or an on-sale licensee. The licensed premises must be located within the defined boundaries of the established entertainment zone. Before enacting an ordinance to establish or modify an entertainment zone, the bill requires a city, county, or city and county to notify local law enforcement and request feedback about specific information, including the entertainment zone's proposed boundaries and days and hours of operation. The bill requires review of the entertainment zone's operation every 2 years. No alcoholic beverages purchased at a participating licensed premises may leave the premises in an open glass or metal container.

Benefits of Entertainment Zones

- ◆ Economic benefits for local businesses

Since the launch of the first Entertainment Zone on Front Street in San Francisco, four zone events have drawn over 21,000 attendees. Participating businesses reported seeing increases in sales between 700.0 percent and 1,500.0 percent. In September 2024, San Francisco experimented with an Entertainment Zone for Oktoberfest and reported at least 10X more foot traffic than in 2023.^{ix x}

- ◆ Smaller community success stories

In Michigan, there are nearly 90 “social districts”, and business owners have noted it helps the businesses marketing in the community and increases sales.^{xi} In Monroe, North Carolina, the city has grown private investment by \$15 million over the last two years from similar zones, including two new breweries and at least six taprooms and restaurants.^{xii}

- ◆ Activation and investment

A similar zone in Wilmington, North Carolina, which also allows for free movement about the zone, has anecdotally led to increased foot traffic for shops, restaurants, and bars.^{xiii} Lansing, Michigan has similarly reported investment attraction because of activation.^{xiv}

- ◆ Relatively low cost to establish

San Francisco has shown that no significant investment is required; an outline of how neighborhoods can form the zones can be found on the city's website.^{xv}

Risks of Entertainment Zones

Entertainment Zones are not without risks:

- ◆ Public health and safety concerns, underage consumption

Some organizations opposed Senate Bill 969 because it could, according to their arguments, contribute to drunk driving incidents and increased alcohol mortality rates.^{xvi}

In opposition to the bill, Alcohol Justice argued: “Open-air alcohol sales areas are central to the idea of a city becoming a party destination. In the United States, public transit is too sparse and too unreliable to deal with much of the alcohol economy. These zones will create magnets for individuals to travel and over-consume.”^{xvii}

- ◆ Family friendliness

In Monroe, NC, some expressed concerns: "Some parents don't have the privilege of finding a babysitter to come." A gift shop employee said she is concerned for families with young children. Another business owner said, "We're a family business, so we don't serve alcohol and don't think it would be a good idea to have alcohol around kids."^{xviii}

- ◆ Residential impact

Alcohol Justice argues that residents will be the first impacted by negative externalities from Entertainment Zones, who should have the right to “reasonable enjoyment” of their homes.^{xix}

- ◆ Administrative and enforcement burden

In San Francisco, the permitting process takes time and organization. Event planners often give themselves 60 days when a street closure is required. One St. Patrick's Day event cost between \$56,000 and \$71,000.^{xx} The experience in Loomis, which is a small community, may be less costly.

Endnotes

- ⁱ <https://www.costar.com/article/197211467/back-on-the-chain-scale>
- ⁱⁱ <https://brandingstrategyinsider.com/a-new-era-in-hotel-market-segmentation/>
- ⁱⁱⁱ <https://hoteltechreport.com/news/hotel-brand-guide>
- ^{iv} <https://www.costar.com/products/benchmark/resources/data-insights-blog/hospitality-industrys-historical-kpis>
- ^v <https://www.hvs.com/article/9999-HVS-US-Hotel-Development-Cost-Survey-2024>
- ^{vi} https://www.matthews.com/market_insights/3q24-hospitality-market-report-california
- ^{vii} <https://www.abc.ca.gov/licensing/entertainment-zone-participation/requirements-and-guidelines/>
- ^{viii} <https://legiscan.com/CA/text/SB969/id/3019288>
- ^{ix} <https://www.sf.gov/news-mayor-lurie-supervisors-announce-legislation-to-support-neighborhoods-small-businesses-with-five-new-entertainment-zones>
- ^x <https://laist.com/brief/news/politics/california-new-laws-cannabis-cafes-alcohol-entertainment-zones-outdoor>
- ^{xi} <https://www.wzzm13.com/article/money/business/small-business/west-michigan-communities-establish-social-districts/69-2ed0bfa8-cfea-4153-87f3-c26c486c167e>
- ^{xii} <https://www.qcitymetro.com/news-buzz/charlotte-wants-social-districts-how-do-they-fare-in-other-n-c-cities-210887/>
- ^{xiii} <https://www.wect.com/2025/01/08/open-container-be-allowed-brooklyn-arts-district-social-district-pilot-program/>
- ^{xiv} <https://www.wilx.com/2022/04/27/mid-michigan-social-districts-are-here-stay/>
- ^{xv} <https://www.sf.gov/reports--august-2024--create-entertainment-zone>
- ^{xvi} <https://laist.com/brief/news/politics/california-new-laws-cannabis-cafes-alcohol-entertainment-zones-outdoor>
- ^{xvii} https://alcoholjustice.org/wp-content/uploads/2024/10/Field-Guide-entertainment-zones_Oct24.pdf
- ^{xviii} <https://www.qcitymetro.com/news-buzz/charlotte-wants-social-districts-how-do-they-fare-in-other-n-c-cities-210887/>
- ^{xix} https://alcoholjustice.org/wp-content/uploads/2024/10/Field-Guide-entertainment-zones_Oct24.pdf
- ^{xx} <https://www.sfchronicle.com/sf/article/s-f-wants-more-entertainment-zones-20226355.php>



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Master Report

File Number: 26-0757

| | | |
|--|---------------------------------|---|
| *File ID #: 26-0757 | Agenda Type: Agenda Item | Status: Agenda Item |
| Version: 1 | Reference: | Gov Body: Strategic Economic Enhancement Development Committee |
| Department: Planning and Building | | Created: 04/21/2026 |
| Agenda Title: 5-21-2026 SEED Meeting | | Final Action: |
| Title: Discussion and Update on the Pending Presentation to the Board of Supervisors. | | |

Notes:

Code Sections:

Agenda Date: 05/21/2026

Agenda Number: 4.

Sponsors:

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Attachments:

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Contact: Karen L. Garner

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History of Legislative File

| Ver- sion: | Acting Body: | Date: | Action: | Sent To: | Due Date: | Return Date: | Result: |
|------------|--------------|-------|---------|----------|-----------|--------------|---------|
|------------|--------------|-------|---------|----------|-----------|--------------|---------|

Text of Legislative File 26-0757

Discussion and Update on the Pending Presentation to the Board of Supervisors.