

Placer County Economic and Demographic Profile 2010

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Foreword

Placer County, one of California's fastest growing counties and a key component of the Sacramento Region's economy, offers many attractive features to businesses and residents including strong economic and demographic growth, a healthy business climate, developed infrastructure, and excellent quality of life. The County has benefited from expansions in its transportation infrastructure and the location of prominent businesses such as Hewlett Packard, Oracle Corporation, Ace Hardware, and PRIDE Industries. One of the County's most noted gems, the Sierra Nevada Mountains, home of the 1960 Winter Olympics at Squaw Valley, provides abundant recreational opportunities to its residents and visitors from around the world. All of these aspects have made Placer County a desirable location to live, work, and play.

Placer County has developed a number of high technology industry clusters since 2000. These include biotechnology/bioscience, hardware, medical device manufacturers, networking/system integration, and software. The software sector, in particular, has grown substantially since the early 2000's with many small firms joining Oracle Corporation in South Placer County. Such firms include UK-based Sage Software, Abso in Roseville, and privately-held Revionics which has received national attention for its price-optimization software development. In 2008, Kodak Imaging announced the establishment of a branch software and engineering development operation in Auburn. Kodak joined other relatively new technology-based firms in the Auburn area including ioSafe, Titan Engineering, Tahoe RF Semiconductor, and Sierra Precision Optics.

The *Placer County Economic and Demographic Profile 2010* covers a number of topics including demographics, education, business climate, real estate, infrastructure, and quality of life. Where available, the most recent data is provided for Placer County and its incorporated cities along with 5-year and 10-year historical data points and projections. Comparisons to the Sacramento Region (El Dorado, Placer, Sacramento, Sutter, Yolo, and Yuba Counties), the core Bay Area (Alameda, Contra Costa, Marin, San Benito, San Francisco, San Mateo, and Santa Clara Counties), and California are also made throughout the report. The Profile was prepared for the Placer County Office of Economic Development by the Center for Strategic Economic Research (CSER), formerly known as the Sacramento Regional Research Institute (SRRI). Content for the Accommodations, Recreational Activities, and Community Events, Cultural Activities, Places of Historical Interest, and Other Entertainment sections of the Quality of Life chapter and the Directory was provided by the Placer County Office of Economic Development.

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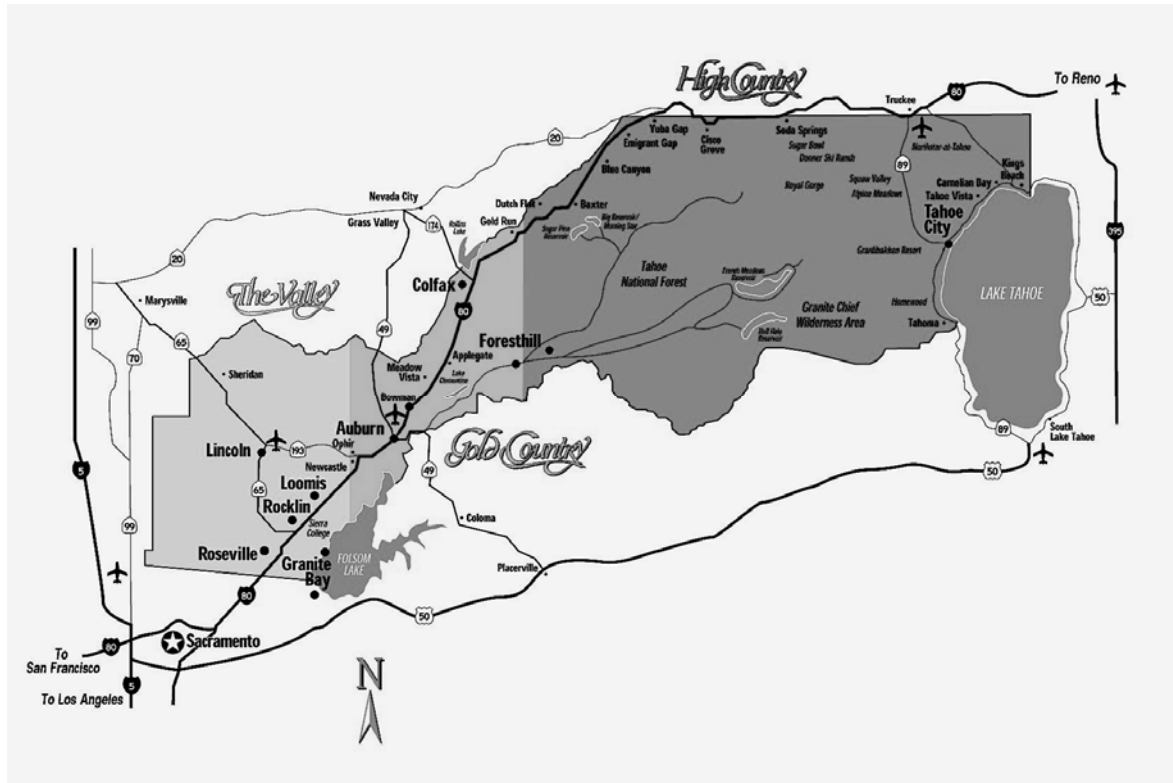
INTRODUCTION

Introduction

Placer County encompasses 1,506 square miles (including 82 square miles of water) or 964,140 acres (including 52,780 acres of water) and is located 80 miles northeast of San Francisco, California. It is bordered by Nevada County to the north, the State of Nevada to the east, El Dorado and Sacramento Counties to the south, and Sutter and Yuba Counties to the west. The County is part of the Sacramento Region, which also includes the Counties of El Dorado, Sacramento, Sutter, Yolo, and Yuba. The government center of Placer County, the City of Auburn, is located 30 miles northeast of the state capital, Sacramento.

Figure 1 is a map of the entire County and its three regions: the Valley, the Gold Country, and the High Country. The three regions have varying degrees of development and geographical/topographical characteristics. The Valley is the most urbanized of the three regions in terms of population and overall commercial development. The Gold Country and High Country vary greatly from the Valley region in terms of its geography—the regions’ foothills and Sierra Nevada Mountains are well known for the recreational opportunities they provide.

FIGURE 1
PLACER COUNTY MAP—THE VALLEY, THE GOLD COUNTRY, AND THE HIGH COUNTRY



Center for Strategic Economic Research, February 2010
Data Source: Placer County Office of Economic Development

INTRODUCTION

Placer County's 150-year history began with the discovery of gold in 1848. In fact, the County took its name from the Spanish word for sand or gravel deposits that contain gold. Gold was discovered on the American River in 1848 by James W. Marshall at Sutter's Mill in Coloma. One of the first parties to capitalize on Marshall's success was organized by Claude Chana who panned three large gold nuggets from a stream at the Auburn Ravine on May 16, 1848. This discovery warranted the establishment of a new mining settlement, which was named Auburn in 1849. By April 25, 1851, the County of Placer was formed, and Auburn was designated as the County seat.

The railroad has also been a major part of Placer County's history. Between 1864 and 1865, Central Pacific Railroad laid track from Sacramento to reach various parts of Placer County, including Roseville, Rocklin, Newcastle, Auburn, and Colfax. The track in Roseville crossed with an existing rail line that connected Folsom with Lincoln—this spot became known as Junction and the site where Roseville was established. In 1906, the Southern Pacific Railroad, wishing to expand, moved its facilities to Roseville, establishing the City as a major railroad center and just three years later (1909), Roseville was incorporated. In 1913, Pacific Fruit Express (PFE, a joint venture between Union Pacific and Southern Pacific) completed construction of its ice manufacturing plant in Roseville, which became the world's largest plant of its kind by 1920. PFE's operations supplied ice to railcars to refrigerate fruits and vegetables being shipped to other parts of the country.

Another major city in Placer County, Rocklin, was incorporated in 1893. The City's history is rooted in the granite mining industry—by 1910, 22 granite quarries were operating in Rocklin. Much of this granite was delivered by train out of town for use in the California State Capitol and San Francisco buildings.

Lincoln, incorporated in 1890, was named after a San Francisco businessman, Charles Lincoln Wilson, who was a major player in the financing of the rail line to carry Pony Express mail between Sacramento and Folsom. Nearby Loomis, founded in 1850, was the second-largest station for fruit shipping in the County in the early 1900s. James Loomis, the main figurehead of the town's early days, is the namesake of the City, which was officially incorporated in December 1984.

Colfax, originally known as Alder Grove, had its beginnings as a camp for trappers and gold miners in the mid-19th century and eventually its activities were centered on the railroad. The town was named after Schulyer Colfax, U.S. Speaker of the House of Representatives at the time, and was incorporated in 1910.

All of the towns and communities (including, but not limited to, Newcastle, Penryn, Sheridan, and Foresthill) within Placer County have contributed to the County's rich history. Many towns had their beginnings in mining, but have evolved over the years into ranching, farming, and timber communities and recreation destinations.

INTRODUCTION

In 1956, construction on Interstate 80 was completed, linking Placer County towns and cities to points East and West. The Interstate was built in preparation for the 1960 Olympic Games at Squaw Valley.

Placer County's strong growth and development in more recent times can, in large part, be attributed to the relocation of Hewlett-Packard from the Bay Area to Roseville in the beginning of the 1980s. The interest shown by new, expanding, and relocating companies to Placer County developed into a demand for substantial expansion of the available commercial and residential space. Today's Placer County represents a rapidly growing and prosperous community characterized by a healthy and mature economy, attractive business environment, and residents who benefit from a developed educational, safety, and healthcare infrastructure, in addition to abundant recreational opportunities.



DEMOGRAPHICS

Demographics

Placer County has seen significant population growth over the past five to ten years as evident in its ranking of 53rd on the U.S. Census Bureau’s list of the “100 Fastest Growing U.S. Counties with 10,000 or more Population in 2007: April 1, 2000 to July 1, 2008.” The County is ranked third among all California counties in the rate of population growth from January 2008 to January 2009 based on California Department of Finance (DOF) estimates. This growth has produced changes in the County’s demographic composition and has naturally led to growth in housing units to support the population increases.

This section covers various demographic characteristics of Placer County including population, migration, age, ethnicity, and income.

Population

Figure 2 shows that in January 2009, Placer County’s total population reached nearly 340,000 people, about 15 percent of the entire Sacramento Region. The highest-populated incorporated cities within Placer County are Roseville (around 112,000) and Rocklin (nearly 55,000).

**FIGURE 2
POPULATION**

| Area | 1999 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|-------------------|------------|------------|------------|------------|------------|------------|------------|
| Placer County | 238,293 | 296,735 | 307,987 | 318,026 | 326,107 | 333,766 | 339,577 |
| Auburn | 12,638 | 12,848 | 12,971 | 13,058 | 13,198 | 13,306 | 13,432 |
| Coffax | 1,523 | 1,809 | 1,840 | 1,837 | 1,850 | 1,860 | 1,878 |
| Lincoln | 9,605 | 23,125 | 27,018 | 33,325 | 37,124 | 39,300 | 40,060 |
| Loomis | 6,363 | 6,334 | 6,335 | 6,522 | 6,573 | 6,642 | 6,677 |
| Rocklin | 32,397 | 49,754 | 50,978 | 51,241 | 52,294 | 54,046 | 54,754 |
| Roseville | 76,634 | 98,566 | 103,165 | 105,314 | 106,970 | 109,437 | 112,343 |
| Unincorporated | 99,133 | 104,299 | 105,680 | 106,729 | 108,098 | 109,175 | 110,433 |
| Sacramento Region | 1,878,117 | 2,149,102 | 2,193,441 | 2,231,389 | 2,265,320 | 2,296,824 | 2,323,112 |
| Bay Area | 5,754,502 | 6,065,938 | 6,103,422 | 6,149,104 | 6,215,897 | 6,301,784 | 6,382,764 |
| California | 33,140,771 | 36,199,342 | 36,676,931 | 37,086,191 | 37,472,074 | 37,883,992 | 38,292,687 |

Center for Strategic Economic Research, February 2010

Data Source: California Department of Finance, E-4 Estimates

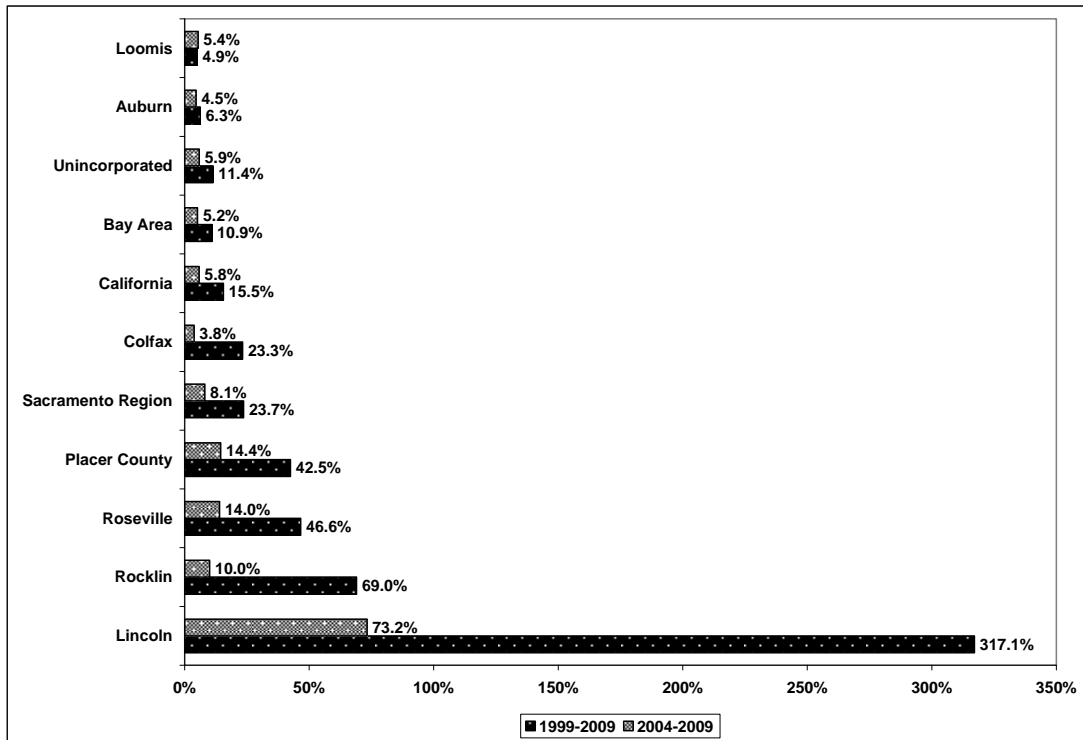
Notes: All figures based on January of the corresponding year.

DOF Disclaimer: "Parts may not add due to independent rounding."

DEMOGRAPHICS

As shown in Figure 3, Placer County’s population grew close to 43 percent in the 1999 to 2009 period, making Placer the fastest-growing county in the Sacramento Region and exceeding average growth rates of the Bay Area and California. Lincoln’s population showed the greatest increase of Placer County cities with approximately 317 percent growth in this ten-year period. According to DOF rankings, the City of Lincoln, with a population of about 39,000, had the highest growth rate of all California cities from April 2000 to January 2009. Both Rocklin and Roseville also experienced high ten-year increases with respective growth rates of approximately 69 percent and 47 percent.

FIGURE 3
1999-2009 AND 2004-2009 POPULATION GROWTH RATES



Center for Strategic Economic Research, February 2010
Data Source: California Department of Finance, E-4 Estimates

Figure 4 shows that Placer County’s population is projected to increase by around 82,000 people to almost 422,000 residents by 2019. Overall, the County is projected to see growth of about 24 percent between 2009 and 2019, which is a higher rate than the Sacramento Region’s, Bay Area’s, and California’s respective projected increases of approximately 18 percent, 9 percent, and 15 percent.

DEMOGRAPHICS

**FIGURE 4
POPULATION PROJECTIONS**

| Area | 2009 | 2014 | 2019 | % Change 2009-2014 | % Change 2009-2019 |
|-------------------|------------|------------|------------|-----------------------|-----------------------|
| Placer County | 339,577 | 376,522 | 421,609 | 10.9% | 24.2% |
| Sacramento Region | 2,323,112 | 2,520,307 | 2,736,133 | 8.5% | 17.8% |
| Bay Area | 6,382,764 | 6,680,375 | 6,985,835 | 4.7% | 9.4% |
| California | 38,292,687 | 41,190,000 | 44,190,000 | 7.6% | 15.4% |

Center for Strategic Economic Research, February 2010
 Data Sources: California Department of Finance, E-4 Estimates; California
 Department of Transportation, 2008 Long-Term Socio-
 Economic Forecasts by County

In addition to the incorporated cities, the Census Bureau provides 2000 population data for places within Placer County that are not designated as incorporated cities (shown in Figure 5). By far, places within the Valley region have the highest population and growth since 1990 of the three Placer County regions. Rocklin and Roseville had the greatest increase in population from 1990 to 2000 with respective growth rates of 91 percent and 79 percent. Although some places within the High Country region are relatively small in population, two of them, Kings Beach and Tahoe Vista, grew considerably during the 1990 to 2000 time period with respective rates of about 44 percent and 46 percent. DOF estimates presented in Figure 2 and 2009 estimates from ESRI Business Analyst Online (a proprietary data provider) for the County's unincorporated places demonstrate that population growth continued in all areas of the County (with the Valley leading the way) resulting in similar shares of residents in each area.

**FIGURE 5
POPULATION IN PLACER COUNTY
PLACES**

| Area | 1990 | 2000 | % Change 1990-2000 |
|----------------------|---------|---------|-----------------------|
| Placer County | 172,796 | 248,399 | 43.8% |
| The Valley | | | |
| Granite Bay | - | 19,388 | - |
| Lincoln | 7,248 | 11,205 | 54.6% |
| Loomis | 5,705 | 6,260 | 9.7% |
| Rocklin | 19,033 | 36,330 | 90.9% |
| Roseville | 44,685 | 79,921 | 78.9% |
| Gold Country | | | |
| Auburn | 10,592 | 12,462 | 17.7% |
| Colfax | 1,306 | 1,496 | 14.5% |
| Meadow Vista | 3,067 | 3,096 | 0.9% |
| North Auburn | 10,301 | 11,847 | 15.0% |
| High Country | | | |
| Dollar Point | 1,449 | 1,539 | 6.2% |
| Foresthill | 1,409 | 1,791 | 27.1% |
| Kings Beach | 2,796 | 4,037 | 44.4% |
| Sunnyside-Tahoe City | 1,643 | 1,761 | 7.2% |
| Tahoe Vista | 1,144 | 1,668 | 45.8% |

Center for Strategic Economic Research, February 2010
 Data Source: U.S. Census Bureau, Census 1990 and 2000
 Note: Granite Bay data was not available in 1990.

DEMOGRAPHICS

Migration

Net migration is the number of residents who left the area to live abroad, all foreign immigrants, and the balance of people that move to and from the location from within the United States. Births and deaths determine an area's natural population increase (or decrease), while net migration shows, for example, the number of retirees or other population groups relocating to a region.

As shown in Figure 6, about 81 percent of Placer County's population growth from 2007 to 2008 was due to net migration. In comparison, only around 46 percent, 51 percent, and 25 percent of the population growth in the Sacramento Region, Bay Area, and California, respectively, can be attributed to net migration. This demonstrates Placer County's relative appeal to residents relocating—a trend projected to continue through at least 2018.

FIGURE 6
TOTAL NET MIGRATION AND PERCENT OF POPULATION GROWTH
DUE TO MIGRATION

| Area | 1998 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2013 | 2018 |
|---|---------|---------|---------|---------|--------|--------|---------|---------|---------|
| Placer County | | | | | | | | | |
| Net Migration | 6,227 | 12,231 | 10,004 | 9,554 | 7,728 | 5,908 | 6,978 | 6,560 | 7,312 |
| % of Population Growth due to Migration | 86.5% | 89.8% | 87.4% | 86.4% | 84.1% | 78.9% | 81.3% | 79.3% | 80.6% |
| Sacramento Region | | | | | | | | | |
| Net Migration | 14,316 | 38,371 | 32,394 | 24,986 | 19,314 | 16,868 | 14,403 | 19,822 | 23,571 |
| % of Population Growth due to Migration | 52.8% | 72.2% | 68.1% | 60.7% | 53.8% | 49.4% | 45.5% | 50.6% | 54.3% |
| Bay Area | | | | | | | | | |
| Net Migration | 41,031 | -13,248 | -8,665 | -7,291 | 11,942 | 36,878 | 43,319 | 22,663 | 19,402 |
| % of Population Growth due to Migration | 49.2% | - | - | - | 21.0% | 44.2% | 50.8% | 35.0% | 32.3% |
| California | | | | | | | | | |
| Net Migration | 114,227 | 278,902 | 209,725 | 128,838 | 85,033 | 90,111 | 106,636 | 222,900 | 280,500 |
| % of Population Growth due to Migration | 27.8% | 47.8% | 41.1% | 29.0% | 21.3% | 21.8% | 24.5% | 40.5% | 46.8% |

Center for Strategic Economic Research, February 2010

Data Sources: California Department of Finance, E-6 Estimates;

California Department of Transportation, 2008 Long-Term Socio-Economic Forecasts by County

Notes: Figures represent totals in July of corresponding year.

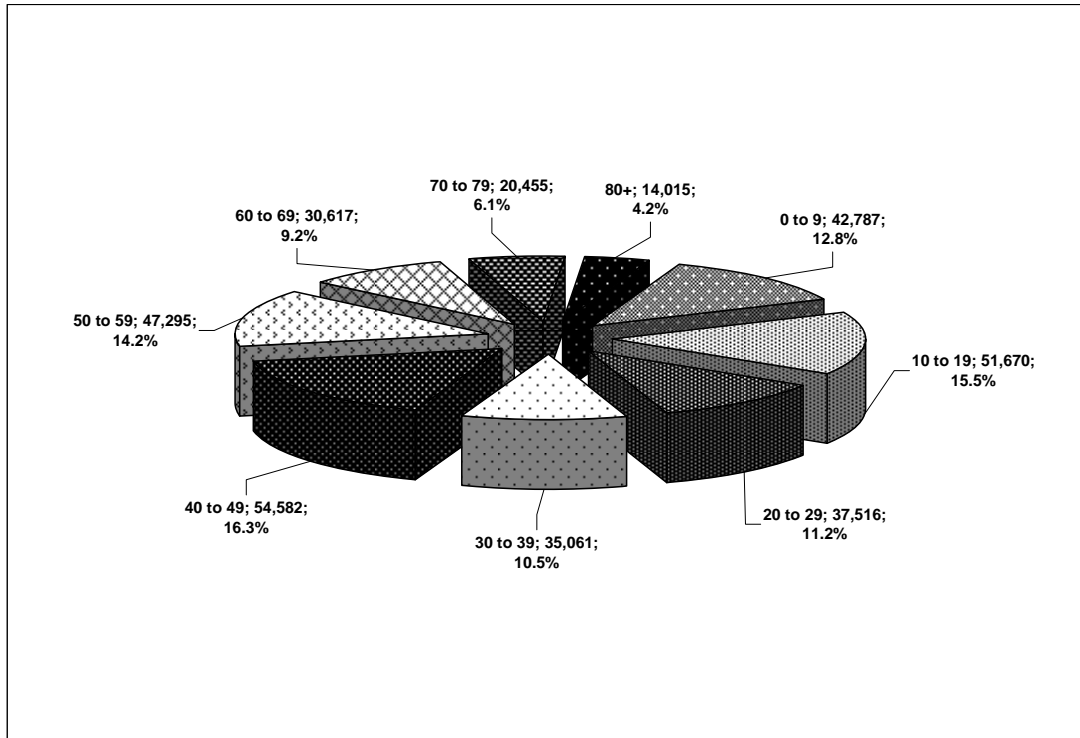
Percent of population growth due to migration cannot be applicably represented when net migration was negative and population change was positive.

DEMOGRAPHICS

Age

Figure 7 shows the age composition of Placer County in 2008. At just over 16 percent (nearly 55,000 people), the 40- to 49-year-old age bracket encompasses the highest proportion of the total population. The second largest age group is the 10- to 19-year-old group with close to 16 percent of Placer's population in 2008, around 52,000 people.

FIGURE 7
PLACER COUNTY AGE COMPOSITION IN 2008



Center for Strategic Economic Research, February 2010

Data Source: California Department of Finance, Race/Ethnic Population with Age and Sex Detail Data Files

DEMOGRAPHICS

Figure 8 shows that a somewhat higher proportion of residents are in Placer County's first and second largest age groups (40 to 49 and 50 to 59) than the comparison areas. The Region's and California's largest age group is the 10 to 19 bracket, followed by the 40 to 49 age range, each accounting for between 15 and 16 percent of the population. The Bay Area's population is largely in the 30 to 39 and 40 to 49 age brackets, each range accounting for approximately 16 percent of the total population.

All age categories 50 and above in Placer County had positive shifts in composition between 1998 and 2008. The largest positive increase in composition from 1998 to 2008 was seen in the 50 to 59 age bracket, about 3 percentage points, while the age group 30 to 39 experienced the greatest negative composition shift (almost -6 percentage points). Similar trends were seen in the Sacramento Region, the Bay Area, and California. Age projections for Placer County show high shifts in composition from 2008 to 2018 in the 20 to 29 and the 60 to 69 age brackets, each increasing about 2 percentage points.

DEMOGRAPHICS

FIGURE 8
ANNUAL AGE COMPOSITION AND COMPOSITION SHIFT

| Area / Timeframe | 0 to 9 | 10 to 19 | 20 to 29 | 30 to 39 | 40 to 49 | 50 to 59 | 60 to 69 | 70 to 79 | 80+ |
|--------------------------|--------|----------|----------|----------|----------|----------|----------|----------|------|
| Placer County | | | | | | | | | |
| 1998 | 14.9% | 13.9% | 10.7% | 16.1% | 16.7% | 11.4% | 7.6% | 5.8% | 2.8% |
| 2003 | 13.4% | 15.7% | 9.0% | 13.6% | 17.1% | 13.0% | 8.1% | 6.2% | 3.9% |
| 2008 | 12.8% | 15.5% | 11.2% | 10.5% | 16.3% | 14.2% | 9.2% | 6.1% | 4.2% |
| 2013 | 13.1% | 14.1% | 13.4% | 9.0% | 14.2% | 14.9% | 10.6% | 6.3% | 4.4% |
| 2018 | 14.0% | 13.2% | 13.3% | 10.8% | 11.3% | 14.3% | 11.5% | 7.0% | 4.5% |
| 2003-2008 | -0.6% | -0.2% | 2.2% | -3.1% | -0.8% | 1.1% | 1.1% | -0.1% | 0.3% |
| 1998-2008 | -2.1% | 1.6% | 0.5% | -5.6% | -0.4% | 2.8% | 1.5% | 0.3% | 1.4% |
| 2008-2013 | 0.3% | -1.4% | 2.2% | -1.5% | -2.1% | 0.8% | 1.4% | 0.2% | 0.2% |
| 2008-2018 | 1.2% | -2.2% | 2.0% | 0.3% | -5.0% | 0.1% | 2.4% | 0.9% | 0.3% |
| Sacramento Region | | | | | | | | | |
| 1998 | 15.7% | 14.9% | 13.9% | 16.0% | 15.2% | 9.9% | 6.7% | 5.1% | 2.6% |
| 2003 | 14.3% | 16.0% | 12.8% | 14.1% | 15.8% | 11.9% | 7.0% | 5.0% | 3.0% |
| 2008 | 13.8% | 15.6% | 13.7% | 12.3% | 15.0% | 13.3% | 8.2% | 4.9% | 3.2% |
| 2013 | 13.8% | 14.3% | 14.7% | 11.5% | 13.4% | 13.9% | 9.9% | 5.2% | 3.3% |
| 2018 | 14.0% | 13.8% | 14.3% | 12.3% | 11.8% | 13.2% | 11.0% | 6.1% | 3.5% |
| 2003-2008 | -0.5% | -0.4% | 0.8% | -1.8% | -0.8% | 1.4% | 1.2% | -0.1% | 0.2% |
| 1998-2008 | -1.9% | 0.7% | -0.3% | -3.7% | -0.2% | 3.4% | 1.6% | -0.2% | 0.7% |
| 2008-2013 | 0.0% | -1.3% | 1.0% | -0.8% | -1.6% | 0.6% | 1.6% | 0.3% | 0.1% |
| 2008-2018 | 0.2% | -1.8% | 0.6% | 0.0% | -3.1% | 0.0% | 2.7% | 1.2% | 0.2% |
| Bay Area | | | | | | | | | |
| 1998 | 13.8% | 12.3% | 15.8% | 17.9% | 15.6% | 10.5% | 6.4% | 5.0% | 2.6% |
| 2003 | 13.1% | 12.5% | 12.9% | 17.4% | 16.2% | 12.5% | 7.2% | 4.9% | 3.3% |
| 2008 | 12.9% | 12.4% | 12.0% | 15.8% | 16.1% | 13.6% | 8.9% | 4.8% | 3.5% |
| 2013 | 12.2% | 12.2% | 12.6% | 13.4% | 15.9% | 14.2% | 10.6% | 5.4% | 3.5% |
| 2018 | 11.8% | 12.1% | 12.6% | 12.7% | 14.5% | 14.3% | 11.5% | 6.8% | 3.6% |
| 2003-2008 | -0.2% | -0.1% | -0.9% | -1.6% | 0.0% | 1.1% | 1.7% | -0.1% | 0.2% |
| 1998-2008 | -0.9% | 0.1% | -3.9% | -2.1% | 0.5% | 3.1% | 2.4% | -0.1% | 0.9% |
| 2008-2013 | -0.7% | -0.2% | 0.6% | -2.4% | -0.2% | 0.7% | 1.7% | 0.6% | 0.0% |
| 2008-2018 | -1.1% | -0.3% | 0.7% | -3.1% | -1.6% | 0.7% | 2.7% | 1.9% | 0.1% |
| California | | | | | | | | | |
| 1998 | 16.2% | 14.7% | 15.1% | 16.6% | 14.5% | 9.5% | 6.2% | 4.8% | 2.5% |
| 2003 | 14.8% | 15.2% | 13.6% | 15.5% | 15.3% | 11.3% | 6.6% | 4.7% | 3.0% |
| 2008 | 14.1% | 15.2% | 13.9% | 13.8% | 14.9% | 12.6% | 7.9% | 4.5% | 3.1% |
| 2013 | 14.0% | 13.9% | 14.9% | 12.8% | 13.9% | 13.3% | 9.3% | 4.9% | 3.2% |
| 2018 | 14.2% | 13.2% | 14.9% | 13.1% | 12.4% | 12.9% | 10.3% | 5.8% | 3.2% |
| 2003-2008 | -0.7% | -0.1% | 0.3% | -1.7% | -0.4% | 1.3% | 1.2% | -0.2% | 0.2% |
| 1998-2008 | -2.1% | 0.5% | -1.3% | -2.8% | 0.5% | 3.1% | 1.7% | -0.3% | 0.7% |
| 2008-2013 | -0.1% | -1.2% | 1.0% | -1.0% | -1.1% | 0.7% | 1.4% | 0.3% | 0.0% |
| 2008-2018 | 0.1% | -2.0% | 1.0% | -0.7% | -2.6% | 0.4% | 2.5% | 1.2% | 0.1% |

Center for Strategic Economic Research, February 2010

Data Source: California Department of Finance, Race/Ethnic Population with Age and Sex Detail Data Files

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In the ten-year historical time period, Placer County's strongest population growth occurred in the 80+, 50 to 59, and 60 to 69 age brackets—similar trends than what was experienced in the comparison areas. As shown in Figure 9, Placer County's respective 1998 to 2008 growth rates in these age brackets were about 112 percent, 78 percent, and 72 percent. The highest population growth from 2008 to 2018 in Placer County, the Sacramento Region, the Bay Area, and California is projected to be in the 60 to 69 and 70 to 79 age groups. A significant difference between the four areas is the projected growth rate in the 20 to 29 age bracket where Placer County is projected to have an approximate 46 percent increase, while the Sacramento Region, the Bay Area, and California are projected to have just 22 percent, 14 percent, and 21 percent respective increases in this age group.

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FIGURE 9
ANNUAL POPULATION BY AGE AND PERCENT GROWTH

| Area / Timeframe | 0 to 9 | 10 to 19 | 20 to 29 | 30 to 39 | 40 to 49 | 50 to 59 | 60 to 69 | 70 to 79 | 80+ |
|--------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Placer County | | | | | | | | | |
| 1998 | 34,775 | 32,404 | 24,946 | 37,637 | 39,048 | 26,511 | 17,820 | 13,555 | 6,601 |
| 2003 | 38,977 | 45,627 | 26,171 | 39,568 | 49,802 | 37,873 | 23,465 | 17,957 | 11,252 |
| 2008 | 42,787 | 51,670 | 37,516 | 35,061 | 54,582 | 47,295 | 30,617 | 20,455 | 14,015 |
| 2013 | 48,466 | 52,176 | 49,651 | 33,482 | 52,667 | 55,298 | 39,097 | 23,313 | 16,140 |
| 2018 | 57,691 | 54,374 | 54,571 | 44,592 | 46,504 | 58,847 | 47,403 | 28,919 | 18,394 |
| 2003-2008 | 9.8% | 13.2% | 43.3% | -11.4% | 9.6% | 24.9% | 30.5% | 13.9% | 24.6% |
| 1998-2008 | 23.0% | 59.5% | 50.4% | -6.8% | 39.8% | 78.4% | 71.8% | 50.9% | 112.3% |
| 2008-2013 | 13.3% | 1.0% | 32.3% | -4.5% | -3.5% | 16.9% | 27.7% | 14.0% | 15.2% |
| 2008-2018 | 34.8% | 5.2% | 45.5% | 27.2% | -14.8% | 24.4% | 54.8% | 41.4% | 31.2% |
| Sacramento Region | | | | | | | | | |
| 1998 | 290,992 | 276,343 | 257,580 | 296,061 | 280,642 | 182,988 | 123,247 | 94,743 | 47,752 |
| 2003 | 304,408 | 340,435 | 272,491 | 298,893 | 335,568 | 253,000 | 148,749 | 107,183 | 64,655 |
| 2008 | 319,172 | 360,718 | 315,875 | 284,761 | 346,285 | 307,049 | 190,746 | 114,077 | 75,138 |
| 2013 | 344,061 | 356,300 | 365,258 | 286,885 | 333,240 | 346,715 | 245,667 | 129,546 | 83,392 |
| 2018 | 375,747 | 370,967 | 383,995 | 330,101 | 317,877 | 355,594 | 295,297 | 165,136 | 92,755 |
| 2003-2008 | 4.9% | 6.0% | 15.9% | -4.7% | 3.2% | 21.4% | 28.2% | 6.4% | 16.2% |
| 1998-2008 | 9.7% | 30.5% | 22.6% | -3.8% | 23.4% | 67.8% | 54.8% | 20.4% | 57.4% |
| 2008-2013 | 7.8% | -1.2% | 15.6% | 0.7% | -3.8% | 12.9% | 28.8% | 13.6% | 11.0% |
| 2008-2018 | 17.7% | 2.8% | 21.6% | 15.9% | -8.2% | 15.8% | 54.8% | 44.8% | 23.4% |
| Bay Area | | | | | | | | | |
| 1998 | 787,087 | 705,746 | 904,474 | 1,025,936 | 891,851 | 600,493 | 367,146 | 284,429 | 150,883 |
| 2003 | 791,589 | 757,230 | 778,081 | 1,053,463 | 977,931 | 755,993 | 433,755 | 298,848 | 198,595 |
| 2008 | 804,074 | 775,752 | 747,781 | 989,615 | 1,009,006 | 848,334 | 553,418 | 303,037 | 218,974 |
| 2013 | 790,347 | 792,389 | 814,337 | 871,140 | 1,031,671 | 923,356 | 685,166 | 350,913 | 228,344 |
| 2018 | 796,211 | 816,007 | 852,774 | 855,545 | 979,615 | 963,035 | 777,427 | 455,565 | 245,537 |
| 2003-2008 | 1.6% | 2.4% | -3.9% | -6.1% | 3.2% | 12.2% | 27.6% | 1.4% | 10.3% |
| 1998-2008 | 2.2% | 9.9% | -17.3% | -3.5% | 13.1% | 41.3% | 50.7% | 6.5% | 45.1% |
| 2008-2013 | -1.7% | 2.1% | 8.9% | -12.0% | 2.2% | 8.8% | 23.8% | 15.8% | 4.3% |
| 2008-2018 | -1.0% | 5.2% | 14.0% | -13.5% | -2.9% | 13.5% | 40.5% | 50.3% | 12.1% |
| California | | | | | | | | | |
| 1998 | 5,315,978 | 4,827,477 | 4,968,066 | 5,459,962 | 4,751,877 | 3,111,517 | 2,032,085 | 1,580,225 | 815,779 |
| 2003 | 5,326,645 | 5,484,110 | 4,886,758 | 5,561,341 | 5,514,931 | 4,058,205 | 2,389,644 | 1,703,476 | 1,069,621 |
| 2008 | 5,396,581 | 5,807,222 | 5,300,381 | 5,278,097 | 5,716,400 | 4,803,123 | 3,004,944 | 1,738,521 | 1,201,329 |
| 2013 | 5,673,520 | 5,657,380 | 6,033,061 | 5,183,320 | 5,627,745 | 5,385,417 | 3,766,671 | 1,968,919 | 1,281,847 |
| 2018 | 6,109,053 | 5,692,847 | 6,409,365 | 5,654,449 | 5,329,610 | 5,567,098 | 4,459,271 | 2,496,326 | 1,385,121 |
| 2003-2008 | 1.3% | 5.9% | 8.5% | -5.1% | 3.7% | 18.4% | 25.7% | 2.1% | 12.3% |
| 1998-2008 | 1.5% | 20.3% | 6.7% | -3.3% | 20.3% | 54.4% | 47.9% | 10.0% | 47.3% |
| 2008-2013 | 5.1% | -2.6% | 13.8% | -1.8% | -1.6% | 12.1% | 25.3% | 13.3% | 6.7% |
| 2008-2018 | 13.2% | -2.0% | 20.9% | 7.1% | -6.8% | 15.9% | 48.4% | 43.6% | 15.3% |

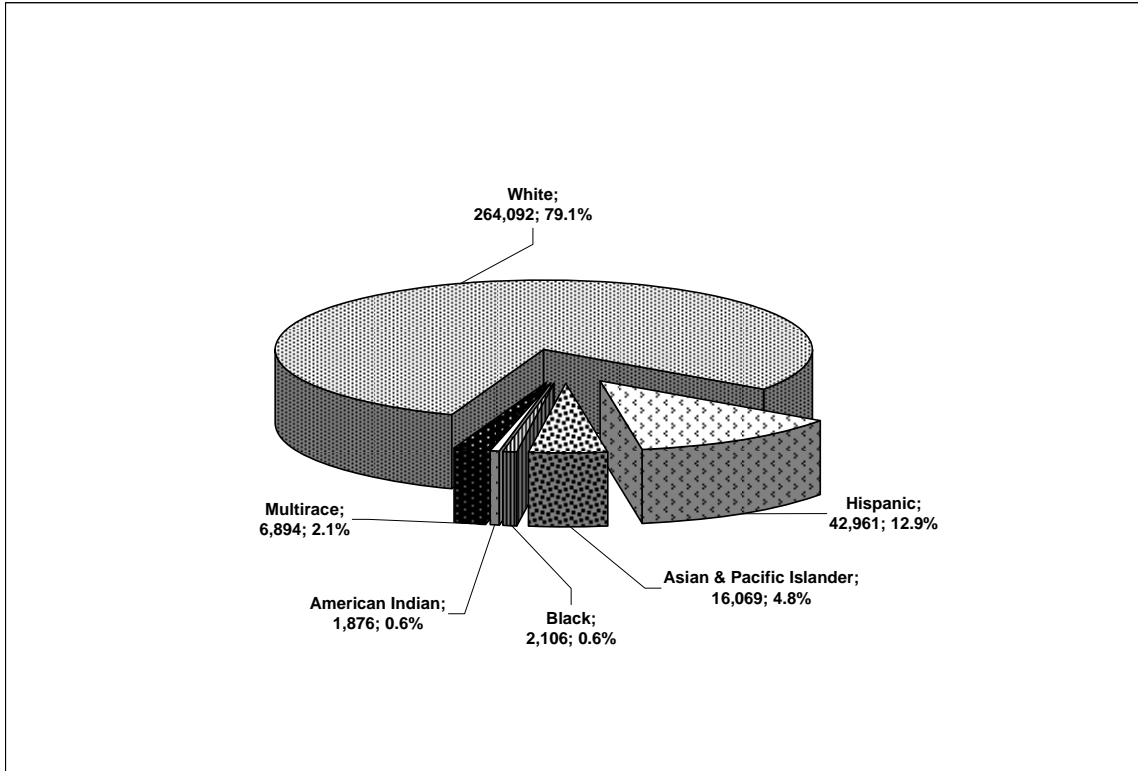
Center for Strategic Economic Research, February 2010

Data Source: California Department of Finance, Race/Ethnic Population with Age and Sex Detail Data Files

Ethnicity

Figure 10 shows that the 2008 population in Placer County was approximately 79 percent White with about 264,000 people. The second largest ethnic group in Placer County was Hispanic, representing approximately 13 percent of the total population with nearly 43,000 people.

FIGURE 10
ETHNIC COMPOSITION IN PLACER COUNTY IN 2008



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Data Source: California Department of Finance, Race/Ethnic Population with Age and Sex Detail Data Files

Figure 11 shows that, with about 79 percent of the total population, the White ethnic group in Placer County has a significantly higher proportion of population than the Sacramento Region (about 59 percent), the Bay Area (around 44 percent), and California (43 percent). The second-largest ethnic group in Placer County, Hispanic, represents a smaller proportion of Placer County's population (almost 13 percent) than that in the Sacramento Region (around 20 percent), the Bay Area (nearly 23 percent), and a significantly lower proportion than in the state overall (just over 36 percent).

Over the past ten years, Placer County's White ethnic group composition decreased over 5 percentage points; the largest increases in composition were seen in the Hispanic (approximately 3 percentage points) and Asian & Pacific Islander (over 1 percentage point) ethnic groups. DOF projects that the proportion of Whites to the total population in Placer County will continue to decrease (over 4 percentage points by 2018) with other

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ethnic groups, specifically Hispanic and Asian & Pacific Islander, increasing their proportion of the population at around average rates of the comparison areas (about 3 percent and 1 percent, respectively).

FIGURE 11
ANNUAL ETHNICITY COMPOSITION AND
COMPOSITION SHIFT

| Area / Timeframe | White | Hispanic | Asian & Pacific Islander | Black | American Indian | Multirace |
|--------------------------|-------|----------|--------------------------------|-------|--------------------|-----------|
| Placer County | | | | | | |
| 1998 | 84.5% | 9.4% | 3.7% | 0.9% | 1.5% | - |
| 2003 | 81.7% | 11.1% | 4.0% | 0.7% | 0.6% | 2.0% |
| 2008 | 79.1% | 12.9% | 4.8% | 0.6% | 0.6% | 2.1% |
| 2013 | 76.9% | 14.5% | 5.4% | 0.6% | 0.5% | 2.1% |
| 2018 | 74.8% | 16.3% | 5.8% | 0.6% | 0.5% | 2.1% |
| 2003-2008 | -2.6% | 1.8% | 0.8% | -0.1% | -0.1% | 0.1% |
| 1998-2008 | -5.4% | 3.4% | 1.1% | -0.3% | -0.9% | - |
| 2008-2013 | -2.2% | 1.7% | 0.5% | 0.0% | 0.0% | 0.0% |
| 2008-2018 | -4.3% | 3.4% | 1.0% | -0.1% | -0.1% | 0.0% |
| Sacramento Region | | | | | | |
| 1998 | 65.7% | 15.2% | 10.2% | 7.1% | 1.8% | - |
| 2003 | 61.5% | 17.8% | 10.3% | 6.4% | 0.8% | 3.2% |
| 2008 | 59.1% | 19.7% | 10.8% | 6.2% | 0.8% | 3.5% |
| 2013 | 57.0% | 21.2% | 11.1% | 6.2% | 0.8% | 3.6% |
| 2018 | 55.0% | 22.9% | 11.4% | 6.2% | 0.7% | 3.8% |
| 2003-2008 | -2.5% | 1.9% | 0.5% | -0.2% | 0.0% | 0.3% |
| 1998-2008 | -6.7% | 4.5% | 0.5% | -0.9% | -1.0% | - |
| 2008-2013 | -2.1% | 1.6% | 0.4% | 0.0% | 0.0% | 0.1% |
| 2008-2018 | -4.1% | 3.2% | 0.7% | 0.0% | 0.0% | 0.3% |
| Bay Area | | | | | | |
| 1998 | 50.1% | 19.2% | 21.8% | 8.1% | 0.8% | - |
| 2003 | 46.8% | 21.0% | 22.3% | 7.1% | 0.4% | 2.5% |
| 2008 | 44.4% | 22.7% | 23.4% | 6.6% | 0.4% | 2.6% |
| 2013 | 42.0% | 24.4% | 24.2% | 6.3% | 0.5% | 2.6% |
| 2018 | 39.9% | 26.2% | 24.8% | 5.9% | 0.5% | 2.6% |
| 2003-2008 | -2.4% | 1.7% | 1.1% | -0.5% | 0.1% | 0.1% |
| 1998-2008 | -5.8% | 3.4% | 1.7% | -1.5% | -0.4% | - |
| 2008-2013 | -2.3% | 1.7% | 0.8% | -0.3% | 0.1% | 0.0% |
| 2008-2018 | -4.5% | 3.5% | 1.4% | -0.6% | 0.1% | 0.1% |
| California | | | | | | |
| 1998 | 49.0% | 31.3% | 11.7% | 6.9% | 1.1% | - |
| 2003 | 45.4% | 33.9% | 11.8% | 6.3% | 0.6% | 2.0% |
| 2008 | 43.0% | 36.2% | 12.2% | 5.9% | 0.6% | 2.1% |
| 2013 | 40.6% | 38.4% | 12.6% | 5.7% | 0.6% | 2.1% |
| 2018 | 38.3% | 40.5% | 12.9% | 5.5% | 0.7% | 2.1% |
| 2003-2008 | -2.5% | 2.3% | 0.4% | -0.3% | 0.0% | 0.1% |
| 1998-2008 | -6.1% | 4.9% | 0.5% | -1.0% | -0.5% | - |
| 2008-2013 | -2.4% | 2.1% | 0.4% | -0.2% | 0.0% | 0.0% |
| 2008-2018 | -4.7% | 4.3% | 0.7% | -0.4% | 0.1% | 0.0% |

Center for Strategic Economic Research, February 2010

Data Source: California Department of Finance, Race/Ethnic Population with Age and Sex
 Detail Data Files

Notes: Prior to 2000, Multirace was not an ethnic group categorized by DOF.

Due to changes in ethnic categories, data are imperfectly comparable.

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As shown in Figure 12, from 1998 to 2008, the fastest-growing ethnic group, in terms of percentage growth, in Placer County was Hispanic, increasing approximately 95 percent to a total population of nearly 43,000 people. The Sacramento Region, the Bay Area, and California also had the highest ten-year growth in the Hispanic ethnic group with respective growth rates of around 62 percent, 29 percent, and 35 percent.

DOF projects the ethnic group with the highest percentage rate of growth in Placer County between 2008 and 2018 will continue to be Hispanic with nearly 56 percent growth. The Asian & Pacific Islander ethnic group is projected to have the second-highest growth rate at about 49 percent growth. The White population is still projected to increase around 16 percent in Placer County by 2018—quite a variation in the ten-year projected growth for the Sacramento Region (about 8 percent), the Bay Area (around -3 percent) and California (slight to no growth).

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FIGURE 12
ANNUAL POPULATION BY ETHNICITY AND PERCENT GROWTH

| Area / Timeframe | White | Hispanic | Asian & Pacific Islander | Black | American Indian | Multirace |
|--------------------------|------------|------------|--------------------------------|-----------|--------------------|-----------|
| Placer County | | | | | | |
| 1998 | 197,059 | 22,042 | 8,612 | 2,186 | 3,398 | - |
| 2003 | 237,393 | 32,206 | 11,547 | 2,000 | 1,808 | 5,738 |
| 2008 | 264,092 | 42,961 | 16,069 | 2,106 | 1,876 | 6,894 |
| 2013 | 284,788 | 53,830 | 19,829 | 2,234 | 1,938 | 7,671 |
| 2018 | 307,490 | 66,923 | 23,932 | 2,356 | 1,992 | 8,602 |
| 2003-2008 | 11.2% | 33.4% | 39.2% | 5.3% | 3.8% | 20.1% |
| 1998-2008 | 34.0% | 94.9% | 86.6% | -3.7% | -44.8% | - |
| 2008-2013 | 7.8% | 25.3% | 23.4% | 6.1% | 3.3% | 11.3% |
| 2008-2018 | 16.4% | 55.8% | 48.9% | 11.9% | 6.2% | 24.8% |
| Sacramento Region | | | | | | |
| 1998 | 1,216,429 | 281,025 | 189,174 | 131,176 | 32,544 | - |
| 2003 | 1,307,841 | 377,939 | 218,669 | 135,943 | 16,830 | 68,160 |
| 2008 | 1,366,602 | 455,134 | 249,086 | 144,165 | 17,790 | 81,044 |
| 2013 | 1,420,105 | 529,194 | 277,358 | 154,744 | 18,747 | 90,916 |
| 2018 | 1,477,765 | 614,217 | 307,221 | 166,288 | 19,803 | 102,175 |
| 2003-2008 | 4.5% | 20.4% | 13.9% | 6.0% | 5.7% | 18.9% |
| 1998-2008 | 12.3% | 62.0% | 31.7% | 9.9% | -45.3% | - |
| 2008-2013 | 3.9% | 16.3% | 11.4% | 7.3% | 5.4% | 12.2% |
| 2008-2018 | 8.1% | 35.0% | 23.3% | 15.3% | 11.3% | 26.1% |
| Bay Area | | | | | | |
| 1998 | 2,865,897 | 1,099,681 | 1,244,247 | 460,644 | 47,576 | - |
| 2003 | 2,828,009 | 1,269,751 | 1,346,462 | 428,642 | 21,603 | 151,018 |
| 2008 | 2,772,580 | 1,416,721 | 1,463,372 | 410,223 | 25,677 | 161,418 |
| 2013 | 2,727,821 | 1,581,964 | 1,572,293 | 406,638 | 30,188 | 168,759 |
| 2018 | 2,687,690 | 1,766,999 | 1,673,555 | 400,729 | 35,041 | 177,702 |
| 2003-2008 | -2.0% | 11.6% | 8.7% | -4.3% | 18.9% | 6.9% |
| 1998-2008 | -3.3% | 28.8% | 17.6% | -10.9% | -46.0% | - |
| 2008-2013 | -1.6% | 11.7% | 7.4% | -0.9% | 17.6% | 4.5% |
| 2008-2018 | -3.1% | 24.7% | 14.4% | -2.3% | 36.5% | 10.1% |
| California | | | | | | |
| 1998 | 16,115,098 | 10,288,056 | 3,843,883 | 2,266,789 | 349,140 | - |
| 2003 | 16,353,679 | 12,203,091 | 4,246,858 | 2,258,478 | 207,284 | 725,341 |
| 2008 | 16,428,238 | 13,858,454 | 4,656,623 | 2,271,258 | 230,198 | 801,827 |
| 2013 | 16,457,784 | 15,572,838 | 5,110,396 | 2,319,682 | 258,884 | 858,296 |
| 2018 | 16,497,275 | 17,468,693 | 5,553,311 | 2,372,277 | 288,415 | 923,169 |
| 2003-2008 | 0.5% | 13.6% | 9.6% | 0.6% | 11.1% | 10.5% |
| 1998-2008 | 1.9% | 34.7% | 21.1% | 0.2% | -34.1% | - |
| 2008-2013 | 0.2% | 12.4% | 9.7% | 2.1% | 12.5% | 7.0% |
| 2008-2018 | 0.4% | 26.1% | 19.3% | 4.4% | 25.3% | 15.1% |

Center for Strategic Economic Research, February 2010

Data Source: California Department of Finance, Race/Ethnic Population Data Files

Notes: Prior to 2000, Multirace was not an ethnic group categorized by DOF.

Due to changes in ethnic categories, data are imperfectly comparable.

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Income

As shown in Figure 13, Placer County's per capita personal income in 2007 was over \$45,000, higher than both the Sacramento Region (around \$38,000) and the state (almost \$42,000), but lower than the Bay Area (approximately \$60,000) where cost of living has traditionally been higher. Placer County per capita personal income grew by around 49 percent from 1997 to 2007, below the growth rates for the Sacramento Region (about 52 percent), the state (close to 58 percent), and the Bay Area (68 percent) in that time period.

FIGURE 13
PER CAPITA PERSONAL INCOME

| Area | 1997 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | % Change 1997-2007 | % Change 2002-2007 |
|-------------------|----------|----------|----------|----------|----------|----------|----------|-----------------------|-----------------------|
| Placer County | \$30,597 | \$36,746 | \$37,611 | \$40,067 | \$41,910 | \$44,310 | \$45,471 | 48.6% | 23.7% |
| Sacramento Region | \$24,778 | \$30,532 | \$31,528 | \$33,283 | \$34,684 | \$36,489 | \$37,634 | 51.9% | 23.3% |
| Bay Area | \$36,005 | \$46,132 | \$46,579 | \$49,601 | \$52,925 | \$57,226 | \$60,493 | 68.0% | 31.1% |
| California | \$26,490 | \$32,870 | \$33,620 | \$35,531 | \$37,418 | \$40,020 | \$41,805 | 57.8% | 27.2% |

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Data Source: U.S. Bureau of Economic Analysis, Regional Economic Accounts

Figure 14 shows that Placer County's per capita personal income is projected to increase about 11 percent from 2007 to 2017 to almost \$51,000. This income level surpasses both the Sacramento Region and California, but is still below the Bay Area's projected income of about \$67,000. The County's projected ten-year per capita personal income growth rate is lower than the Sacramento Region (about 13 percent), but greater than California (nearly 9 percent) and Bay Area (approximately 10 percent).

FIGURE 14
PER CAPITA PERSONAL INCOME PROJECTIONS

| Area | 2007 | 2012 | 2017 | % Change 2007-2012 | % Change 2007-2017 |
|-------------------|----------|----------|----------|-----------------------|-----------------------|
| Placer County | \$45,471 | \$48,007 | \$50,553 | 5.6% | 11.2% |
| Sacramento Region | \$37,634 | \$40,612 | \$42,401 | 7.9% | 12.7% |
| Bay Area | \$60,493 | \$62,052 | \$66,745 | 2.6% | 10.3% |
| California | \$41,805 | \$42,780 | \$45,489 | 2.3% | 8.8% |

Center for Strategic Economic Research, February 2010

Data Sources: U.S. Bureau of Economic Analysis, Regional Economic Accounts; California Department of Transportation, 2008 Long-Term Socio-Economic Forecasts by County

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The median household income, as reported by the U.S. Census Bureau, is the middle value of the household incomes (income of all household members aged 15 and above) within a certain location. Figure 15 shows that, in 2008, Placer County's median household income was around \$75,000, the highest income among the counties within the Sacramento Region and much higher than California. Between 2000 and 2008, Placer County experienced an approximate 31 percent increase in median household income, which was higher than California, at or below the rate of other counties within the Sacramento Region, but above the average growth rate of the counties within the Bay Area.

FIGURE 15
MEDIAN HOUSEHOLD INCOME

| Area | 2000 | 2008 | % Change 2000-2008 |
|----------------------|----------|----------|-----------------------|
| Placer County | \$57,535 | \$75,183 | 30.7% |
| Sacramento Region | | | |
| El Dorado County | \$51,484 | \$67,660 | 31.4% |
| Sacramento County | \$43,816 | \$56,984 | 30.1% |
| Sutter County | \$38,375 | \$50,021 | 30.3% |
| Yolo County | \$40,769 | \$60,001 | 47.2% |
| Yuba County | \$30,460 | \$51,844 | 70.2% |
| Bay Area | | | |
| Alameda County | \$55,946 | \$70,395 | 25.8% |
| Contra Costa County | \$63,675 | \$78,618 | 23.5% |
| Marin County | \$71,306 | \$91,982 | 29.0% |
| San Benito County | \$57,469 | - | - |
| San Francisco County | \$55,221 | \$73,798 | 33.6% |
| San Mateo County | \$70,819 | \$85,153 | 20.2% |
| Santa Clara County | \$74,335 | \$88,846 | 19.5% |
| California | \$47,493 | \$61,021 | 28.5% |

Center for Strategic Economic Research, February 2010

Data Sources: U.S. Census Bureau, 2000 Census and 2008

American Community Survey

Notes: 2000 income in 1999 dollars and 2008 income in 2008 inflation-adjusted dollars.

San Benito data is not available for 2008.

Five-year data point (2003) data is not available for comparison regions.



EDUCATION

Education

One of Placer County's most important resources is its education system. Through a network of public and private schools, the County benefits from a well-educated community and labor force. Local institutions offer programs for most undergraduate and graduate degrees, and several institutions specialize in services to assist the business community.

This section covers enrollment and other information on primary and secondary education, as well as higher education (including community colleges, public universities, private schools, technical schools, and vocational training), in addition to a brief comparison of educational attainment in Placer County to other areas.

Primary and Secondary Education

Placer County has 16 public K-12 school districts serving its various cities and communities. The largest districts and their service regions are listed below:

- Dry Creek Joint Elementary—Roseville
- Eureka Union—Roseville
- Roseville City—Roseville
- Roseville Joint Union High—Roseville
- Rocklin Unified—Rocklin
- Placer Union High—Auburn, Loomis, Newcastle, Penryn, Foresthill, Colfax, Weimar
- Western Placer Unified—Lincoln, Sheridan
- Tahoe-Truckee Unified—Tahoe City and Kings Beach (in addition to locations in other counties bordering Placer County)

EDUCATION

Over 67,000 students attended school in Placer County in the 2008-09 school year. Figure 16 displays the various types of schools from kindergarten through 12th grade (K-12) that are located within Placer County. With about 31,000 students, elementary schools have the highest enrollment followed by high schools (approximately 19,000 students) and middle schools (over 11,000 students). The overall pupil-teacher ratio in Placer County is 20.8—slightly lower than California’s ratio of 21.3.

FIGURE 16
SCHOOL TYPES IN PLACER COUNTY
IN THE 2008-2009 SCHOOL YEAR

| <i>School Type</i> | <i>Enrollment</i> | <i>Number of Schools</i> | <i>Pupil-Teacher Ratio</i> |
|--------------------------|-------------------|--------------------------|----------------------------|
| Elementary | 31,138 | 71 | 19.8 |
| Middle | 11,179 | 16 | 22.9 |
| Junior High | 838 | 1 | 22.6 |
| High | 19,101 | 14 | 22.4 |
| K-12 | 3,071 | 1 | 21.3 |
| Alternative | 484 | 4 | 25.1 |
| Continuation | 654 | 5 | 16 |
| Special Education | 264 | 2 | 4.9 |
| County Community | 266 | 2 | 19.9 |
| Juvenile Court | 61 | 1 | 15.3 |
| Nonpublic, Nonsectarian* | 32 | - | - |
| Total | 67,088 | 117 | 20.8 |

Center for Strategic Economic Research, February 2010

Data Source: California Department of Education, Ed-Data

Note: California Department of Education defines nonpublic, nonsectarian schools as an alternative Special Education service available to districts, Special Education Local Plan Areas (SELPAs), county offices of education, and parents. "Nonsectarian" means a nonpublic school or agency that is not owned, operated, controlled by, or formally affiliated with a religious group.

EDUCATION

The County's total K-12 enrollment, shown in Figure 17, grew around 28 percent over the past ten years (nearly 15 percentage points higher than the Sacramento Region's growth, around 16 times greater than the Bay Area, and approximately four times California's growth). This is naturally in relation to the high levels of population growth experienced in the County. The largest school district in the 2008-2009 school year, with an enrollment of about 11,100 students, was Rocklin Unified followed by Roseville Joint Union High and Western Placer Unified (each with around 9,500 students). Rocklin Unified, Western Placer Unified, and Roseville City school districts are the fastest-growing of the largest districts in Placer County with respective ten-year growth rates of about 73 percent, 67 percent, and 62 percent.

FIGURE 17
TOTAL K-12 SCHOOL ENROLLMENT

| Area | 1998- | 2003- | 2004- | 2005- | 2006- | 2007- | 2008- | % Change | % Change |
|-----------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|---------------------------|---------------------------|
| | 1999 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 1998-1999 to 2008-2009 | 2003-2004 to 2008-2009 |
| Placer County | 52,306 | 61,718 | 62,666 | 63,742 | 64,401 | 65,708 | 67,088 | 28.3% | 8.7% |
| Largest School Districts: | | | | | | | | | |
| Dry Creek Joint Elementary | 4,846 | 7,008 | 7,271 | 7,249 | 7,377 | 7,395 | 7,279 | 50.2% | 3.9% |
| Eureka Union Elementary | 3,796 | 4,264 | 4,210 | 4,089 | 3,989 | 3,841 | 3,700 | -2.5% | -13.2% |
| Placer Union High | 4,687 | 4,746 | 4,743 | 4,752 | 4,669 | 4,588 | 4,524 | -3.5% | -4.7% |
| Rocklin Unified | 6,423 | 9,171 | 9,644 | 10,011 | 10,155 | 10,617 | 11,079 | 72.5% | 20.8% |
| Roseville City | 5,714 | 7,527 | 8,002 | 8,316 | 8,422 | 8,697 | 9,268 | 62.2% | 23.1% |
| Roseville Joint Union High | 6,515 | 8,023 | 8,387 | 8,627 | 8,918 | 9,056 | 9,472 | 45.4% | 18.1% |
| Tahoe-Truckee Joint Unified | 5,204 | 4,589 | 4,503 | 4,304 | 4,108 | 4,090 | 4,114 | -20.9% | -10.4% |
| Western Placer Unified | 5,667 | 7,309 | 7,160 | 7,842 | 8,511 | 9,182 | 9,459 | 66.9% | 29.4% |
| Sacramento Region | 346,611 | 387,142 | 392,314 | 394,681 | 395,240 | 397,285 | 398,098 | 14.9% | 2.8% |
| Bay Area | 816,394 | 821,626 | 822,062 | 821,089 | 821,804 | 825,133 | 830,952 | 1.8% | 1.1% |
| California | 5,844,111 | 6,298,747 | 6,322,096 | 6,312,393 | 6,286,943 | 6,275,469 | 6,252,031 | 7.0% | -0.7% |

Center for Strategic Economic Research, February 2010
Data Source: California Department of Education, Dataquest

EDUCATION

Placer County has had consistently higher graduation rates than the Sacramento Region, the Bay Area, and California over the past ten years, as shown in Figure 18. In the most recent school year where data is available (2007-2008), Placer County's graduation rate was approximately 91 percent—over 9 percentage points higher than the Sacramento Region, 7 percentage points over the Bay Area's rate, and around 10 percentage points higher than California. Of the largest school districts in Placer County, Rocklin Unified, Tahoe-Truckee Joint Unified, and Roseville Joint Union High had the highest graduation rates (between about 93 and 96 percent) in 2007-2008.

FIGURE 18
HIGH SCHOOL GRADUATION RATES

| <i>Area</i> | <i>1997-</i> | <i>2002-</i> | <i>2003-</i> | <i>2004-</i> | <i>2005-</i> | <i>2006-</i> | <i>2007-</i> | <i>Shift</i> | <i>Shift</i> |
|-----------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------|---------------------|
| | <i>1998</i> | <i>2003</i> | <i>2004</i> | <i>2005</i> | <i>2006</i> | <i>2007</i> | <i>2008</i> | <i>1997-1998 to</i> | <i>2002-2003 to</i> |
| | | | | | | | | <i>2007-2008</i> | <i>2007-2008</i> |
| Placer County | 90.5% | 91.5% | 91.0% | 90.4% | 90.9% | 90.2% | 90.6% | 0.1% | -0.9% |
| High School Districts: | | | | | | | | | |
| Placer Union High | 85.0% | 88.3% | 88.8% | 88.3% | 92.1% | 93.6% | 91.9% | 6.9% | 3.6% |
| Rocklin Unified | 91.0% | 99.1% | 95.7% | 96.1% | 96.3% | 93.6% | 96.4% | 5.4% | -2.7% |
| Roseville Joint Union High | 93.4% | 95.9% | 95.8% | 93.4% | 93.7% | 92.7% | 93.1% | -0.3% | -2.8% |
| Tahoe-Truckee Joint Unified | 90.2% | 93.2% | 93.0% | 95.4% | 96.4% | 95.8% | 93.9% | 3.7% | 0.7% |
| Western Placer Unified | 96.8% | 81.3% | 78.7% | 79.4% | 75.5% | 79.1% | 81.4% | -15.4% | 0.1% |
| Sacramento Region | 84.4% | 84.1% | 85.0% | 85.9% | 85.7% | 82.6% | 81.3% | -3.2% | -2.8% |
| Bay Area | 87.1% | 91.1% | 90.1% | 88.6% | 87.2% | 84.6% | 83.6% | -3.4% | -7.5% |
| California | 83.3% | 86.7% | 85.4% | 85.0% | 83.2% | 80.2% | 80.2% | -3.1% | -6.5% |

Center for Strategic Economic Research, February 2010
Data Source: California Department of Education, Dataquest

EDUCATION

The Scholastic Aptitude Test (SAT) measures high school students' verbal and mathematical reasoning skills where total scores of verbal and math each are measured on a scale between 200 and 800. In the 2005-2006 academic year, a writing section was added to the SAT with the same scoring scale as the verbal and math sections. Combined, the total score of these three sections can range from 600 to 2400. In order to compare scores over the past five years, only the total of the verbal and math average scores are included in Figure 19. As shown in this Figure, in the 2007-2008 school year, Placer County's total average SAT score (math and verbal average combined) was 1063, higher than the Sacramento Region and California, but slightly lower than the Bay Area. The County's total average scores have been historically higher than those for California and the Sacramento Region and have increased at a higher rate over the five-year period than all comparison areas, except for the Bay Area. On average, scores for Placer County students have been 50 points above statewide scores and 35 points above Sacramento Region average scores. The County has had similar SAT scores as the Bay Area over the past five years. Placer County's largest school districts with the highest average scores in the 2007-2008 school year were Placer Union High (1084), Rocklin Unified (1063), and Roseville Joint Union High (1060).

FIGURE 19
AVERAGE TOTAL SAT SCORES

| Area | 2002- | 2003- | 2004- | 2005- | 2006- | 2007- | % Change |
|-----------------------------|-------|-------|-------|-------|-------|-------|---------------------------|
| | 2003 | 2004 | 2005 | 2006* | 2007* | 2008* | 2002-2003 to 2007-2008 |
| Placer County | 1054 | 1061 | 1070 | 1061 | 1060 | 1063 | 0.9% |
| High School Districts: | | | | | | | |
| Placer Union High | 1062 | 1065 | 1085 | 1082 | 1086 | 1084 | 2.1% |
| Rocklin Unified | 1052 | 1057 | 1064 | 1059 | 1062 | 1063 | 1.0% |
| Roseville Joint Union High | 1058 | 1062 | 1072 | 1059 | 1055 | 1060 | 0.2% |
| Tahoe-Truckee Joint Unified | 1032 | 1052 | 1051 | 1058 | 1013 | 1035 | 0.3% |
| Western Placer Unified | 1043 | 1059 | 1037 | 990 | 1061 | 1053 | 1.0% |
| Sacramento Region | 1030 | 1034 | 1038 | 1024 | 1021 | 1015 | -1.5% |
| Bay Area | 1060 | 1065 | 1069 | 1068 | 1065 | 1070 | 0.9% |
| California | 1012 | 1015 | 1020 | 1011 | 1006 | 1007 | -0.5% |

Center for Strategic Economic Research, February 2010

Data Source: California Department of Education, Dataquest

Note: Weighted averages used for Sacramento Region and Bay Area data. Ten-year historical score not available.

*Starting in 2005-2006, writing average scores (a new component of the SAT) were tracked; however, in order to compare over a time period, this table only reflects a total score of math and verbal averages. Total scores (including the writing average) for the comparison areas in 2007-2008, 2006-2007, and 2005-2006 are as follows: Placer County = 1577, 1576, and 1580; Sacramento Region = 1510, 1517, and 1525; Bay Area = 1591, 1581, and 1587; California = 1500, 1497, and 1506.

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Figure 20 illustrates the percentage of public high school graduates that met the course requirements to qualify for entrance into the University of California (UC) and California State University (CSU) systems. These higher education institutions require courses beyond the California high school graduation requirements, including four years of English, three years of mathematics, three years of social science, two years of science, one year of visual and performing arts, three years of a foreign language, and one additional elective. In the 2007-2008 school year, about 35 percent of the graduating seniors in Placer County met these course requirements. Placer County ranks above the Sacramento Region and California, but the Bay Area leads all of the comparison areas in this measure. The greatest proportion of students with these qualifications of the largest districts in Placer County was in the Tahoe-Truckee Joint Unified district with around 50 percent of students in the 2007-2008 school year completing these requirements.

Over the past five years, with the exception of the 2004-2005 academic year, Placer County high school graduates have completed the entrance courses required for the UC and CSU systems at a slightly higher proportion than the overall Sacramento Region. The Placer County proportion has also remained close to the statewide average over the past few years.

FIGURE 20
PERCENT OF HIGH SCHOOL GRADUATES COMPLETING UC AND CSU
ENTRANCE COURSE REQUIREMENTS

| Area | 1997- | 2002- | 2003- | 2004- | 2005- | 2006- | 2007- | Shift | Shift |
|-----------------------------|-------|-------|-------|-------|-------|-------|-------|---------------------------|---------------------------|
| | 1998 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 1997-1998 to 2007-2008 | 2002-2003 to 2007-2008 |
| Placer County | 38.1% | 35.4% | 32.1% | 35.0% | 36.9% | 35.6% | 35.1% | -3.0% | -0.3% |
| High School Districts: | | | | | | | | | |
| Placer Union High | 39.7% | 38.8% | 35.6% | 34.4% | 35.0% | 31.8% | 34.9% | -4.8% | -3.9% |
| Rocklin Unified | 51.5% | 37.1% | 42.3% | 48.0% | 41.8% | 41.8% | 35.2% | -16.3% | -1.9% |
| Roseville Joint Union High | 37.4% | 42.1% | 32.4% | 37.2% | 45.2% | 43.4% | 42.1% | 4.7% | 0.0% |
| Tahoe-Truckee Joint Unified | 54.2% | 51.7% | 48.1% | 43.0% | 41.7% | 52.0% | 49.8% | -4.4% | -1.9% |
| Western Placer Unified | 9.7% | 7.9% | 9.7% | 13.8% | 5.7% | 9.7% | 8.8% | -0.9% | 0.9% |
| Sacramento Region | 36.0% | 33.7% | 31.8% | 39.2% | 35.1% | 31.7% | 32.6% | -3.4% | -1.1% |
| Bay Area | 44.6% | 43.3% | 44.0% | 43.7% | 46.7% | 47.6% | 46.3% | 1.6% | 2.9% |
| California | 36.6% | 33.6% | 33.7% | 35.2% | 35.9% | 35.5% | 33.9% | -2.7% | 0.3% |

Center for Strategic Economic Research, February 2010
 Data Source: California Department of Education, Dataquest

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Educational Attainment

Placer County benefits from high educational attainment at the postsecondary level, outperforming all comparison areas in the percentage of the population with some education beyond high school in 2008. As shown in Figure 21, around 72 percent of Placer County's population has received some postsecondary education, compared to about 65 percent, 69 percent, and 59 percent in the Sacramento Region, the Bay Area, and California, respectively, in 2008. The number of Placer residents with bachelor's and higher level degrees is also higher at around 33 percent, compared to almost 29 percent in the Sacramento Region and 30 percent in California, but is lower than around 44 percent in the Bay Area.

The percentage of Placer County's population with at least a high school degree (or the equivalent) stands at around 93 percent. This is about 7 percentage points above the rate for the Sacramento Region and the Bay Area and over 13 points above the rate for California. Placer County also posted a significant change in the number of its population over 25 years old that possess a bachelor's degree or higher—from 2000 to 2008, the County's population within this category increased around 57 percent, much higher than the other areas' percentage changes that range from about 16 to 36 percent.

FIGURE 21
EDUCATIONAL ATTAINMENT

| Area / Educational Attainment Categories | 2000 | | 2008 | | % Change 2000-2008 |
|--|------------|---------|------------|---------|-----------------------|
| | Total | Percent | Total | Percent | |
| Placer County | | | | | |
| Population 25 years and over | 165,894 | 100.0% | 236,208 | 100.0% | 42.4% |
| Less than high school graduate | 15,835 | 9.5% | 15,506 | 6.6% | -2.1% |
| High school graduate (incl. equivalency) | 35,327 | 21.3% | 50,398 | 21.3% | 42.7% |
| Some college or associate degree | 64,506 | 38.9% | 91,573 | 38.8% | 42.0% |
| Bachelor's degree or higher | 50,226 | 30.3% | 78,731 | 33.3% | 56.8% |
| Sacramento Region | | | | | |
| Population 25 years and over | 1,223,128 | 100.0% | 1,475,257 | 100.0% | 20.6% |
| Less than high school graduate | 199,068 | 16.3% | 198,756 | 13.5% | -0.2% |
| High school graduate (incl. equivalency) | 275,227 | 22.5% | 319,105 | 21.6% | 15.9% |
| Some college or associate degree | 435,384 | 35.6% | 532,019 | 36.1% | 22.2% |
| Bachelor's degree or higher | 313,449 | 25.6% | 425,377 | 28.8% | 35.7% |
| Bay Area* | | | | | |
| Population 25 years and over | 3,962,199 | 100.0% | 4,146,059 | 100.0% | 4.6% |
| Less than high school graduate | 635,257 | 16.0% | 556,922 | 13.4% | -12.3% |
| High school graduate (incl. equivalency) | 673,594 | 17.0% | 712,840 | 17.2% | 5.8% |
| Some college or associate degree | 1,097,290 | 27.7% | 1,070,600 | 25.8% | -2.4% |
| Bachelor's degree or higher | 1,556,058 | 39.3% | 1,805,697 | 43.6% | 16.0% |
| California | | | | | |
| Population 25 years and over | 21,298,900 | 100.0% | 23,528,476 | 100.0% | 10.5% |
| Less than high school graduate | 4,942,743 | 23.2% | 4,651,663 | 19.8% | -5.9% |
| High school graduate (incl. equivalency) | 4,288,452 | 20.1% | 4,903,309 | 20.8% | 14.3% |
| Some college or associate degree | 6,397,739 | 30.0% | 7,011,378 | 29.8% | 9.6% |
| Bachelor's degree or higher | 5,669,966 | 26.6% | 6,962,126 | 29.6% | 22.8% |

Center for Strategic Economic Research, February 2010

Data Sources: U.S. Census Bureau, 2000 Census and 2008 American Community Survey

Note: The 2000 Census data was used as historical reference as it includes data from all comparison areas.

*2008 data for San Benito County is not available; therefore it has not been included in 2000 Bay Area data.

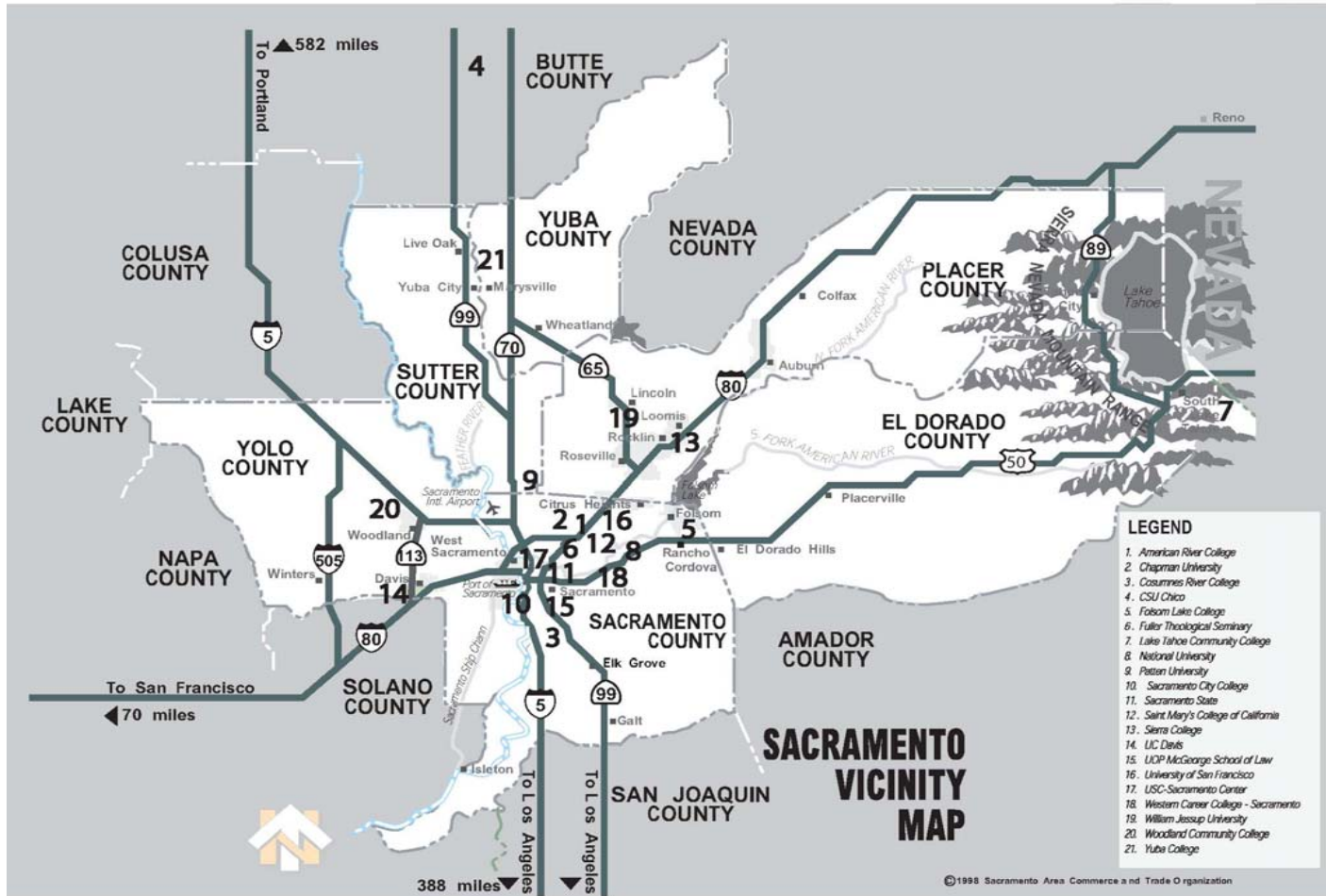
Higher Education

Higher education is available from a variety of institutions throughout the area. The University of California, Davis (UCD) and California State Universities, Sacramento (Sacramento State) and Chico (CSUC), several community colleges, numerous vocational schools, professional schools, and local campuses of colleges headquartered elsewhere in the state provide services to meet the educational needs of local businesses and the community. Additionally, within a three-hour distance from Placer County, the University of California, Berkeley and Stanford University, among other Bay Area institutions, provide an accessible supply of well-educated graduates.

Figure 22 is a map that includes Western Association of Schools and Colleges-accredited postsecondary institutions in the Sacramento Region.

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FIGURE 22
WASC-ACCREDITED AND PUBLIC POSTSECONDARY INSTITUTIONS IN THE SACRAMENTO REGION



Center for Strategic Economic Research, February 2010

Data Source: Sacramento Area Commerce and Trade Organization, Sacramento Vicinity Map

Note: WASC represents Western Association of Schools and Colleges which is one of six regional associations that accredit educational institutions in the nation.

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Of the four-year universities in the Sacramento Region, UCD is the largest with approximately 31,000 students in the fall term of 2008 (see Figure 23). Since 1998, UCD's enrollment increased about 26 percent. The California State University campuses in Sacramento and Chico had around 29,000 and 17,000 students, respectively, in 2008.

By far, the largest community college in the Region is American River College with nearly 34,000 students enrolled in 2008—a figure that increased around 60 percent since 1998. Sacramento City College and Sierra College also serve a large student population with respective 2008 enrollments of approximately 26,000 and 21,000 students, both posting considerable gains in enrollment since 1998.

FIGURE 23
SACRAMENTO REGION HIGHER EDUCATION ENROLLMENT FOR PUBLIC INSTITUTIONS

| <i>Type / Institution Name</i> | 1998 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | % Change 1998-2008 | % Change 2003-2008 |
|---|--------|--------|--------|--------|--------|--------|--------|-----------------------|-----------------------|
| University of California | | | | | | | | | |
| University of California, Davis | 24,866 | 30,229 | 30,065 | 29,637 | 30,475 | 30,685 | 31,426 | 26.4% | 4.0% |
| California State University | | | | | | | | | |
| California State University, Sacramento | 23,676 | 28,375 | 27,972 | 27,932 | 28,529 | 28,829 | 29,011 | 22.5% | 2.2% |
| California State University, Chico* | 14,983 | 15,516 | 15,734 | 15,919 | 16,250 | 17,034 | 17,132 | 14.3% | 10.4% |
| California Community Colleges | | | | | | | | | |
| American River College | 21,211 | 30,614 | 30,580 | 31,050 | 32,460 | 34,751 | 33,991 | 60.3% | 11.0% |
| Cosumnes River College | 13,967 | 17,726 | 11,461 | 11,542 | 12,180 | 13,228 | 13,989 | 0.2% | -21.1% |
| Folsom Lake College** | - | - | 6,212 | 6,507 | 7,381 | 8,441 | 8,937 | - | - |
| Lake Tahoe Community College | 2,624 | 3,702 | 3,645 | 3,459 | 3,290 | 3,327 | 3,442 | 31.2% | -7.0% |
| Sacramento City College | 16,692 | 21,998 | 21,729 | 22,107 | 22,991 | 24,991 | 25,912 | 55.2% | 17.8% |
| Sierra College | 16,754 | 18,791 | 18,727 | 18,981 | 19,373 | 20,187 | 21,448 | 28.0% | 14.1% |
| Woodland Community College*** | - | - | - | - | - | - | 3,018 | - | - |
| Yuba College*** | 8,758 | 8,907 | 9,507 | 9,234 | 9,516 | 10,445 | 8,418 | 30.6% | 28.4% |

Center for Strategic Economic Research, February 2010

Source: California Postsecondary Education Commission (CPEC)

Notes: Data reflects enrollment for fall term of year stated.

*California State University, Chico in Butte County is outside of the six-county Sacramento Region, but in close proximity to Placer County.

**Folsom Lake College enrollment prior to 2004 not available as it was not yet established.

***Yuba College enrollment data prior to 2008 includes Woodland Community College and Clear Lake Campus.

Woodland Community College enrollment data separated out in 2008 after it become fully accredited.

Five-year and ten-year change reflects Woodland Community College and Yuba College combined enrollment for 2008.

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Enrollment for select private institutions in the Sacramento Region is provided in Figure 24. Private institutions that have had notable increases in enrollment over the past five years include Western Career College, Heald College—Rancho Cordova, and ITT Technical Institute which posted about 79 percent, 77 percent, and 30 percent respective increases in enrollment.

FIGURE 24
SACRAMENTO REGION HIGHER EDUCATION
ENROLLMENT FOR SELECT PRIVATE
INSTITUTIONS

| <i>Institution</i> | <i>Location</i> | <i>2003</i> | <i>2008</i> | <i>% Change 2003-2008</i> |
|---------------------------|-----------------|-------------|-------------|-------------------------------|
| Heald College | Rancho Cordova | 557 | 984 | 76.7% |
| Heald College | Roseville | 632 | 735 | 16.3% |
| High-Tech Institute | Sacramento | 589 | 752 | 27.7% |
| ITT Technical Institute | Rancho Cordova | 553 | 716 | 29.5% |
| MTI College | Sacramento | 843 | 636 | -24.6% |
| Western Career College | Sacramento | 867 | 1,548 | 78.5% |
| William Jessup University | Rocklin | 358 | 462 | 29.1% |

Center for Strategic Economic Research, February 2010

Data Sources: California Postsecondary Education Commission and National Center for Education Statistics, College Opportunities Online Locator

Notes: Data reflects enrollment for Fall term of year stated.

Limited data available for years 2004 through 2007 and years prior to 2003.

Other private postsecondary institutions, in addition to those in Figure 24, serving the Sacramento Region include:

- Art Institute of California (Sacramento)
- Aviation & Electronic School of America (Colfax)
- Breining Institute (Orangevale)
- Bryan College (Gold River)
- Capital Bible College (Sacramento)
- Chapman University (Roseville, Folsom, Yuba City)
- DeVry University (Sacramento)
- Drexel University Center for Graduate Studies (Sacramento)
- Embry-Riddle Aeronautical University (Beale AFB)
- Fuller Theological Seminary (Sacramento)
- International Academy of Design and Technology (Sacramento)
- Kitchen Academy (Sacramento)
- Lincoln Law School of Sacramento (Sacramento)
- Kaplan College—formerly Maric College (Sacramento)
- National University (Citrus Heights, Sacramento)
- Northwestern California University School of Law (Sacramento)
- Patten University (Rio Linda)
- Professional School of Psychology (Sacramento)

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- Rudolf Steiner College (Fair Oaks)
- Saint Mary's College of California (Sacramento)
- Trinity Life Bible College (Sacramento)
- The Union Institute (Sacramento)
- Universal Technical Institute (Sacramento)
- University of Northern California, Lorenzo Patiño School of Law (Sacramento)
- University of the Pacific, McGeorge School of Law (Sacramento)
- University of Phoenix (Sacramento)
- University of Sacramento (Sacramento)
- University of San Francisco, Sacramento Regional Campus (Sacramento)
- University of Southern California, State Capital Center (Sacramento)
- Weimar College (Weimar)
- Western Seminary (Sacramento)
- WyoTech (Sacramento)

Community Colleges

Sierra Community College District

For over half a century, the 300-acre Sierra College campus has offered general education and technical courses, serving the Counties of Placer, Nevada, and parts of El Dorado and Sacramento. The main campus is located off of Interstate 80 in Rocklin. Other facilities include a 115-acre Nevada County Campus in Grass Valley and campuses in Roseville and Tahoe-Truckee. In November 2009, Sierra College became the first community college in California to be LEED Gold certified for its first permanent building at the new Tahoe-Truckee Campus. These campuses, administered by the Sierra Community College District, offer day, evening, and weekend classes to over 21,000 students in their service region which covers approximately 3,200 square miles. Sierra College has a national reputation based on excellence in such academic areas as computer science, mathematics, electronics, nursing, and early childhood education. Sierra College has awarded the greatest number of Associate Degrees of all California Community Colleges reporting results in five of the annual studies published by Community College Week since 2003 based on data from the U.S. Department of Education's National Center for Education Statistics.

Sierra College has approximately 970 full- and part-time faculty members and offers around 160 degree and certificate programs. In addition, Sierra College provides the first two years of pre-professional programs including medicine, law, engineering, computer science, and education. It is the only community college in California that offers an Osher Lifelong Learning Program (OLLI) which provides educational opportunities in more than 175 tuition-free non-credit classes for active adults. In January 2006, Sierra College also began offering a new program in Mechatronics, a field in which electronics, mechanics, pneumatics, hydraulics and computer control are integrated. Over \$1 million from a grant plus industry donations made this program possible at Sierra College.

Another new program is the virtual office professional program that prepares students for careers in this burgeoning field. Sierra College sets itself apart in this area of education by requiring significantly more units than other colleges in the nation and awarding a degree and a program certificate upon completion of the program. The College also was awarded a \$468,000 grant from the California Community College Chancellor's Office to develop a Photovoltaic Technician training program which will educate solar panel installers for solar companies, contractors, and local governments. In March 2009, the California Community College Chancellor's Office also awarded Sierra College \$500,000 to expand Science, Technology, Engineering, and Mathematical (STEM) education. The College offers a technical career hands-on program for students from middle school to college.

To benefit area firms, Sierra College offers assistance through its Center for Applied Competitive Technologies (CACT) which specializes in combining computer-aided design and manufacturing to supply training and instruction to small and medium manufacturing and technology companies. The College also provides on-site custom training to local companies through its Contract Education Program.

Los Rios Community College District

The Los Rios Community College District currently has nearly 83,000 students enrolled at American River College, Cosumnes River College, Sacramento City College, and Folsom Lake College (and El Dorado Center in Placerville) and covers a service area of 2,400 square miles. In a recent election, voters in Los Rios' service area approved a \$465 million local bond measure that will allow the District to renovate and build new facilities at its four colleges and six education centers. Los Rios is one of the fastest-growing community college districts in the state and has high transfer rates to the UC and CSU systems. The Los Rios colleges offer career education programs in such high growth fields as nursing and health, computer information science, electronics, and business. Los Rios also recently launched an initiative called GreenForce to create new programs focused on clean and green technology to meet the increasing demand by local businesses for workers skilled in this area. Certificate programs for solar technology technician, green building design and construction, and energy management systems began in the 2008-09 academic year. In October of 2009, the National Science Foundation awarded Folsom Lake College a \$285,000 grant to be used for developing curriculum strategies in Computational Thinking (a set of skills developed in computer science and related disciplines that can be applied to problem-solving tasks and projects in any discipline) which may someday be used as a model for community colleges across the country.

Los Rios Community College District operates the Business and Economic Development Center (BEDC) which offers services such as customized training, business consulting, and international trade development through the Training Source, the Small Business Development Center (SBDC), the Center for International Trade Development (CITD), and the Workplace Learning Resource Center. The Training Source is a division that provides custom-designed training in short workshops or semester classes to public and private sector clients either at their site or at The Training Source. Other services offered

are marketing and business planning guidance for small business owners and program management and evaluation. The SBDC offers small business consultation in management, marketing, finance and strategic planning, and the CITD provides coaching services to small- and medium-sized business in importing and exporting, sponsors around 30 global commerce seminars per year, and has an extensive international trade library. The Workplace Learning Resource Center offers customized training geared towards basic skills training, workplace English as a Second Language (ESL), and workplace Spanish.

Yuba Community College District

The Yuba Community College District has been providing high-quality education since it was founded in 1927. The District now serves over 11,000 students in an area that covers about 4,200 square miles in six counties. The District operates Yuba College, Woodland Community College, the Clear Lake Campus, and Beale Air Force Base Outreach Operation, as well as other outreach area off-campus sites. The two campuses within the six-county Sacramento Region include Yuba College and Woodland Community College serving the Counties of Yuba, Sutter, and Yolo. Yuba College, the largest in the District, offers over 1,000 courses in 90 departments.

Lake Tahoe Community College District

Lake Tahoe Community College, within proximity of the Sacramento Region, was opened in 1975 and had an enrollment of approximately 3,400 students in the Fall term of 2008. The 164-acre campus in South Lake Tahoe offers full credit, transferable courses to the UC and CSU systems. The College boasts affordability and accessibility in its classes and offers 36 associate degrees and 20 certificates in areas such as business, culinary arts, environmental science, psychology, and political science. Lake Tahoe Community College also provides career education in over 20 fields including criminal justice, culinary arts, nursing, and hospitality, among others. Programs such as study abroad for course credit and wilderness classes in the natural landscape are also offered as additional learning opportunities for the College's students.

Public Universities

California State University, Sacramento

Sacramento State is a major university in the heart of the state capital on 300 acres. Founded in 1947, the University has completed over one-half century of service and claims one in 26 residents in the Sacramento Region as a Sacramento State alumnus. Around 29,000 students (24,000 undergraduates and 5,000 graduates) are enrolled at Sacramento State, with about 750 international students representing over 80 nations. The University's academic programs are organized into eight colleges: Arts & Letters; Business Administration; Continuing Education; Education; Engineering & Computer Science; Health & Human Services; Natural Sciences & Mathematics; and Social

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Sciences & Interdisciplinary Studies. Sacramento State students can earn degrees in 60 undergraduate, 40 graduate, and two joint doctorate degree programs. Other major academic programs include business administration, criminal justice, communication studies, psychology, and computer science. The criminal justice program, according to Sacramento State, is the largest in this discipline west of the Mississippi.

In order to meet the needs of its growing student population, Sacramento State has completed several additions to its campus recently, including a continuing education building, a five-story classroom building, an Alumni Center, and expansion of the student union (housing various restaurants, shops, offices, and study areas). The students of Fall 2009 were the first students to move into the campus' new residence hall, American River Courtyard. A remodeling effort of the Alex G. Spanos Sports Complex was completed in time to host the U.S. Olympic Track and Field trials in July 2000. Sacramento State also had the honor to host the trials again in 2004. Other planned additions includes construction of a new athletic facility containing training facilities, locker rooms, and coaches' offices for the University's Division I athletics program as well as development of a Science and Space Center that includes a state-of-the-art planetarium. The University has recently received a \$500,000 grant to furnish a clinical simulation lab in the Division of Nursing's new facilities.

Sacramento State, Sacramento Municipal Utility District (SMUD), Los Rios Community College District, and the Department of General Services were awarded \$127 million in American Recovery and Reinvestment Act (ARRA) funding for a smart grid project which will enable installation of a regional smart grid system of 600,000 energy efficient smart meters and 50,000 demand response controls. The funding also allows Sacramento State's California Smart Grid Center to oversee installation of the technology to 50 of the university's buildings. The Center also has developed curriculum for students interested in smart grid careers.

Around 30 research and service centers are associated with the University. In addition, through the College of Continuing Education, Sacramento State has focused on extension and continuing education programs to accommodate the business community's changing needs. The continuing education programs include, but are not limited to, business; criminal justice and safety; education; health and human services; and science and technology. Additionally, Sacramento State created an Executive Master's of Business Administration (EMBA) program that is hosted at corporate locations throughout the Sacramento Region. PRIDE Industries in Roseville hosted the first cohort which began classes in September 2005.

Through a partnership with UCD and Sonoma State University, Sacramento State offers a new doctoral program in education. The program is designed to help California schools and community colleges meet the growing need for well-qualified managers and leaders in education. It has been initiated in direct response to the continuing expansion of Northern California's education system and its growing demand for administrators and leaders with advanced training necessary to address the complexities of the present

educational environment. A doctor of education, or Ed.D., degree will be awarded jointly by the CSU and UC systems.

California State University, Chico

Located about 85 miles northwest of Auburn on 119 acres, CSUC is another major public university (with an enrollment of over 17,000 students) that provides educational services to Placer County residents. Founded in 1887, the University is the second oldest California State University campus, known for its picturesque views, beautiful architecture, and a cozy college town atmosphere. CSUC provides excellent educational opportunities and is committed to developing a high quality learning environment. The University's graduation rate continually ranks as one of the highest in the CSU system and the campus ranked 35th in *U.S. News & World Report's* 2009 edition of "America's Best Colleges" and 30th in the 2010 edition for master's level universities in the West—a category generally dominated by private universities. Additionally, CSUC's outstanding MBA program was recognized in the *Princeton Review's* 2010 book "The Best 301 Business Schools" for the third consecutive year.

The University is comprised of seven colleges, organized in two general categories (the Colleges of Liberal Arts and Sciences and the Colleges of Professional Studies), and two interdisciplinary units (Undergraduate Education and the School of Graduate, International, and Interdisciplinary Studies). The seven colleges include: Agriculture; Behavioral and Social Sciences; Business; Communication and Education; Engineering, Computer Science, and Construction Management; Humanities and Fine Arts; Natural Sciences. The University offers over 150 undergraduate majors that allows students to declare an option or pattern—a way to obtain specialization in a major program. The top five majors, by size, are business administration, liberal studies (elementary school teaching), psychology, construction management, and prenursing/nursing. CSUC has also been nurturing its academic programs and campus practices in sustainable development. The University currently offers over 100 "Green Courses," such as *Energy Alternatives in Agriculture* and *Sustainability and the Built Environment* and created The Institute for Sustainable Development to facilitate research and integrate environmental efforts across campus.

CSUC is considered to be one of the leaders in distance education having offered these services for 34 years through various modes of learning—Instructional Television Fixed Service (ITFS), via satellite, and online. Since 1993, courses have been offered online and institutions around the world have used CSUC's program to model their own distance education programs.

University of California, Davis

Since its beginnings in the early 20th century, the UCD campus has grown to 5,300 acres and about 31,000 students. An acknowledged international leader in agricultural, biological, biotechnological and environmental sciences, UCD is gaining similar recognition for excellence in the arts, humanities, social sciences, health sciences, law, and management. According to UCD's web site and National Science Foundation rankings, the Institution is one of the top research universities in the United States, earning \$586 million in research funding in 2007-2008, and was ranked 10th nationally in research funding of public universities and fourth among other UC schools for that time period. UCD garnered worldwide recognition ranking among the top 100 universities in the world in 2008, according to the *Times Higher Education*, an organization/publication based in London focused on worldwide higher education policy issues. Each year, the university has improved its ranking—starting from 206th place in 2005 up to 89th in 2008. UCD was also recognized by *U.S. News & World Report*, which ranked the University 11th overall among public universities nationwide.

UCD offers 102 undergraduate majors and 87 graduate programs in the Colleges of Agricultural and Environmental Sciences, Biological Sciences, Letters and Science, and Engineering and six professional schools: Education, Medicine, Veterinary Medicine, Law, Management, and the Betty Irene Moore School of Nursing.

UCD's Graduate School of Management has garnered an excellent reputation among other national MBA programs as indicated in its inclusion in *U.S. News & World Report's* annual ranking of best U.S. business schools for 14 consecutive years from 1996 to 2009, most recently placing 40th overall in the nation. Additionally, the University's Graduate School of Management ranked 29 on the *Wall Street Journal's* annual list of top regional business schools in the country in 2007, as based on the outcomes of corporate recruiters' rankings. UCD's Engineering and Law programs also received recognition in academic excellence, ranking 33rd and 35th, respectively, in *U.S. News & World Report's* 2009 list of best graduate and law schools.

UC Davis Extension, founded 1960, offers hundreds of courses per quarter in over 75 subjects such as business, art, and agriculture where the student has the option to take individual courses, pursue a certificate program, or complete a specialized master's degree program. Courses are offered in traditional classroom settings open to the public, in an online format, or customized on-site for employers.

The UC Davis Health System includes a teaching hospital in Sacramento, a medical school, and a network of primary care physician practices and affiliated community hospitals in Northern California communities. The system operates the Region's only Level 1 trauma center, a comprehensive cancer center, a children's hospital, transplant services, an Alzheimer's center, an institute for neurodevelopment disorders, and a burn center. UC Davis Health System's variety of programs that address the Region's underserved citizens was recognized by the Association of American Medical Colleges in their 2005 Outstanding Community Service Award.

The Mondavi Center for the Performing Arts opened on the UCD campus in the fall of 2002. It houses a 1,800-seat performance hall and a 250-seat studio theater and provides performance space unrivaled outside the San Francisco Bay Area.

In October 2007, UCD dedicated its new Aggie Stadium, a \$31 million facility with seating for more than 10,700 fans and an artificial playing surface of over 100,000 square feet. The University's Graduate School of Management constructed a "state-of-the-art green" building and conference center complex that was completed in October 2009. The hotel, which is part of the complex, is expected to be completed in March 2010. The University also has several major expansion projects underway that will further enhance its renowned programs in law, business, viticulture, and food science. UCD is expanding and renovating its School of Law facilities in a \$30 million project that will be completed by the end of 2010. The departments of Viticulture and Enology and Food Science and Technology also benefit from new facilities in a 129,600-square-foot complex called the Robert Mondavi Institute for Wine and Food Science (RMI) which celebrated the grand opening of its first phase in October 2008. The second phase of the project, with an anticipated completion date of July 2010, will include two buildings totaling 32,000 square feet—one building housing the Teaching and Research Winery and the other will be the Anheuser-Busch Brewing and Food Science Laboratory. Together, design and construction of both phases cost approximately \$93.5 million. Additionally, a \$280 million campus community called West Village is under construction and is expected to be completed in the fall of 2011. Plans for this project include a mix of student and employee housing, retail space, and a community college center with a goal to create a "zero net energy" community incorporating energy efficiency measures and on-site renewable resources to meet its demand.

Private Schools

William Jessup University, formerly San Jose Christian College, relocated to Rocklin and officially opened in the fall of 2004. The four-year Christian University prepares its students for leadership and service in church and society by focusing on theological higher education as well as providing degrees in teaching, business administration, and psychology. The University has recently allocated \$25 million in a campus expansion plan that will double its on-campus housing and will include dining, banquet, athletic, and music centers. The first phase of the expansion, that includes student apartment complexes which doubled the available student housing space on campus, was completed in August 2009. Students from the fall of 2009 were the first to move in to the apartments. Furthermore, William Jessup University was one of few colleges to actually decrease tuition costs by 2.5 percent for the 2009-2010 school year and plans to freeze tuition for the 2010-2011 school year.

Numerous branches of private colleges headquartered outside the Sacramento Region also have local programs for Placer County and other residents within the Region. One of them, Drexel University, a Philadelphia-based college, offers nine programs (business

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administration, educational leadership & management, higher education, human resource development, information systems, library & information science, nursing education & faculty role, nursing leadership in health systems management, and public health) at its Sacramento Center for Graduate Studies in downtown Sacramento. Two of these programs at the University's main campus were recognized in the 2009 *U.S. News & World Report's* list of best graduate schools: library & information science (ranking 9) and education (ranking 54). The Drexel LeBow College of Business part-time MBA program (the largest program offered at the Sacramento Center) was ranked number one among 30 programs ranked by *BusinessWeek* magazine based on academic quality, post-graduation outcomes, and a student satisfaction survey. Drexel University is interested in pursuing development of a 600-acre undergraduate campus in Placer County that could eventually serve up to 6,000 students.

National University primarily serves working adults with its online-degree and intensive, one-course-per-month evening class format. Its Sacramento location offers extended learning, credential, and certificate programs as well as associate of art degrees and bachelor and master degrees in areas within business and management, engineering and technology, psychology, education, and letters and sciences. Chapman University offers bachelor's and master's degrees, as well as teaching credentials and extended education in its three campuses within the Sacramento Region (Roseville, Folsom, and Yuba City). The University of Phoenix's Sacramento Valley Campus offers master's and bachelor's degree programs in nursing and business—among the Campus' most popular programs, with many of these programs' courses conveniently offered both in class and online.

The University of Southern California's State Capital Center for the School of Policy, Planning, and Development offers nationally-accredited master's degrees in public administration and health administration in downtown Sacramento near the State Capitol where key policy decisions are made.

The University of San Francisco's Sacramento Regional Campus is a complete university facility with programs designed for working adults who generally attend classes that meet one day a week for 22 to 27 months. Five undergraduate degree completion programs (for transfer students) and six master's degree programs are offered in fields such as applied economics, information systems, non-profit administration, organizational studies, project management, public administration, and counseling.

The University of the Pacific, McGeorge School of Law in Sacramento is a recognized leader in the field of legal education. McGeorge seeks to educate practice-ready graduates through its required curriculum and opportunities for practical experience in clinical and internship settings. In addition to the juris doctor (J.D.) degree, students can choose various specializations, including governmental affairs and advocacy, as well as graduate legal studies in several areas. Located nearby is the Lincoln Law School of Sacramento which is fully-accredited by the Committee of Bar Examiners of the State Bar of California and offers an affordable and accessible legal education in a four-year, weeknight format.

Technical Schools and Vocational Training

In addition to the comprehensive instruction given at area community colleges, specific technical training is available at trade and vocational schools in Placer County and the Sacramento Region. The Placer County Office of Education, in coordination with Nevada County Superintendent's of Schools, sponsors the 49er Regional Occupational Program that regularly trains high school students and adults for new careers or to upgrade skills necessary in an existing occupation. Training comes in the form of classes where students have the opportunity to research careers, learn job skills, or participate in an internship, possible through the support of over 600 businesses within Placer and Nevada Counties.

The best known postsecondary schools offering vocational education in the Sacramento Region are the Heald Business Colleges, ITT Technical Institute, MTI College of Business Technology, DeVry University, and Western Career College. Universal Technical Institute (UTI), a vocational technical school providing diploma or certificate level programs in automotive technology, recently chose the Sacramento Region as its newest location. The Kitchen Academy, another private vocational school that recently located to the Region, provides students the opportunity to graduate with a Professional Culinary Arts Diploma in approximately 30 weeks. The Sacramento branch of the Art Institute of California, which was established in 2007, offers associate and bachelor degrees in career-oriented programs such as design, media arts, fashion and culinary arts.



BUSINESS CLIMATE

Business Climate

Prior to the economic downturn, Placer County's economy had seen impressive levels of job growth and significant increases in taxable sales. Like most areas of the country, economic conditions in Placer County have suffered, but its strong base and rather diversified industry composition have mitigated some of the potential effects of the recession. The County is specialized in six sectors (Construction; Leisure & Hospitality; Financial Activities; Other Services; Trade, Transportation, & Utilities; and Educational & Health Services) and has continued to encourage start-ups and relocations of businesses within these and other sectors.

This section provides an overview of several business aspects of Placer County in comparison to the Sacramento Region, the Bay Area, and California. Topics included are industry employment, establishments, and specialization; occupational wages; labor force and unemployment rates; economic health; major employers; recently located companies in the County; taxable sales; banking; as well as business resources and workforce training programs.

Industry Overview

Over a ten-year time span, Placer County employment increased by nearly 43,000 jobs to nearly 138,000 total jobs in 2008 (about 15 percent of all jobs in the Sacramento Region), as shown in Figure 25. This growth of about 45 percent is over twice as high as the Sacramento Region, around 45 times higher than the Bay Area (which experienced negative growth), and about four times higher than California's rate from 1998 to 2008. The recent economic downturn has significantly affected all comparison areas bringing Placer County's, the Sacramento Region's, and California's employment totals back to levels seen in 2005 and 2006. The Bay Area's current employment is below the level seen in 1998, prior to the dot-com bust.

The greatest employment increase from 1998 to 2008 was seen in Placer County's Financial Activities sector, an approximate 93 percent increase to almost 11,000 jobs, due to previous years' high population growth seen in the area and the housing construction needed to support this growth. The Educational & Health Services sector posted the highest employment growth rates in the comparative regions: around 54 percent in the Sacramento Region, 18 percent in the Bay Area, and 30 percent in California.

Educational & Health Services posted the second-highest growth rate in Placer County at around 90 percent in the ten-year time period. None of the comparative regions displayed such strong growth across all industry sectors as Placer County did in this time period. The Trade, Transportation, & Utilities sector, posting the County's third-highest growth rate, increased about 56 percent in Placer County, but saw a much lower rate in the Sacramento Region (about 16 percent), the Bay Area (-7 percent), and California (10 percent).

BUSINESS CLIMATE

FIGURE 25
EMPLOYMENT BY INDUSTRY

| Industry Sector | 1998 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | % Change 1998-2008 | % Change 2003-2008 |
|-------------------------------------|------------|------------|------------|------------|------------|------------|------------|-----------------------|-----------------------|
| Placer County | | | | | | | | | |
| Total, All Industries | 95,100 | 129,900 | 134,700 | 137,300 | 140,100 | 140,400 | 137,700 | 44.8% | 6.0% |
| Agriculture | 400 | 500 | 600 | 600 | 400 | 300 | 400 | 0.0% | -20.0% |
| Mining and Logging | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 0.0% | 0.0% |
| Construction | 8,400 | 16,600 | 16,800 | 16,800 | 16,100 | 14,700 | 12,300 | 46.4% | -25.9% |
| Manufacturing | 9,300 | 8,800 | 9,400 | 9,200 | 8,900 | 8,500 | 8,000 | -14.0% | -9.1% |
| Trade, Transportation and Utilities | 17,900 | 24,600 | 25,500 | 26,400 | 28,500 | 29,200 | 27,900 | 55.9% | 13.4% |
| Information | 2,100 | 2,800 | 2,900 | 2,700 | 2,900 | 2,600 | 2,400 | 14.3% | -14.3% |
| Financial Activities | 5,500 | 9,200 | 10,000 | 11,000 | 11,500 | 11,300 | 10,600 | 92.7% | 15.2% |
| Professional and Business Services | 10,400 | 13,800 | 13,900 | 14,600 | 14,600 | 14,300 | 14,900 | 43.3% | 8.0% |
| Educational and Health Services | 8,800 | 12,500 | 13,100 | 13,600 | 13,900 | 15,800 | 16,700 | 89.8% | 33.6% |
| Leisure and Hospitality | 12,600 | 16,400 | 17,200 | 18,100 | 18,700 | 19,100 | 19,600 | 55.6% | 19.5% |
| Other Services | 4,000 | 3,500 | 3,900 | 4,200 | 4,200 | 4,500 | 5,100 | 27.5% | 45.7% |
| Government | 15,700 | 20,900 | 21,500 | 20,000 | 20,300 | 20,000 | 20,000 | 27.4% | -4.3% |
| Sacramento Region | | | | | | | | | |
| Total, All Industries | 780,100 | 896,400 | 910,000 | 932,500 | 952,300 | 957,400 | 935,100 | 19.9% | 4.3% |
| Agricultural | 14,600 | 12,500 | 12,400 | 12,200 | 12,000 | 12,600 | 12,800 | -12.3% | 2.4% |
| Mining and Logging | 1,000 | 1,000 | 900 | 900 | 900 | 1,000 | 1,100 | 10.0% | 10.0% |
| Construction | 42,500 | 68,800 | 73,300 | 75,800 | 73,300 | 69,300 | 58,100 | 36.7% | -15.6% |
| Manufacturing | 49,700 | 44,500 | 45,500 | 45,600 | 45,200 | 43,400 | 41,300 | -16.9% | -7.2% |
| Trade, Transportation and Utilities | 134,500 | 150,900 | 153,900 | 157,000 | 162,200 | 162,000 | 155,400 | 15.5% | 3.0% |
| Information | 18,100 | 22,200 | 21,300 | 20,300 | 20,400 | 20,500 | 19,600 | 8.3% | -11.7% |
| Financial Activities | 53,600 | 60,800 | 61,900 | 65,000 | 66,100 | 63,300 | 58,900 | 9.9% | -3.1% |
| Professional and Business Services | 96,400 | 103,200 | 106,000 | 111,800 | 115,800 | 115,400 | 112,900 | 17.1% | 9.4% |
| Educational and Health Services | 68,500 | 86,000 | 89,600 | 93,400 | 97,600 | 102,500 | 105,700 | 54.3% | 22.9% |
| Leisure and Hospitality | 67,300 | 80,700 | 83,300 | 85,500 | 88,900 | 90,200 | 89,500 | 33.0% | 10.9% |
| Other Services | 26,300 | 29,400 | 29,800 | 29,700 | 29,500 | 30,200 | 30,300 | 15.2% | 3.1% |
| Government | 207,900 | 236,700 | 232,500 | 235,400 | 240,300 | 246,900 | 249,600 | 20.1% | 5.4% |
| Bay Area | | | | | | | | | |
| Total, All Industries | 2,970,900 | 2,859,300 | 2,836,400 | 2,858,600 | 2,911,500 | 2,959,400 | 2,950,200 | -0.7% | 3.2% |
| Agriculture | 12,700 | 12,700 | 11,300 | 10,600 | 10,500 | 10,900 | 10,200 | -17.3% | -17.3% |
| Mining and Logging | 2,900 | 1,300 | 1,500 | 1,500 | 1,700 | 1,700 | 1,700 | -41.4% | 30.8% |
| Construction | 136,400 | 152,300 | 155,000 | 158,600 | 163,200 | 164,300 | 152,900 | 12.1% | 0.4% |
| Manufacturing | 426,300 | 318,700 | 309,500 | 303,100 | 303,000 | 304,600 | 303,900 | -28.7% | -4.6% |
| Trade, Transportation and Utilities | 533,000 | 497,400 | 489,400 | 491,100 | 496,600 | 501,600 | 494,700 | -7.2% | -0.5% |
| Information | 107,700 | 110,300 | 107,400 | 106,800 | 106,600 | 108,100 | 109,500 | 1.7% | -0.7% |
| Financial Activities | 182,200 | 192,800 | 190,400 | 193,600 | 193,500 | 188,500 | 177,800 | -2.4% | -7.8% |
| Professional and Business Services | 546,200 | 488,800 | 489,300 | 499,400 | 518,600 | 540,200 | 550,700 | 0.8% | 12.7% |
| Educational and Health Services | 290,500 | 309,500 | 312,300 | 316,100 | 325,400 | 332,600 | 341,900 | 17.7% | 10.5% |
| Leisure and Hospitality | 250,100 | 261,900 | 265,500 | 271,900 | 280,700 | 289,100 | 293,400 | 17.3% | 12.0% |
| Other Services | 98,600 | 100,600 | 98,500 | 97,100 | 98,000 | 99,900 | 100,500 | 1.9% | -0.1% |
| Government | 384,500 | 413,200 | 406,300 | 408,900 | 413,800 | 418,100 | 412,800 | 7.4% | -0.1% |
| California | | | | | | | | | |
| Total, All Industries | 14,002,300 | 14,768,000 | 14,919,000 | 15,179,500 | 15,435,500 | 15,557,200 | 15,384,900 | 9.9% | 4.2% |
| Agriculture | 406,200 | 375,100 | 386,400 | 378,200 | 375,200 | 383,700 | 390,900 | -3.8% | 4.2% |
| Mining and Logging | 27,500 | 22,200 | 22,800 | 23,600 | 25,100 | 26,700 | 28,500 | 3.6% | 28.4% |
| Construction | 615,500 | 796,800 | 850,400 | 905,300 | 933,700 | 892,600 | 785,800 | 27.7% | -1.4% |
| Manufacturing | 1,853,800 | 1,542,400 | 1,521,300 | 1,502,600 | 1,488,000 | 1,464,400 | 1,425,400 | -23.1% | -7.6% |
| Trade, Transportation and Utilities | 2,589,400 | 2,718,400 | 2,755,600 | 2,822,100 | 2,878,600 | 2,912,800 | 2,854,700 | 10.2% | 5.0% |
| Information | 483,500 | 476,100 | 482,400 | 473,600 | 466,000 | 470,800 | 474,700 | -1.8% | -0.3% |
| Financial Activities | 785,600 | 885,700 | 902,200 | 927,200 | 935,200 | 904,600 | 849,900 | 8.2% | -4.0% |
| Professional and Business Services | 2,017,300 | 2,084,400 | 2,096,900 | 2,159,800 | 2,241,500 | 2,264,300 | 2,244,400 | 11.3% | 7.7% |
| Educational and Health Services | 1,332,100 | 1,536,300 | 1,560,000 | 1,586,500 | 1,614,000 | 1,670,300 | 1,725,300 | 29.5% | 12.3% |
| Leisure and Hospitality | 1,264,800 | 1,400,100 | 1,439,400 | 1,475,200 | 1,519,000 | 1,560,400 | 1,570,600 | 24.2% | 12.2% |
| Other Services | 460,700 | 504,300 | 503,900 | 505,500 | 507,100 | 512,200 | 515,400 | 11.9% | 2.2% |
| Government | 2,166,100 | 2,426,100 | 2,397,700 | 2,420,200 | 2,452,300 | 2,494,600 | 2,519,300 | 16.3% | 3.8% |

Center for Strategic Economic Research, February 2010

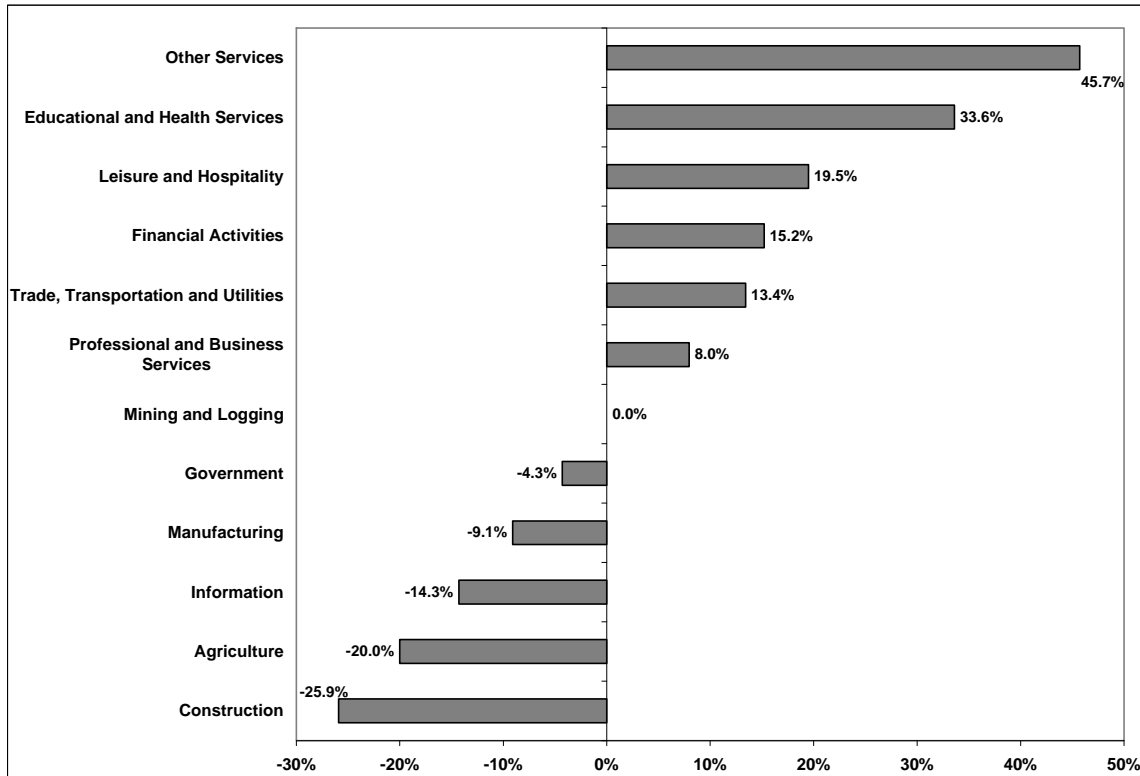
Data Source: California Employment Development Department, Annual Average Employment by Industry Data

Notes: The 'Other Services' encompasses establishments that provide repair and maintenance and personal services as well as religious, grantmaking, civil, and professional organizations and personal household activities.

Differences due to rounding.

The industry sectors that posted the highest five-year growth rates in Placer County, displayed in Figure 26, are Other Services; Educational & Health Services; and Leisure & Hospitality, with rates ranging from almost 20 percent to 46 percent.

FIGURE 26
PLACER COUNTY EMPLOYMENT GROWTH BY INDUSTRY SECTOR
FROM 2003 TO 2008



Center for Strategic Economic Research, February 2010

Data Source: California Employment Development Department, Annual Average Employment by Industry Data

Note: The 'Other Services' encompasses establishments that provide repair and maintenance and personal services as well as religious, grantmaking, civil, and professional organizations and personal household activities.

As shown in Figure 27, total employment in Placer County is projected to increase nearly 27 percent by 2018 to a total of around 174,000 jobs. The comparative areas are projected to have lower growth rates in this time period with 18 percent for the Sacramento Region, just over 14 percent for the Bay Area, and approximately 13 percent for California.

These employment projections show that the strongest growth through 2018 in Placer County will be in the Trade, Transportation, & Utilities; Professional & Business Services; and Construction sectors (about 44 percent, 39 percent, and 36 percent, respectively). Similar to Placer County, the Sacramento Region's, Bay Area's, and California's Professional & Business Services sector is projected to be in the top three performing sectors. The remaining top sectors in terms of projected growth vary among the three comparison areas—Trade, Transportation, & Utilities and Leisure & Hospitality in the Sacramento Region; Information and Leisure & Hospitality in the Bay Area; and the Trade, Transportation, & Utilities and Educational & Health Services sectors in California. By 2018, employment in the Manufacturing sector in Placer County is projected to decline by 11 percent while the Sacramento Region and California are projected to see positive growth in all sectors (with the exception of Agriculture in California). The Bay Area is projected to see a decline in two sectors—nearly -8 percent in Agriculture and over -2 percent in Manufacturing.

BUSINESS CLIMATE

FIGURE 27
EMPLOYMENT PROJECTIONS BY INDUSTRY (IN THOUSANDS)

| <i>Area/Industry</i> | <i>2008</i> | <i>2013</i> | <i>2018</i> | <i>% Change 2008-2018</i> | <i>% Change 2008-2013</i> |
|-------------------------------------|-------------|-------------|-------------|-------------------------------|-------------------------------|
| Placer County | | | | | |
| Total, All Industries | 137,700 | 154,326 | 174,179 | 26.5% | 12.1% |
| Agriculture | 400 | 442 | 463 | 15.8% | 10.5% |
| Construction | 12,300 | 14,045 | 16,705 | 35.8% | 14.2% |
| Manufacturing | 8,000 | 7,415 | 7,122 | -11.0% | -7.3% |
| Trade, Transportation and Utilities | 27,900 | 33,879 | 40,156 | 43.9% | 21.4% |
| Information | 2,400 | 2,640 | 2,880 | 20.0% | 10.0% |
| Financial Activities | 10,600 | 10,498 | 11,110 | 4.8% | -1.0% |
| Professional and Business Services | 14,900 | 17,719 | 20,739 | 39.2% | 18.9% |
| Educational and Health Services | 16,700 | 17,909 | 19,447 | 16.4% | 7.2% |
| Leisure and Hospitality | 19,600 | 22,816 | 25,832 | 31.8% | 16.4% |
| Government | 20,000 | 21,198 | 22,673 | 13.4% | 6.0% |
| Sacramento Region | | | | | |
| Total, All Industries | 935,100 | 1,022,447 | 1,103,195 | 18.0% | 9.3% |
| Agriculture | 12,800 | 13,320 | 13,349 | 4.3% | 4.1% |
| Construction | 58,100 | 64,174 | 68,817 | 18.4% | 10.5% |
| Manufacturing | 41,300 | 42,709 | 44,466 | 7.7% | 3.4% |
| Trade, Transportation and Utilities | 155,400 | 173,256 | 192,999 | 24.2% | 11.5% |
| Information | 19,600 | 21,142 | 23,075 | 17.7% | 7.9% |
| Financial Activities | 58,900 | 63,468 | 65,305 | 10.9% | 7.8% |
| Professional and Business Services | 112,900 | 134,738 | 149,577 | 32.5% | 19.3% |
| Educational and Health Services | 105,700 | 115,162 | 123,152 | 16.5% | 9.0% |
| Leisure and Hospitality | 89,500 | 98,068 | 106,423 | 18.9% | 9.6% |
| Government | 249,600 | 262,625 | 279,631 | 12.0% | 5.2% |
| Bay Area | | | | | |
| Total, All Industries | 2,950,200 | 3,179,280 | 3,371,997 | 14.3% | 7.8% |
| Agriculture | 10,200 | 9,732 | 9,433 | -7.5% | -4.6% |
| Construction | 152,900 | 155,690 | 159,085 | 4.0% | 1.8% |
| Manufacturing | 303,900 | 305,758 | 296,740 | -2.4% | 0.6% |
| Trade, Transportation and Utilities | 494,700 | 527,856 | 562,954 | 13.8% | 6.7% |
| Information | 109,500 | 126,772 | 145,556 | 32.9% | 15.8% |
| Financial Activities | 177,800 | 180,013 | 182,993 | 2.9% | 1.2% |
| Professional and Business Services | 550,700 | 652,295 | 722,206 | 31.1% | 18.4% |
| Educational and Health Services | 341,900 | 362,643 | 382,608 | 11.9% | 6.1% |
| Leisure and Hospitality | 293,400 | 320,372 | 338,750 | 15.5% | 9.2% |
| Government | 412,800 | 432,964 | 461,277 | 11.7% | 4.9% |
| California | | | | | |
| Total, All Industries | 15,384,900 | 16,482,056 | 17,421,064 | 13.2% | 7.1% |
| Agriculture | 390,900 | 392,864 | 384,025 | -1.8% | 0.5% |
| Construction | 785,800 | 850,006 | 911,336 | 16.0% | 8.2% |
| Manufacturing | 1,425,400 | 1,448,041 | 1,429,338 | 0.3% | 1.6% |
| Trade, Transportation and Utilities | 2,854,700 | 3,159,827 | 3,434,637 | 20.3% | 10.7% |
| Information | 474,700 | 512,013 | 528,596 | 11.4% | 7.9% |
| Financial Activities | 849,900 | 868,355 | 894,580 | 5.3% | 2.2% |
| Professional and Business Services | 2,244,400 | 2,516,034 | 2,645,988 | 17.9% | 12.1% |
| Educational and Health Services | 1,725,300 | 1,883,808 | 2,046,381 | 18.6% | 9.2% |
| Leisure and Hospitality | 1,570,600 | 1,689,268 | 1,807,935 | 15.1% | 7.6% |
| Government | 2,519,300 | 2,587,927 | 2,724,186 | 8.1% | 2.7% |

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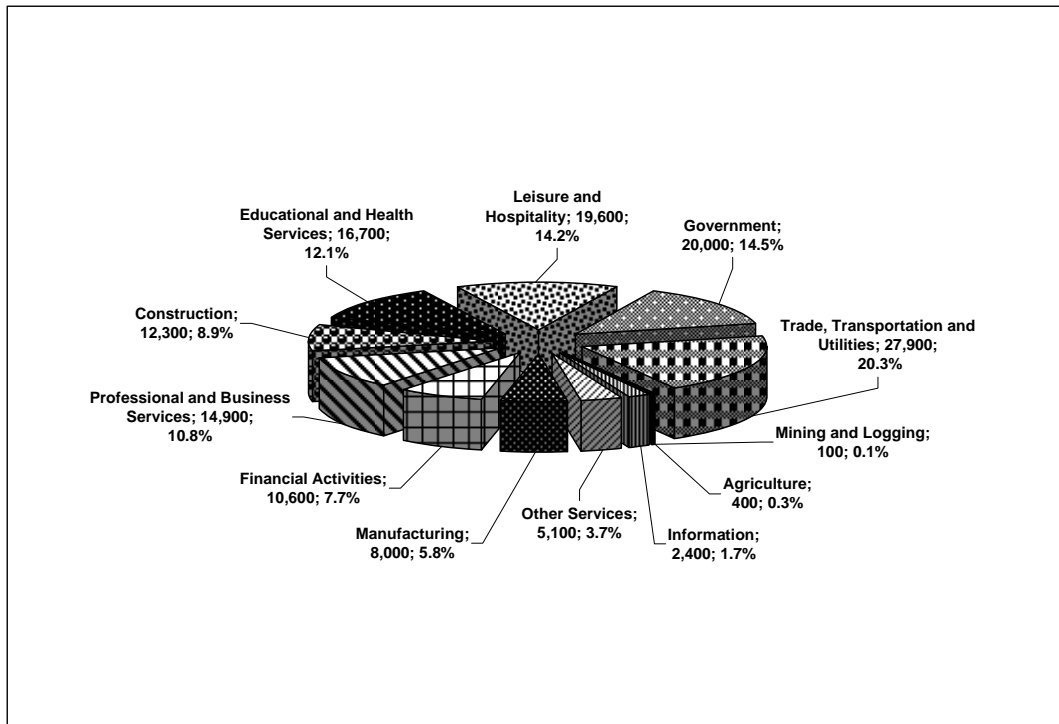
Data Sources: California Employment Development Department, Annual Average Employment by Industry Data and California Department of Transportation, 2008 Long-Term Socio-Economic Forecasts by County

Notes: Projections for Mining & Logging and Other Services industries not available.
Differences due to rounding.

BUSINESS CLIMATE

The largest proportions of total jobs in Placer County in 2008, shown in Figure 28, are in Trade, Transportation, & Utilities (around 20 percent with close to 28,000 jobs); Government (nearly 15 percent with 20,000 jobs); and Leisure & Hospitality (about 14 percent with almost 20,000 jobs). These industries combined make up almost half of Placer County's economy.

FIGURE 28
INDUSTRY COMPOSITION IN PLACER COUNTY IN 2008



Center for Strategic Economic Research, February 2010

Data Source: California Employment Development Department, Annual Average Employment by Industry Data

Note: The 'Other Services' encompasses establishments that provide repair and maintenance and personal services as well as religious, grantmaking, civil, and professional organizations and personal household activities.

As shown in Figure 29, Placer County's industry composition varies from the comparative areas in that Leisure & Hospitality is one of the top three largest sectors in its economy, due to various resorts and accommodations in its High Country area and the increased number of food services establishments that have been emerging in the County to meet demand of the growing population. All areas have Trade, Transportation, & Utilities and Government as one of their largest sectors in 2008, but unlike Placer County, Professional & Business Services rounds out the comparison areas' top three.

The Educational & Health Services sector experienced the greatest positive shift in composition in all comparative areas from 1998 to 2008—Placer County and the Sacramento Region, each with about 3 percentage points and nearly 2 percentage points in the Bay Area and California. In this time period, Manufacturing experienced the greatest negative shift in all four areas, ranging between -2 and -4 percentage points.

BUSINESS CLIMATE

FIGURE 29
INDUSTRY COMPOSITION

| Industry Sector | 1998 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | Shift | Shift |
|-------------------------------------|-------|-------|-------|-------|-------|-------|-------|-----------|-----------|
| | | | | | | | | 1998-2008 | 2003-2008 |
| Placer County | | | | | | | | | |
| Agriculture | 0.4% | 0.4% | 0.4% | 0.4% | 0.3% | 0.2% | 0.3% | -0.1% | -0.1% |
| Mining and Logging | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% | 0.0% | 0.0% |
| Construction | 8.8% | 12.8% | 12.5% | 12.2% | 11.5% | 10.5% | 8.9% | 0.1% | -3.8% |
| Manufacturing | 9.8% | 6.8% | 7.0% | 6.7% | 6.4% | 6.1% | 5.8% | -4.0% | -1.0% |
| Trade, Transportation and Utilities | 18.8% | 18.9% | 18.9% | 19.2% | 20.3% | 20.8% | 20.3% | 1.4% | 1.3% |
| Information | 2.2% | 2.2% | 2.2% | 2.0% | 2.1% | 1.9% | 1.7% | -0.5% | -0.4% |
| Financial Activities | 5.8% | 7.1% | 7.4% | 8.0% | 8.2% | 8.0% | 7.7% | 1.9% | 0.6% |
| Professional and Business Services | 10.9% | 10.6% | 10.3% | 10.6% | 10.4% | 10.2% | 10.8% | -0.1% | 0.2% |
| Educational and Health Services | 9.3% | 9.6% | 9.7% | 9.9% | 9.9% | 11.3% | 12.1% | 2.9% | 2.5% |
| Leisure and Hospitality | 13.2% | 12.6% | 12.8% | 13.2% | 13.3% | 13.6% | 14.2% | 1.0% | 1.6% |
| Other Services | 4.2% | 2.7% | 2.9% | 3.1% | 3.0% | 3.2% | 3.7% | -0.5% | 1.0% |
| Government | 16.5% | 16.1% | 16.0% | 14.6% | 14.5% | 14.2% | 14.5% | -2.0% | -1.6% |
| Sacramento Region | | | | | | | | | |
| Agricultural | 1.9% | 1.4% | 1.4% | 1.3% | 1.3% | 1.3% | 1.4% | -0.5% | 0.0% |
| Mining and Logging | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% | 0.0% | 0.0% |
| Construction | 5.4% | 7.7% | 8.1% | 8.1% | 7.7% | 7.2% | 6.2% | 0.8% | -1.5% |
| Manufacturing | 6.4% | 5.0% | 5.0% | 4.9% | 4.7% | 4.5% | 4.4% | -2.0% | -0.5% |
| Trade, Transportation and Utilities | 17.2% | 16.8% | 16.9% | 16.8% | 17.0% | 16.9% | 16.6% | -0.6% | -0.2% |
| Information | 2.3% | 2.5% | 2.3% | 2.2% | 2.1% | 2.1% | 2.1% | -0.2% | -0.4% |
| Financial Activities | 6.9% | 6.8% | 6.8% | 7.0% | 6.9% | 6.6% | 6.3% | -0.6% | -0.5% |
| Professional and Business Services | 12.4% | 11.5% | 11.6% | 12.0% | 12.2% | 12.1% | 12.1% | -0.3% | 0.6% |
| Educational and Health Services | 8.8% | 9.6% | 9.8% | 10.0% | 10.2% | 10.7% | 11.3% | 2.5% | 1.7% |
| Leisure and Hospitality | 8.6% | 9.0% | 9.2% | 9.2% | 9.3% | 9.4% | 9.6% | 0.9% | 0.6% |
| Other Services | 3.4% | 3.3% | 3.3% | 3.2% | 3.1% | 3.2% | 3.2% | -0.1% | 0.0% |
| Government | 26.7% | 26.4% | 25.5% | 25.2% | 25.2% | 25.8% | 26.7% | 0.0% | 0.3% |
| Bay Area | | | | | | | | | |
| Agriculture | 0.4% | 0.4% | 0.4% | 0.4% | 0.4% | 0.4% | 0.3% | -0.1% | -0.1% |
| Mining and Logging | 0.1% | 0.0% | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% | 0.0% | 0.0% |
| Construction | 4.6% | 5.3% | 5.5% | 5.5% | 5.6% | 5.6% | 5.2% | 0.6% | -0.1% |
| Manufacturing | 14.3% | 11.1% | 10.9% | 10.6% | 10.4% | 10.3% | 10.3% | -4.0% | -0.8% |
| Trade, Transportation and Utilities | 17.9% | 17.4% | 17.3% | 17.2% | 17.1% | 16.9% | 16.8% | -1.2% | -0.6% |
| Information | 3.6% | 3.9% | 3.8% | 3.7% | 3.7% | 3.7% | 3.7% | 0.1% | -0.1% |
| Financial Activities | 6.1% | 6.7% | 6.7% | 6.8% | 6.6% | 6.4% | 6.0% | -0.1% | -0.7% |
| Professional and Business Services | 18.4% | 17.1% | 17.3% | 17.5% | 17.8% | 18.3% | 18.7% | 0.3% | 1.6% |
| Educational and Health Services | 9.8% | 10.8% | 11.0% | 11.1% | 11.2% | 11.2% | 11.6% | 1.8% | 0.8% |
| Leisure and Hospitality | 8.4% | 9.2% | 9.4% | 9.5% | 9.6% | 9.8% | 9.9% | 1.5% | 0.8% |
| Other Services | 3.3% | 3.5% | 3.5% | 3.4% | 3.4% | 3.4% | 3.4% | 0.1% | -0.1% |
| Government | 12.9% | 14.5% | 14.3% | 14.3% | 14.2% | 14.1% | 14.0% | 1.1% | -0.5% |
| California | | | | | | | | | |
| Agriculture | 2.9% | 2.5% | 2.6% | 2.5% | 2.4% | 2.5% | 2.5% | -0.4% | 0.0% |
| Mining and Logging | 0.2% | 0.2% | 0.2% | 0.2% | 0.2% | 0.2% | 0.2% | 0.0% | 0.0% |
| Construction | 4.4% | 5.4% | 5.7% | 6.0% | 6.0% | 5.7% | 5.1% | 0.7% | -0.3% |
| Manufacturing | 13.2% | 10.4% | 10.2% | 9.9% | 9.6% | 9.4% | 9.3% | -4.0% | -1.2% |
| Trade, Transportation and Utilities | 18.5% | 18.4% | 18.5% | 18.6% | 18.6% | 18.7% | 18.6% | 0.1% | 0.1% |
| Information | 3.5% | 3.2% | 3.2% | 3.1% | 3.0% | 3.0% | 3.1% | -0.4% | -0.1% |
| Financial Activities | 5.6% | 6.0% | 6.0% | 6.1% | 6.1% | 5.8% | 5.5% | -0.1% | -0.5% |
| Professional and Business Services | 14.4% | 14.1% | 14.1% | 14.2% | 14.5% | 14.6% | 14.6% | 0.2% | 0.5% |
| Educational and Health Services | 9.5% | 10.4% | 10.5% | 10.5% | 10.5% | 10.7% | 11.2% | 1.7% | 0.8% |
| Leisure and Hospitality | 9.0% | 9.5% | 9.6% | 9.7% | 9.8% | 10.0% | 10.2% | 1.2% | 0.7% |
| Other Services | 3.3% | 3.4% | 3.4% | 3.3% | 3.3% | 3.3% | 3.4% | 0.1% | -0.1% |
| Government | 15.5% | 16.4% | 16.1% | 15.9% | 15.9% | 16.0% | 16.4% | 0.9% | -0.1% |

Center for Strategic Economic Research, February 2010

Data Source: California Employment Development Department, Annual Average Employment by Industry Data

Note: The 'Other Services' encompasses establishments that provide repair and maintenance and personal services as well as religious, grantmaking, civil, and professional organizations and personal household activities.

Differences due to rounding.

As shown in Figure 30, it is projected that, by 2018, the highest proportion of employment in Placer County will be in Trade, Transportation, & Utilities (about 23 percent); Leisure & Hospitality (almost 15 percent); and Government (13 percent). Government; Trade, Transportation, & Utilities; and Professional & Business Services are projected to continue to comprise the largest proportions of the Sacramento Region, Bay Area, and California economies in 2018. The Trade, Transportation, & Utilities sector is projected to experience the greatest shift in composition in Placer County by 2018 (nearly 3 percentage points). The Sacramento Region's and Bay Area's Professional & Business Services sector is projected to see the greatest composition shift (nearly 2 and 3 percentage points, respectively), while the Trade, Transportation, & Utilities sector is projected to experience the greatest composition shift in California (about 1 percentage point). Placer County's Manufacturing sector is projected to experience the greatest decrease in proportion of total employment (approximately -2 percentage points between 2008 and 2018). The Sacramento Region's Government sector is forecast to see the greatest negative shift in employment composition (just over -1 percentage point), while the Bay Area and California are projected to see the greatest negative shift in the Manufacturing sector (around -2 and -1 percentage points, respectively).

BUSINESS CLIMATE

**FIGURE 30
INDUSTRY COMPOSITION PROJECTIONS**

| Area/Industry | 2008 | 2013 | 2018 | Shift | |
|-------------------------------------|-------|-------|-------|-----------|-----------|
| | | | | 2008-2018 | 2008-2013 |
| Placer County | | | | | |
| Agriculture | 0.3% | 0.3% | 0.3% | 0.0% | 0.0% |
| Construction | 8.9% | 9.1% | 9.6% | 0.7% | 0.2% |
| Manufacturing | 5.8% | 4.8% | 4.1% | -1.7% | -1.0% |
| Trade, Transportation and Utilities | 20.3% | 22.0% | 23.1% | 2.8% | 1.7% |
| Information | 1.7% | 1.7% | 1.7% | -0.1% | 0.0% |
| Financial Activities | 7.7% | 6.8% | 6.4% | -1.3% | -0.9% |
| Professional and Business Services | 10.8% | 11.5% | 11.9% | 1.1% | 0.7% |
| Educational and Health Services | 12.1% | 11.6% | 11.2% | -1.0% | -0.5% |
| Leisure and Hospitality | 14.2% | 14.8% | 14.8% | 0.6% | 0.6% |
| Government | 14.5% | 13.7% | 13.0% | -1.5% | -0.8% |
| Sacramento Region | | | | | |
| Agriculture | 1.4% | 1.3% | 1.2% | -0.2% | -0.1% |
| Construction | 6.2% | 6.3% | 6.2% | 0.0% | 0.1% |
| Manufacturing | 4.4% | 4.2% | 4.0% | -0.4% | -0.2% |
| Trade, Transportation and Utilities | 16.6% | 16.9% | 17.5% | 0.9% | 0.3% |
| Information | 2.1% | 2.1% | 2.1% | 0.0% | 0.0% |
| Financial Activities | 6.3% | 6.2% | 5.9% | -0.4% | -0.1% |
| Professional and Business Services | 12.1% | 13.2% | 13.6% | 1.5% | 1.1% |
| Educational and Health Services | 11.3% | 11.3% | 11.2% | -0.1% | 0.0% |
| Leisure and Hospitality | 9.6% | 9.6% | 9.6% | 0.1% | 0.0% |
| Government | 26.7% | 25.7% | 25.3% | -1.3% | -1.0% |
| Bay Area | | | | | |
| Agriculture | 0.3% | 0.3% | 0.3% | -0.1% | 0.0% |
| Construction | 5.2% | 4.9% | 4.7% | -0.5% | -0.3% |
| Manufacturing | 10.3% | 9.6% | 8.8% | -1.5% | -0.7% |
| Trade, Transportation and Utilities | 16.8% | 16.6% | 16.7% | -0.1% | -0.2% |
| Information | 3.7% | 4.0% | 4.3% | 0.6% | 0.3% |
| Financial Activities | 6.0% | 5.7% | 5.4% | -0.6% | -0.4% |
| Professional and Business Services | 18.7% | 20.5% | 21.4% | 2.8% | 1.9% |
| Educational and Health Services | 11.6% | 11.4% | 11.3% | -0.2% | -0.2% |
| Leisure and Hospitality | 9.9% | 10.1% | 10.0% | 0.1% | 0.1% |
| Government | 14.0% | 13.6% | 13.7% | -0.3% | -0.4% |
| California | | | | | |
| Agriculture | 2.5% | 2.4% | 2.2% | -0.3% | -0.2% |
| Construction | 5.1% | 5.2% | 5.2% | 0.1% | 0.0% |
| Manufacturing | 9.3% | 8.8% | 8.2% | -1.1% | -0.5% |
| Trade, Transportation and Utilities | 18.6% | 19.2% | 19.7% | 1.2% | 0.6% |
| Information | 3.1% | 3.1% | 3.0% | -0.1% | 0.0% |
| Financial Activities | 5.5% | 5.3% | 5.1% | -0.4% | -0.3% |
| Professional and Business Services | 14.6% | 15.3% | 15.2% | 0.6% | 0.7% |
| Educational and Health Services | 11.2% | 11.4% | 11.7% | 0.5% | 0.2% |
| Leisure and Hospitality | 10.2% | 10.2% | 10.4% | 0.2% | 0.0% |
| Government | 16.4% | 15.7% | 15.6% | -0.7% | -0.7% |

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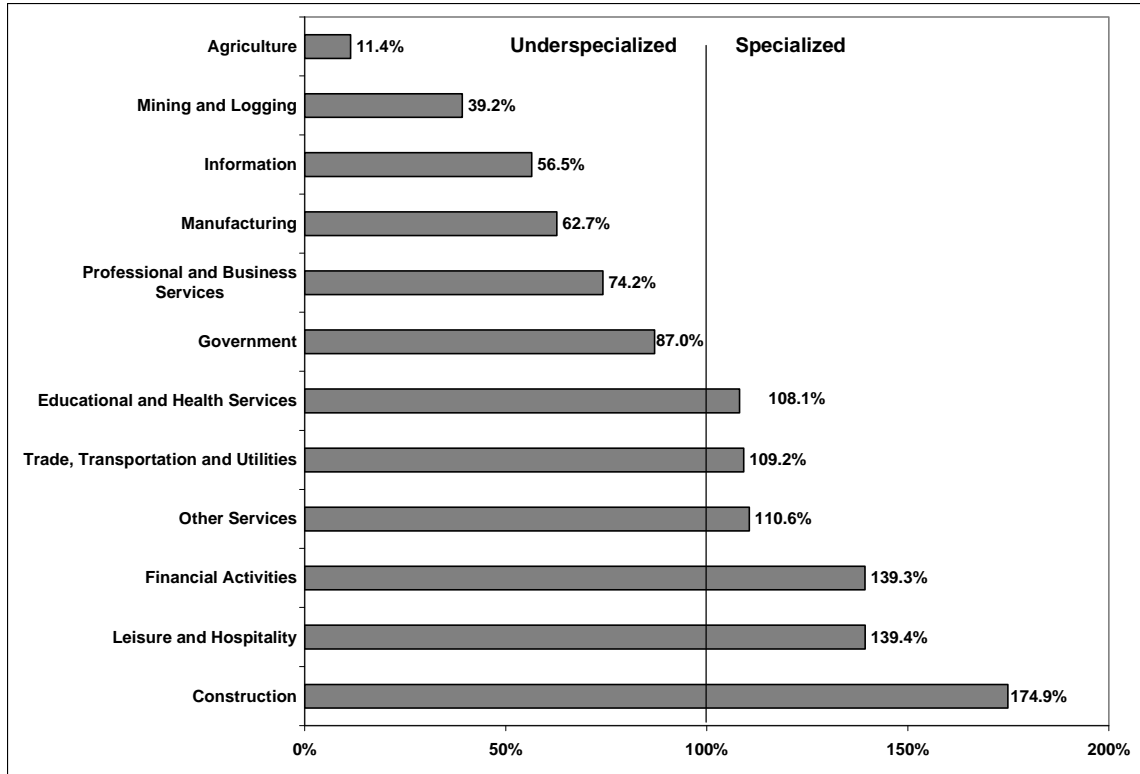
Data Sources: California Employment Development Department, Annual Average Employment by Industry Data and California Department of Transportation, 2008 Long-Term Socio-Economic Forecasts by County

Notes: Projections for Mining & Logging and Other Services industries not available.
Differences due to rounding.

BUSINESS CLIMATE

Specialization, illustrated in Figure 31, compares the proportion of total employment between Placer County and California—a level of specialization over 100 percent in Placer County indicates that the County is specialized in that sector (the County has a greater proportion of total employment compared to the state). Placer County is specialized in six sectors: Construction; Leisure & Hospitality; Financial Activities; Other Services; Trade, Transportation, & Utilities; and Educational & Health Services, while the County is underspecialized in the remaining six sectors.

FIGURE 31
PLACER COUNTY INDUSTRY SPECIALIZATION IN 2008



Center for Strategic Economic Research, February 2010

Data Source: California Employment Development Department, Annual Average Employment by Industry Data

Notes: Specialization reflects a comparison of the proportion of total employment in Placer County compared to the statewide average.

The 'Other Services' encompasses establishments that provide repair and maintenance and personal services as well as religious, grantmaking, civil, and professional organizations and personal household activities.

BUSINESS CLIMATE

Over the past ten years (1998 to 2008), three sectors in Placer County showed positive increases in their level of specialization, as shown in Figure 32: Financial Activities; Trade, Transportation, & Utilities; and Educational & Health Services.

**FIGURE 32
PLACER COUNTY INDUSTRY SPECIALIZATION**

| <i>Industry Sector</i> | <i>1998</i> | <i>2003</i> | <i>2004</i> | <i>2005</i> | <i>2006</i> | <i>2007</i> | <i>2008</i> | <i>% Change 1998-2008</i> | <i>% Change 2003-2008</i> |
|-------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------------------------|-------------------------------|
| Agriculture | 14.5% | 15.2% | 17.2% | 17.5% | 11.7% | 8.7% | 11.4% | -21.1% | -24.6% |
| Mining and Logging | 53.5% | 51.2% | 48.6% | 46.8% | 43.9% | 41.5% | 39.2% | -26.8% | -23.4% |
| Construction | 200.9% | 236.8% | 218.8% | 205.2% | 190.0% | 182.5% | 174.9% | -13.0% | -26.2% |
| Manufacturing | 73.9% | 64.9% | 68.4% | 67.7% | 65.9% | 64.3% | 62.7% | -15.1% | -3.3% |
| Trade, Transportation and Utilities | 101.8% | 102.9% | 102.5% | 103.4% | 109.1% | 111.1% | 109.2% | 7.3% | 6.1% |
| Information | 64.0% | 66.9% | 66.6% | 63.0% | 68.6% | 61.2% | 56.5% | -11.7% | -15.5% |
| Financial Activities | 103.1% | 118.1% | 122.8% | 131.2% | 135.5% | 138.4% | 139.3% | 35.2% | 18.0% |
| Professional and Business Services | 75.9% | 75.3% | 73.4% | 74.7% | 71.8% | 70.0% | 74.2% | -2.3% | -1.5% |
| Educational and Health Services | 97.3% | 92.5% | 93.0% | 94.8% | 94.9% | 104.8% | 108.1% | 11.2% | 16.9% |
| Leisure and Hospitality | 146.7% | 133.2% | 132.3% | 135.6% | 135.6% | 135.6% | 139.4% | -4.9% | 4.7% |
| Other Services | 127.8% | 78.9% | 85.7% | 91.9% | 91.3% | 97.4% | 110.6% | -13.5% | 40.1% |
| Government | 106.7% | 100.5% | 100.1% | 100.1% | 91.7% | 90.4% | 87.0% | -18.5% | -13.4% |

Center for Strategic Economic Research, February 2010

Data Source: California Employment Development Department, Annual Average Employment by Industry Data

Notes: Specialization reflects a comparison of the proportion of total employment in Placer County to the statewide average.

The 'Other Services' encompasses establishments that provide repair and maintenance and personal services as well as religious, grantmaking, civil, and professional organizations and personal household activities.

Differences due to rounding.

By 2018, as shown in Figure 33, it is projected that Placer County will increase its specialization in five sectors: Agriculture; Construction; Trade, Transportation, & Utilities; Professional & Business Services; and Leisure & Hospitality. The other four major sectors will see a decline in their level of specialization with Financial Activities remaining specialized and Educational & Health Services dropping just under the California composition.

**FIGURE 33
PLACER COUNTY INDUSTRY SPECIALIZATION
PROJECTIONS**

| <i>Area/Industry</i> | <i>2008</i> | <i>2013</i> | <i>2018</i> | <i>% Change 2008-2018</i> | <i>% Change 2008-2013</i> |
|-------------------------------------|-------------|-------------|-------------|-------------------------------|-------------------------------|
| Agriculture | 11.4% | 12.0% | 12.1% | 5.5% | 5.1% |
| Construction | 174.9% | 176.5% | 183.3% | 4.8% | 0.9% |
| Manufacturing | 62.7% | 54.7% | 49.8% | -20.5% | -12.8% |
| Trade, Transportation and Utilities | 109.2% | 114.5% | 116.9% | 7.1% | 4.9% |
| Information | 56.5% | 55.1% | 54.5% | -3.5% | -2.5% |
| Financial Activities | 139.3% | 129.1% | 124.2% | -10.9% | -7.3% |
| Professional and Business Services | 74.2% | 75.2% | 78.4% | 5.7% | 1.4% |
| Educational and Health Services | 108.1% | 101.5% | 95.0% | -12.1% | -6.1% |
| Leisure and Hospitality | 139.4% | 144.3% | 142.9% | 2.5% | 3.5% |
| Government | 88.7% | 87.5% | 83.2% | -6.1% | -1.4% |

Center for Strategic Economic Research, February 2010

Data Sources: California Employment Development Department, Annual Average Employment by Industry Data and California Department of Transportation, 2008 Long-Term Socio-Economic Forecasts by County

Notes: Projections for Mining & Logging and Other Services industries not available.

Specialization reflects a comparison of the proportion of total employment in Placer County to the statewide average. Differences due to rounding.

BUSINESS CLIMATE

Figure 34 shows that there were over 10,800 business establishments in 2008 in Placer County—a number which has increased almost 20 percent since 2003 and is nearly 14 percent of total establishments in the Sacramento Region. Placer County's establishment growth is higher than all of the comparison areas: the Sacramento Region (18 percent); the Bay Area (just over 12 percent); and California (almost 15 percent). In all comparison areas, establishments in the Other Services sector experienced the greatest percentage increase from 2003 to 2008 ranging from around 32 percent in California to 41 percent in Placer County. The second-highest percent growth of establishments in this time period was seen in the Financial Activities sector in Placer County and the Sacramento Region and the Education & Health Services sector in the Bay Area and California. All comparison areas' Natural Resources & Mining establishments experienced the greatest percentage decrease of all establishments in this five-year period while Information in Placer County and the Sacramento Region and Manufacturing in the Bay Area and California had the second-highest negative growth rates.

BUSINESS CLIMATE

FIGURE 34
ESTABLISHMENTS BY INDUSTRY

| Area / Industry | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | % Change 2003-2008 |
|-------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------------------|
| Placer County | | | | | | | |
| Total All Industries | 9,039 | 9,338 | 9,578 | 10,388 | 10,421 | 10,805 | 19.5% |
| Mining and Logging | 79 | 73 | 68 | 68 | 60 | 66 | -16.5% |
| Construction | 1,400 | 1,440 | 1,439 | 1,536 | 1,502 | 1,419 | 1.4% |
| Manufacturing | 311 | 309 | 303 | 304 | 294 | 292 | -6.1% |
| Trade, Transportation and Utilities | 1,540 | 1,530 | 1,506 | 1,576 | 1,591 | 1,569 | 1.9% |
| Information | 140 | 142 | 145 | 153 | 142 | 124 | -11.4% |
| Financial Activities | 996 | 1,079 | 1,128 | 1,280 | 1,288 | 1,241 | 24.6% |
| Professional and Business Services | 1,378 | 1,438 | 1,481 | 1,714 | 1,685 | 1,671 | 21.3% |
| Educational and Health Services | 873 | 895 | 916 | 984 | 985 | 995 | 14.0% |
| Leisure and Hospitality | 745 | 777 | 802 | 858 | 851 | 888 | 19.2% |
| Other Services | 1,304 | 1,389 | 1,518 | 1,643 | 1,682 | 1,839 | 41.0% |
| Government | 257 | 259 | 267 | 270 | 276 | 278 | 8.2% |
| Sacramento Region | | | | | | | |
| Total All Industries | 67,563 | 69,544 | 70,797 | 75,213 | 76,423 | 79,741 | 18.0% |
| Mining and Logging | 1,558 | 1,485 | 1,409 | 1,385 | 1,347 | 1,318 | -15.4% |
| Construction | 5,489 | 5,619 | 5,593 | 5,991 | 5,884 | 5,639 | 2.7% |
| Manufacturing | 1,758 | 1,769 | 1,728 | 1,707 | 1,650 | 1,631 | -7.2% |
| Trade, Transportation and Utilities | 8,844 | 8,881 | 8,742 | 9,113 | 8,990 | 8,778 | -0.7% |
| Information | 743 | 716 | 699 | 740 | 711 | 684 | -7.9% |
| Financial Activities | 5,102 | 5,265 | 5,403 | 5,892 | 5,873 | 5,631 | 10.4% |
| Professional and Business Services | 7,878 | 7,953 | 8,050 | 8,816 | 8,733 | 8,639 | 9.7% |
| Educational and Health Services | 5,018 | 5,121 | 5,160 | 5,341 | 5,390 | 5,422 | 8.1% |
| Leisure and Hospitality | 4,301 | 4,352 | 4,348 | 4,629 | 4,656 | 4,697 | 9.2% |
| Other Services | 19,652 | 21,241 | 22,523 | 24,419 | 25,428 | 27,453 | 39.7% |
| Government | 7,160 | 7,109 | 7,120 | 7,176 | 7,267 | 7,418 | 3.6% |
| Bay Area | | | | | | | |
| Total All Industries | 204,430 | 205,353 | 203,954 | 212,751 | 213,642 | 229,543 | 12.3% |
| Mining and Logging | 1,028 | 967 | 906 | 871 | 799 | 763 | -25.8% |
| Construction | 13,528 | 13,398 | 13,097 | 13,617 | 13,465 | 13,142 | -2.9% |
| Manufacturing | 8,760 | 8,310 | 7,864 | 7,648 | 7,294 | 7,112 | -18.8% |
| Trade, Transportation and Utilities | 30,217 | 29,546 | 28,921 | 29,776 | 29,203 | 28,822 | -4.6% |
| Information | 4,048 | 3,696 | 3,487 | 3,529 | 3,418 | 3,377 | -16.6% |
| Financial Activities | 17,787 | 17,781 | 17,716 | 18,646 | 18,392 | 17,820 | 0.2% |
| Professional and Business Services | 35,523 | 34,635 | 33,836 | 36,061 | 35,570 | 35,371 | -0.4% |
| Educational and Health Services | 17,929 | 18,086 | 17,961 | 18,646 | 18,621 | 18,669 | 4.1% |
| Leisure and Hospitality | 15,300 | 15,285 | 15,127 | 15,782 | 15,768 | 15,873 | 3.7% |
| Other Services | 55,845 | 59,336 | 60,841 | 64,097 | 65,782 | 76,244 | 36.5% |
| Government | 4,306 | 4,180 | 4,065 | 4,045 | 4,029 | 4,193 | -2.6% |
| California | | | | | | | |
| Total All Industries | 1,159,321 | 1,193,718 | 1,221,898 | 1,265,069 | 1,292,147 | 1,327,351 | 14.5% |
| Mining and Logging | 21,913 | 20,933 | 19,938 | 19,569 | 18,843 | 18,420 | -15.9% |
| Construction | 71,781 | 73,320 | 73,338 | 78,567 | 77,942 | 76,124 | 6.1% |
| Manufacturing | 51,150 | 49,522 | 47,042 | 46,428 | 44,639 | 43,745 | -14.5% |
| Trade, Transportation and Utilities | 180,341 | 179,770 | 176,930 | 187,729 | 185,131 | 181,624 | 0.7% |
| Information | 21,150 | 20,145 | 19,209 | 20,060 | 19,400 | 19,145 | -9.5% |
| Financial Activities | 86,525 | 88,217 | 89,331 | 96,921 | 95,848 | 92,396 | 6.8% |
| Professional and Business Services | 153,774 | 153,857 | 152,523 | 167,345 | 165,473 | 163,813 | 6.5% |
| Educational and Health Services | 91,642 | 93,515 | 93,827 | 97,719 | 97,652 | 98,170 | 7.1% |
| Leisure and Hospitality | 80,380 | 81,721 | 81,494 | 85,607 | 85,567 | 85,772 | 6.7% |
| Other Services | 345,158 | 371,513 | 391,799 | 415,073 | 428,226 | 455,062 | 31.8% |
| Government | 30,722 | 30,803 | 30,735 | 30,972 | 31,501 | 31,761 | 3.4% |

Center for Strategic Economic Research, February 2010

Data Source: California Employment Development Department, Annual Average Quarterly Census of Employment and Wages Data

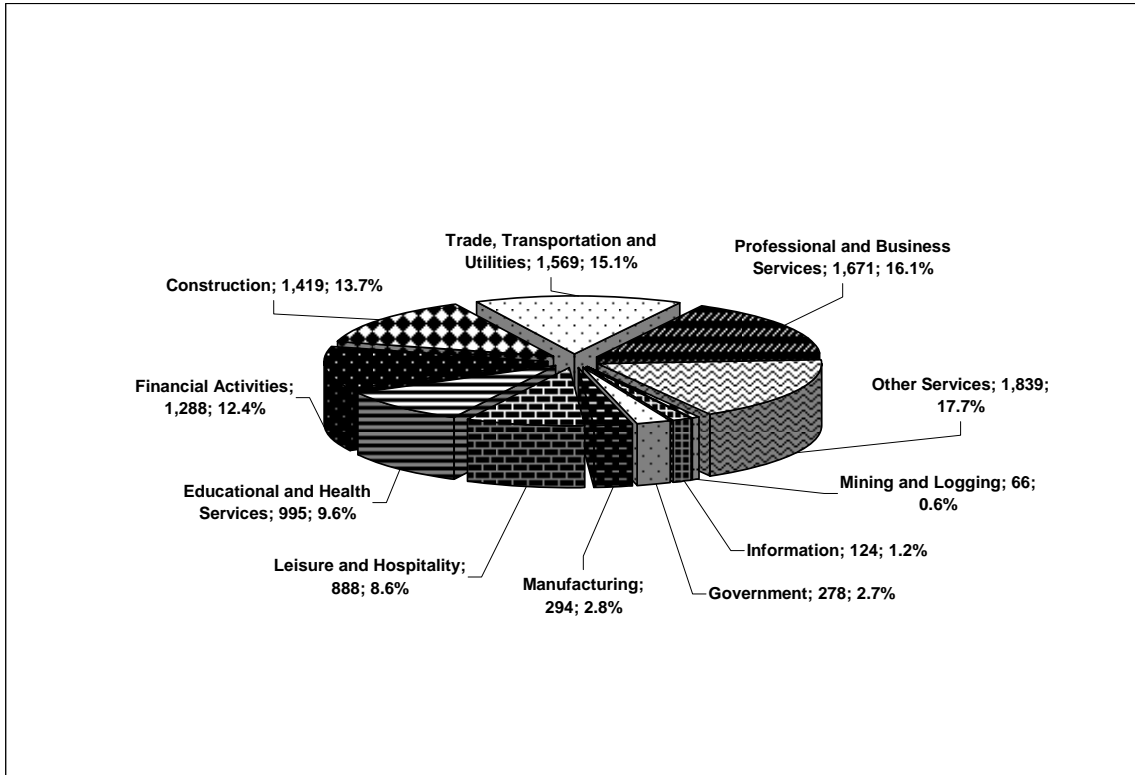
Notes: Agriculture sector not included in this data.

The 'Other Services' encompasses establishments that provide repair and maintenance and personal services as well as religious, grantmaking, civil, and professional organizations and personal household activities. Number of establishments at the sector level are limited due to non-disclosure restrictions. The sum of the sectors do not equal the total because 'Total All Industries' includes all establishments not included at sector level.

BUSINESS CLIMATE

The highest proportions of establishments in Placer County are in Other Services; Professional & Business Services; and Trade, Transportation, & Utilities. As shown in Figure 35, each of these sectors has between around 1,600 and 1,800 establishments and account for about 15 to 18 percent of the County’s total number of establishments. Combined, these sectors make up almost half of the establishments in Placer County.

FIGURE 35
INDUSTRY COMPOSITION IN PLACER COUNTY BY
ESTABLISHMENTS IN 2008



Center for Strategic Economic Research, February 2010

Data Source: California Employment Development Department, Annual Average Quarterly Census of Employment and Wages Data

Notes: Agriculture sector not included in this data.

The ‘Other Services’ encompasses establishments that provide repair and maintenance and personal services as well as religious, grantmaking, civil, and professional organizations and personal household activities.

Number of establishments at the sector level are limited due to non-disclosure restrictions, therefore the sum of the sectors do not equal 100 percent or the value of ‘Total All Industries’ as this includes all establishments not included at the sector level.

As illustrated in Figure 36, establishments classified in the Other Services; Professional & Business Services; and Trade, Transportation, & Utilities sectors have the largest proportion of all industries in Placer County, the Sacramento Region, the Bay Area, and California. The largest positive composition shift of establishments in all comparison areas was in the Other Services sector, with shifts between nearly 3 and 6 percentage points from 2003 to 2008. Trade, Transportation, & Utilities had the highest decreases in composition in all areas—between around -2 and -3 percentage points.

BUSINESS CLIMATE

FIGURE 36
INDUSTRY COMPOSITION BY ESTABLISHMENTS

| Area / Industry | | | | | | | Shift |
|-------------------------------------|-------|-------|-------|-------|-------|-------|-----------|
| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2003-2008 |
| Placer County | | | | | | | |
| Mining and Logging | 0.9% | 0.8% | 0.7% | 0.7% | 0.6% | 0.6% | -0.3% |
| Construction | 15.5% | 15.4% | 15.0% | 14.8% | 14.4% | 13.1% | -2.4% |
| Manufacturing | 3.4% | 3.3% | 3.2% | 2.9% | 2.8% | 2.7% | -0.7% |
| Trade, Transportation and Utilities | 17.0% | 16.4% | 15.7% | 15.2% | 15.3% | 14.5% | -2.5% |
| Information | 1.5% | 1.5% | 1.5% | 1.5% | 1.4% | 1.1% | -0.4% |
| Financial Activities | 11.0% | 11.6% | 11.8% | 12.3% | 12.4% | 11.5% | 0.5% |
| Professional and Business Services | 15.2% | 15.4% | 15.5% | 16.5% | 16.2% | 15.5% | 0.2% |
| Educational and Health Services | 9.7% | 9.6% | 9.6% | 9.5% | 9.5% | 9.2% | -0.4% |
| Leisure and Hospitality | 8.2% | 8.3% | 8.4% | 8.3% | 8.2% | 8.2% | 0.0% |
| Other Services | 14.4% | 14.9% | 15.8% | 15.8% | 16.1% | 17.0% | 2.6% |
| Government | 2.8% | 2.8% | 2.8% | 2.6% | 2.6% | 2.6% | -0.3% |
| Sacramento Region | | | | | | | |
| Mining and Logging | 2.3% | 2.1% | 2.0% | 1.8% | 1.8% | 1.7% | -0.7% |
| Construction | 8.1% | 8.1% | 7.9% | 8.0% | 7.7% | 7.1% | -1.1% |
| Manufacturing | 2.6% | 2.5% | 2.4% | 2.3% | 2.2% | 2.0% | -0.6% |
| Trade, Transportation and Utilities | 13.1% | 12.8% | 12.3% | 12.1% | 11.8% | 11.0% | -2.1% |
| Information | 1.1% | 1.0% | 1.0% | 1.0% | 0.9% | 0.9% | -0.2% |
| Financial Activities | 7.6% | 7.6% | 7.6% | 7.8% | 7.7% | 7.1% | -0.5% |
| Professional and Business Services | 11.7% | 11.4% | 11.4% | 11.7% | 11.4% | 10.8% | -0.8% |
| Educational and Health Services | 7.4% | 7.4% | 7.3% | 7.1% | 7.1% | 6.8% | -0.6% |
| Leisure and Hospitality | 6.4% | 6.3% | 6.1% | 6.2% | 6.1% | 5.9% | -0.5% |
| Other Services | 29.1% | 30.5% | 31.8% | 32.5% | 33.3% | 34.4% | 5.3% |
| Government | 10.6% | 10.2% | 10.1% | 9.5% | 9.5% | 9.3% | -1.3% |
| Bay Area | | | | | | | |
| Mining and Logging | 0.5% | 0.5% | 0.4% | 0.4% | 0.4% | 0.3% | -0.2% |
| Construction | 6.6% | 6.5% | 6.4% | 6.4% | 6.3% | 5.7% | -0.9% |
| Manufacturing | 4.3% | 4.0% | 3.9% | 3.6% | 3.4% | 3.1% | -1.2% |
| Trade, Transportation and Utilities | 14.8% | 14.4% | 14.2% | 14.0% | 13.7% | 12.6% | -2.2% |
| Information | 2.0% | 1.8% | 1.7% | 1.7% | 1.6% | 1.5% | -0.5% |
| Financial Activities | 8.7% | 8.7% | 8.7% | 8.8% | 8.6% | 7.8% | -0.9% |
| Professional and Business Services | 17.4% | 16.9% | 16.6% | 16.9% | 16.6% | 15.4% | -2.0% |
| Educational and Health Services | 8.8% | 8.8% | 8.8% | 8.8% | 8.7% | 8.1% | -0.6% |
| Leisure and Hospitality | 7.5% | 7.4% | 7.4% | 7.4% | 7.4% | 6.9% | -0.6% |
| Other Services | 27.3% | 28.9% | 29.8% | 30.1% | 30.8% | 33.2% | 5.9% |
| Government | 2.1% | 2.0% | 2.0% | 1.9% | 1.9% | 1.8% | -0.3% |
| California | | | | | | | |
| Mining and Logging | 1.9% | 1.8% | 1.6% | 1.5% | 1.5% | 1.4% | -0.5% |
| Construction | 6.2% | 6.1% | 6.0% | 6.2% | 6.0% | 5.7% | -0.5% |
| Manufacturing | 4.4% | 4.1% | 3.8% | 3.7% | 3.5% | 3.3% | -1.1% |
| Trade, Transportation and Utilities | 15.6% | 15.1% | 14.5% | 14.8% | 14.3% | 13.7% | -1.9% |
| Information | 1.8% | 1.7% | 1.6% | 1.6% | 1.5% | 1.4% | -0.4% |
| Financial Activities | 7.5% | 7.4% | 7.3% | 7.7% | 7.4% | 7.0% | -0.5% |
| Professional and Business Services | 13.3% | 12.9% | 12.5% | 13.2% | 12.8% | 12.3% | -0.9% |
| Educational and Health Services | 7.9% | 7.8% | 7.7% | 7.7% | 7.6% | 7.4% | -0.5% |
| Leisure and Hospitality | 6.9% | 6.8% | 6.7% | 6.8% | 6.6% | 6.5% | -0.5% |
| Other Services | 29.8% | 31.1% | 32.1% | 32.8% | 33.1% | 34.3% | 4.5% |
| Government | 2.6% | 2.6% | 2.5% | 2.4% | 2.4% | 2.4% | -0.3% |

Center for Strategic Economic Research, February 2010

Data Source: California Employment Development Department, Annual Average Quarterly Census of Employment and Wages Data

Notes: Agriculture sector not included in this data.

The 'Other Services' encompasses establishments that provide repair and maintenance and personal services as well as religious, grantmaking, civil, and professional organizations and personal household activities.

Number of establishments at the sector level are limited due to non-disclosure restrictions.

The sum of the sectors do not equal 100 percent because 'Total All Industries' includes all establishments not included at sector level.

BUSINESS CLIMATE

Labor Force

Figure 37 shows that in 2008, Placer County had a labor force of over 176,000 people, with almost 165,000 employed. The County had a 2008 unemployment rate of 6.5 percent, lower than the Sacramento Region and California, but above the Bay Area. Placer County had the highest increase in its labor force, in line with its population growth—56 percent growth from 1998 to 2008, significantly greater than the Sacramento Region (about 26 percent), the Bay Area (around 2 percent), and California (nearly 14 percent).

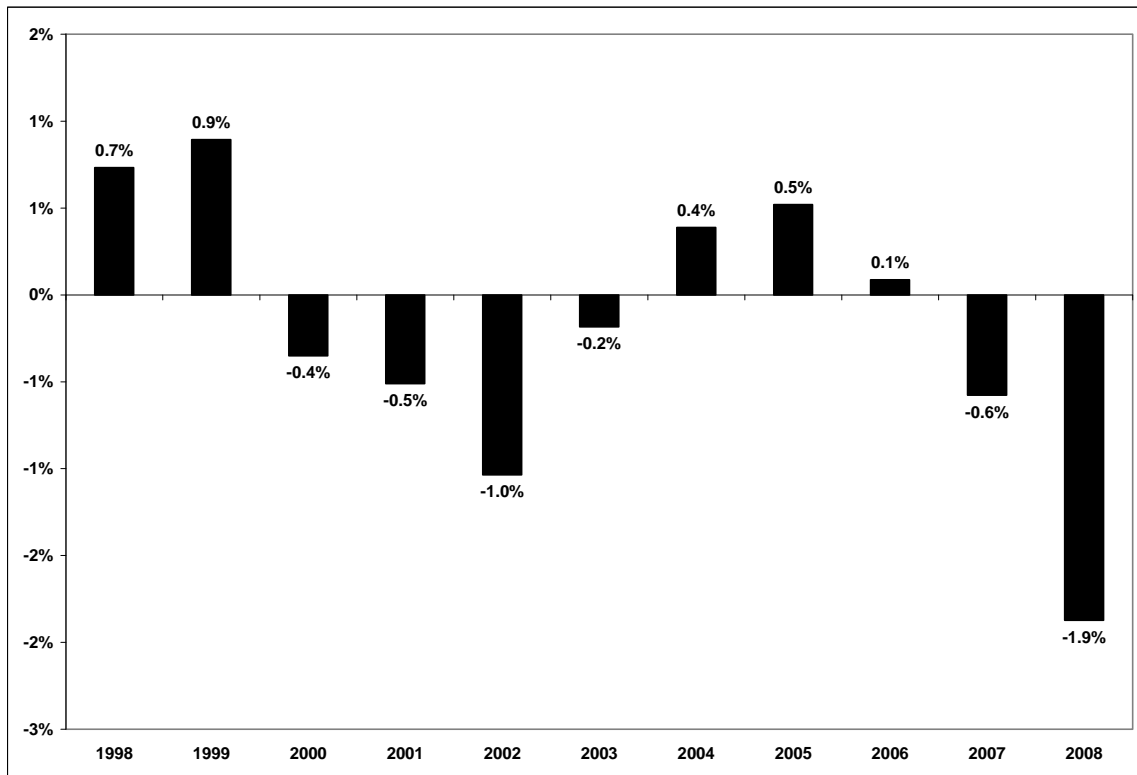
FIGURE 37
ANNUAL LABOR FORCE, EMPLOYMENT, UNEMPLOYMENT, AND
UNEMPLOYMENT RATE

| <i>Area/Factor</i> | <i>1998</i> | <i>2003</i> | <i>2004</i> | <i>2005</i> | <i>2006</i> | <i>2007</i> | <i>2008</i> | <i>% Change 1998-2008</i> | <i>% Change 2003-2008</i> |
|--------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------------------------|-------------------------------|
| Placer County | | | | | | | | | |
| Labor Force | 113,300 | 153,900 | 159,100 | 165,100 | 170,600 | 174,300 | 176,200 | 55.5% | 14.5% |
| Employment | 108,700 | 146,000 | 151,500 | 158,000 | 163,400 | 166,000 | 164,700 | 51.5% | 12.8% |
| Unemployment | 4,600 | 7,900 | 7,600 | 7,200 | 7,100 | 8,300 | 11,500 | 150.0% | 45.6% |
| Unemployment Rate | 4.1% | 5.1% | 4.8% | 4.3% | 4.2% | 4.8% | 6.5% | - | - |
| Sacramento Region | | | | | | | | | |
| Labor Force | 898,600 | 1,056,000 | 1,067,800 | 1,083,700 | 1,100,700 | 1,116,000 | 1,128,600 | 25.6% | 6.9% |
| Employment | 848,700 | 991,500 | 1,005,800 | 1,027,300 | 1,046,300 | 1,053,700 | 1,045,200 | 23.2% | 5.4% |
| Unemployment | 49,900 | 64,500 | 61,900 | 56,300 | 54,400 | 62,400 | 83,400 | 67.1% | 29.3% |
| Unemployment Rate | 5.6% | 6.1% | 5.8% | 5.2% | 4.9% | 5.6% | 7.4% | - | - |
| Bay Area | | | | | | | | | |
| Labor Force | 3,099,500 | 3,081,700 | 3,017,100 | 3,003,200 | 3,031,300 | 3,093,000 | 3,172,800 | 2.4% | 3.0% |
| Employment | 2,991,300 | 2,867,500 | 2,842,100 | 2,852,900 | 2,901,500 | 2,953,900 | 2,989,300 | -0.1% | 4.2% |
| Unemployment | 108,200 | 214,200 | 175,000 | 150,300 | 129,700 | 139,200 | 183,500 | 69.6% | -14.3% |
| Unemployment Rate | 3.5% | 7.0% | 5.8% | 5.0% | 4.3% | 4.5% | 5.8% | - | - |
| California | | | | | | | | | |
| Labor Force | 16,166,900 | 17,390,700 | 17,444,400 | 17,629,200 | 17,821,100 | 18,078,000 | 18,391,800 | 13.8% | 5.8% |
| Employment | 15,203,700 | 16,200,100 | 16,354,800 | 16,671,900 | 16,948,400 | 17,108,700 | 17,059,600 | 12.2% | 5.3% |
| Unemployment | 963,200 | 1,190,600 | 1,089,700 | 957,200 | 872,700 | 969,300 | 1,332,300 | 38.3% | 11.9% |
| Unemployment Rate | 6.0% | 6.8% | 6.2% | 5.4% | 4.9% | 5.4% | 7.2% | - | - |

Center for Strategic Economic Research, February 2010
 Data Source: Employment Development Department, Labor Market Information

Economic theory suggests that as long as the year-over-year growth rate in the number of persons employed is larger than the growth rate in the civilian labor force, the region is in good economic health. As shown in Figure 38, for five years between 1998 and 2008, Placer County was in good economic health where the number of employment opportunities available to the County’s residents grew faster than the number of employable people. From 2000 to 2003, growth in employable residents outpaced the growth in the number of employment opportunities in Placer County. The County experienced healthy conditions between 2004 and 2006, but this measure flipped in 2007, in line with the overall economic downturn seen across the nation.

FIGURE 38
PLACER COUNTY ECONOMIC HEALTH



Center for Strategic Economic Research, February 2010

Data Source: California Employment Development Department, Annual Average Labor Force Data

Note: Bars reflect the percentage point difference between the year-over-year growth rates in the employed portion of the labor force and the total labor force.

BUSINESS CLIMATE

Wages

Wage data follows the larger labor market; therefore, the major occupational category wages shown in Figure 39 are for the entire Sacramento Region. Occupations that earn the highest salaries are in the Management; Legal; and Healthcare Practitioners & Technical occupational categories, earning annual salaries between about \$82,000 and \$101,000, generally lower in comparison to mean annual salaries in the Bay Area and California due to typically lower cost of living in the Sacramento Region.

FIGURE 39
WAGES FOR MAJOR OCCUPATIONAL CATEGORIES,
1ST QUARTER 2009

| <i>Occupational Category</i> | <i>Sacramento Region</i> | | <i>Bay Area</i> | | <i>California</i> | |
|--|--------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| | <i>Mean Hourly</i> | <i>Mean Annual</i> | <i>Mean Hourly</i> | <i>Mean Annual</i> | <i>Mean Hourly</i> | <i>Mean Annual</i> |
| Management | \$48.60 | \$101,081 | \$62.15 | \$129,268 | \$54.60 | \$113,577 |
| Legal | \$41.69 | \$86,709 | \$58.44 | \$121,551 | \$53.00 | \$110,242 |
| Healthcare Practitioners and Technical | \$39.46 | \$82,051 | \$44.79 | \$93,163 | \$39.24 | \$81,624 |
| Architecture and Engineering | \$38.42 | \$79,913 | \$45.11 | \$93,828 | \$40.85 | \$84,968 |
| Computer and Mathematical | \$34.98 | \$72,757 | \$46.97 | \$97,691 | \$41.05 | \$85,391 |
| Life, Physical, and Social Science | \$32.40 | \$67,403 | \$39.77 | \$82,705 | \$35.33 | \$73,494 |
| Business and Financial Operations | \$31.32 | \$65,133 | \$40.32 | \$83,865 | \$34.68 | \$72,127 |
| Education, Training, and Library | \$26.09 | \$54,270 | \$28.24 | \$58,738 | \$27.31 | \$56,806 |
| Arts, Design, Entertainment, Sports, and Media | \$25.13 | \$52,281 | \$32.88 | \$68,401 | \$30.49 | \$63,417 |
| Community and Social Services | \$24.14 | \$50,193 | \$25.73 | \$53,523 | \$24.16 | \$50,259 |
| Construction and Extraction | \$23.90 | \$49,712 | \$28.06 | \$58,382 | \$23.91 | \$49,734 |
| Protective Service | \$23.56 | \$49,016 | \$25.60 | \$53,250 | \$23.92 | \$49,769 |
| Installation, Maintenance, and Repair | \$22.26 | \$46,285 | \$25.34 | \$52,701 | \$22.34 | \$46,453 |
| Sales and Related | \$17.35 | \$36,085 | \$22.93 | \$47,694 | \$18.64 | \$38,760 |
| Office and Administrative Support | \$17.59 | \$36,560 | \$20.14 | \$41,888 | \$17.57 | \$36,555 |
| Production | \$16.91 | \$35,175 | \$17.67 | \$36,751 | \$15.49 | \$32,237 |
| Transportation and Material Moving | \$15.80 | \$32,872 | \$17.97 | \$37,371 | \$15.64 | \$32,522 |
| Healthcare Support | \$14.79 | \$30,737 | \$16.92 | \$35,209 | \$14.57 | \$30,307 |
| Building and Grounds Cleaning and Maintenance | \$13.02 | \$27,070 | \$14.31 | \$29,778 | \$13.01 | \$27,051 |
| Personal Care and Service | \$12.52 | \$26,044 | \$14.50 | \$30,161 | \$12.93 | \$26,893 |
| Farming, Fishing, and Forestry | \$11.13 | \$23,154 | \$11.93 | \$24,823 | \$9.95 | \$20,691 |
| Food Preparation and Serving-Related | \$10.29 | \$21,423 | \$11.16 | \$23,226 | \$10.44 | \$21,709 |

Center for Strategic Economic Research, February 2010

Data Source: California Employment Development Department, Occupational Wage Data

Notes: Sacramento Region and Bay Area wages based on weighted average by employment.

Major Employers

The major private sector employers in Placer County displayed in Figure 40, represent a wide spectrum of industry sectors such as healthcare, manufacturing, recreation, and financial services.

FIGURE 40
MAJOR PRIVATE EMPLOYERS IN PLACER COUNTY

| <i>Company</i> | <i>City</i> | <i>Industry</i> | <i>Number of Local Employees</i> |
|------------------------------|-------------------|--------------------------------------|--|
| Kaiser Permanente | Roseville | Healthcare | 3,281 |
| Hewlett-Packard Co. | Roseville | Computer Hardware Manufacturing | 3,000* |
| Sutter Health | Roseville, Auburn | Healthcare | 2,270 |
| Union Pacific Railroad | Roseville | Transportation, Railroad | 2,000 |
| Thunder Valley Casino Resort | Lincoln | Casinos | 1,651 |
| PRIDE Industries Inc. | Roseville | Manufacturing & Logistics Services | 1,352 |
| Northstar-at-Tahoe | Truckee | Ski Resort | 1,250 |
| NEC Electronics America Inc. | Roseville | Electronic Components & Accessories | 791 |
| Safeway Inc. | Various Locations | Grocery Retailer | 700 |
| Wells Fargo & Co. | Various Locations | Financial Services | 668 |
| Pacific Gas and Electric Co. | Various Locations | Utility Distributor | 619 |
| SureWest Communications | Roseville | Telecommunication Services | 560 |
| United Natural Foods Inc. | Rocklin | Wholesale Groceries | 500 |
| Resort at Squaw Creek | Olympic Valley | Misc. Amusement, Recreation Services | 480** |
| Raley's Inc. | Various Locations | Retail Groceries | 408 |
| Sierra Pacific Industries | Lincoln | Sawmills & Planing Mills | 336 |
| Future Automotive Group | Roseville | Auto Dealerships | 271 |
| Nugget Market, Inc. | Roseville | Retail Grocery | 90 |

Center for Strategic Economic Research, February 2010

Data Sources: Sacramento Business Journal, *Book of Lists 2009*

Note: Employment numbers are full-time equivalents except where otherwise noted.

*Estimated employment.

** Peak seasonal employment; 265 year-round employees.

BUSINESS CLIMATE

Recently Located Companies in Placer County

Figure 41 provides a sampling of companies that recently located in, relocated to, or established within Placer County between 2002 and 2009, representing a mix of manufacturing, high technology, retail, and business services companies.

**FIGURE 41
SELECT COMPANIES THAT RECENTLY LOCATED OR ESTABLISHED
IN PLACER COUNTY BETWEEN 2002 AND 2009**

| <i>Company</i> | <i>City</i> | <i>Industry</i> | <i>Date Located/ Established</i> |
|---|---------------------|--|--------------------------------------|
| Miltenyi Biotec* | Auburn | Stem Cell Research & Equipment | 2009 |
| TGH Aviation* | Auburn | Aircraft Instrument Repair | 2009 |
| Solar-e-City | Rocklin | Solar Power Installations | 2009 |
| Staybridge Suites | Rocklin | Extended Stay Hotel Chain | 2009 |
| Sedgwick Claims Management Services, Inc. | Roseville | Claims & Managed Care Services | 2009 |
| Zoom Imaging | Roseville | Toshiba Office Equipment | 2009 |
| Ternion Bio Industries | Loomis | Carbon Recycling Solutions | 2008 |
| SMA America Inc. | Rocklin | Solar Inverters | 2008 |
| Verifone Holdings Inc. | Rocklin | Electronic Payment Systems | 2008 |
| Best Buy | Unincorporated | Electronics | 2008 |
| Beverages & More | Unincorporated | Spirits & Libations | 2008 |
| OTD Cycle Sports | Unincorporated | Motocycles & ATV's | 2008 |
| Rogers Family Co. | Lincoln | Coffee Roasting | 2008 |
| Mercedes-Benz | Rocklin | Showroom/Parts/Service | 2008 |
| Whole Foods Market | Roseville | Grocery Store | 2008 |
| Gallina LLP | Roseville | Accounting Services | 2008 |
| Unify Corp. | Roseville | Computer Programming Services | 2008 |
| Special Order Systems | Loomis | Telecommunications | 2007 |
| General Pool & Spa Supply Inc. | Rocklin | Distribution | 2007 |
| Emulex Corporation | Roseville | Storage Connectivity | 2007 |
| Composite Engineering Inc. | Roseville | Composite Product Development Services | 2007 |
| Sara Lee Baking Group | Roseville | Bakery Goods | 2007 |
| J4 Systems Inc. | Rocklin | Information Technology | 2007 |
| EquiPoint Financial Network | Penryn | Mortgage Services | 2007 |
| Fry's Electronics | Roseville | Electronic Equipment and Supplies | 2007 |
| iQurious Corp./Visionapp AG | Auburn | Computer Operating Systems | 2006 |
| Strikes Family Entertainment Center | Rocklin | Recreation | 2006 |
| Arizona Tile | Roseville | Tile & Slab Showroom | 2006 |
| R.C. Willey | Rocklin & Roseville | Home Furnishing Retailer & Distribution Center | 2006 |
| Rabobank | Roseville | Financial Services West Coast Headquarters | 2005 |
| Iosafe | Auburn | Hard Drive Disaster Proofing | 2005 |
| Titan Engineering | Auburn | CNC Machining | 2005 |
| CalSTAR | Auburn | Air Ambulance Service | 2004 |
| Kenai Systems | Rocklin | Web Services Security | 2004 |
| Ace Hardware Corp. | Unincorporated | Retail Support Center | 2003 |
| Esurance | Unincorporated | Online Auto Insurance | 2003 |
| Applied Networking & Systems Integration Inc. | Roseville | Software Developer | 2002 |
| Dynesco Inc. | Roseville | Electronic Mfg. & Assembly | 2002 |
| Evolve Technology Group Inc. | Rocklin | Information Technology Services | 2002 |
| Tahoe RF Semiconductor Inc. | Auburn | Integrated Circuit Design & Manufacturing | 2002 |
| Pacific Power Management | Auburn | Solar Power Installations | 2002 |

Center for Strategic Economic Research, February 2010

Data Sources: Located Companies List Greater Sacramento Area, Sacramento Area Commerce and Trade Organization; *High Tech Direct*, Sacramento Business Journal, December 2007 and 2006; City of Roseville; Sacramento Business Journal; Placer County Office of Economic Development; and above-listed companies.

*Expansion at current location.

Note: This list is not a comprehensive record of companies that located to Placer County within this time period. It is intended to serve as a guide as to the types of companies that are establishing within the County.

Taxable Sales

Placer County's taxable sales totaled over \$6.6 billion in 2008, an increase of about 11 percent since 2003, as shown in Figure 42. The County's taxable sales growth was higher than the Sacramento Region, around 9 percent, but lower than the Bay Area and California, each with approximately 16 percent growth in this time period. The largest amount of Placer County's total taxable sales came from Roseville with over \$3.4 billion. Lincoln and Auburn had had the highest increase of taxable sales from 2003 to 2008 with respective changes of about 121 percent and 55 percent.

FIGURE 42
TAXABLE SALES (IN THOUSANDS)

| Area | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | % Change 2003-2008 |
|-------------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------------|
| Placer County | \$5,973,818 | \$6,595,566 | \$7,232,568 | \$7,531,225 | \$7,431,405 | \$6,634,810 | 11.1% |
| Auburn | \$252,093 | \$314,002 | \$416,590 | \$403,315 | \$404,656 | \$390,524 | 54.9% |
| Colfax | \$54,435 | \$59,943 | \$66,385 | \$66,656 | \$60,534 | \$55,071 | 1.2% |
| Lincoln | \$106,532 | \$131,654 | \$173,875 | \$199,742 | \$230,842 | \$235,429 | 121.0% |
| Loomis | \$82,744 | \$102,265 | \$114,633 | \$113,148 | \$100,477 | \$89,431 | 8.1% |
| Rocklin | \$515,953 | \$558,913 | \$622,691 | \$685,921 | \$696,844 | \$626,898 | 21.5% |
| Roseville | \$3,288,459 | \$3,660,431 | \$3,897,859 | \$4,024,823 | \$3,854,226 | \$3,409,792 | 3.7% |
| Unincorporated | \$1,673,602 | \$1,768,358 | \$1,940,535 | \$2,037,620 | \$2,083,826 | \$1,827,664 | 9.2% |
| Sacramento Region | \$30,114,878 | \$33,085,580 | \$35,415,319 | \$35,749,524 | \$35,092,759 | \$32,903,845 | 9.3% |
| Bay Area | \$87,905,723 | \$93,073,847 | \$98,101,277 | \$102,978,972 | \$106,469,138 | \$102,083,967 | 16.1% |
| California | \$460,096,468 | \$500,076,783 | \$536,904,428 | \$559,652,437 | \$561,050,149 | \$531,653,540 | 15.6% |

Center for Strategic Economic Research, February 2010

Data Source: State of California Board of Equalization

Note: Taxable sales by county not available for 10-year data point.

It is projected that Placer County's taxable sales will increase almost 26 percent from 2008 to 2013, reaching total taxable sales of just over \$11.2 billion in 2013, as shown in Figure 43. The County's projected growth rate through 2013 is similar to the Bay Area, above the Sacramento Region (around 24 percent), and below California (about 31 percent).

FIGURE 43
PROJECTED TAXABLE SALES (IN THOUSANDS)

| Area | 2008 | 2013 | 2018 | % Change 2008-2013 | % Change 2008-2018 |
|-------------------|---------------|---------------|---------------|-----------------------|-----------------------|
| Placer County | \$6,634,810 | \$8,339,649 | \$11,248,420 | 25.7% | 69.5% |
| Sacramento Region | \$32,903,845 | \$40,757,591 | \$53,375,694 | 23.9% | 62.2% |
| Bay Area | \$102,083,967 | \$128,342,533 | \$160,088,100 | 25.7% | 56.8% |
| California | \$531,653,540 | \$694,320,142 | \$921,244,286 | 30.6% | 73.3% |

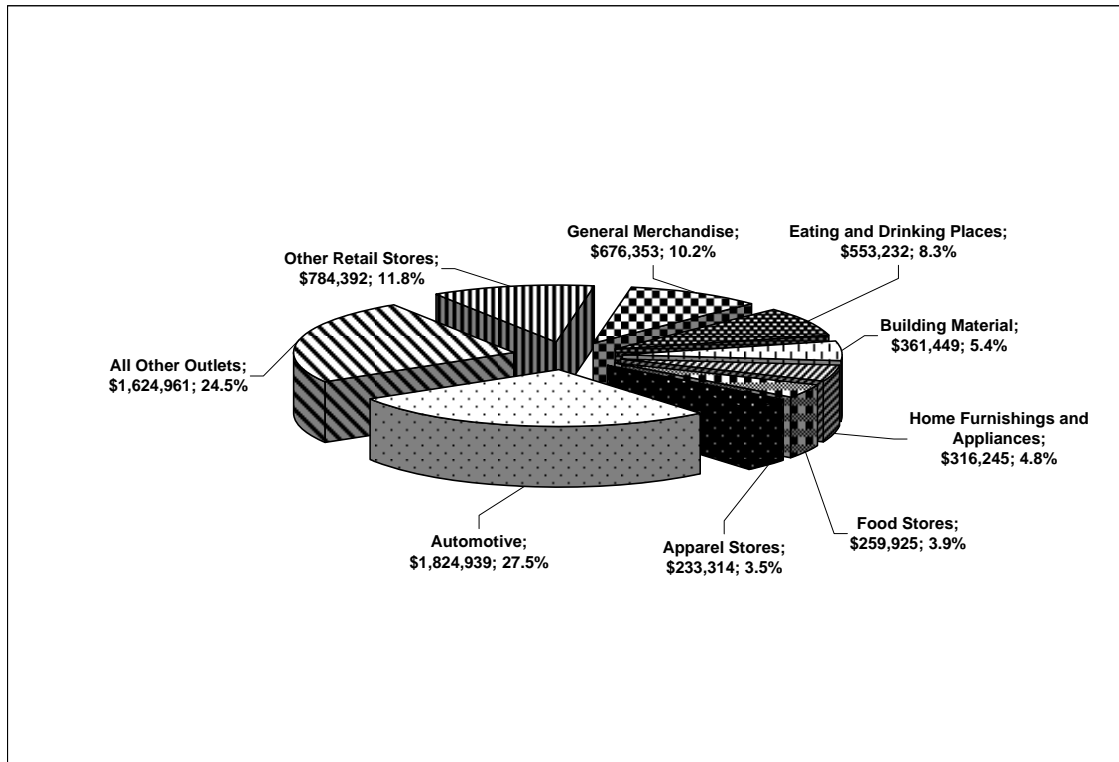
Center for Strategic Economic Research, February 2010

Data Sources: State of California Board of Equalization; Department of Transportation
2008 Long-Term Socio-Economic Forecasts by County

BUSINESS CLIMATE

Figure 44 shows that a large portion of the 2008 taxable sales in Placer County was obtained from Automotive businesses, contributing over \$1.8 billion in taxable sales (about 28 percent of the total), followed by businesses classified as All Other Outlets with around \$1.6 billion (about 25 percent of all taxable sales) and Other Retail Stores with about \$784 million in taxable sales (nearly 12 percent of total).

FIGURE 44
COMPOSITION OF TAXABLE SALES IN PLACER COUNTY IN 2008
(IN THOUSANDS)



Center for Strategic Economic Research, February 2010
Data Source: State of California Board of Equalization, Taxable Sales in California Report

Automotive and All Other Outlets business types also comprise the largest proportion of total taxable sales in the Sacramento Region, the Bay Area, and California, as illustrated in Figure 45. From 2003 to 2008, Home Furnishings & Appliances; Apparel Stores; and Eating & Drinking Places businesses in Placer County saw the greatest increase in taxable sales—around 88 percent, 54 percent, and 32 percent, respectively. There was not one business type in any of the comparative areas that posted such a high increase as Home Furnishings & Appliances did in Placer County. The notable taxable sales increases from these population-serving sectors reflect the County's recent strong growth in the number of its residents. Apparel Stores and Eating & Drinking Places businesses had the highest increases in taxable sales in all of the comparative areas between 2003 and 2008.

BUSINESS CLIMATE

FIGURE 45
TAXABLE SALES BY BUSINESS TYPE (IN THOUSANDS)

| Area/Business Type | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | % Change 2003-2008 |
|---------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------------|
| Placer County | | | | | | | |
| Total Taxable Sales | \$5,973,818 | \$6,595,566 | \$7,232,568 | \$7,531,225 | \$7,431,405 | \$6,634,810 | 11.1% |
| Apparel Stores | \$151,425 | \$182,781 | \$194,547 | \$193,880 | \$193,281 | \$233,314 | 54.1% |
| General Merchandise | \$654,898 | \$692,463 | \$738,097 | \$760,162 | \$752,994 | \$676,353 | 3.3% |
| Food Stores | \$256,357 | \$256,228 | \$276,490 | \$281,116 | \$283,527 | \$259,925 | 1.4% |
| Eating and Drinking Places | \$418,410 | \$464,769 | \$504,728 | \$534,059 | \$556,057 | \$553,232 | 32.2% |
| Home Furnishings and Appliances | \$168,596 | \$205,139 | \$228,056 | \$260,136 | \$270,218 | \$316,245 | 87.6% |
| Building Material | \$403,768 | \$467,430 | \$480,570 | \$482,012 | \$463,873 | \$361,449 | -10.5% |
| Automotive | \$1,691,680 | \$1,888,201 | \$2,157,160 | \$2,225,508 | \$2,071,033 | \$1,824,939 | 7.9% |
| Other Retail Stores | \$794,212 | \$867,142 | \$959,689 | \$974,025 | \$962,464 | \$784,392 | -1.2% |
| All Other Outlets | \$1,434,472 | \$1,571,413 | \$1,693,231 | \$1,820,327 | \$1,877,958 | \$1,624,961 | 13.3% |
| Sacramento Region | | | | | | | |
| Total Taxable Sales | \$30,114,878 | \$33,085,580 | \$35,415,319 | \$35,749,524 | \$35,092,759 | \$32,903,845 | 9.3% |
| Apparel Stores | \$737,717 | \$853,185 | \$930,093 | \$948,558 | \$954,064 | \$1,015,685 | 37.7% |
| General Merchandise | \$3,287,336 | \$3,522,300 | \$3,724,844 | \$3,818,217 | \$3,851,859 | \$3,710,685 | 12.9% |
| Food Stores | \$1,438,857 | \$1,493,272 | \$1,574,000 | \$1,627,028 | \$1,636,323 | \$1,490,313 | 3.6% |
| Eating and Drinking Places | \$2,206,565 | \$2,398,061 | \$2,585,079 | \$2,716,485 | \$2,782,573 | \$2,775,643 | 25.8% |
| Home Furnishings and Appliances | \$924,320 | \$1,014,200 | \$1,072,076 | \$1,096,508 | \$997,067 | \$1,056,974 | 14.4% |
| Building Material | \$2,249,878 | \$2,697,878 | \$2,807,698 | \$2,587,832 | \$2,219,824 | \$1,795,986 | -20.2% |
| Automotive | \$6,407,290 | \$6,997,434 | \$7,679,763 | \$7,711,362 | \$7,412,839 | \$6,704,622 | 4.6% |
| Other Retail Stores | \$3,761,136 | \$4,080,758 | \$4,424,299 | \$4,554,835 | \$4,513,128 | \$3,710,339 | -1.4% |
| All Other Outlets | \$9,101,779 | \$10,028,492 | \$10,617,467 | \$10,688,699 | \$10,725,082 | \$10,643,598 | 16.9% |
| Bay Area | | | | | | | |
| Total Taxable Sales | \$87,905,723 | \$93,073,847 | \$98,101,277 | \$102,978,972 | \$106,469,138 | \$102,083,967 | 16.1% |
| Apparel Stores | \$3,045,295 | \$3,345,211 | \$3,651,927 | \$3,868,326 | \$4,091,469 | \$4,604,239 | 51.2% |
| General Merchandise | \$8,962,686 | \$9,357,643 | \$9,707,483 | \$10,198,248 | \$10,501,614 | \$9,726,576 | 8.5% |
| Food Stores | \$3,176,076 | \$3,195,687 | \$3,261,689 | \$3,319,277 | \$3,465,467 | \$3,426,357 | 7.9% |
| Eating and Drinking Places | \$7,840,590 | \$8,405,388 | \$8,980,840 | \$9,550,883 | \$10,202,908 | \$10,512,093 | 34.1% |
| Home Furnishings and Appliances | \$3,193,522 | \$3,378,432 | \$3,488,658 | \$3,512,571 | \$3,491,392 | \$3,734,276 | 16.9% |
| Building Material | \$4,996,657 | \$5,767,841 | \$5,954,516 | \$6,003,242 | \$5,699,789 | \$4,885,149 | -2.2% |
| Automotive | \$15,137,537 | \$16,042,410 | \$17,083,529 | \$17,757,244 | \$17,838,028 | \$16,370,530 | 8.1% |
| Other Retail Stores | \$11,417,676 | \$12,165,539 | \$13,107,450 | \$13,646,419 | \$13,902,813 | \$11,678,626 | 2.3% |
| All Other Outlets | \$30,135,684 | \$31,415,696 | \$32,865,185 | \$35,122,762 | \$37,275,658 | \$37,146,120 | 23.3% |
| California | | | | | | | |
| Total Taxable Sales | \$460,096,468 | \$500,076,783 | \$536,904,428 | \$559,652,437 | \$561,050,149 | \$531,653,540 | 15.6% |
| Apparel Stores | \$15,179,710 | \$16,957,137 | \$18,712,125 | \$19,829,416 | \$20,855,890 | \$22,120,094 | 45.7% |
| General Merchandise | \$50,550,818 | \$53,939,532 | \$56,787,153 | \$59,264,894 | \$59,897,350 | \$56,425,472 | 11.6% |
| Food Stores | \$19,407,823 | \$19,825,771 | \$21,128,469 | \$21,864,179 | \$22,461,059 | \$21,504,308 | 10.8% |
| Eating and Drinking Places | \$40,049,699 | \$43,275,038 | \$46,412,847 | \$49,229,418 | \$51,658,575 | \$52,051,404 | 30.0% |
| Home Furnishings and Appliances | \$15,104,217 | \$16,405,347 | \$17,388,704 | \$17,383,449 | \$16,720,852 | \$17,199,187 | 13.9% |
| Building Material | \$28,200,869 | \$34,154,543 | \$36,152,218 | \$36,163,326 | \$32,656,324 | \$26,647,007 | -5.5% |
| Automotive | \$94,766,776 | \$103,528,856 | \$112,167,922 | \$115,154,535 | \$112,820,149 | \$102,913,020 | 8.6% |
| Other Retail Stores | \$56,957,142 | \$62,086,464 | \$67,058,687 | \$70,177,355 | \$69,954,903 | \$58,457,936 | 2.6% |
| All Other Outlets | \$139,879,414 | \$149,904,095 | \$161,096,303 | \$170,585,865 | \$174,025,047 | \$174,335,113 | 24.6% |

Center for Strategic Economic Research, February 2010

Data Source: State of California Board of Equalization, Taxable Sales in California Report

Notes: Taxable sales by business type not available at county level prior to 1999.

Taxable sales data for 'RV and all other vehicles' have been moved from the 'Other Retail Stores' category to the 'Automotive' category in 2007. To maintain consistency with historical data, 2007 and 2008 data for this line item was included in the 'Automotive' category with the exception of smaller-sized counties (San Benito, Yuba, and Sutter Counties) where detailed categories were not allocated.

Banking and Finance

A complete network of banks, savings, and credit union institutions serves the business community in Placer County. Several of these institutions are locally-based and are shown in Figure 46. Five Star Bank is the largest locally-based institution with about \$321 million in deposits and \$372 million in assets.

FIGURE 46
LOCALLY-BASED BANKING AND SAVINGS
INSTITUTIONS IN PLACER COUNTY
(IN THOUSANDS)

| <i>Institution</i> | <i>City</i> | <i>Total Deposits</i> | <i>Assets</i> |
|------------------------------|-------------|-----------------------|---------------|
| Five Star Bank | Rocklin | \$320,590 | \$372,344 |
| Granite Community Bank, N.A. | Granite Bay | \$108,054 | \$121,350 |
| Community First Bank | Auburn | \$118,838 | \$152,730 |

Center for Strategic Economic Research, February 2010
 Data Source: Federal Deposit Insurance Corporation, Financial Data as of
 September 30, 2009

Most major financial institutions have branch offices in Placer County, and the headquarters of several financial institutions are based in the County. As shown in Figure 47, Wells Fargo Bank, Bank of America, and Umpqua Bank rank as the largest banks, by market share, in Placer County.

FIGURE 47
DEPOSITS AND MARKET SHARE OF TOP
TEN BANKING AND SAVINGS
INSTITUTIONS IN PLACER COUNTY
(IN THOUSANDS)

| <i>Rank</i> | <i>Institution</i> | <i>Inside Market</i> | |
|-------------|--------------------------|----------------------|---------------------|
| | | <i>Deposits</i> | <i>Market Share</i> |
| 1 | Wells Fargo Bank* | \$1,908,614 | 28.1% |
| 2 | Bank of America | \$1,273,167 | 18.7% |
| 3 | Umpqua Bank | \$542,009 | 8.0% |
| 4 | Wachovia Bank* | \$479,383 | 7.1% |
| 5 | U.S. Bank | \$393,114 | 5.8% |
| 6 | JPMorgan Chase Bank | \$340,699 | 5.0% |
| 7 | First Bank | \$164,707 | 2.4% |
| 8 | Five Star Bank | \$152,102 | 2.2% |
| 9 | Redding Bank of Commerce | \$151,226 | 2.2% |
| 10 | Citibank | \$148,507 | 2.2% |

Center for Strategic Economic Research, February 2010
 Data Source: Federal Deposit Insurance Corporation (FDIC),
 Financial Data as of June 30, 2009

*Wells Fargo Bank purchased Wachovia Bank in December 2008; however, FDIC still presents bank data separately within the report.

Workforce Development and Training Programs

Placer County offers a wide range of workforce development services, organizations, and programs including recruitment, training, and incentive programs that jointly support local businesses and individuals seeking employment.

Business Advantage Network

The Placer County Business Advantage Network (BAN) represents a network of career developers in the Placer County area who work together to assist businesses with their hiring needs and regional job seekers, including those individuals who have been laid-off, are relocating, or re-entering the workforce.

BAN organizes individual informational sessions and recruiting events, such as their free biannual job fairs, to bring job seekers and businesses together. BAN also can refer eligible individuals for business-incentive programs such as the Work Opportunity Tax Credit (WOTC), Work Experience (WEX), and On-the-Job Training (OJT).

In addition to these free workforce development programs, BAN also offers rapid-response assistance to small businesses that are in danger of shutting their doors permanently or laying off employees. BAN works together with these businesses to devise a strategy to rapidly re-employ workers or provide them with referral and resource assistance to prevent lay-offs. This program is co-sponsored with the Golden Sierra Workforce Investment Board.

Golden Sierra Job Training Agency and One-Stop Career Centers

Through the partnership of state and local agencies with the Golden Sierra Job Training Agency, the Golden Sierra One-Stop Career Center system provides services to both employers and job seekers. The system is designed to provide workforce preparation services to job seekers increasing the employment, employment retention, and earnings of the local workforce. In addition, the One-Stops provide services to businesses that will enhance the productivity and competitiveness of the local and regional economy. Some employer resources available at the One-Stop Career Centers include interview space, scheduling assistance, and advertising of recruiting events. Job seeker resources, such as resume and interviewing workshops, computers with Internet access, resources for career research, and employer recruiting events, are available at no cost.

Job Talk Recruiting Events

Job Talk is a recruiting event held on the second Wednesday of each month at the Roseville One-Stop Career Center. Job Talk typically features one to three companies who have immediate hiring needs. Job seekers who attend have an opportunity to

introduce themselves to the recruiters and hear information on the hiring needs of the presenting companies.

California Work Opportunity and Responsibility to Kids Welfare to Work Program

The California Work Opportunity and Responsibility to Kids (CalWORKs) program has a pool of job seekers eager to transition to work. Employers who hire CalWORKs eligible participants may also be eligible to receive tax credits and on-the-job training funds. Self-sufficiency is the goal of this program. Participants may receive assistance with childcare and supportive services for uniforms or supplies that may be needed for their job. The CalWORKs Welfare to Work Program is a partner with the One-Stop Career Centers and the Business Advantage Network.

Employment Development Department

The California Employment Development Department (EDD) is a multifaceted department offering a variety of services under the Job Service, Unemployment Insurance, and Disability Insurance programs. As the designated agency for employment services and the nation's largest employment agency, EDD offers employers an abundance of assistance, including job recruitment, screening and hiring assistance, tax credits for hiring targeted individuals, labor market information, and assistance with unemployment and disability insurance questions and concerns. EDD works in partnership with local community groups to develop programs that will increase employment and educational opportunities for both job seekers and the employer community. Local Job Service offices have an Employer Advisory Council (EAC), which serves as a resource to the local office and provides the business community with a network to other businesses.

The California Job Openings Browse System (CalJOBS)

This Internet-based job-opening and resume listing system, provided by the EDD's Job Services Division, includes no-fee services for both employers and job seekers using the service, as well as the largest database of job seekers in California. It provides easy access for employers and job seekers 24 hours a day through virtually any computer that has access to the Internet.

Sierra College Training & Development

Sierra College Training & Development provides client-defined programs of instruction (credit and not-for-credit courses, associated activities, and other training services) at sites that are conveniently located for participants to attend. Training includes such areas

as technical training, supervision/management, computer applications, and core business skills.

The Center for Applied Competitive Technologies (CACT), provided by Sierra College's Rocklin campus, is a program under Training & Development which helps California's manufacturing industry compete successfully in the global economy and serves the industry by preparing the workforce for future technological challenges. CACT is a free service, geared towards small- to medium-sized manufacturers, focusing on process improvement training and workshops.

Employment Training Panel

Employment Training Panel (ETP) provides funds to employers to train all types of California workers (those who are currently employed and those who are drawing or have exhausted Unemployment Insurance benefits) and small business owners. ETP contracts with employers and training agencies to increase the efficiency and competitiveness of businesses by funding new or upgraded skills training to the state's workforce.

Grant Funded Training

The Community College Chancellor's Office provides various levels of funding for specific training projects. Training programs can be structured to fit production demands. Training may be fully- or partially-funded by state grants.

49er Regional Occupational Program Internships

49er Regional Occupational Program (R.O.P) is a part of a statewide program designed to bring education and business together. 49er R.O.P provides career preparation for high school students and adults through classroom academics, skill training, and through hands-on training taught through internships at local businesses and industry. R.O.P. classes are free for high school students and cost a minimal fee per semester for adults.

Organizational Development

The Board of Supervisors and County Executive Officer invest resources to assure county employees are well-trained. Organizational Development (OD), part of the County Executive Office, has developed an extensive series of courses in federal- and state-mandated areas, as well as in standard business practices, such as personnel supervision, management, and safety procedures. Local businesses, agencies, and organizations may register their staff for these courses as class attendance permits.

Economic Development and Business Resources

In addition to workforce development and training programs, other local resources, such as financial assistance and counseling, tax incentive programs, business seminars, and networking events, are available to businesses already located in or considering locating to Placer County.

Placer County Office of Economic Development

The Placer County Office of Economic Development offers direct assistance and referrals for businesses, some of which include:

- Business Relocation
- Business Retention
- Community Development Block Grant
- Community Rehabilitation Loans
- Demographic/Economic Profiles
- Employment Training
- Export Assistance
- Export Financing
- Film Liaison and Permitting
- Foreign Trade Zones
- Forgivable Façade Loan Program
- Industrial Bond Financing
- Industrial Sites Inventory
- Low Interest Rate Loans
- Main Street Program Support
- Permit Assistance
- Pollution Control Financing
- Recycling Market Development Zone
- Regional Industrial Attraction
- Site Acquisition Financing
- Site Location
- Small Business Financing Assistance
- Tourism Promotion

Business Environmental Resource Center (BERC)

Business can receive assistance in understanding and complying with federal, state, and local environmental regulations through BERC's compliance consultation, regulatory agency liaison, and information resource services.

Business & Industry Guaranteed Loan Program

The United States Department of Agriculture, Rural Development Program, provides potential guarantees (70 or 80 percent) to lenders making rural business loans up to \$10 million. Loans are available for real estate, buildings, leasehold improvements, equipment, inventory and working capital.

Business Improvement Program—Commercial Rehabilitation Loans

Commercial Rehabilitation Loans are designed for both exterior and interior improvements for properties within Redevelopment Project Areas and may be combined with the Façade Loan Program or Mixed-Use Pre-Development loan. Loan amounts

range up to \$150,000 with available terms up to 20 years. There is no prepayment penalty. Interest rates are tied to the Prime Rate and will be determined on a case-by-case basis by the Placer County Loan Advisory Committee.

Business Improvement Program—Forgivable Façade Loans

Placer County has established the Business Improvement Program to assist business and property owners by providing financing for projects that help to revitalize designated redevelopment project areas within the County. Forgivable Façade Loans are designed for exterior physical improvements only. Loan amounts range from \$500 to \$30,000 per business address, with available terms of 5 and 10 years. The principal amount will only be forgiven if the property owner or the business owner continues to maintain the property or business pursuant to the loan documents and does not sell the property or the business for five years from the date of the loan note. The loan obligation will be forgiven in equal amounts for the second half of the loan term (e.g., on a 10-year loan, 20 percent will be forgiven for year six through 10 if the property is adequately maintained).

California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA)

The California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) provides financing for businesses that use alternative energy sources and technologies and/or develop and commercialize advanced transportation technologies that conserve energy and reduce air pollution. Businesses purchasing manufacturing equipment used for zero emission vehicles can work with CAEATFA on a sale-leaseback transaction with sales tax exemptions.

California Pollution Control Financing Authority

The Pollution Control Tax-Exempt Bond Financing Program provides private activity tax-exempt bond financing to California businesses for the acquisition, construction, or installation of qualified pollution control, waste disposal, waste recovery facilities, and the acquisition and installation of new equipment. Financing is performed in conjunction with allocation from the California Debt Limit Allocation Committee. The allocation is required by federal tax law for private activity tax-exempt bonds to be issued. Tax-exempt bond financing provides qualified borrowers with lower interest costs than are available through conventional financing mechanisms.

Employer Advisory Councils

Employer Advisory Councils (EACs) are formed in local areas to develop stronger partnerships between EDD and the business community. Volunteers from local

employers work with EDD staff in helping employers conduct business more efficiently. This includes workshops and monthly meetings, depending on needs and requests from employers. In Placer County, there are presently two EAC associations, the Foothill Employer Advisory Council (FEAC) and the South Placer Employer Advisory Council (SPEAC), both of which cover Auburn, Roseville, Rocklin, Lincoln, and their surrounding areas.

The Federal Technology Center

The Federal Technology Center (FTC) is a non-profit organization that promotes economic development by facilitating technology transfer between government and the private sector and by helping small businesses to successfully compete for government contracts. Some of their services include free classes and counseling, access to a resource library, providing referrals, and conducting seminars. The FTC also links small business technology companies to federal lab resources.

Foreign Trade Zone

A Foreign Trade Zone (FTZ) is a designated site licensed by the Foreign-Trade Zones Board at which special customs procedures may be used. These procedures allow domestic activity involving a foreign item to take place prior to formal customs entry. Duty-free treatment is accorded items that are re-exported and duty payment is deferred on items sold in the U.S. market, thus offsetting customs advantages available to overseas producers who compete with producers located in the United States. Subzones are special-purpose zones, usually at manufacturing plants.

Industrial Development Revenue Bond Program

The California Infrastructure and Economic Development Bank provides manufacturers with below-market financing at a tax-exempt interest rate (approximately 60 percent of prime). The eligibility requirements include the following: available to manufacturers only; the project cannot exceed \$20 million; the project must create new jobs; and the project must have support from the local city or county.

Labor Market Information

This One-Stop Career Center online resource assists businesses in obtaining labor market information including employment and unemployment numbers, occupational supply and demand trends, wage and benefits data, labor force characteristics, and a variety of other statistics available in historical, current, and projected figures.

Metro Pulse

In 2007, the Placer County Office of Economic Development joined Metro Pulse, an Internet program designed to boost business expansion and retention within Placer County and the larger Sacramento Region. Business owners participating in the program fill out a short survey or request a personal visit from County representatives, which ultimately results in connecting them to resources that could help resolve various business issues, such as regulations, staffing, lack of capital, and more.

Northern California World Trade Center

The Northern California World Trade Center (WTC), founded in part by Placer County Office of Economic Development, promotes economic development through international trade with the objective to diversify Northern California's economy and better market the region globally. The WTC builds alliances with regional and worldwide businesses and organizations and provides various international trade programs and services.

Patents in Commerce

Patents in Commerce (PIC) was formed as a collaborative partnership between public and private sector organizations (IPT Company; US Bank; the County of Placer; Recycling Market Development Zones; Patentcafe.com, Inc.; and Wells Fargo) to provide a worldwide learning resource for investors and innovators. PIC's objective is to show innovators the proper methods of invention development and commercialization and help them become successful. PIC is structured as a complete system that covers all the critical steps required to launch a profitable innovation.

Recycling Market Development Zone

The Recycling Market Development Zone (RMDZ) was created to help provide market development to ensure a healthy market for collected recyclables in order to make recycling economically feasible in the county and state. The program provides attractive loans, technical assistance, and free product marketing to business that use materials from the waste stream to manufacture their products and are located within Placer County. In addition, this program can assist in creating jobs through the manufacturing of recycled-content products. The maximum loan amount is \$2 million.

Sacramento Area Regional Technology Alliance

Sacramento Area Regional Technology Alliance (SARTA) is a technology-focused corporation that supports entrepreneurial programs, companies, and technology

investment throughout Placer County and the Sacramento Region through its offering of various resources and network opportunities. The McClellan Technology Incubator (MTI), which merged under SARTA in 2007, supports the growth of technology businesses through its mentor program and classes for start-ups and entrepreneurs. These classes are open to SARTA members as well as non-members. An initiative from SARTA and MTI, called CleanStart, encourages development of clean energy technology companies within the Sacramento Region. MedStart is another initiative from SARTA which focuses on building and strengthening a health medical technical industry in the Sacramento Region.

SACTO and the Center for Strategic Economic Research

SACTO is the Sacramento Region's leading facilitator of economic development, assisting hundreds of companies in location and expansion in the Region, generating billions of dollars of investments, and strengthening the regional economy. SACTO brings together the organizations, information, and resources in the pursuit of jobs, talent, and investment needed to ensure regional prosperity and global competitiveness. The Center for Strategic Economic Research (CSER), the research arm of SACTO, supports the Region's economic development community and provides a full range of objective economic and demographic research services to businesses, government entities, educational institutions, and non-profit organizations.

Sierra Economic Development Corporation

The Sierra Economic Development Corporation's (SEDC) mission is to alleviate unemployment and underemployment in the region by expanding industrial resource and small business development. They offer Rural Revolving Loans up to \$150,000 for equipment, inventory, supplies, furniture, vehicles and working capital. The organization also offers SBA Micro Loans up to \$35,000 and Broadband Service Loans providing gap funding to small businesses engaged in the provision of Internet services to isolated and remote areas.

Small Business Administration 7a Guaranty Program

The Small Business Administration (SBA) 7a Guaranty Program is available for the purchase of land, existing building(s) and improvements, new construction, machinery/equipment working capital, inventory and business buy-outs. The maximum loan amount is \$2 million with SBA exposure of \$1.5 million.

Small Business Administration CDC/504 Loan Program

The Small Business Administration CDC/504 Loan Program was developed to assist communities in stimulating growth and expanding existing businesses. The Small Business Administration finances a maximum of 40 percent of a project (up to a maximum of \$1.5 million), the private lender finances approximately 50 percent of the project via a separate loan to the small business, and the small business injects a minimum of 10 percent of the total project cost. The program also provides financing for the expansion of existing buildings and the acquisition of equipment.

Small Business Loan Guarantee Program

California Capital Financial Development Corporation allows businesses to obtain loans they otherwise could not and establish a favorable credit history with a lender. The Loan Guarantee Program permits Regional Development Corporations to use state funds to guarantee loans made by banks or financial institutions up to 90 percent of the outstanding principal balance with a maximum guarantee amount of \$500,000, including guarantees for short-term capital.

Tools for Business Success

Small businesses and entrepreneurs can access the Tools for Business Success local web sites for resources, templates, contacts, and tutorial videos focusing on starting and managing a small business.

UC Davis InnovationAccess

UC Davis InnovationAccess focuses the existing resources of the university and the business community on the development of new business ventures in the Sacramento Region. The organization provides an on-going series of seminars, courses, programs, and networking events for entrepreneurs. These services educate the business community and help members connect with venture capitalists.

U.S. Commercial Service

The U.S. Commercial Service is the trade promotion unit of the International Trade Administration with trade specialists in 107 U.S. cities and more than 80 countries. They work with companies to help get them started in exporting or to increase sales to new global markets. Services include world class market research, trade events that promote products or services for qualified buyers, introductions to qualified buyers and distributors, counseling, and advocacy through every step of the export process.

Work Opportunity Tax Credit

Through the Work Opportunity Tax Credit (WOTC) Program, federal legislation provides employers with the opportunity to claim income tax credits for qualified applicants they plan to hire. These credits can equal up to \$9,000 for each person hired.

Working Capital & International Trade Loans

The Small Business Administration's (SBA) Export Working Capital Program guarantees bank loans of up to \$1.5 million or 90 percent of a loan amount. A loan can support a single transaction or multiple sales on a revolving basis. International Trade Loans may be used to acquire, construct, renovate, modernize, improve or expand facilities and equipment used to produce goods or services involved in international trade. SBA can guarantee up to \$1.5 million of a \$2 million loan.



REAL ESTATE

Real Estate

Over the past decade, Placer County has experienced extensive growth in both commercial and residential construction and real estate activity. Like many markets across the nation, the County is also seeing slowing and negatives effects of the housing downturn and recession; however, it still remains competitive relative to other neighboring markets in the Sacramento Region and the Bay Area.

This section outlines commercial (office and industrial markets and retail space) and residential real estate aspects in Placer County.

Commercial Real Estate

Several factors, such as local government's favorable attitude toward economic development and the proximity of the County to the Bay Area and the Sierra Nevada mountains, make a great contribution to the commercial real estate activity in Placer County.

Topics covered under commercial real estate include office and industrial market vacancy, net absorption, lease rates, industrial parks, and retail space.

Office Market

The demand for office space in Placer County remains moderately strong as the area has become a competitor for regional corporate relocations and other businesses wanting to benefit from the County's assets such as developed infrastructure, executive housing, and high-quality school systems.

Figure 48 shows net absorption (net change in occupied space) and estimated construction of office space in Placer County submarkets from the third quarter of 2004 through the third quarter of 2009. Over this period, the Roseville/Rocklin submarket experienced its strongest levels of office market activity in 2005 with over 224,000 square feet of total net absorption and close to 870,000 square feet space under construction. Net absorption within this submarket has generally stayed positive over the past years with negative absorption becoming evident over the past few years as general market conditions have slowed in the Sacramento Region, state, and nation. It is interesting to note that, although around 1.1 million square feet of office space was under construction in the Roseville/Rocklin market in 2007, total net absorption experienced minimal decreases the years following. Auburn, a much smaller submarket within Placer County, has seen decreased construction activity, but has maintained positive net absorption despite the overall slowing market conditions the past couple years.

FIGURE 48
NET ABSORPTION AND SPACE UNDER
CONSTRUCTION OF PLACER COUNTY OFFICE
SUBMARKETS (IN SQUARE FEET)

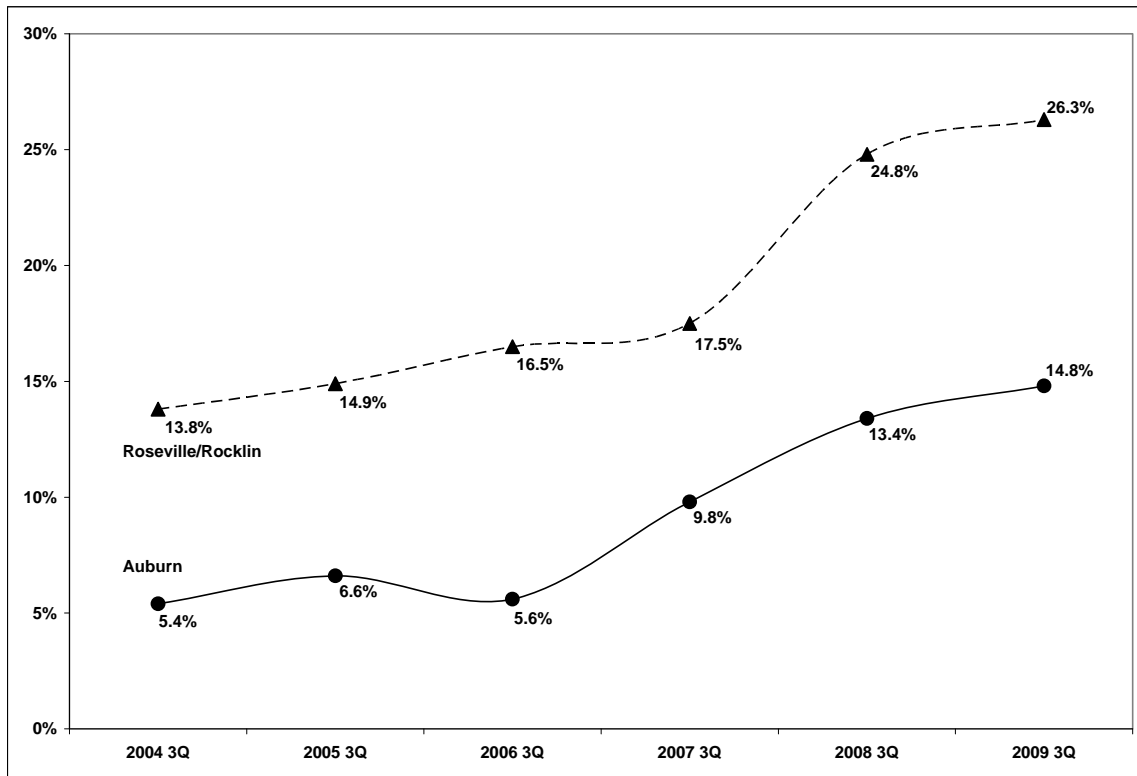
| <i>Submarket / Topic</i> | <i>2004 3Q</i> | <i>2005 3Q</i> | <i>2006 3Q</i> | <i>2007 3Q</i> | <i>2008 3Q</i> | <i>2009 3Q</i> |
|--------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Auburn/Lincoln | | | | | | |
| Total Net Absorption | -13,812 | 28,147 | -7,816 | -5,601 | 6,503 | 1,188 |
| Construction | 54,168 | 48,148 | 111,994 | 137,867 | 22,000 | 34,000 |
| Roseville/Rocklin | | | | | | |
| Total Net Absorption | 83,857 | 224,019 | 126,636 | -21,952 | -46,717 | -18,057 |
| Construction | 698,662 | 869,706 | 760,099 | 1,077,107 | 91,500 | 53,000 |

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Data Source: Colliers International Office Overview, Knowledge Report, 3rd Quarter 2009

As shown in Figure 49, the Roseville/Rocklin submarket had an office vacancy rate of 26.3 percent in the third quarter of 2009, while the Auburn submarket experienced vacancy at 14.8 percent. Roseville/Rocklin's and Auburn's office market vacancy rates were at a five-year low in the third quarter of 2004, 13.8 percent and 5.4 percent, respectively. The two submarkets' vacancy rates have crept up because of the significant level of construction and growth of available office space in the past few years in addition to the overall weakening economy. In comparison, according to Colliers International third quarter 2009 market reports, average Bay Area vacancy rates by market area are as follows: Oakland—15.4 percent; San Jose—23.4 percent; and Santa Clara—24.0 percent. The total Sacramento market had an average office vacancy rate of 16.3 percent in the third quarter of 2009.

FIGURE 49
VACANCY RATES OF PLACER COUNTY OFFICE SUBMARKETS



Center for Strategic Economic Research, February 2010
Data Source: Colliers International Office Overview, Knowledge Report, 3rd Quarter 2009

Figure 50 displays a comparison of Class A and Class B office lease rates between select submarkets (with highest total square feet of space) within Placer County, the Sacramento Region, and the Bay Area in the third quarter of 2009. The Roseville/Rocklin submarket had average lease rates ranging from \$1.86 to \$2.14 for Class B to Class A office space. In comparison to the major submarkets represented in Figure 50, these are roughly around the average rates for the total Sacramento market and below average for the Bay Area submarkets (excluding the San Francisco market).

FIGURE 50
AVERAGE OFFICE LEASE RATES OF
SELECT SUBMARKETS,
3rd QUARTER 2009

| Area | Class A | Class B |
|------------------------------------|---------|---------|
| Placer County | | |
| Roseville/Rocklin | \$2.14 | \$1.86 |
| Other Sacramento Region Submarkets | | |
| Downtown | \$2.88 | \$1.87 |
| Folsom/El Dorado Hills | \$2.07 | \$1.84 |
| Laguna/Elk Grove | \$2.28 | \$1.98 |
| Natomas | \$2.16 | \$1.80 |
| West Sacramento | - | \$1.52 |
| Bay Area Submarkets | | |
| San Francisco* | \$33.56 | \$26.67 |
| San Mateo | \$2.52 | \$2.19 |
| Redwood City | \$2.50 | \$2.24 |
| San Jose (Downtown) | \$2.85 | \$1.96 |
| Sunnyvale | \$3.51 | \$2.09 |
| Mountain View | \$3.81 | \$2.62 |
| Concord | \$2.15 | \$1.60 |
| Walnut Creek (Downtown) | \$3.25 | \$2.10 |
| Pleasanton | \$1.90 | \$1.70 |

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 Data Source: Grubb & Ellis *Office Market Trends* reports by market

*Includes all CBD (central business district) and non-CBD submarkets.

Industrial Market

Placer County’s industrial market has had considerable growth in the amount of space constructed over the past several years. Figure 51 displays net absorption and estimated construction of the industrial market in Placer County’s submarkets from the third quarter of 2004 to the third quarter of 2009. Over this period, net absorption for four of the six quarters represented has remained positive in the Roseville/Rocklin submarket with the highest levels seen in 2005 at over 757,000 square feet. Roseville/Rocklin’s space under construction in the third quarter 2004 to third quarter 2009 ranged from 21,500 to around 357,000 square feet. With the exception of the third quarter 2005, Auburn/Newcastle generally had negative net absorption and minimal industrial construction activity in the past few years.

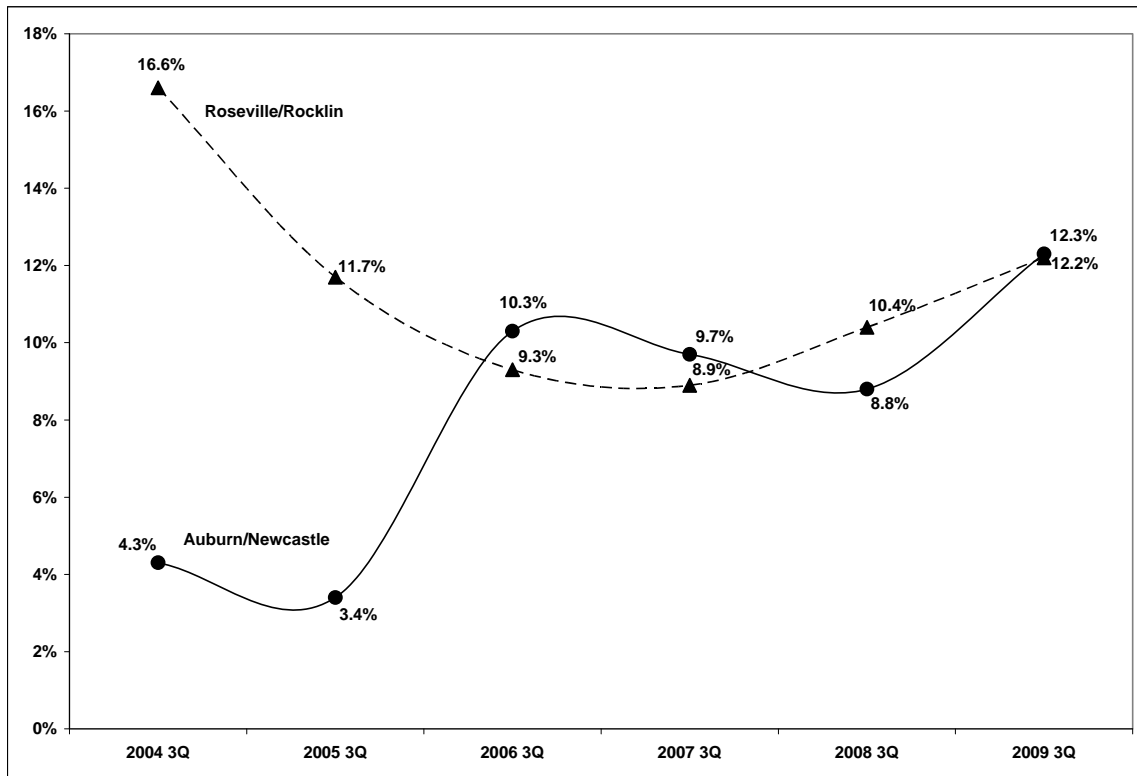
**FIGURE 51
NET ABSORPTION AND SPACE UNDER
CONSTRUCTION OF PLACER COUNTY INDUSTRIAL
SUBMARKETS (IN SQUARE FEET)**

| <i>Submarket / Topic</i> | <i>2004 3Q</i> | <i>2005 3Q</i> | <i>2006 3Q</i> | <i>2007 3Q</i> | <i>2008 3Q</i> | <i>2009 3Q</i> |
|--------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Auburn/Newcastle | | | | | | |
| Total Net Absorption | -81,500 | 18,795 | -18,912 | -18,370 | -13,820 | -57,882 |
| Construction | 0 | 29,854 | 0 | 54,958 | 0 | 0 |
| Roseville/Rocklin | | | | | | |
| Total Net Absorption | 284,870 | 757,345 | 492,469 | -119,849 | -39,117 | 83,590 |
| Construction | 238,378 | 356,730 | 277,520 | 216,826 | 103,672 | 21,500 |

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 Data Source: Colliers International Industrial Overview, Knowledge Report, 3rd Quarter 2009

The Roseville/Rocklin submarket, as shown in Figure 52, had an industrial vacancy rate of 12.2 percent in the third quarter of 2009, while the Auburn/Newcastle submarket experienced vacancy at 12.3 percent. Within the time period represented in this Figure, Roseville/Rocklin’s industrial market vacancy rates were at their lowest in the third quarter of 2007 at 8.9 percent, while Auburn/Newcastle had its lowest rate of 3.4 percent in the third quarter of 2005, when rates began fluctuating in an overall upward trend. In comparison to other areas, as reported in Colliers International’s third quarter 2009 market reports, average Bay Area industrial vacancy rates by market area are as follows: Oakland—9.3 percent; San Jose—17.5 percent; and Santa Clara—13.7 percent. The total Sacramento market had an average industrial vacancy rate of 12.1 percent in the third quarter of 2009.

FIGURE 52
VACANCY RATES OF PLACER COUNTY INDUSTRIAL SUBMARKETS



Center for Strategic Economic Research, February 2010
Data Source: Colliers International Industrial Overview, Knowledge Report, 3rd Quarter 2009

Average industrial lease rates of select submarkets (with the highest total square feet of space) in Placer County, the Sacramento Region, and the Bay Area in the third quarter of 2009 are shown in Figure 53. The average wholesale/distribution lease rate for the Roseville/Rocklin/Lincoln submarket was \$0.39—one of the lowest of all of the major submarkets shown in the Figure. The average R&D/Flex lease rate in the Placer County submarket was \$1.03—above most of the select submarkets, but competitive with Silicon Valley rates.

FIGURE 53
AVERAGE INDUSTRIAL LEASE RATES OF
SELECT SUBMARKETS,
3rd QUARTER 2009

| <i>Area</i> | <i>Wholesale/ Distribution</i> | <i>R&D/ Flex</i> |
|------------------------------------|------------------------------------|--------------------------|
| Placer County | | |
| Auburn/Lincoln/Roseville/Rocklin | \$0.39 | \$1.03 |
| Other Sacramento Region Submarkets | | |
| Downtown | \$0.26 | \$0.68 |
| Folsom/El Dorado Hills | \$0.51 | \$0.93 |
| Highway 50 Corridor | \$0.49 | \$0.87 |
| McClellan | \$0.36 | \$0.81 |
| South Sacramento | \$0.39 | \$0.87 |
| West Sacramento | \$0.37 | \$0.61 |
| Bay Area Submarkets | | |
| San Jose - Central San Jose | \$0.50 | \$1.08 |
| Santa Clara - S 101 | \$0.55 | \$1.15 |
| Sunnyvale - Oakmead | \$0.57 | \$1.22 |
| Fremont - E of 880 | \$0.48 | \$0.70 |
| Oakland/Alameda | \$0.42 | \$0.82 |
| San Leandro/San Lorenzo | \$0.43 | \$0.79 |
| Hayward/Union City | \$0.43 | \$0.86 |

Center for Strategic Economic Research, February 2010
 Data Source: Grubb & Ellis *Industrial Market Trends* reports by market

Office/Industrial Parks

Supported by the continuing expansion of commercial and business activities in Placer County, the number of industrial/office parks in the County has quickly increased over the last several years. Figure 54 shows some of the major existing industrial/office parks (sized over 100,000 square feet) with the park size and type plus its location.

FIGURE 54
SELECT MAJOR INDUSTRIAL/OFFICE PARKS IN PLACER COUNTY (100,000 SQUARE FEET SPACE AND ABOVE)

| <i>Project Name</i> | <i>Location</i> | <i>Size (sq. ft.)</i> | <i>Park Type</i> |
|--|-----------------|-----------------------|---|
| Auburn Industrial Park | Auburn | 3,484,800 | Industrial, Distribution |
| Stone Point Campus | Roseville | 1,167,000 | Office |
| Sierra Business Center | Roseville | 806,668 | Industrial, Office |
| Loomis Industrial Park | Loomis | 740,520 | Industrial |
| Atherton Tech Center | Rocklin | 700,000 | Office |
| Shea Center | Roseville | 600,933 | Office |
| Roseville Parkway Industrial Center | Roseville | 456,000 | Office |
| Parkside Industrial Center | Roseville | 380,000 | Industrial, Office |
| Roseville Highlands | Roseville | 364,648 | Office |
| Foothills Commerce Center | Roseville | 350,759 | Industrial, Warehouse, Technology Park |
| Eureka Corporate Center | Roseville | 350,000 | Office |
| Creekside Center | Roseville | 350,000 | Office |
| Placer Industrial Park | Unincorporated | 332,000 | Industrial, Warehouse |
| NIPA Coastal/KMS Commercial Center | Roseville | 291,328 | Industrial, Distribution, Warehouse |
| Parkway Corporate Plaza | Roseville | 286,780 | Office |
| Roseville Commerce Center | Roseville | 273,987 | Warehouse |
| Granite Creek Business Park | Rocklin | 250,000 | Office |
| Vintage Oaks Business Park | Roseville | 248,000 | Office |
| Placer Village | Roseville | 226,442 | Office |
| Douglas Corporate Center | Roseville | 213,935 | Office |
| Lincoln Air Center | Lincoln | 195,486 | Industrial, Research and Development |
| Olympus Corporate Centre | Roseville | 192,494 | Office |
| Opus Corporate Center | Roseville | 190,000 | Office |
| Lava Ridge Business Center | Roseville | 183,200 | Office |
| Johnson Ranch Corporate Center | Roseville | 179,990 | Office |
| Highway 65 Office Plaza | Rocklin | 168,615 | Office |
| Stanford Ranch Office Plaza | Rocklin | 158,413 | Office |
| Cemo Business Park | Roseville | 146,880 | Office, Technology Park |
| Pacific Technology Spectrum | Rocklin | 121,000 | Research and Development, Warehouse, Office |
| Placer Corporate Center | Rocklin | 112,276 | Industrial, Office |
| Roseville Corporate Center | Roseville | 111,411 | Office |
| Creekside Business Park | Auburn | 106,000 | Office |
| Stoneview Plaza | Roseville | 105,000 | Office |
| Vineyard Pointe Business Park | Roseville | 103,233 | Industrial, Office |
| Roseville Office/Warehouse Business Park | Roseville | 103,170 | Industrial, Warehouse, Office |
| Sunset Commercial Center | Rocklin | 100,000 | Office |
| Aviation Business Park | Lincoln | 100,000 | Industrial, Warehouse, Manufacturing |

Center for Strategic Economic Research, February 2010

Data Sources: CB Richard Ellis; Cemo Commercial; City of Auburn; City of Lincoln; City of Roseville; Equity Office Properties Trust; Giannelli, Jarrette, Waters & Holland LLC; Grubb & Ellis; Loopnet; Mack-Cali ; Placer County Office of Economic Development; Realty Corporation; Realty Advisory Group, Inc.; Sacramento Business Journal; Sisler & Sisler; Triple Net Properties, LLS

Retail Space

As shown in Figure 55, the Roseville/Rocklin submarket boasts a significant retail market with nearly 8.1 million square feet available for lease; however, it has seen the effects of the weakened economy with a vacancy rate of nearly 15.5 percent and no space under construction. The average asking rents for the submarkets in Placer County range from \$1.86 to \$2.23.

FIGURE 55
PLACER COUNTY RETAIL MARKET OVERVIEW,
3rd QUARTER 2009

| Area | Average Asking Rate | Vacancy Rate | Year-to-Date Net Absorption* | Leasable Square Feet | Under Construction |
|-------------------|---------------------|--------------|------------------------------|----------------------|--------------------|
| Auburn/Loomis | \$1.86 | 14.4% | - | 1,208,402 | 0 |
| Lincoln | \$2.23 | 12.7% | - | 1,192,747 | 0 |
| Roseville/Rocklin | \$1.88 | 15.5% | - | 8,088,789 | 0 |

Center for Strategic Economic Research, February 2010

Data Source: CB Richard Ellis *Sacramento Retail MarketView Report 3rd Quarter 2009*

*Not available due to the establishment of a new database.

Over the past five to ten years, the significant expansion in Placer County's housing supply prompted the development of many major retail centers in the area, mostly within the Valley Region and particularly along the Highway 65 Corridor in Roseville and Rocklin. One recently completed retail project was the \$260 million, 400,000-square-foot expansion of the Westfield Galleria at Roseville which made it the largest shopping destination in the Sacramento Region.

As with many regions across the nation, developers are feeling the effects of the recession and putting new retail projects in Placer County on hold until the market revitalizes. Several proposals are pending and/or under review for a total of around 1.1 million square feet of retail space along the Interstate 80 and Sierra College Boulevard interchange in Rocklin. Prospective space in this area includes two retail centers, a mixed-use retail/office center, a movie theater complex, restaurants, mid-sized box stores, and a major home improvement store. One of the two proposed retail centers, Rocklin Crossings, would be approximately 543,000 square feet anchored by a Wal-Mart Superstore and Home Depot and include up to 18 other tenants.

In the Auburn area of Highway 49, the public and private sector have been working together to improve traffic flow and access and enhance beautification along the highway and within specific commercial development projects. Some of these projects include Auburn Plaza Phases I & II, Rock Creek Plaza, Walgreens, Safeway Stores, Home Depot, Target Expansion, and several office development projects near Sutter Auburn Faith Hospital. A 2007 North Auburn Market and Commercial Study estimated a substantial retail leakage of \$30 million in building materials, \$15 million in eating and drinking establishments, \$15 million in general merchandise, and \$10 million in apparel. The aforementioned projects begin to address this opportunity and several proposed projects along Highway 49 would close this gap even further.

Residential Real Estate

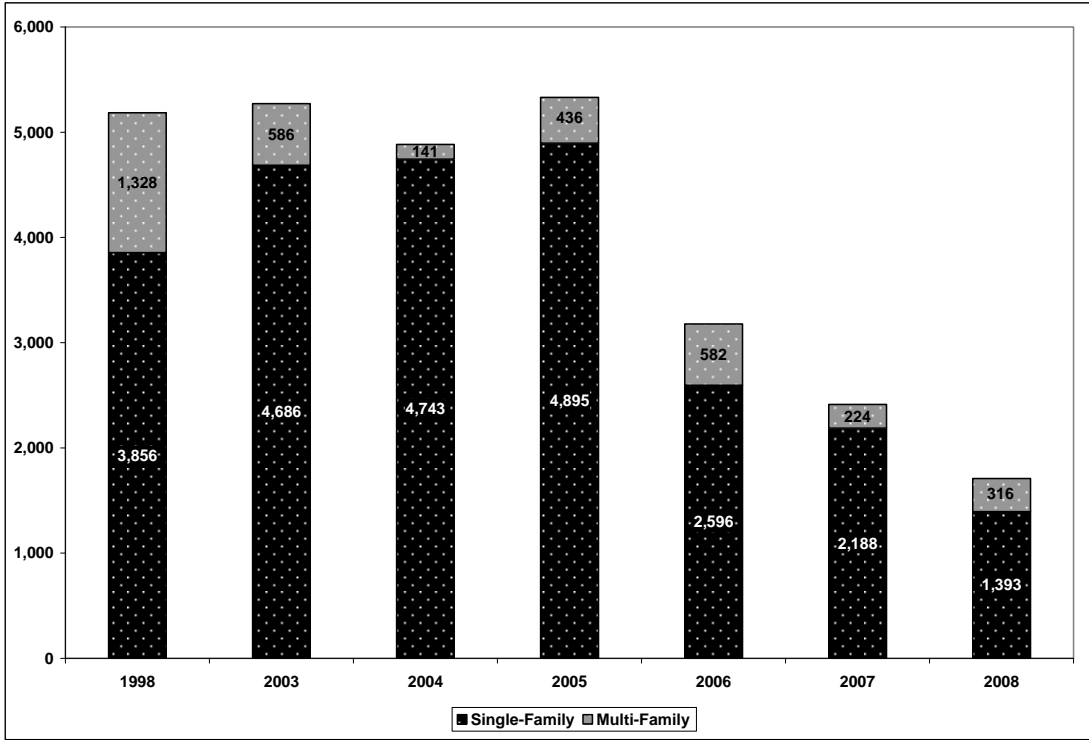
Placer County offers a variety of housing types in various geographic areas—urban, suburban, and rural. In addition to commonly found housing subdivisions and planned developments, Placer County offers the opportunity to live by rivers, lakes, streams, the foothills, and the Sierra Nevada Mountains. It is possible to find homes with significant acreage a short distance from major employment centers. For those living in more urbanized areas of the County, parks provide excellent recreation near most neighborhoods.

Many Californians migrate to Placer County for its quality of life, and in some cases, relatively less-expensive housing. Topics in this section include residential permits, annual home transactions, housing units, and median home prices.

Residential Permits

Residential permit data illustrates the future supply of housing units in the short-term within a particular area. Total Placer County residential permits in the time period represented in Figure 56 range from around 1,700 to 5,300—a notable decline in recent years due to the housing downturn. In the past five years, total residential permits were at the highest point in 2005 with about 4,900 total single-family permits and over 400 multi-family permits. Since then, total residential permits have decreased to levels seen over a decade ago. The proportion of multi-family permits has fluctuated over the past several years, but has been gaining recently—around 19 percent of total permits were issued for multi-family in 2008.

FIGURE 56
SINGLE- AND MULTI-FAMILY RESIDENTIAL PERMITS IN PLACER COUNTY



Center for Strategic Economic Research, February 2010
Data Sources: U.S. Census Bureau, Permits by County or Place

Home Transactions

As shown in Figure 57, around 6,400 single-family and condominium homes were sold in Placer County in 2008, an increase of about 2 percent from the previous year. Of the six incorporated cities tracked in Placer County, Roseville had the highest number of transactions (over 2,700 in 2008) and saw around 12 percent growth in transactions from the previous year while all other areas, with the exception of Rocklin, experienced decreases in year-over-year home transactions. Placer County's year-over-year growth rate in home transactions wasn't as strong as other comparison areas that experienced a gain; however, it fared better than half of the areas which saw declines in sales.

FIGURE 57
ANNUAL NEW AND RESALE HOME
TRANSACTIONS (SINGLE-FAMILY
AND CONDOMINIUMS)

| Area | 2007 | 2008 | % Change 2007-2008 |
|----------------------|---------|---------|-----------------------|
| Placer County | 6,284 | 6,415 | 2.1% |
| Auburn | 396 | 370 | -6.6% |
| Colfax | 85 | 77 | -9.4% |
| Lincoln | 1,436 | 1,272 | -11.4% |
| Loomis | 152 | 122 | -19.7% |
| Rocklin | 939 | 1,029 | 9.6% |
| Roseville | 2,435 | 2,719 | 11.7% |
| Sacramento Region | | | |
| El Dorado County | 2,055 | 2,026 | -1.4% |
| Placer County | 6,284 | 6,415 | 2.1% |
| Sacramento County | 15,577 | 25,298 | 62.4% |
| Yolo County | 1,814 | 2,368 | 30.5% |
| Bay Area | | | |
| Alameda County | 12,675 | 13,436 | 6.0% |
| Contra Costa County | 12,166 | 16,082 | 32.2% |
| Marin County | 2,663 | 2,208 | -17.1% |
| San Benito County | 363 | 616 | 69.7% |
| San Francisco County | 5,451 | 4,937 | -9.4% |
| San Mateo County | 5,721 | 5,713 | -0.1% |
| Santa Clara County | 15,781 | 14,621 | -7.4% |
| California | 255,340 | 519,530 | 103.5% |

Center for Strategic Economic Research, February 2010

Data Sources: Dataquick Information Systems;

California Association of Realtors

Notes: California data reflects existing single-family home sales only.

Historical data not provided due to varying methodology.

Sutter and Yuba County data not available.

Housing Units

In 2009, Placer County had a total of nearly 145,000 housing units—around 121,000 single family homes (84 percent of total) and 23,000 multiple family units (16 percent of total), as displayed in Figure 58 on the following page. Placer County has the highest percentage of single family homes in comparison to the Sacramento Region (76 percent), the Bay Area (61 percent), and California (67 percent).

Compared to the state, the Sacramento Region, and the Bay Area, Placer County experienced the largest housing unit growth rate (around 18 percent growth in total housing units) from 2004 to 2009. Placer County's ten-year growth rate was about 50 percent, over double the Sacramento Region's growth rate of just over 24 percent, nearly six times the Bay Area (9 percent), and four times California's rate of around 13 percent for total housing unit growth.

Lincoln and Rocklin had the highest housing unit growth of all incorporated cities in Placer County in the ten-year historical period. From 1999 to 2009, Lincoln and Rocklin had respective rates of about 435 and 75 percent growth of total housing units.

REAL ESTATE

**FIGURE 58
NUMBER AND TYPE OF HOUSING UNITS**

| Area / Housing Type | 1999 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | % Change 1999-2009 | % Change 2004-2009 |
|---------------------|------------|------------|------------|------------|------------|------------|------------|-----------------------|-----------------------|
| Placer County | | | | | | | | | |
| Single | 80,859 | 103,295 | 108,174 | 113,098 | 116,647 | 119,631 | 121,410 | 50.2% | 17.5% |
| Multiple | 15,496 | 21,299 | 21,934 | 22,494 | 22,820 | 23,032 | 23,112 | 49.1% | 8.5% |
| Total | 96,355 | 124,594 | 130,108 | 135,592 | 139,467 | 142,663 | 144,522 | 50.0% | 16.0% |
| Auburn | | | | | | | | | |
| Single | 3,778 | 4,052 | 4,134 | 4,218 | 4,291 | 4,324 | 4,345 | 15.0% | 7.2% |
| Multiple | 1,629 | 1,680 | 1,680 | 1,680 | 1,680 | 1,680 | 1,689 | 3.7% | 0.5% |
| Total | 5,407 | 5,732 | 5,814 | 5,898 | 5,971 | 6,004 | 6,034 | 11.6% | 5.3% |
| Colfax | | | | | | | | | |
| Single | 430 | 524 | 533 | 538 | 543 | 547 | 551 | 28.1% | 5.2% |
| Multiple | 175 | 227 | 235 | 235 | 235 | 235 | 235 | 34.3% | 3.5% |
| Total | 605 | 751 | 768 | 773 | 778 | 782 | 786 | 29.9% | 4.7% |
| Lincoln | | | | | | | | | |
| Single | 2,535 | 8,979 | 10,895 | 13,711 | 15,439 | 16,203 | 16,437 | 548.4% | 83.1% |
| Multiple | 770 | 889 | 889 | 1,000 | 1,097 | 1,215 | 1,239 | 60.9% | 39.4% |
| Total | 3,305 | 9,868 | 11,784 | 14,711 | 16,536 | 17,418 | 17,676 | 434.8% | 79.1% |
| Loomis | | | | | | | | | |
| Single | 2,048 | 2,162 | 2,179 | 2,267 | 2,278 | 2,286 | 2,288 | 11.7% | 5.8% |
| Multiple | 74 | 67 | 60 | 60 | 60 | 60 | 60 | -18.9% | -10.4% |
| Total | 2,122 | 2,229 | 2,239 | 2,327 | 2,338 | 2,346 | 2,348 | 10.7% | 5.3% |
| Rocklin | | | | | | | | | |
| Single | 9,566 | 14,140 | 14,644 | 14,837 | 15,186 | 15,855 | 16,035 | 67.6% | 13.4% |
| Multiple | 2,334 | 4,596 | 4,596 | 4,648 | 4,741 | 4,741 | 4,741 | 103.1% | 3.2% |
| Total | 11,900 | 18,736 | 19,240 | 19,485 | 19,927 | 20,596 | 20,776 | 74.6% | 10.9% |
| Roseville | | | | | | | | | |
| Single | 22,891 | 30,611 | 32,092 | 32,919 | 33,560 | 34,509 | 35,465 | 54.9% | 15.9% |
| Multiple | 6,076 | 8,982 | 9,584 | 9,971 | 10,084 | 10,178 | 10,222 | 68.2% | 13.8% |
| Total | 28,967 | 39,593 | 41,676 | 42,890 | 43,644 | 44,687 | 45,687 | 57.7% | 15.4% |
| Unincorporated | | | | | | | | | |
| Single | 39,611 | 42,827 | 43,697 | 44,608 | 45,350 | 45,907 | 46,289 | 16.9% | 8.1% |
| Multiple | 4,438 | 4,858 | 4,890 | 4,900 | 4,923 | 4,923 | 4,926 | 11.0% | 1.4% |
| Total | 44,049 | 47,685 | 48,587 | 49,508 | 50,273 | 50,830 | 51,215 | 16.3% | 7.4% |
| Sacramento Region | | | | | | | | | |
| Single | 534,010 | 609,052 | 628,349 | 646,963 | 661,477 | 670,713 | 675,946 | 26.6% | 11.0% |
| Multiple | 180,414 | 197,172 | 200,919 | 205,277 | 208,079 | 211,219 | 212,363 | 17.7% | 7.7% |
| Total | 714,424 | 806,224 | 829,268 | 852,240 | 869,556 | 881,932 | 888,309 | 24.3% | 10.2% |
| Bay Area | | | | | | | | | |
| Single | 1,320,892 | 1,374,236 | 1,383,873 | 1,393,521 | 1,402,353 | 1,409,549 | 1,412,189 | 6.9% | 2.8% |
| Multiple | 813,808 | 855,165 | 865,807 | 875,614 | 884,436 | 895,620 | 905,070 | 11.2% | 5.8% |
| Total | 2,134,700 | 2,229,401 | 2,249,680 | 2,269,135 | 2,286,789 | 2,305,169 | 2,317,259 | 8.6% | 3.9% |
| California | | | | | | | | | |
| Single | 7,682,559 | 8,216,969 | 8,345,496 | 8,482,948 | 8,603,384 | 8,678,120 | 8,720,779 | 13.5% | 6.1% |
| Multiple | 3,812,778 | 3,963,666 | 4,016,207 | 4,070,270 | 4,117,735 | 4,171,373 | 4,213,013 | 10.5% | 6.3% |
| Total | 11,495,337 | 12,180,635 | 12,361,703 | 12,553,218 | 12,721,119 | 12,849,493 | 12,933,792 | 12.5% | 6.2% |

Center for Strategic Economic Research, February 2010

Data Source: California Department of Finance, E-8 Historical Population and Housing Estimates and E-5 Population and Housing Estimates

Note: Data represents of January 1 estimates for the year specified. Mobile home data has been excluded.

Median Home Prices

Figure 59 shows that the median home sale price in Placer County generally remains below the prices seen on an overall basis for California and for most of the Bay Area, but above other counties within the Sacramento Region. In September 2009, Placer County's median home price was \$293,750. Of the County's incorporated cities for which data was available, Colfax had the lowest median price of \$198,250, while Loomis had the highest price of \$389,750. Placer County's overall change in median home prices from 1999 to 2009 (around 52 percent) was greater than the average of California and the Bay Area and Sacramento Region counties.

FIGURE 59
MEDIAN HOME PRICES

| Area | 1999 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | % Change 1999-2009 | % Change 2004-2009 |
|----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------------------|-----------------------|
| Placer County | \$193,000 | \$412,500 | \$515,000 | \$430,000 | \$403,000 | \$330,000 | \$293,750 | 52.2% | -28.8% |
| Auburn | \$183,750 | \$420,000 | \$450,000 | \$434,000 | \$399,000 | \$335,000 | \$297,500 | 61.9% | -29.2% |
| Colfax | \$139,500 | - | - | \$300,500 | \$387,500 | \$282,000 | \$198,250 | 42.1% | - |
| Lincoln | \$127,000 | \$378,500 | \$523,500 | \$425,000 | \$370,000 | \$304,000 | \$262,500 | 106.7% | -30.6% |
| Loomis | \$185,000 | - | - | \$499,500 | \$400,000 | \$483,000 | \$389,750 | 110.7% | - |
| Rocklin | \$201,000 | \$413,750 | \$510,000 | \$455,000 | \$400,000 | \$323,000 | \$285,000 | 41.8% | -31.1% |
| Roseville | \$171,750 | \$418,500 | \$487,500 | \$400,472 | \$388,000 | \$325,000 | \$280,500 | 63.3% | -33.0% |
| Sacramento Region | | | | | | | | | |
| El Dorado County | \$162,800 | \$408,250 | \$489,000 | \$481,750 | \$405,000 | \$370,000 | \$288,000 | 76.9% | -29.5% |
| Sacramento County | \$139,500 | \$321,500 | \$382,750 | \$357,000 | \$308,500 | \$200,000 | \$175,000 | 25.4% | -45.6% |
| Yolo County | \$163,000 | \$372,250 | \$480,000 | \$405,000 | \$375,000 | \$272,750 | \$250,000 | 53.4% | -32.8% |
| Bay Area | | | | | | | | | |
| Alameda County | \$270,000 | \$484,000 | \$585,000 | \$595,000 | \$560,000 | \$385,000 | \$357,000 | 32.2% | -26.2% |
| Contra Costa County | \$224,522 | \$450,000 | \$565,000 | \$560,000 | \$562,000 | \$300,000 | \$259,500 | 15.6% | -42.3% |
| Marin County | \$419,500 | \$675,000 | \$805,000 | \$795,000 | \$810,000 | \$680,000 | \$635,500 | 51.5% | -5.9% |
| San Benito County | \$244,500 | \$505,000 | \$590,000 | \$572,250 | \$491,955 | \$300,000 | \$265,000 | 8.4% | -47.5% |
| San Francisco County | \$374,000 | \$672,000 | \$735,000 | \$760,000 | \$770,000 | \$675,000 | \$662,000 | 77.0% | -1.5% |
| San Mateo County | \$393,500 | \$650,000 | \$755,000 | \$760,000 | \$750,000 | \$605,000 | \$570,000 | 44.9% | -12.3% |
| Santa Clara County | \$340,000 | \$549,000 | \$660,000 | \$677,000 | \$700,000 | \$505,000 | \$450,000 | 32.4% | -18.0% |
| California | \$206,546 | \$463,630 | \$543,510 | \$557,150 | \$535,760 | \$319,310 | \$296,090 | 43.4% | -36.1% |

Center for Strategic Economic Research, February 2010

Data Sources: California Association of Realtors (CAR) with DataQuick Information Systems; RAND California

Notes: Data reflects September of year specified.

Sutter and Yuba County data not available.

- represents that data is not available for that area in that time period.

All California data is from CAR. County and city historical data from RAND California, 2004-2009 data from CAR.



INFRASTRUCTURE

Infrastructure

Interstate freeways, transcontinental railways, a deep-water shipping channel, and two major international airports give Placer County easy access to many major markets. Various utility companies in Placer County and the Sacramento Region provide reliable electricity, gas, and sufficient water supplies to the County’s businesses and residents.

This section provides information on Placer County and Sacramento Region transportation infrastructure, such as highways, airports, the Port of West Sacramento, railroads, trucking, public transportation, and a profile on providers and rates of electrical utilities, natural gas, water, and wastewater that service the area.

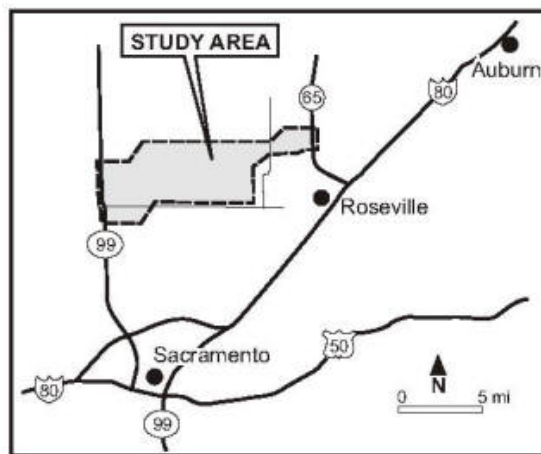
Transportation

Four major highways allow one-day freight delivery throughout California and parts of the West Coast, making Placer County an excellent location for warehouse and distribution facilities. Similarly, the Port of West Sacramento provides access for deep-draft ships. The Sacramento Region transportation advantages benefit the local economy and enhance Placer County's ability to reach and serve markets in the United States and abroad.

Access via Interstate 80 and more than 820 miles of connecting highways permit rapid commutes to surrounding regions, placing cities such as San Francisco; Reno, Nevada; and Salt Lake City, Utah within one day's travel from Placer County. Highway 65 provides access from Interstate 80 north to Lincoln and Marysville. Interstate 5 links Placer County with Oregon and Washington in the north, and Los Angeles, Orange, and San Diego Counties in the south. Highway 99 travels north and south through the agricultural regions of the San Joaquin and Sacramento Valleys and nearby Highway 50 provides a direct connection to South Lake Tahoe and convenient access to all connecting freeways in the Sacramento Region.

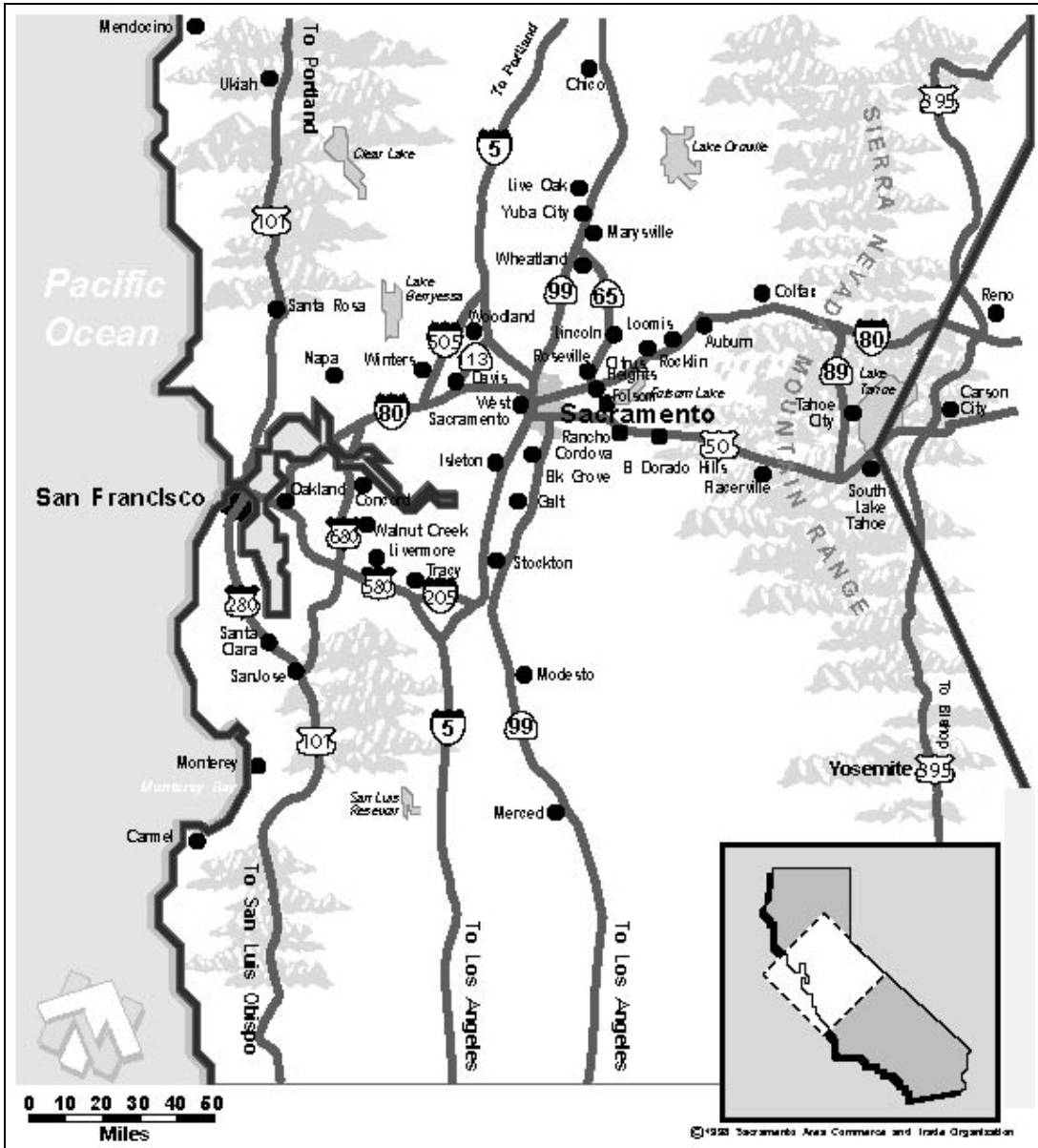
Plans are underway for a 15-mile long corridor, called Placer Parkway (in the shaded study area in the map to the right), which will connect Highway 65 in Placer County to Highway 70 and 99 in south Sutter County. Placer Parkway will improve access from Placer County to downtown Sacramento and the Sacramento International Airport.

Figure 60 provides a view of the major transportation infrastructure in the Sacramento Region and beyond.



Center for Strategic Economic Research, February 2010
Data Source: Placer County Transportation Planning Agency

FIGURE 60
TRANSPORTATION MAP

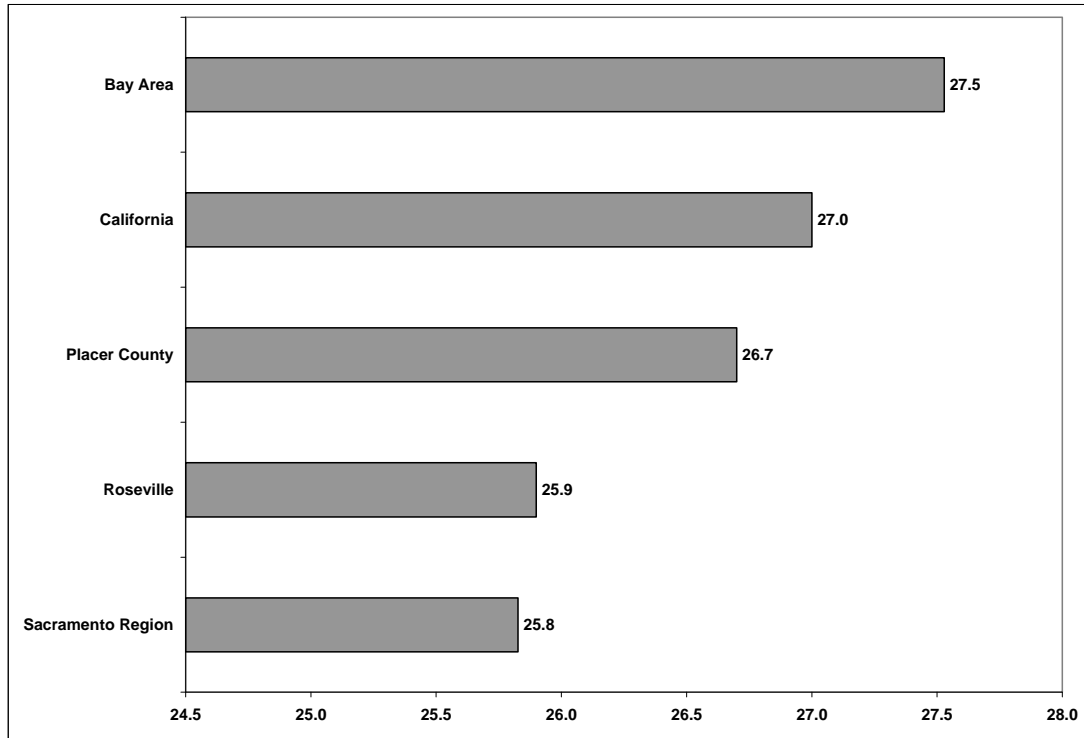


Center for Strategic Economic Research, February 2010
Data Source: Sacramento Area Commerce and Trade Organization, Sacramento Regional Map

Commute Times

As shown in Figure 61, Placer County’s mean commute time of close to 27 minutes is around one minute, on average, longer than the Sacramento Region and less than one minute shorter than the Bay Area and California.

FIGURE 61
MEAN TRAVEL TIME TO WORK FOR WORKERS AGE 16 & ABOVE IN 2008



Center for Strategic Economic Research, February 2010
 Data Source: U.S. Census Bureau, 2008 American Community Survey
 Notes: Sacramento Region and Bay Area are weighted averages based on population.
 San Benito County is not included in Bay Area as 2008 data is not available.
 Roseville is the only Placer County city for which 2008 data is available.

Airports

Sacramento International Airport, Reno/Tahoe International Airport, Mather Airport, and Executive Airport serve Placer County, the Sacramento Region, and outlying areas. Sacramento International Airport is located 12 miles north of downtown Sacramento and 23 miles from Roseville and is currently served by the following airlines: Alaska, American, Continental, Delta, Frontier, Hawaiian, Horizon, JetBlue, Mexicana, Southwest, United, and U.S. Airways. Offering over 150 scheduled departures daily, Sacramento International Airport’s airlines provide travelers with nonstop or convenient connecting service to numerous destinations across the country and around the world. The Sacramento County Airport System has begun construction on a Terminal Modernization Program at the Sacramento International Airport that will cost approximately \$1.3 billion and is slated for completion in late 2011. The project, designed to replace the current Terminal B to meet future travel demand, will be able to

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accommodate around 10 million passengers per year. The new Terminal B facilities will include: a landside terminal building, airside concourse, an automated people mover, two-level structured roadway, and cross-field taxiway and apron paving.

Another major passenger and cargo airport serving Placer County (primarily the High Country) and outlying areas is the Reno/Tahoe International Airport, which has been in operation for over 80 years. The Airport, located in Reno, Nevada and 51 miles from Tahoe City, has over 120 daily flights and provides service to 16 nonstop destinations and 20 one-stop destinations. The following airlines operate at the Reno/Tahoe International Airport: Alaska/Horizon, American, Delta/Delta Connection, Northwest, Southwest, United, and U.S. Airways.

Mather Airport, located in Rancho Cordova and 15 miles from Roseville, began operations in May 1995 as an air cargo and general aviation facility. The 2,875-acre Airport includes 40 acres of cargo ramp space and two parallel runways, one that is an impressive 11,300 feet long. In addition, Mather Airport has 321,000 square feet of warehouse space and 198,000 square feet of office space.

Sacramento's Executive Airport is located 10 minutes south of downtown Sacramento. This general aviation airport has three paved runways, the longest at slightly over 5,500 feet. The Airport offers such services as air charters, aircraft sales, and flight training provided by over 20 businesses located on the 540-acre site.

INFRASTRUCTURE

Figure 62 shows that the Sacramento International Airport posted healthy growth in passenger traffic from 2003 to 2008 with an almost 14 percent increase, servicing nearly 10 million passengers in 2008. Pounds of air freight during this same time period increased nearly 16 percent to the 2008 level of close to 154 million pounds. Additionally, almost 5 million pounds of air mail were processed through the airport in 2008. Reno/Tahoe International Airport had around 5 million passengers in 2008, an increase of 10 percent since 2003. Pounds of air freight increased approximately 16 percent during this time period to a total of over 120 million in 2008. Mather Airport processed approximately 154 million pounds in air freight in 2008 and Sacramento Executive Airport had about 98,000 air operations (including scheduled and non-scheduled general aviation and military flights). Sacramento International Airport, Reno/Tahoe International Airport, and Mather Airport had around 153,000, 125,000, and 82,000 respective operations in 2008.

FIGURE 62
AIRPORT PASSENGERS, CARGO, AND OPERATIONS TOTALS

| <i>Airport</i> | <i>2003</i> | <i>2004</i> | <i>2005</i> | <i>2006</i> | <i>2007</i> | <i>2008</i> | <i>% Change 2003-2008</i> |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------------------------|
| Sacramento International Airport | | | | | | | |
| Passengers | 8,778,163 | 9,580,722 | 10,203,066 | 10,362,800 | 10,767,639 | 9,982,661 | 13.7% |
| Air Mail (in pounds) | 24,062,757 | 19,764,879 | 19,005,797 | 9,787,393 | 2,818,161 | 4,958,686 | -79.4% |
| Air Freight (in pounds) | 133,004,390 | 128,971,692 | 135,811,044 | 139,438,494 | 171,778,161 | 153,680,001 | 15.5% |
| Air Operations | 159,221 | 164,211 | 168,305 | 172,522 | 173,416 | 152,675 | -4.1% |
| Reno/Tahoe International Airport | | | | | | | |
| Passengers | 4,586,027 | 5,093,914 | 5,169,256 | 5,000,663 | 5,043,964 | 5,044,087 | 10.0% |
| Air Freight (in pounds) | 103,937,116 | 106,120,479 | 110,770,301 | 122,490,191 | 129,249,404 | 120,232,329 | 15.7% |
| Air Operations | 139,109 | 145,443 | 140,851 | 141,727 | 140,806 | 125,107 | -10.1% |
| Mather Airport | | | | | | | |
| Air Freight (in pounds) | 120,249,435 | 127,316,112 | 130,370,798 | 135,368,167 | 164,565,490 | 154,200,207 | 28.2% |
| Air Operations | 70,709 | 80,591 | 85,944 | 91,600 | 92,539 | 82,394 | 16.5% |
| Sacramento Executive Airport | | | | | | | |
| Air Operations | 134,234 | 128,651 | 117,277 | 127,923 | 100,392 | 98,164 | -26.9% |

Center for Strategic Economic Research, February 2010

Data Sources: Sacramento Department of Airports, Airport Properties & Business Development, *Operations Reports*;
Reno/Tahoe International Airport Air Cargo Development Department and web site

Other airports that primarily provide services for private individuals and corporate use include the Lincoln Regional Airport, the Truckee Tahoe Airport, and the Auburn Municipal Airport. The publicly-owned Lincoln Regional Airport, 17 miles north of Sacramento and two miles west of the City of Lincoln, is a general and corporate aviation airport and industrial/business park situated on 775 acres. With one 6,000 foot long asphalt runway suited for most corporate jet aircraft, Lincoln Regional Airport is designated as a reliever airport for the Sacramento Region. A heliport, three helicopter tiedowns, 260 aircraft tiedowns, 46 portable hangars, 88 T-hangars, 9 corporate hangars, and conventional hangar space for 46 aircraft are also available at the airport.

The Truckee Tahoe Airport is located two miles east of Truckee and offers excellent access to skiing, boating, tennis, golf, swimming, and lodgings in the Sierra Nevada

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Mountains. The airport provides a full range of airport services, such as flight training, aircraft rental, aerial tours/sightseeing, and aircraft sales available for corporate and individual clients. The airport has two asphalt runways on their 80 acres of land paved and designated for aviation—one 4,650 feet long, the other 7,000 feet long.

The Auburn Municipal Airport site is located three miles north of Auburn. The paved runway is 3,700 feet long and 75 feet wide with one 30-foot wide parallel paved taxiway. The Auburn Municipal Airport has an average of 188 aircraft operations per day, with slightly over half of them local general aviation.

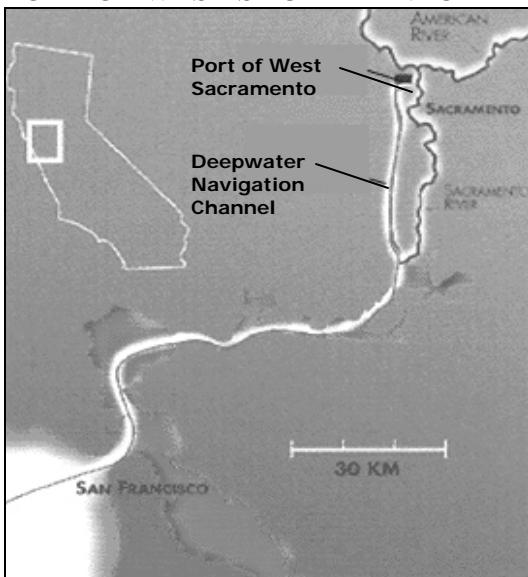
Port of West Sacramento

The Port of West Sacramento, opened in 1963, is an operating port that offers a complete line of services to both shippers and receivers of cargo. A variety of bulk and break-bulk cargos move through the Port’s five berths. Major commodities are wood chips, rice, wheat, fertilizers, lumber, and animal feeds. Its location near Interstates 80 and 5 give the 50 truck companies that service the port easy access. Major transcontinental railways (Burlington Northern Santa Fe Railway, Union Pacific, and Sierra Northern) service the Port, operating on the Port’s own track system and 200-railcar marshalling yard.

Located 79 nautical miles northeast of the San Francisco Bay (pictured in Figure 63), the inland Port of West Sacramento provides covered storage including two warehouses for flat bulk with the capacity for 75,000 tons with a total of eight bins; one warehouse with 42,000 square feet for general cargo; and two ‘flat’ 100,000-ton capacity warehouses. The Port also has 24 acres of outside bulk paved storage for 650,000 tons.

The Port of West Sacramento was awarded funding to cover the majority of the \$80 million cost for their Sacramento River Deep Water Channel Deepening project. The project, which will deepen the 43-mile-long channel from 30 to 35 feet, is scheduled to begin in 2010 and be completed in 2011. A major goal of this project is to reduce the number of trucks on the roadways that transport goods within the area, ultimately decreasing diesel fuel pollution. One project that is in process is a \$175 million, 24-megawatt solar power plant that will be built by a Spanish company on a portion of 160 acres of land, along the deep-water channel, that it will lease from the Port. A plant of this size is significantly larger than any such plant currently operating in the United States and would provide power for about 6,000 homes.

**FIGURE 63
PORT OF WEST SACRAMENTO MAP**



Center for Strategic Economic Research, February 2010
Source: Port of West Sacramento web site

Railroads

Placer County is home to the largest commercial rail facility on the West Coast, the Union Pacific J. R. Davis Yard in Roseville. The Davis Yard is the premier classification yard on the West Coast, consolidating rail traffic into longer, dedicated trains that can move directly to a final destination or interchange. As a result of the 1996 merger of Union Pacific with Southern Pacific, Placer County has access to Burlington Northern Santa Fe Railway, giving the County service by both major Western railroads. Approximately 98 percent of all traffic in Northern California moves through the yard. Rededicated in 1999 after a \$145 million reconstruction project, it encompasses 915 acres on a site that has operated for about 100 years. Short line railroads, Sierra Northern Railway, and California Northern Railroad also service the Region.

Passenger rail in Placer County includes daily service to the Bay Area as far south as San Jose and eastbound service to Chicago via Reno, Salt Lake City, and Denver. Amtrak's Capitol Corridor from Auburn to San Jose provides commuting and travel links for Placer County residents, and its California Zephyr route offers eastern access over the Sierra Nevada Mountains to its Chicago terminus.

Trucking

The Sacramento Valley's reputation as a leading agricultural center is supported by trucking service that moves the majority of produce from the fields to processing plants, and market destinations throughout the United States. The trucking industry also supports the Sacramento Region's manufacturing base by transporting goods produced by industries within the Region. Trucks serve other businesses that send and receive daily shipments, making it clear that trucking is a major component in the network of transportation services available to Placer County.

Some of the larger trucking companies located within Placer County and the Sacramento Region include Sacramento Kenworth Company, Hendrickson Trucking, Con-Way Western Express, ABF Freight System Inc., and Saia Motor Freight Line.

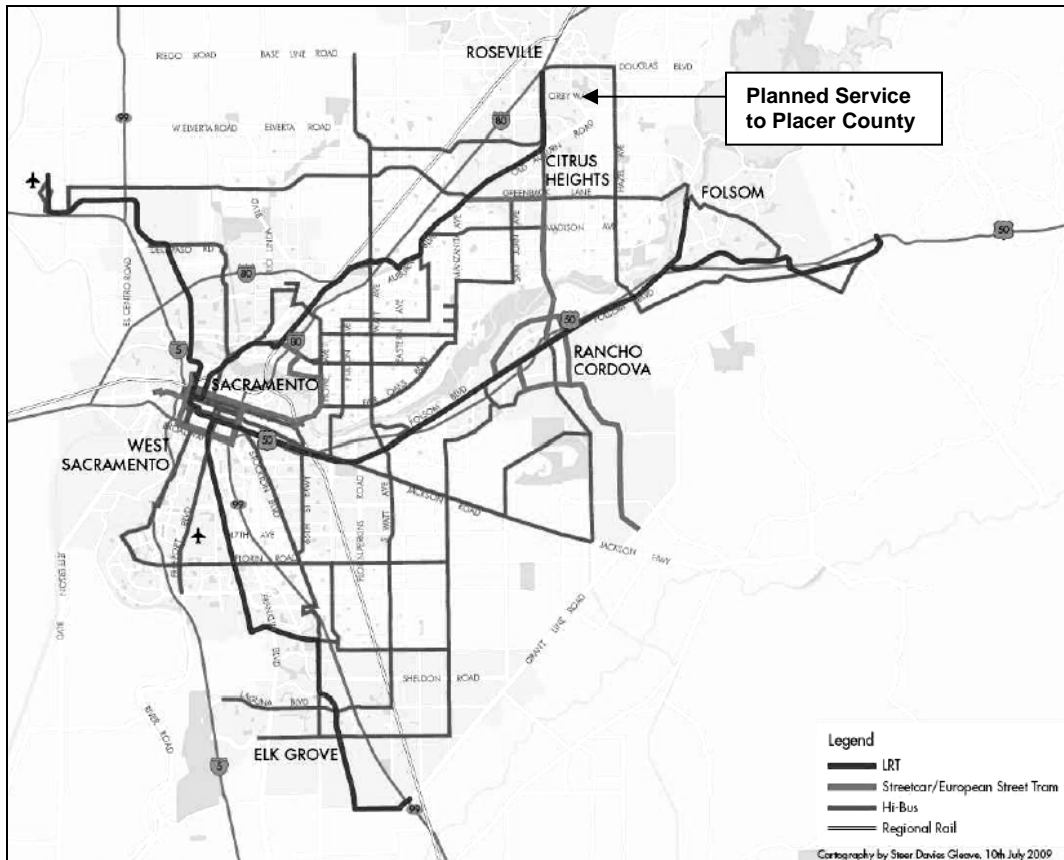
Public Transportation

Tahoe Area Regional Transit (TART) operates along 30 miles of Lake Tahoe shoreline and includes a shuttle between Tahoe City and Truckee via Highway 89, several times daily between 6:00 a.m. and 7:00 p.m. seven days per week. A connection between TART and Greyhound or Amtrak is available at the Truckee Depot. A new Tahoe City Transit Center has been approved on 64 acres at the intersection of State Routes 89 and 28. TART bus service is funded by Placer County, Washoe County Regional Transportation Commission, the Town of Truckee, and the North Lake Tahoe Resort Association.

INFRASTRUCTURE

Sacramento Regional Transit District's (RT) service area covers 418 square miles with 97 bus routes and almost 37 miles of light rail. In 1987, Sacramento RT began operating light rail and, since then, has extended services to Mather Field in Rancho Cordova (1998), South Sacramento (2003), Sunrise Boulevard in Rancho Cordova (2004), and Historic Folsom (2005). The final part of the Folsom plan was completed in December 2006 which extended the route about 0.7 mile to the downtown Sacramento Valley Station connecting light rail with Amtrak services and local and commuter buses. Light rail ridership has increased greatly since its opening and is a major part of the total regional transit system. In August 2009, Sacramento RT adopted the Transit Action Plan (TAP) which is a vision of the expansion of Sacramento RT's public transportation system over the next 30 years. Some of the features of TAP include extending the light rail system, building streetcar lines to downtown Sacramento and Rancho Cordova, and investigating technology upgrades for busy bus corridors. Future light rail plans include extensions to Natomas and the Sacramento International Airport in addition to further extensions to South Sacramento. RT is also in the planning stages, in partnership with other transportation agencies, to implement light rail train service to the 'Northeast Corridor'—i.e. Roseville in South Placer County. These plans are included in the District's 30-year vision map, Figure 64.

FIGURE 64
SACRAMENTO REGIONAL TRANSIT DISTRICT VISION MAP



Center for Strategic Economic Research, February 2010
Source: Sacramento Regional Transit District

INFRASTRUCTURE

Figure 65 illustrates the annual ridership for Sacramento RT and TART. In fiscal year 2008-2009, Sacramento RT's bus ridership totaled almost 17 million passengers. Light rail ridership has had a significant five-year growth of around 62 percent, servicing more than 17 million passengers in the 2008-2009 fiscal year. TART ridership has grown around 52 percent over the past five years with approximately 437,000 passengers serviced in the most current full fiscal year.

FIGURE 65
PUBLIC TRANSIT ANNUAL RIDERSHIP

| <i>System</i> | <i>2003- 2004</i> | <i>2004- 2005</i> | <i>2005- 2006</i> | <i>2006- 2007</i> | <i>2007- 2008</i> | <i>2008- 2009</i> | <i>Absolute Growth 2003-2004 to 2008-2009</i> | <i>% Growth 2003-2004 to 2008-2009</i> |
|-----------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---|--|
| Sacramento Regional Transit | | | | | | | | |
| Bus | 19,080,024 | 18,929,000 | 16,778,000 | 16,807,000 | 16,607,800 | 16,800,000 | -2,280,024 | -11.9% |
| Light Rail | 10,589,500 | 12,009,000 | 14,452,000 | 14,760,400 | 15,951,600 | 17,200,000 | 6,610,500 | 62.4% |
| Total | 29,669,524 | 30,938,000 | 31,230,000 | 31,951,000 | 32,559,400 | 34,000,000 | 4,330,476 | 14.6% |
| Tahoe Area Regional Transit | | | | | | | | |
| | 286,563 | 295,116 | 330,818 | 363,372 | 433,628 | 436,668 | 150,105 | 52.4% |

Center for Strategic Economic Research, February 2010

Data Sources: Sacramento Regional Transit and Tahoe Area Regional Transit

Notes: Data represents fiscal year from July to June.

There are several other public transit providers serving Placer County, but limited historical ridership data is available. Placer County Transit (PCT) operates fixed-route buses, Placer Commuter Express, Dial-A-Ride service, and vanpool services. PCT fixed bus routes cover areas from the Gold Country region (Alta, Colfax, and Auburn) through The Valley (South Placer County) stretching to the Watt-I-80 Light Rail stop. Placer Commuter Express provides bus service Monday through Friday from Colfax, Clipper Gap, Auburn, Penryn, Loomis, Rocklin, and Roseville to Downtown Sacramento to Sacramento RT buses and light rail trains. Dial-A-Ride services (transportation available via reservation for the general public) are available within the service area generally covering Auburn, Rocklin, Loomis, and Granite Bay. PCT also funds vanpool and shuttle services for senior transportation and other routes to Foresthill and to Auburn (Gold Country Stage service). According to the Placer County Transportation Planning Agency (PCTPA), around 526,000 passengers used PCT's combined services in fiscal year 2008-2009 (July to June).

Roseville Transit contains three services including a fixed-route service throughout the City of Roseville, Dial-A-Ride, and weekday peak-period commuter service to downtown Sacramento. Connections with PCT and Sacramento RT are also provided at various Roseville Transit stops within the City. Approximately 434,000 passengers used Roseville Transit services in fiscal year 2008-2009.

The Cities of Auburn and Lincoln also operate local bus service within their respective communities. Auburn Transit offers two routes on weekdays and one route on Saturdays and is based at Auburn Multi-Modal Station which provides a transfer point to other transportation providers such as PCT. About 66,000 passengers rode Auburn Transit in fiscal year 2008-2009. Lincoln Transit offers three fixed routes on weekdays and Dial-a-

Ride services throughout the City of Lincoln. Last fiscal year, ridership for Lincoln Transit's services was about 33,000 passengers (based on PCTPA data).

The Western Placer Consolidated Transportation Services Agency (WPCTSA) provides elderly and disabled transit services in Placer County and had a total ridership for the fiscal year 2008-2009 of almost 12,000 passengers.

Utilities

Various utility providers service the County's residents and businesses. A description of the various providers and rates are provided in the following section.

Utility Distribution Companies

Electricity in the Placer County area is provided by Pacific Gas and Electric Company (PG&E), the City of Roseville, Sacramento Municipal Utility District (SMUD), and NV Energy.

Pacific Gas and Electric Company (PG&E) provides natural gas and electric service to approximately 15 million people in its 70,000 square mile Northern and Central California service area—one of the largest utility companies of its kind in the United States. PG&E's power is generated from hydroelectric powerhouses, a nuclear power plant, and fossil-fired power plants in addition to purchasing power from independent producers. In 2009, PG&E was named, for the second year in a row, to the Dow Jones Sustainability North American Index, one of only 10 utilities in the United States recognized for environmental stewardship and corporate responsibility. It was also included in the Dow Jones Sustainability World Index for the first time and is only one of two U.S. utilities included on the index. Over 50 percent of the electricity PG&E delivers within its territory originates from carbon-free sources. PG&E's commitment to environmental issues is also demonstrated through a voluntary program it developed, called ClimateSmart, which gives their customers the opportunity to fund environmental projects that will help remove greenhouse gas emissions associated with their energy use. In November 2007, the City of Rocklin was the first city in California to enroll in the ClimateSmart program. PG&E has a number of locally-based economic development representatives to provide cost and needs analysis for new and expanding business facilities. These representatives partner with local economic development corporations to provide a full assistance package in addressing the various questions that arise and decisions to be made with relocation, expansion, or new facility plans.

Roseville Electric, providing electric power to its customers for nearly 100 years, is a municipal-owned utility covering a service area of about 36 square miles within Roseville city borders including around 52,000 total customers. The utility company is supervised by the Roseville City Council, advised by the Roseville Public Utilities Commission, and offers some of the lowest rates and highest power supply reliability within the state. It

has earned the ReliabilityOne™ Award from PA Consulting for eight consecutive years, demonstrating its ability to excel in delivering reliable electric services to its customers. Roseville Electric opened Roseville Energy Park (REP) in 2007 which, at maximum capacity, features 160 megawatt natural gas-fired generation that provides up to 40 percent of the City’s electricity. Roseville Electric offers its customers the option to participate in ‘Green Roseville,’ a program that helps them limit their impact on the environment. Customers who participate in Green Roseville pay an additional amount for the company to purchase 100 percent of their energy from wind and solar resources and set aside a portion to go toward the development of renewable energy in the local community.

The Sacramento Municipal Utility District (SMUD) is a public utility that covers a 900-square-mile service area including primarily Sacramento County and a small portion of Placer County. SMUD generates, transmits, and distributes electric power to almost 590,000 residential and commercial customers and represents the nation’s sixth largest publicly-owned utility based on the number of customers served. SMUD is nationally recognized as a leader in renewable resources and electric transportation. SMUD supports environmental protection through its green energy programs including providing options for customers to purchase energy from natural sources through its Greenergy program and underwriting a web site, OurGreenCommunity.org, which allows residents to share ideas on ways to reduce their emissions impacts. By 2011, SMUD aims to meet 23 percent of its retail electricity sales with renewable energy. The utility company completed the first phase of construction of the Cosumnes Power Plant (CPP) in 2006, which increases its long-term power supply to its customer base in a cost-effective manner. Phase one of the CPP includes one 500 megawatt plant which meets the annual demand of 450,000 single-family homes and is located on a 30-acre site about 25 miles southeast of Sacramento.

Figure 66 displays average 2009 California retail electricity prices, calculated in cents per kilowatt-hour by the California Energy Commission for the local major utility companies PG&E, SMUD, and Roseville Electric compared to other major utilities that primarily serve Southern California. As evident in the Figure, the utility companies serving Placer County and the Sacramento Region are generally competitive with others in the state.

FIGURE 66
AVERAGE RETAIL ELECTRICITY PRICES BY MAJOR UTILITY (PRICE PER KILOWATT-HOUR)

| Customer Classes | Roseville | | | | | |
|------------------|-----------|---------|---------|----------|----------|--------|
| | Electric | PG&E(1) | SMUD(2) | LADWP(3) | SDG&E(4) | SCE(5) |
| Residential | 0.12 | 0.13 | 0.10 | 0.12 | 0.18 | 0.12 |
| Commercial | 0.10 | 0.19 | 0.11 | 0.13 | 0.16 | 0.19 |
| Industrial | 0.08 | 0.16 | 0.09 | 0.11 | 0.15 | 0.16 |
| Agricultural | - | 0.20 | 0.11 | 0.12 | 0.17 | 0.16 |
| System Average | 0.10 | 0.17 | 0.11 | 0.12 | 0.17 | 0.16 |

Center for Strategic Economic Research, February 2010

Data Source: California Energy Commission staff

Notes: The electricity prices represented in the table is an average retail price per kilowatt-hour. System average is an average of all classifications.

(1) Pacific Gas and Electric, (2) Sacramento Municipal Utility District, (3) Los Angeles Department of Water & Power, (4) San Diego Gas & Electric, (5) Southern California Edison

Another public utility company providing electricity to a portion of Placer County is NV Energy (formerly NV Power). This investor-owned company supplies power mostly to customers within Nevada, but also covers the Lake Tahoe area of northeastern California—a total service area of almost 55,000 square miles and around 2.4 million customers.

Natural Gas

In addition to electricity, PG&E also provides natural gas for commercial and residential use in Placer County. PG&E relies on three major sources for its gas piping system: Canada, Southwestern United States, and California. Most customers directly purchase their natural gas from the utility company; however, large PG&E gas customers can purchase their gas from the supplier of their choice and pay PG&E only for the gas transportation services they actually use. Figure 67 provides PG&E natural gas rates for commercial customers.

FIGURE 67
PG&E COMMERCIAL NATURAL GAS RATES

| <i>User Class</i> | <i>Summer</i> | | <i>Winter</i> | |
|--|-------------------------|---------------|-------------------------|---------------|
| | <i>Per Therm Charge</i> | | <i>Per Therm Charge</i> | |
| | <i>First 4,000</i> | <i>Excess</i> | <i>First 4,000</i> | <i>Excess</i> |
| | <i>Therms</i> | <i>Therms</i> | <i>Therms</i> | <i>Therms</i> |
| Small Commercial (Up to 20,800 Therms/Month) | \$0.86951 | \$0.68394 | \$0.93045 | \$0.70307 |
| Large Commercial (Above 20,800 Therms/Month) | \$0.82612 | \$0.64055 | \$0.88706 | \$0.65968 |

Center for Strategic Economic Research, February 2010
 Data Source: PG&E Company Schedules G-NR1 and G-NR2
 Notes: A Public Purpose Program Surcharge (PPPS) is added to each rate.
 Rates effective November 1, 2009.

Water

The Placer County Water Agency (PCWA) is a major provider of water to over 150,000 Placer County customers. PCWA is a public non-profit agency established in 1957 that encompasses the entire boundary of Placer County. PCWA is responsible for water resource planning, supplying retail/wholesale water, as well as for producing hydroelectric energy. These responsibilities are carried out by three different divisions: Administrative Services, Water System, and Power System.

Administrative Services handles the administrative and resource planning (including surface and groundwater issues) duties of PCWA. The Water System division operates eight water treatment plants that produce drinking water. This division also irrigates agricultural land and golf courses with its raw water that is distributed through 165 miles of canals, ditches, flumes, and small reservoirs. The Power system division operates the Middle Fork American River Project that features two main reservoirs, seven dams, five

INFRASTRUCTURE

hydroelectric power plants, and 21 miles of tunnels. This division of PCWA also sells its power output that it generates (a 244 megawatt capacity) to PG&E.

San Juan Water District (SJWD), a community services district, provides water to various areas in Sacramento County, but additionally serves Granite Bay in Placer County. SJWD’s water source is in the American River watershed which flows to the Folsom Reservoir and onward for treatment.

The City of Roseville Environmental Utilities provides the City water originating from Folsom Lake which is treated and fluoridated at the city-owned and operated Barton Road Water Treatment Plant. In order to meet the increasing demands of its expanding customer base, the plant was expanded to increase its daily capacity to 100 million gallons.

Additionally, several private and other mutual water companies serve parts of Placer County. A listing of some of these agencies is provided in the Directory. Figure 68 shows the water usage cost comparison of different areas in Placer County and the Sacramento Region. Water rates in Placer County areas present the lower and mid-range figures in comparison to other areas in the Sacramento Region ranging from about \$240 to \$560 per month (based on 30,000 cubic feet with a two inch meter).

FIGURE 68
MONTHLY WATER
RATES

| <i>Area</i> | <i>Monthly Fee 30,000 CF/2" Meter</i> |
|-----------------|---|
| Sacramento | \$242.18 |
| Roseville* | \$294.00 |
| El Dorado Hills | \$333.23 |
| Yuba City | \$342.89 |
| Folsom** | \$357.40 |
| Marysville | \$422.69 |
| Rocklin*** | \$461.28 |
| Woodland | \$547.46 |
| Davis**** | \$556.61 |

Center for Strategic Economic Research,
February 2010

Data Sources:

- Placer County Water Agency;
- City of Woodland Public Works;
- California Water Service Company;
- City of Davis Public Works;
- Yuba City Utilities Department; City of Sacramento Department of Utilities; City of Folsom Department of Finance; City of Roseville Utility/Finance Department; El Dorado Irrigation District

*Effective April 1, 2010

**Customers in the east area may be subject To a \$0.48/ccf charge if water use in the area exceeds 27,000 acre feet.

***First 50,000 cf.

****Based on Tier 2 use of over 619 ccf.

Solid Waste and Wastewater

The Environmental Engineering Division oversees the solid waste management program for Placer County which includes the Eastern and Western Material Recovery Facilities and landfills throughout the County. The Division also supports the Western Placer Waste Management Authority's administrative functions.

The Eastern Material Recovery Facility (MRF) is located in Truckee and provides services to Tahoe area residents. The MRF sorts waste to recover recyclable materials, then cleans the materials to sell them worldwide. The Cities of Lincoln, Rocklin, Roseville, Auburn, Colfax, the Town of Loomis, and the County of Placer are serviced by the Western Placer MRF which is operated by the Western Placer Waste Management Authority. This MRF is located between Lincoln and Roseville and is able to handle solid waste for years to come due to a recent expansion that increased the facility's processing capacity to over 2,000 tons of garbage daily.

Wastewater in Placer County is handled by wastewater treatment plants also managed by the County's Environmental Engineering Division (which services North Auburn, Granite Bay, Loomis, Livoti, Sunset Industrial Area, Applegate, Blue Canyon, Sheridan, and the Dry Creek area), the South Placer Municipal Utility District, the County's individual cities, and the Tahoe-Truckee Sanitation Agency.

The South Placer Municipal Utility District has provided over 50 years of service to its customers and covers a service area within the Loomis Basin of around 18,560 acres with about 20,000 connections. Additionally, over 247 miles of pipe, ten pump stations, and 5,000 manholes are owned, operated, and maintained by the District.

The City of Roseville owns and operates two of the largest wastewater treatment plants in Placer County. One of them, the Dry Creek Wastewater Treatment Plant, located in southwest Roseville, screens, clarifies, aerates, and disinfects water to be used in the irrigation of golf courses, parks, and some streetscapes. The Pleasant Grove Wastewater Plant is a rather new plant located west of Sun City Roseville. The facility uses the latest state-of-the-art wastewater treatment technology to produce recycled water used for landscape and commercial irrigation as well as water to cool the Roseville Energy Park.

The Tahoe-Truckee Sanitation Agency was formed in 1972 to fulfill the mandate of the Porter Cologne Water Quality Control Act which required the exportation all sewage out of the Tahoe Basin to protect the water quality of Lake Tahoe and the Truckee River. The Agency manages five sewage collection districts: the Tahoe City Public Utility District, the North Tahoe Public Utility District, the Squaw Valley Public Service District, the Alpine Springs County Water District, and the Truckee Sanitary District. The Agency transports all sewage from the member districts to a regional plant in Martis Valley. This plant, which began operating in 1978, meets some of the most stringent discharge requirements in the country.



QUALITY OF LIFE

Quality of Life

Placer County's climate, geography, and historical richness contribute to its high quality of life. The geography of the County encompasses the grasslands of the Valley, oak hills of the Gold Country, snow-capped Sierra Nevada mountain range, and numerous rivers, lakes, state parks, and ski resorts. For those who desire a respite from urban life, Placer County offers hiking, biking, camping, snow skiing, snow boarding, horseback riding, fishing, water sports, ice-skating, and hunting. For the more cosmopolitan resident, Placer County also offers superb shopping, education, and cultural opportunities.

This section discusses climate, ground stability, personal safety, health services, recreational activities, in addition to entertainment and cultural activities.

Climate

Moderate, dry days and cool nights characterize the summer months in Placer County. The temperature during the summer varies greatly between the Valley and High Country areas. Typically, as shown in Figure 69, the Valley reaches higher temperatures, while mountain temperatures are lower. The rainy season in Placer County occurs between November and April, but excessive rainfall and damaging windstorms are rare. The Sierra Nevada snowfields are a major source of water during the dry summer months.

FIGURE 69
YEARLY AVERAGE TEMPERATURE AND PRECIPITATION OF
SELECT AREAS OF PLACER COUNTY

| Area | Temperature (Degrees Fahrenheit) | | | | | | | | Average Annual Precipitation (in.) | Average Annual Snowfall (in.) |
|--------------|----------------------------------|------|--------|------|------|------|--------|------|------------------------------------|-------------------------------|
| | Spring | | Summer | | Fall | | Winter | | | |
| | High | Low | High | Low | High | Low | High | Low | | |
| The Valley | | | | | | | | | | |
| Rocklin | 71.8 | 43.9 | 93.5 | 55.9 | 77.7 | 45.8 | 55.9 | 35.8 | n/a* | n/a* |
| Gold Country | | | | | | | | | | |
| Auburn | 68.9 | 45.5 | 89.8 | 59.8 | 75.3 | 50.3 | 55.7 | 37.6 | 34.3 | 1.4 |
| Coffax | 66.5 | 42.8 | 87.9 | 59.0 | 73.5 | 47.5 | 54.9 | 35.3 | 45.3 | 19 |
| High Country | | | | | | | | | | |
| Blue Canyon | 52.8 | 37.6 | 74.4 | 56.6 | 61.5 | 45.6 | 44.6 | 32.0 | 67.5 | 240.3 |
| Tahoe City | 51.4 | 27.5 | 74.6 | 42.2 | 58.5 | 32.3 | 39.7 | 19.9 | 31.5 | 190.6 |

Center for Strategic Economic Research, February 2010

Data Source: Western Region Climate Center

*Official precipitation data for the Rocklin weather station is not available.

Notes: Data represents seasonal average temperatures and annual precipitation and snowfall.

Seasons are represented as follows: Spring (March, April, May); Summer (June, July, August);

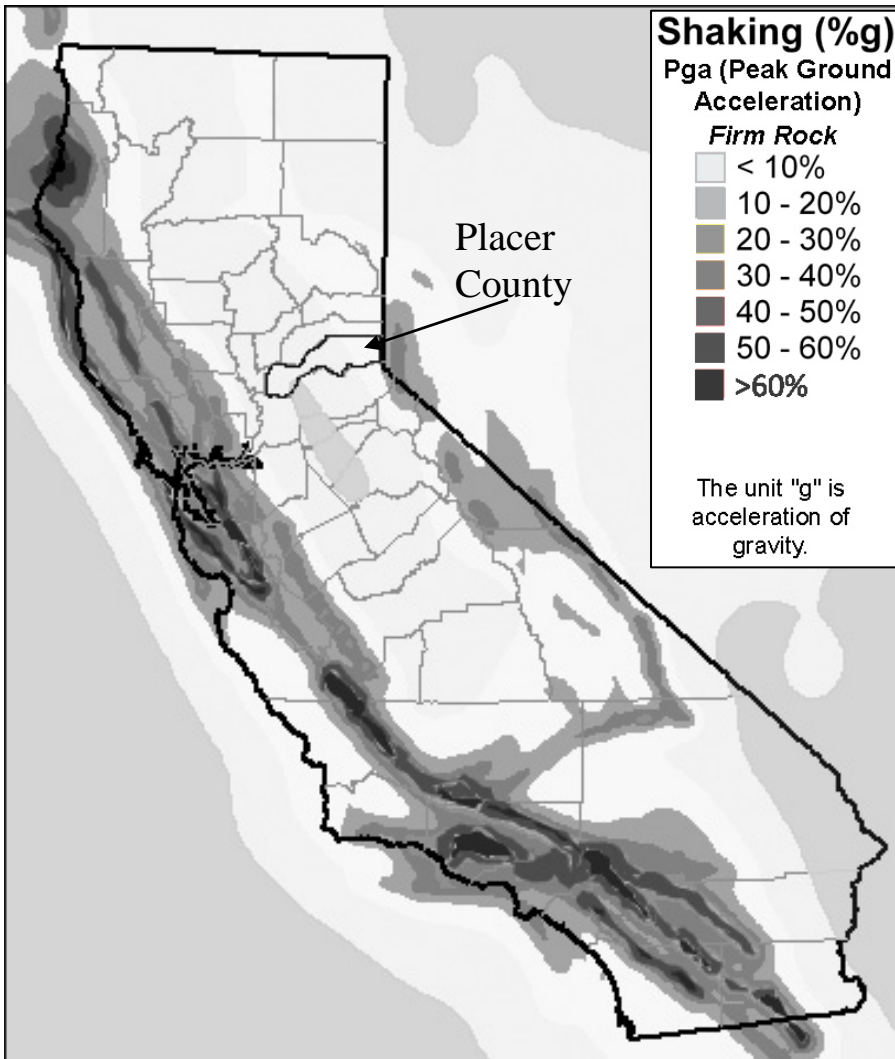
Fall (September, October, November); and Winter (December, January, February).

Ground Stability

Unlike high level seismic activity areas such as the San Francisco Bay and the Los Angeles area, the Sacramento Region ranks among the lowest in the state for the probability of a major earthquake. Placer County and the Sacramento Region are expected to experience minimal earthquake effects. Ground stability is an important factor in the relocation and creation of high technology firms, because a high degree of precision is necessary for development and manufacturing of technological devices.

Figure 70 shows California's earthquake shaking hazards which are measured in peak ground acceleration and estimated by projecting earthquake rates based on earthquake history and fault slip rates. As illustrated, Placer County is located in the state's lowest shaking hazard areas.

FIGURE 70
CALIFORNIA SEISMIC SHAKING HAZARD MAP



Center for Strategic Economic Research, February 2010
 Source: California Department of Conservation, based on the U.S. Geological Survey / California Geological Survey Probabilistic Seismic Hazards Assessment Model, 2002 (revised April 2003)

QUALITY OF LIFE

Personal Safety

All of the areas shown in Figure 71 experienced similar large decreases in the crime rate between 1998 and 2008. Placer County's property crimes per 10,000 inhabitants in 2008 (about 250) was lower than all comparison areas, while its violent crime rate (nearly 24) was about half of the other areas' rates.

**FIGURE 71
ANNUAL VIOLENT AND PROPERTY CRIMES
(PER 10,000 INHABITANTS)**

| Area/Crime Type | 1998 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | % Change | | Absolute Change | | |
|--------------------------|-------|-------|-------|-------|-------|-------|-------|-----------|-----------|-----------------|-----------|--|
| | | | | | | | | 1998-2008 | 2003-2008 | 1998-2008 | 2003-2008 | |
| Placer County | | | | | | | | | | | | |
| Violent Crime | 25.1 | 20.2 | 20.6 | 21.2 | 25.3 | 26.1 | 23.7 | -5.6% | 17.0% | -1.4 | 3.4 | |
| Property Crime | 291.3 | 276.9 | 305.7 | 309.8 | 267.2 | 248.0 | 246.3 | -15.4% | -11.0% | -45.0 | -30.6 | |
| Sacramento Region | | | | | | | | | | | | |
| Violent Crime | 58.6 | 49.7 | 55.4 | 55.3 | 61.4 | 54.4 | 50.8 | -13.4% | 2.1% | -7.9 | 1.1 | |
| Property Crime | 449.2 | 415.8 | 430.0 | 398.7 | 382.6 | 343.1 | 326.0 | -27.4% | -21.6% | -123.2 | -89.8 | |
| Bay Area | | | | | | | | | | | | |
| Violent Crime | 61.3 | 46.9 | 44.2 | 47.0 | 52.1 | 52.0 | 51.3 | -16.2% | 9.4% | -9.9 | 4.4 | |
| Property Crime | 394.0 | 356.2 | 352.7 | 340.9 | 344.0 | 321.2 | 310.2 | -21.3% | -12.9% | -83.8 | -46.0 | |
| California | | | | | | | | | | | | |
| Violent Crime | 68.6 | 56.9 | 54.0 | 51.2 | 51.8 | 50.7 | 48.6 | -29.2% | -14.7% | -20.0 | -8.4 | |
| Property Crime | 354.7 | 336.5 | 334.3 | 323.0 | 308.7 | 294.5 | 285.4 | -19.5% | -15.2% | -69.3 | -51.0 | |

Center for Strategic Economic Research, February 2010

Data Sources: Office of the Attorney General: Criminal Justice Statistics Center; Federal Bureau of Investigation, Uniform Crime Reports

Health Services

High-quality, comprehensive medical services are another aspect of the quality of life enjoyed by Placer County residents. Placer County is served by three major acute care hospitals as reported by the Office of Statewide Health Planning and Development. Figure 72 provides a listing of acute care hospitals in Placer County and outlying areas in the six-county Sacramento Region along with total beds in each hospital.

FIGURE 72
GENERAL ACUTE CARE HOSPITALS IN PLACER
COUNTY AND THE SACRAMENTO REGION

| <i>Hospital Name</i> | <i>City</i> | <i>Total Beds</i> |
|---|------------------|-------------------|
| Placer County | | |
| Kaiser Permanente Roseville Medical Center | Roseville | 340 |
| Sutter Roseville Medical Center | Roseville | 313 |
| Sutter Auburn Faith Hospital | Auburn | 97 |
| Sacramento Region | | |
| University of California, Davis Medical Center | Sacramento | 613 |
| Fremont Medical Center | Yuba City | 396 |
| Sutter Memorial Hospital | Sacramento | 348 |
| Mercy General Hospital | Sacramento | 342 |
| Methodist Hospital of Sacramento | Sacramento | 333 |
| Sutter General Hospital | Sacramento | 306 |
| Kaiser Foundation Hospital - Sacramento | Sacramento | 288 |
| Mercy San Juan Hospital | Carmichael | 260 |
| Kaiser Foundation Hospital - South Sacramento | Sacramento | 161 |
| Rideout Memorial Hospital | Marysville | 149 |
| Barton Memorial Hospital | South Lake Tahoe | 119 |
| Woodland Memorial Hospital | Woodland | 108 |
| Marshall Medical Center | Placerville | 105 |
| Mercy Hospital - Folsom | Folsom | 85 |
| Shriners Hospitals for Children - Northern California | Sacramento | 80 |
| Sutter Davis Hospital | Davis | 48 |
| Kindred Hospital - Sacramento | Folsom | 39 |
| Sutter Surgical Hospital-North Valley | Yuba City | 14 |

Center for Strategic Economic Research, February 2010

Data Source: Office of Statewide Health Planning and Development Healthcare
 Quality & Analysis Division

Note: Data as of June 30, 2009.

In October 1998, Kaiser Permanente opened a 116-bed hospital on Eureka Road adjacent to its medical offices. Since then, the hospital increased the number of beds to 166 (not including the Women's and Children's Center). In addition to the hospital, comprehensive outpatient, primary, and specialty care services are offered, as well as education, pharmacy, laboratory, radiology, optical, EKG, and physical therapy services at three sites in Roseville. Kaiser opened a 75,000 square-foot medical office building in Lincoln in October 2006. In December 2008, construction was also completed for a \$52 million emergency room expansion project that quadrupled the size of the Kaiser Roseville facility and doubled the number of beds. Part of this expansion is a renovation of the radiology department which tripled in size and includes high-tech rooms with advanced diagnostic tools. Kaiser Roseville's Women's and Children's Center opened in

January 2009 and includes 174 beds, neonatal and pediatric intensive care units, and a second medical office building.

Sutter Roseville Medical Center, opened in 1997, is a 791,000 square-foot campus set on 57 acres that provides the residents of seven counties, including Placer, with comprehensive community health care. In addition to providing complete inpatient/outpatient medical and surgical services on its new campus, Sutter Roseville operates a trauma center and a 24-hour emergency department. It also provides critical care services, cancer treatment, cardiology services, a modern Family Birth Center, and a 15-bed skilled nursing facility. Recent expansions include a 20,800 square-foot medical office in Lincoln with physicians, dentists, physical therapists, and other health care professionals; an additional 64,000 square-foot medical office building with various specialists (ear, nose, and throat; dermatology; sports medicine; etc.); and an expansion of 19 to 30 bays in the emergency department.

Sutter Roseville is currently in the planning and approval stages of an expansion project that would increase the campus size to over 1 million square feet over the next 15 to 20 years. Some major projects under the plan that have recently been completed to include a 90,000 square-foot, 90-bed patient care tower; a 106,000 square-foot, 56-bed acute rehabilitation center (40 beds currently with space for 16 more); and a 13,000 square-foot, 16-bed neonatal intensive care unit.

Sutter Auburn Faith Hospital, originally founded in 1966, is a 97-bed acute care hospital located off Highway 49 in Auburn. The services offered at this facility include obstetrics, hospice, acute rehabilitation, outpatient cardiac rehabilitation, occupational therapy, and home health services. There is also a 24-hour emergency department, complete inpatient/outpatient medical and surgical services, and critical care services. The Hospital is getting an \$18.6 million upgrade over the next few years which will update its operating rooms and refurbish 61 patient rooms. The multi-phase renovation is anticipated to be completed in mid-2011.

Accommodations

Placer County offers abundant lodging, conference, and banquet facilities as well as accommodations for smaller groups. The number of hotels and lodging facilities has rapidly increased to meet the growing demand stimulated by the swell of business and tourist activity in Placer County. Figure 73 lists the largest accommodations (50 rooms and above) in the County.

FIGURE 73
LARGER ACCOMMODATIONS (50+ ROOMS) IN PLACER COUNTY

| <i>Name</i> | <i>Location</i> | <i>Total Number of Rooms</i> | <i>Number of Suites</i> | <i>Total Meeting Rooms</i> | <i>Maximum Banquet/Meeting Capacity</i> |
|--|-----------------|------------------------------|-------------------------|----------------------------|---|
| Resort at Squaw Creek, Squaw Valley | Olympic Valley | 405 | 186 | 24 | 600 |
| The Village at Squaw Valley | Olympic Valley | 276 | 0 | 5 | 250 |
| Northstar-at-Tahoe | Northstar | 240 | 15 | 13 | 250 |
| Orchid Suites, Roseville | Roseville | 179 | 179 | 3 | 80 |
| Granlibakken Conference Center and Resort | Tahoe City | 160 | 56 | 16 | 400 |
| Ritz-Carlton Highlands, Lake Tahoe | Northstar | 154 | 16 | 13 | 478 |
| Hilton Garden Inn, Roseville | Roseville | 131 | 0 | 2 | 100 |
| Squaw Valley Lodge | Olympic Valley | 130 | 130 | 2 | 100 |
| Best Western Roseville Inn, Roseville | Roseville | 126 | 22 | 2 | 45 |
| Courtyard Roseville Galleria Mall | Roseville | 125 | 4 | 1 | 60 |
| Howard Johnson, Rocklin | Rocklin | 124 | 21 | 4 | 125 |
| TownePlace Suites by Marriott - Sacramento | Roseville | 124 | 124 | 1 | 50 |
| Extended Stay America | Roseville | 122 | 2 | 0 | 0 |
| SpringHill Suites by Marriott | Roseville | 118 | 118 | 1 | 30 |
| Homewood Suites, Roseville | Roseville | 111 | 111 | 1 | 60 |
| Heritage Inn Express, Rocklin | Rocklin | 104 | 20 | 1 | 30 |
| Heritage Inn, Roseville | Roseville | 101 | 9 | 2 | 120 |
| Staybridge Suites | Rocklin | 98 | 98 | 0 | 0 |
| Holiday Inn, Auburn | Auburn | 96 | 2 | 3 | 75 |
| Tahoe Inn | Brockway | 94 | 0 | 0 | 0 |
| Courtyard Roseville | Roseville | 90 | 3 | 1 | 50 |
| Larkspur Landing, Roseville | Roseville | 90 | 90 | 1 | 40 |
| Olympic Village Inn | Olympic Valley | 90 | 0 | 0 | 0 |
| Residence Inn, Roseville | Roseville | 90 | 90 | 1 | 30 |
| Holiday Inn Express Lincoln | Lincoln | 87 | 23 | 1 | 50 |
| Roseville Hampton Inn & Suites | Roseville | 85 | 24 | 3 | 40 |
| Holiday Inn Express Roseville Galleria | Roseville | 83 | 23 | 1 | 45 |
| Fairfield Inn by Marriott | Roseville | 82 | 0 | 1 | 25 |
| Comfort Inn Central, Auburn | Auburn | 80 | 5 | 0 | 0 |
| Quality Inn | Auburn | 76 | 0 | 0 | 0 |
| Comfort Suites | Rocklin | 72 | 72 | 1 | 20 |
| Best Western Golden Key | Auburn | 68 | 0 | 0 | 0 |
| Rocklin Park Hotel & Spa | Rocklin | 67 | 1 | 3 | 140 |
| Days Inn Rocklin | Rocklin | 65 | 1 | 3 | 30 |
| Foothills Motel | Auburn | 61 | 1 | 0 | 0 |
| Motel 6 Auburn | Auburn | 57 | 0 | 0 | 0 |
| Super 8 Motel | Auburn | 52 | 1 | 0 | 0 |

Center for Strategic Economic Research and Placer County Office of Economic Development, February 2010
Data Sources: Above-listed hotels, Placer County Visitor's Bureau, Placer Valley Tourism, North Lake Tahoe Resort Association

Notes: The number of suites are included in 'Total Number of Rooms' column.
Accommodations sorted by total number of rooms.

Recreational Activities

The expansive range of Placer County's elevation and landscape characteristics provides ample opportunity for recreational and leisure activities for every season and every region within the County. This explains the continuing and growing popularity of Placer County among residents and tourists seeking active leisure. Topographical and geographical descriptions of each of the three regions in Placer County are as follows:

The Valley: The Placer Valley area consists of the three vibrant suburban communities of Roseville, Rocklin and Lincoln. The cities' high standards and family values have resulted in a nationally-recognized quality of life, as exemplified by the *Family Circle* magazine designation of Rocklin as one of the 10 most desirable places for a family to live, the *Money* magazine ranking of Roseville as one of the best places to live in the United States, and Lincoln's "All American City" designation (an annual award presented to 10 U.S. communities whose citizens work together to identify and tackle community-wide challenges and achieve uncommon results). Recreational amenities, cultural activities, world class shopping, dining and golf abound in the area. This safe, green-oriented, and affluent community hosts a variety of amateur and youth sports events at facilities including Hardwood Palace, Mahany Park, Roseville Aquatics Complex, Skatetown USA, Strikes Bowling Center, American Powerhouse Trampoline & Tumbling, SkyZone, and Maidu Regional Park. Golf enthusiasts are thrilled with the array of championship courses, many of which boast five star banquet facilities. Shopping opportunities abound with the expansion of the 1.5 million square-foot Westfield Galleria at Roseville, and the recently completed upscale lifestyle center, The Fountains at Roseville. The expanding Thunder Valley Casino is one of the nation's most elegant casino-resort attractions. Rich agricultural lands, recreational amenities, and cultural activities characterize the Valley area of Placer County. Folsom Lake State Recreation Area offers opportunities for activities such as boating, water skiing, fishing, swimming, horseback riding, and camping.

The Gold Country: Well-stocked lakes with tree-lined shores characterize the world-famous Gold Country. The search for gold brought many to the hills of Placer County. Hiking along old wagon trails through the Tahoe National Forest is a hike through the area's history. Off the beaten path, adventure seekers can experience gold panning, nature photography, or river rafting. Fans of water activities will find a large number of opportunities for fun and adventure. Numerous commercial companies offer canoeing, kayaking, and rafting trips for different skill levels along the picturesque routes on the American River. Follow up these activities with a stop at one of the local farmers markets, where fresh produce can be found year-round. Placer County is world-famous for its sweet and nutritious mandarins, in-season during November and December. The strawberry harvests in Spring and Summer are delicious and juicy, red and ripe, straight from the fields. Vine-ripened and freshly picked, tomatoes can be found

in abundance at the produce stands in Newcastle, Loomis, Auburn as well as various farmers markets.

The High Country: Those seeking adventure or rest and relaxation can enjoy the splendor of the High Country. Abundant opportunities for hiking, camping, mountain bicycling, and horseback riding are available during the summer and fall seasons. Snowmobiling, ice skating, downhill and cross-country skiing, and sledding are popular in the winter and early spring. One of the winter sports gaining in popularity is snowshoeing along the many trails in the Sierras.

The various ski resorts located in or in close proximity to the High Country region are major tourism draws to Placer County in winter, offering many activities to its visitors. Figure 74 provides a basic overview of these resorts including general information, amenities, and activities.

QUALITY OF LIFE

**FIGURE 74
PLACER COUNTY SKI RESORT AMENITIES AND ACTIVITIES**

| | <i>Squaw Valley USA*</i> | <i>The Resort at Squaw Creek*</i> | <i>The Village at Squaw Valley*</i> | <i>Alpine Meadows</i> | <i>Northstar-at-Tahoe</i> | <i>Sugar Bowl</i> | <i>Homewood Mountain Resort</i> | <i>Royal Gorge Cross Country Ski Area</i> |
|---|--------------------------|-----------------------------------|-------------------------------------|-----------------------|---------------------------|-------------------|---------------------------------|---|
| General Information & Amenities: | | | | | | | | |
| Year Opened | 1949 | 1990 | 2002 | 1961 | 1972 | 1939 | 1961 | 1971 |
| Average Snowfall (inches) | 450 | 450 | 450 | 400 | 350 | 500 | 450 | 600 |
| Base Elevation (feet) | 6,200 | 6,200 | 6,200 | 6,835 | 6,330 | 6,883 | 6,230 | 5,800 |
| Summit Elevation (feet) | 8,900 | 8,900 | 8,900 | 8,637 | 8,610 | 8,383 | 7,880 | 7,400 |
| Accommodations (Number of Units) | 950 | 405 | 276 | 0 | 240 | 27 | 0 | 57 |
| Ski Rental/ Repair | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Number of Restaurants | 56 | 4 | 8 | 4 | 9 | 4 | 4 | 4 |
| Number of Shops | 27 | 6 | 20 | 1 | 22 | 2 | 1 | 1 |
| Child Program | Yes | Yes | No | Yes | Yes | Yes | Yes | Yes |
| Winter Sports & Activities: | | | | | | | | |
| Number of Ski Lifts | 33 | 1 | 0 | 13 | 17 | 10 | 8 | 4 |
| Number of Ski School Staff | 225 | 0 | 0 | 120-150 | 250-300 | 100 | 75 | 40 |
| Miles of Cross Country Trails | 11 | 0 | 0 | 0 | 31 | 0 | 0 | 191 |
| Ice Skating Rink | Yes | Yes | No | No | Yes | No | No | No |
| Snow Boarding | Yes | No | No | Yes | Yes | Yes | Yes | No |
| Summer Sports & Activities: | | | | | | | | |
| Lifts Operating | 1 | 0 | 0 | 0 | 2 | 0 | 0 | 0 |
| Miles of Mountain Bike Trails | 0 | 0 | 0 | 0 | 100+ | 0 | 0 | 0 |
| Number of Swimming Pools | 1 | 3 | 0 | 0 | 1 | 0 | 0 | 0 |

Center for Strategic Economic Research and Placer County Office of Economic Development, February 2010

Data Source: Above-listed resorts and web sites

* With the exception of accommodations, restaurants and shops for Squaw Valley USA, the numbers provided in the table reflect only the amenities offered directly by that resort; however, the Resort at Squaw Creek and The Village at Squaw Valley are in close proximity of Squaw Valley USA and share many of its amenities.

Squaw Valley USA, the Village at Squaw Valley, and the Resort at Squaw Creek feature ski lifts, ice skating, accommodations, and restaurants. In addition to the amenities and activities displayed in Figure 74, this site of the 1960 Winter Olympics boasts other winter activities, including a fitness and health spa, indoor climbing wall, snowshoeing, sleigh rides, dog sled tours, snowtubing, cable car rides, heated swimming pools, and hot tubs. Summer activities include some of the amenities available during the winter season in addition to golfing, hiking, biking, tennis, sky jumping, ropes course, flying trapeze, and horseback riding. The Olympic Museum is also open year-round at High Camp with the purchase of a cable car ride.

Northstar-at-Tahoe is in the midst of a mountain expansion plan. Recently-completed projects include a new children’s center, a new cross-country and snowshoe center, new trails, and additional snowmaking over two new runs. In September 2007, Northstar-at-Tahoe completed its LiveWire Trail which has an irrigation system running through the length of the trail and over 45 tabletop jumps—it is the first downhill bike trail of its kind. The ski resort finished construction of a five-star Ritz-Carlton hotel which opened in December 2009 and includes over 170 rooms. Northstar-at-Tahoe opened a new Tahoe-style village featuring 193 condominiums, shopping, art galleries, cafes, and restaurants, in addition to a year-round skating rink. Phase Three of the Village’s expansion was completed in the 2008-2009 winter season and includes 101

condominiums, townhomes, and a recreation center. Winter activities at Northstar-at-Tahoe, in addition to those listed in Figure 74, include cross country skiing, snowshoeing, snowtubing, telemarking, outdoor heated pools and spas, saunas, and a fitness center. Summer activities include mountain biking, flyfishing, golfing, horseback riding, tennis, hiking, Action Zone (bungee trampoline and basketball shootoff), and ATV tours.

Sugar Bowl recently completed a \$10 million, 14,000 square-foot addition to its Mount Judah Day Lodge to include a bar, restaurant, and a medical clinic which is managed by Tahoe Forest Hospital. In addition to the winter activities in Figure 74, one can participate in dogsled tours, snowshoe tours, and airboarding. Sugar Bowl is closed during the summer months, but can be reserved for private functions, such as weddings, reunions, and corporate retreats.

In the 2007-2008 winter season, Homewood Mountain Resort introduced a new quad chairlift, called “Homewood Express” which transports visitors to the top of the mountain in four minutes. Some activities that are available at the resort during summer include a paintball playground and bike rentals. Space is also available for private parties and outdoor wedding ceremonies.

Royal Gorge Cross Country Ski Area has the largest groomed track system in North America. In addition to cross country skiing, lessons for snowshoeing and telemarking are also available at the resort.

Golf Courses

With over twenty-five beautiful golf courses ranging from short, par-three to world-class courses, Placer County is a perfect place for golfers. The major public and private golf courses in the County include:

- Auburn Country Club, Auburn
- Black Oak Golf Course, Auburn
- Catta Verdera Country Club, Lincoln
- Diamond Oaks Golf Course, Roseville
- Granite Bay Golf Club, Granite Bay
- Indian Creek Country Club, Loomis
- Lincoln Hills Golf Club, Lincoln
- Mc Ginty’s Golf West, Roseville
- Morgan Creek Golf and Country Club, Roseville
- Northstar-at-Tahoe Resort Golf Course, Northstar
- Old Brockway Golf Course, Kings Beach
- Raspberry Hill Public Golf Course, Auburn
- Resort at Squaw Creek, Olympic Valley
- Roseville Rolling Greens Golf Course, Granite Bay
- Sierra View Country Club, Roseville

- Sierra Pines (Sun City) Golf Course, Roseville
- Timber Creek (Sun City) Golf Course, Roseville
- Sunset Whitney Golf and Country Club, Rocklin
- Tahoe City Golf Course, Tahoe City
- The Ridge Golf Course, Auburn
- Turkey Creek Golf Club, Lincoln
- Whitney Oaks Golf Club, Rocklin
- Winchester Country Club, Auburn
- Woodcreek Golf Club, Roseville

Camping

Placer County provides many opportunities for outdoor activities, including hiking, nature photography, and camping. Approximately half of Placer County's territory belongs to the California State Department of Parks and Recreation and the United States Forest Service which operates over 1,100 tent and RV campsites. Placer County is known for providing many picturesque camping locations with access to numerous recreational activities like fishing, boating, hiking, horseback riding, and other opportunities to discover and enjoy the County's beautiful nature. A listing of these campgrounds is as follows:

The Valley

- Camp Far West, Lincoln
- Folsom Lake State Recreation Area

The Gold Country

- Baxter RV Campground, Baxter
- Bear River Park, Colfax
- Bowman RV Park, Auburn
- Dutch Flat Campground, Dutch Flat/Gold Run
- Lake Clementine Boat-in-Camp, Auburn
- Loomis RV Park, Loomis
- Mineral Bar, Colfax
- River-Trail Permit Camping, Auburn
- Rollins Lake - Greenhorn Park Campground, Colfax
- Rollins Lake - Long Ravine Campground, Colfax
- Rollins Lake - Orchard Springs Campground, Colfax
- Ruck-a-Chucky Bar, Auburn

The High Country

- Ahart Campground, Foresthill
- Big Meadows Campground, Foresthill
- Big Reservoir Campground, Foresthill

- Coyote Group Campground, Foresthill
- Cisco Grove Campground, Soda Springs
- French Meadows Campgrounds, Foresthill
- Gates Group Campground, Foresthill
- Hell Hole Campground, Foresthill
- Kaspian Recreation, Tahoe City
- Lake Forest, Tahoe City
- Lewis Campground, Foresthill
- Poppy Campground, Foresthill
- Robinson Flat Campground, Foresthill
- Sandy Beach Resort, Tahoe Vista
- Sugar Pine Reservoir, Foresthill
- Sugar Pine Reservoir - Forbes Creek Group Campground, Foresthill
- Sugar Pine Reservoir - Giant Gap Campground, Foresthill
- Sugar Pine Reservoir – Shirttail Creek Campground, Foresthill
- Talbot Campground, Foresthill
- Upper Hell Hole Campground, Foresthill
- William Kent, Tahoe City

Other Recreation and Sports

In addition to the various outdoor activities offered in Placer County, the Valley region has several recreation and sport complexes to meet various interests:

- **Ballooning:** Mountain High Balloons, Truckee
- **Bowling:** AMF Rocklin Bowl, Rocklin; Foothills Bowling Center, Auburn; and Strikes Family Entertainment Center, Rocklin
- **Children’s Play & Party Center:** Bounce U, Roseville; Pump It Up, Roseville; and Wacky Tacky, Roseville
- **Cinema:** Regal Theaters, Auburn; Brockway Theatre, Kings Beach; Century 14, Roseville; Harding Plaza, Roseville; Regal/UA Olympus Point, Roseville; and Cobblestone Cinema, Tahoe City
- **Fitness & Community Center:** Roseville Sports Center, Roseville
- **Frisbee:** Auburn Recreational District Frisbee Golf, Auburn
- **Ice Skating:** Skatetown, Roseville and Squaw Valley Olympic Ice Pavilion, Olympic Village
- **Kayaking, Mountain Biking:** Tahoe Adventure Company, Tahoe City
- **Miniature Golf, Water Fun, Arcade:** Golfland Sunsplash, Roseville
- **Motocross:** Oak Creek BMX, Roseville and Lincoln Indoor Motocross Complex, Lincoln
- **Motorcycle Races:** Fast Friday’s, Auburn Fair Grounds
- **Paintball:** Homewood Paintball Playground, Homewood

- **River Rafting:** Truckee River Rafting, Tahoe City
- **Skateboarding:** Auburn Recreation District Skateboard Park, Auburn and EPIC Indoor Skatepark, Rocklin
- **Stock Car Racing:** Roseville All American Speedway, Roseville
- **Stock Car Racing, Simulated:** Bush League Racing, Rocklin
- **Swimming:** Auburn Recreation District Park Pool, Auburn; Roseville Aquatic Complex, Roseville; and McBean Pool Recreation, Lincoln
- **Trampoline Jumping Fun:** SkyZone, Rocklin

Community Events, Cultural Activities, Places of Historical Interest, and Other Entertainment

While outdoors enthusiasts have a great opportunity to experience the abundance of year-round recreational activities in Placer County, others can enjoy entertainment at numerous musical and festival events as well as local galleries, theaters, and museums. At the same time, shoppers are offered a large selection of boutiques, specialty shops, and farmers markets, as well as extensive wine tasting venues.

Community Events

Community activities and events in Placer County are scheduled throughout the year. In January, the County begins the year's activities with the Gem Faire in Roseville and Tahoe Rim Nordic Race ending at Northstar-at-Tahoe. February brings the Chinese New Year Parade and the Foothill Quilters Guild Show in Auburn. The Snowfest Winter Festival, one of the biggest events of the year, is held at North Lake Tahoe throughout March and Auburn hosts a St. Patrick's Day Celebration this month. The Foresthill Chamber of Commerce in partnership with the Sierra Nevada Dog Drivers is once again sponsoring the Foresthill Sled Dog Winter Classic March 13-14, 2010 at the China Wall staging area. The Placer County Fair Grounds in Roseville hosts a NASCAR event on its half mile oval dirt track.

In April, Auburn is the site of the 77-year-old Wild West Stampede Pro Rodeo event and Roseville hosts the annual Placer County Strawberry Festival at the Placer County Fairgrounds. Also in April, Placer Valley Tourism hosts an ABA BMX Nationals event and the annual Easter Egg Hunt at Memorial Park in Foresthill. World Class White Water Rafting trips on the Middle and North Forks of the American River originate from Foresthill in April and early May.

During May, weather permitting, OHV Trails are opened on the Foresthill Divide which attracts trail riding enthusiasts from around the world, old Auburn hosts the Annual Spring Antiques Street Faire, Cinco De Mayo festivities are held in Auburn, and Lincoln hosts the Portuguese Holy Ghost Celebration, and cyclists from all over Northern California come to ride the hills in the annual Tour de Lincoln. The Foresthill Divide Home and Business Showcase is held the first weekend in May. All local businesses are

welcome at this popular community networking event. The popular internationally-acclaimed Feats of Clay exhibition, held at the Gladding McBean Pottery Company in Lincoln, is also held in May. The Auburn Regional Park turns the clock back to the Middle Ages with the annual Mother's Day weekend Renaissance Faire. The Foresthill Divide Historical Society Museum opens Memorial Day weekend for the summer and includes a working smithy shop.

June brings about a continuing series of events, beginning with Pioneer Days, held in Meadow Vista, Auburn Family Night Out, and the Placer County Fair in Roseville. Additional June events include the Concours d'Elegance Boat Show at North Lake Tahoe and the American River Confluence Festival, held in Auburn, and the 100-Mile Western States Endurance Run which is routed through Squaw Valley, Foresthill, and Auburn. Lincoln hosts a delicious Downtown Certified Farmers Market for 12 weeks during the summer.

Other summer activities include Fourth of July celebrations held throughout Placer County. Placer Valley Tourism hosts the California Capitols Tennis championships at the Galleria Mall in Roseville. The Tevis Cup Ride, a grueling 100-mile horse race with a course that stretches between Tahoe and Auburn, takes place in the end of July. New in 2010 is an August Tomato Festival in Loomis. August events include the Thunder in the Sky Auburn Air Fair, the Heritage Trail and Placer County Museums Tour, and summer music series in Auburn, Roseville, and Lincoln.

Harvest festivals are the major events of the fall season. September brings the Classic Car Show and Poker run to Cruise the Historic Gold Country co-sponsored by the Foresthill and Georgetown Chambers of Commerce. Also during September, Auburn hosts the Gold Country Fair and the Fall Antiques, Collective Street Fair; Colfax hosts the Founder's Day Celebration; the Eggplant Festival is held in Loomis; Foresthill's Heritage Festival takes place; and the Lincoln Chamber sponsors the Lincoln Showcase which highlights regional restaurants, wineries, and breweries under the stars in historic downtown Lincoln. During October, North Lake Tahoe, Placer Valley Tourism and Foresthill and Lincoln host Oktoberfests, several farms participate in the Placer Farm and Barn Tour featuring many agricultural activities, while the Del Oro Band Spectacular is held in Loomis. Placer Valley Tourism hosts the 3rd annual Wine & Arts Festival in Roseville and the Placer County Wine & Grape Growers host the Auburn Wine Festival. In Mid-October, Iowa Hill celebrates their heritage by hosting the Gold Rush Days.

November is the time of year when some of the most festive celebrations are held in Placer County. Holiday in the Pines Craft Fair is held the first weekend in November at the Foresthill Memorial Hall. The Autumn Arts Studio Tour throughout the County, the International Rail Fair in Roseville, the Mountain Mandarin Festival in Auburn, and the Christmas Lighting Ceremony & Songfest in Rocklin are the main November events. The month's activities conclude with a Christmas Craft Fair in Auburn. Holiday tree lighting events and parades are held in Lincoln, Roseville, and Auburn.

December rounds out the year's activities and celebrations associated with the holiday season. North Lake Tahoe hosts the Alpenlight Festival, the Christmas Eve Torchlight Parade, and the New Year's Eve Fireworks Festivities. On the first Friday in December, the Foresthill Chamber of Commerce sponsors the Christmas tree lighting in downtown Foresthill. During this month, Auburn hosts the Festival of Lights Parade, the Old Town Country Christmas, and Victorian Christmas at the Bernhard Museum. A Christmas Craft Fair is held in Loomis while Colfax hosts the Colfax Hometown Holiday Celebration.

Celebrate the Arts

Throughout the county, the arts in its many forms—an internationally-recognized art competition, world-class symphony and ballet performances, outstanding theatre productions, and a collection of art galleries—has become a hallmark of the region. The catalyst for the burgeoning arts and humanities in Placer County is PlacerArts, a not-for-profit, public-benefit agency located in Auburn. Since 1983, this spearhead organization has rallied hundreds of regional artists, musicians, and performers to grow the arts, and make it a permanent and integral part of the region's cultural tapestry.

Annual events include the Autumn Art Studios Tour, where artists open their studios to visitors and demonstrate their work for three days in November. The Auburn Art Walks, where local businesses transform their walls into exhibition space and team with artists to showcase a variety of artistic techniques four times from April through October. Jazz at 808, Placer County's only world-class jazz series, is held in Auburn three times from May through September.

Local arts organization, Roseville Arts!, supports the arts in the South Placer area, including in the Granite Bay and Rocklin communities. The organization recently took up residence in the Blue Line Gallery on Vernon Street, which showcases regional and national artists, and hosts small concerts, lectures and poetry readings.

Also in the South Placer region is the Lincoln Arts and Culture Foundation, known for its Feats of Clay juried ceramic art competition, held each spring at the 130-year-old Gladding McBean terra-cotta factory. The competition is internationally-recognized and draws an amazing cache of ceramic artists.

The North Tahoe Arts Center overlooks magnificent Lake Tahoe and helps support the arts in Placer County's High Country. Its two galleries showcase local art, and their Open Studios Tour in July draws visitors from around the region.

Besides visual arts, performing arts offer entertainment throughout the year. The Auburn Symphony, recognized as one of the best community orchestras in the nation, delivers professional-level performances under the superb direction of Maestro Michael Goodwin. Magic Circle Theatre in Roseville presents top-line plays in its Tower and Roseville Theatres. Placer Theatre Ballet continues to woo audiences with renowned guest

performers and quality performances. The Auburn Community Concert Association makes world-class musical performances affordable for the entire community. The Auburn Placer Performing Arts Center at the State Theatre in Auburn is coming into its own under the restored neon marquee, presenting live concerts, plays, dance and movie series. Youth theatre groups Take Note Troupe and Theatre Alive! instill a love of the performing arts in children from 8 through 18.

Placer County's arts organizations, theaters and art galleries include:

- 404 Gallery, Roseville
- Auburn Community Concert Association, Auburn
- Auburn Old Town Gallery
- Auburn Placer Performing Arts Center at the State Theatre, Auburn
- Auburn Symphony, Auburn
- Chamber Music Alive! at Sierra College
- Foresthill High School Theater, Foresthill
- Lincoln Arts and Culture Foundation
- Music & More Arts Academy & Theatre, Auburn
- North Tahoe Arts
- Old Library Art Studio (OLAS), Auburn
- Placer Community Theater, Auburn
- Placer Theatre Ballet
- Ridley Gallery, Rocklin
- Roseville Arts! and Blue Line Gallery, Roseville
- PlacerArts and The Arts Building Gallery, Auburn
- Take Note Troupe
- The Magic Circle Theater (Roseville and Tower Theaters), Roseville
- Theatre Alive!

Visit PlacerArts' online **Artist Registry** and **Arts Calendar**—two new places for artists to connect with patrons, businesses and event coordinators for potential exhibitions and sales, performances, and special events.

Access both the Artist Registry and the Arts Calendar from the main menu at:
www.placerarts.org.

Cultural Activities and Places of Historical Interest

The history and culture of Placer County come alive in its many museums and theaters. The Gold Country Museum, in Auburn's Gold Country Fairgrounds, displays Gold Rush exhibits and information on the history of gold mining. The Placer County Museum, located inside the historic Placer County Courthouse, gives an overview of the history of Placer County life. Main features at this museum include a video presentation of the

history of the transcontinental railroad, a holographic image of an early miner, and Native American Art.

One of Auburn's oldest buildings is the Bernhard Residence, built in 1851 as the Traveler's Rest Hotel. The Bernhard Museum Complex depicts the typical life of a late 19th century farm family. The Griffith Quarry Museum, originally the office of the Penryn Granite Works, houses exhibits on the Griffith family, the granite industry, and the Penryn-Loomis Basin region.

Mining exhibits, general regional information, a reconstructed livery stable, and the original Foresthill Jail are on display at the Foresthill Divide Museum. Exhibits exploring Placer County's rich heritage and history of hydraulic mining and the birth of the transcontinental railroad can be experienced at the Golden Drift Museum in Dutch Flat.

Other historical sites and museums around Placer County include:

- Bernhard Museum Complex
- Carnegie Library and Museum, Roseville
- Colfax Area Heritage Museum
- Foresthill Divide & Leroy Botts Memorial Park, Foresthill
- Gatekeepers Cabin Museum, Tahoe City
- Gold Country Medical History Museum, Auburn
- Gold Country Museum, Auburn
- Golden Drift Museum, Dutch Flat
- Griffith Quarry Museum, Penryn
- Iowa Hill
- Joss House Museum and Chinese History Center, Auburn
- Maidu Interpretive Center, Roseville
- Maritime Museum, Homewood
- Placer County Courthouse Museum, Auburn
- Rocklin History Museum & Old St. Mary's Chapel, Rocklin
- Roseville Telephone Company Museum, Roseville
- Sierra College Museum of Natural History, Rocklin
- Tahoe City Gatekeeper's & Indian Basket Museum, Tahoe City
- Tahoe Maritime Museum, Homewood
- Town of Dutch Flat
- Town of Foresthill
- Town of Gold Run
- Town of Michigan Bluff
- Watson Cabin Living Museum, Tahoe City

Trails

The beautiful landscapes of the Gold Country can be enjoyed by looking out the window of a car as well as by taking a walk or hike along one of the many trails. Placer County is home to the Auburn State Recreation Area, containing numerous hiking and nature trails along the scenic rivers, canyons, lakes and meadowlands. The Tahoe National Forest has many nature trails and interpretive trails. There are seasonal guided activities such as Springtime Wildflower Walks and Star-Gazing parties. One of the self-guided tours is the Placer County Big Trees Grove – the northernmost grove of Giant Sequoia.

Placer County is home to abundant wildlife – birds, fish, bugs, bears, deer, mountain lions, and more. You name it; we’ve probably got it. With both Auburn and Meadow Vista offering official bird sanctuaries, bird watching options are excellent. For the fishing enthusiast, there are several reservoirs and rivers stocked with varieties of bass and trout.

Trail maps and directions are available at the California Welcome Center, 13411 Lincoln Way, Auburn, CA 95603, 530 887-2111 or 866 752-2371. www.visitplacer.com

Trails of the Auburn State Recreation Area (ASRA):

- American Canyon Trail
- Applegate to Lake Clementine Trail
- Clarks Hole Trail
- Codfish Falls Trail
- Confluence Trail
- Confluence Interpretive Trail
- Culvert Trail
- Foresthill Divide Loop Trail
- Fuel Break Trail
- Indian Creek Trail
- Lake Clementine Access Trail
- Lake Clementine Trail
- Lakeview Connector Trail
- Olmstead Loop Trail
- Park HQ-to-Confluence Loop
- Pointed Rocks Trail
- Quarry Road Trail
- Quarry & Western States Loop Trail
- Robie Point FB Trail
- Stagecoach Trail
- Stevens Trail

- Tinker’s Cutoff Trail
- Upper Stagecoach Trail
- Western States – Railroad Bed Section
- Windy Point Trail

Other Trails in the Tahoe National Forest:

- American River Trail
- Beacroft Trail
- Big Trees Interpretive Trail & Forest View Trail
- Euchre Bar Trail
- Forest View Trail
- Green Valley Trail
- Grouse Falls Trail
- Italian Bar Trail
- Little Bald Mountain Trail
- Loch Leven Lakes Trail System
- McGuire Trail
- Michigan Bluff to Deadwood Trail
- Mosquito Ridge Trail
- Mumford Bar Trail
- North Fork of the Middle Fork Trail
- Pacific Crest Trail
- Sailor Flat Trail
- Sugar Pine Trail

Parks

Hidden Falls, including the Spears Ranch parcel, has been described by Supervisor Robert Weygandt as the “crown jewel” of the county’s award-winning Placer Legacy program created by the Board of Supervisors about eight years ago. Opened to the public on October 30, 2006, the 221-acre open space park is located at 7587 Mears Place, north of Mt. Vernon Road between Auburn and Lincoln. Features of the new park include seven miles of natural surface trails suitable for hiking, running, biking and horseback riding. In addition to the more vigorous activities on the natural surface trails, park visitors are able to enjoy fishing, picnicking, wildlife viewing, photography and other passive recreational pursuits. A paved, accessible trail is also available, which begins near the parking lot and winds through a live oak grove and picnic areas. Outstanding natural features at Hidden Falls include Coon Creek and Deadman Creek, groves of blue oak woodlands and a year-round waterfall, 20 to 30 feet high.

Other park amenities include a paved access road, 50-space paved parking lot, equestrian staging area, utilities, restrooms and a 60-foot emergency-access bridge over Deadman Creek.

Hidden Falls Regional Park, formerly known as Didion Ranch, was acquired under the Placer Legacy Open Space and Agricultural Conservation Program. Placer Legacy is a voluntary program to conserve open space, help preserve the local farm economy, protect native plants and wildlife, and provide more passive recreation opportunities to the public.

Adjacent to this section of Hidden Falls is a 961-acre property that the county also acquired through Placer Legacy, previously called "Spears Ranch." The county has begun an environmental-review process which must be completed before making improvements to the second site. Together, the two parcels comprise almost 1,200 acres of open space - including three miles of Coon Creek.

To visit the park, take Atwood Road west from Highway 49 in Auburn until it becomes Mt. Vernon Road. Follow Mt. Vernon Rd. to Mears Road (about 3.5 miles from DeWitt Center). Turn right (north) on Mears Road and follow to Mears Place. Park hours are from one half hour before sunrise to one half hour after sunset daily.

For more information on Hidden Falls and the parks listed below, please visit the Placer County web site www.placer.ca.gov.

- Applegate Park
- Auburn Library Garden Theater
- Auburn Plaza Park
- Bear River Campground
- Douglas Ranch Park
- Doyle Ranch Park
- Foresthill Memorial Park
- Granite Bay Community Park
- Griffith Quarry Park
- Hidden Falls Regional Park
- Loomis Basin Community Park
- Meadow Vista Trail Staging Area and Equestrian Arenas
- Miners Ravine Nature Reserve
- North Park
- Ronald L. Feist Park
- Sabre City Park and Community Hall
- Sheridan Park and Stewart Community Hall
- Spring Meadows Park
- Squaw Valley Bike Trail
- Squaw Valley Park
- Sterling Pointe Park
- Todd Valley Pond Park
- Traylor Ranch Bird Sanctuary and Nature Reserve
- Treelake Park
- Treelake Terrace Park

Other Entertainment

In addition to the recreation, cultural, historical activities and entertainment found within Placer County, Las Vegas style casino gaming can be found at Thunder Valley Casino near the City of Lincoln. The United Auburn Indian Community opened the Casino in June 2003. Today the casino has over 2,800 slot machines and 98 gaming tables, and offers activities such as blackjack and video poker, as well as a choice of nine restaurants such as Austin's Steakhouse, Thunder Café, Feast Buffet, and Koi Palace.

In 2010, Thunder Valley will complete the 400-room, 15 story hotel tower and a 10,000 square-foot flexible meeting space that can be used for conferences, concerts or trade shows. The hotel project will include a health spa, a large pool and pool bar, and cabanas can that be used for parties.

Tourism Resources

There are three main tourism councils/associations for the three regions in Placer County. The Placer County Visitors Bureau and California Welcome Center in Auburn is one of the thirteen+ regional visitors' bureaus for the State of California and covers all areas in Placer County. Placer Valley Tourism is a non-profit organization that markets tourism and overnight stays in the Valley region of Placer County for leisure and business travel. North Lake Tahoe Resort Association is the official visitors and convention bureau for North Lake Tahoe to promote the area's lodging, activities, and dining options. Contact details for these three organizations are provided on the following page.

Placer County Visitors Bureau and California Welcome Center
 13411 Lincoln Way
 Auburn, CA 95603
 (530) 887-2111 or (866) 752-2371 toll free
<http://www.visitplacer.com/>

Placer Valley Tourism
 2204 Plaza Drive, #110
 Rocklin, CA 95765
 (916) 773-5400
<http://www.placertourism.com/>

North Lake Tahoe Resort Association
 Visitors and Convention Bureau
 P.O. Box 5459
 Tahoe City, CA 96145
 (530) 583-3494
<http://www.puretahoenorth.com>

Additional tourism resources include city and area chambers of commerce, as well as State of California Department of Parks and Recreation and the United States Forest Service, which are available in the Directory.



DIRECTORY

Directory

Placer County

Administrative Services
2962 Richardson Drive
Auburn, CA 95603-2640
(530) 889-4275
www.placer.ca.gov/admin.aspx

Assessor
2980 Richardson Drive
Auburn, CA 95603-2640
(530) 889-4300
www.placer.ca.gov/assessor.aspx

Auditor Controller
2970 Richardson Drive
DeWitt Center
Auburn, CA 95603
(530) 889-4160
www.placer.ca.gov/auditor.aspx

Board of Supervisors
175 Fulweiler Avenue
Auburn, CA 95603
(530) 889-4010
www.placer.ca.gov/bos.aspx

Community Development Resource Agency
3091 County Center Drive
(530) 886-3000
www.placer.ca.gov/CommunityDevelopment.aspx

County Executive Office
175 Fulweiler Avenue
Auburn, CA 95603
(530) 889-4030
www.placer.ca.gov/exec.aspx

District Attorney
10810 Justice Center Drive, #240
Roseville, CA 95678
(916) 543-8000
www.placer.ca.gov/da.aspx

DIRECTORY

Economic Development

Mailing Address: 175 Fulweiler Avenue

Physical Address: 145 Fulweiler Avenue, Suite 120

Auburn, CA 95603

(530) 889-4016

www.placer.ca.gov/business.aspx

Sheriff-Coroner-Marshal

2929 Richardson Drive

P.O. Box 6990

Auburn, CA 95604

(530) 889-7800

www.placer.ca.gov/sheriff.aspx

Treasurer-Tax Collector

Finance Administration Building

2976 Richardson Drive, 2nd Floor

Auburn, CA 95603

(530) 889-4120

www.placer.ca.gov/tax.aspx

City of Auburn

Building Department

1225 Lincoln Way, Room 3

Auburn, CA 95603

(530) 823-4211, ext. 3

www.auburn.ca.gov/dept/dept_bldng.html

City Manager

1225 Lincoln Way, Room 9

Auburn, CA 95603

(530) 823-4211 ext. 191

www.auburn.ca.gov/dept/dept_ctymngr.html

Community Development Department

1225 Lincoln Way, Room 3

Auburn, CA 95603

(530) 823-4211 ext. 3

www.auburn.ca.gov/dept/dept_comdev.html

Fire Department
1225 Lincoln Way, Room 7
Auburn, CA 95603
(530) 823-4211 ext. 2
www.auburn.ca.gov/dept/dept_fire.html

Police Department
1215 Lincoln Way
Auburn, CA 95603
(530) 823-4237
www.auburn.ca.gov/pd/index.htm

Public Works
1225 Lincoln Way, Room 3
Auburn, CA 95603
(530) 823-4211 ext. 3
www.auburn.ca.gov/dept/dept_pubwrks.html

City of Colfax

Building Department
33 South Main Street
Colfax, CA 95713
(530) 346-2313
<http://www.ci.colfax.ca.us/services.shtml>

City Hall
P.O. Box 702 (Mailing)
33 South Main Street
Colfax, CA 95713
(530) 346-2313
<http://www.ci.colfax.ca.us/services.shtml>

Economic Development
33 South Main Street
Colfax, CA 95713
(530) 346-2313
www.ci.colfax.ca.us/economic.shtml

Fire Department
33 South Main Street
Colfax, CA 95713
(530) 346-6776
www.ci.colfax.ca.us/services.shtml

DIRECTORY

Planning Department
33 South Main Street
Colfax, CA 95713
(530) 888-6479
www.ci.colfax.ca.us/planningdepartment.shtml

Public Works
33 South Main Street
Colfax, CA 95713
(530) 346-2313
<http://www.ci.colfax.ca.us/services.shtml>

Sheriff-Coroner-Marshal
Placer County Colfax Substation
33 South Main Street
Colfax, CA 95713
(530) 346-2256
<http://www.placer.ca.gov/Departments/Sheriff.aspx>

City of Lincoln

City Manager
600 Sixth Street
Lincoln, CA 95648
(916) 434-2490
www.ci.lincoln.ca.us

Community Development Department
600 Sixth Street
Lincoln, CA 95648
(916) 434-2470
www.ci.lincoln.ca.us

Administrative Services Department
600 Sixth Street
Lincoln, CA 95648
(916) 434-2430
www.ci.lincoln.ca.us

Fire Department
126 Joiner Parkway
Lincoln, CA 95648
(916) 645-4040
www.ci.lincoln.ca.us

Police Department
770 Seventh Street
Lincoln, CA 95648
(916) 645-4040
www.lincolnpd.org

Public Works/Engineering
600 Sixth Street
Lincoln, CA 95648
(916) 434-2450
www.ci.lincoln.ca.us

Town of Loomis

Town Hall
6140 Horseshoe Bar Road, Suite K
Loomis, CA 95650
(916) 652-1840
www.loomis.ca.gov

City of Rocklin

Administrative Services
3970 Rocklin Road
Rocklin, CA 95677
(916) 625-5000
http://www.rocklin.ca.us/government/administrative_services

City Manager
3970 Rocklin Road
Rocklin, CA 95677
(916) 625-5560
http://www.rocklin.ca.us/government/legislative_services

Community Development Department
3970 Rocklin Road
Rocklin, CA 95677
(916) 625-5120 (Building Division)
(916) 625-5140 (Engineering Division)
(916) 625-5160 (Planning Division)
<http://www.rocklin.ca.us/government/development>

DIRECTORY

Fire Department
4060 Rocklin Road
Rocklin, CA 95677
(916) 625-5300
<http://www.rocklin.ca.us/government/fire>

Police Department
4080 Rocklin Road
Rocklin, CA 95677
(916) 625-5400
<http://www.rocklin.ca.us/government/police>

Public Works Department
4081 Alvis Court
Rocklin, CA 95677
(916) 625-5500
<http://www.rocklin.ca.us/government/works>

City of Roseville

City Manager
311 Vernon Street
Roseville, CA 95678
(916) 774-5362
www.roseville.ca.us/citymanager

Community Development
311 Vernon Street
Roseville, CA 95678
(916) 774-5334
www.roseville.ca.us/gov/community_development

Economic Development
311 Vernon Street
Roseville, CA 95678
(916) 774-5362
www.roseville.ca.us/ed

Fire Department
401 Oak Street, Room 402
Roseville, CA 95678
(916) 774-5800
www.roseville.ca.us/fire

Parks and Recreation

316 Vernon Street
Roseville, CA 95678
(916) 774-5505

www.roseville.ca.us/parks

Planning and Redevelopment

311 Vernon Street
Roseville, CA 95678
(916) 774-5276

www.roseville.ca.us/planning

Police Department

1051 Junction Boulevard
Roseville, CA 95678
(916) 774-5010

www.roseville.ca.us/police

Public Works Department

311 Vernon Street
Roseville, CA 95678
(916) 774-5331

www.roseville.ca.us/pw

Accommodations

Best Western Golden Key

13450 Lincoln Way
Auburn, CA 95603
(530) 885-8611

www.bestwestern.com

Best Western Roseville Inn

220 Harding Boulevard
Roseville, CA 95678
(916) 782-4434

www.bestwestern.com

Comfort Inn Central

1875 Auburn Ravine Road
Auburn, CA 95603
(530) 885-1800

www.choicehotel.com

DIRECTORY

Comfort Suites
6830 Five Star Blvd.
Rocklin, CA 95677
(916) 315-1300
www.choicehotels.com

Courtyard Roseville
1920 Taylor Road
Roseville, CA 95661
(916) 772-5555
www.marriott.com

Courtyard Roseville Galleria Mall
301 Creekside Ridge Court
Roseville, CA 95678
(916) 772-3404
www.marriott.com

Days Inn, Rocklin
4515 Granite Drive
Rocklin, CA 95677
(916) 632-0101
<http://bayareainns.com/rocklin.html>

Fairfield Inn by Marriott
1910 Taylor Road
Roseville, CA 95661
(916) 772-3500
www.marriott.com

Foothills Motel
13431 Bowman Road
Auburn, CA 95603
(530) 885-8444
<http://www.foothillsmotel.ws/>

Granlibakken Conference Center and Lodge
725 Granlibakken Road
Tahoe City, CA 96145
(877) 552-6301
www.granlibakken.com

DIRECTORY

Heritage Inn Express
4480 Rocklin Road
Rocklin, CA 95677
(916) 632-3366
www.heritageinnexpressrocklin.com

Heritage Inn Express
204 Harding Boulevard
Roseville, CA 95678
(916) 782-4466
www.heritagehotelroseville.com

Hilton Garden Inn
1951 Taylor Road
Roseville, CA 95661
(916) 773-7171
www.hiltongardeninn.com

Holiday Inn
120 Grass Valley Highway
Auburn, CA 95603
(530) 887-8787
www.holiday-inn.com

Holiday Inn Express
155 Ferrari Ranch Rd
Lincoln, CA 95648
(916) 644-3440
www.hiexpress.com

Homewood Suites by Hilton
401 Creekside Ridge Court
Roseville, CA 95678
(916) 783-7455
<http://homewoodsuites1.hilton.com/>

Howard Johnson
4420 Rocklin Road
Rocklin, CA 95677
(800) 462-2400
www.howardjohnsonrocklin.com

DIRECTORY

Larkspur Landing
1931 Taylor Road
Roseville, CA 95661
(916) 773-1717
www.larkspurlanding.com

Motel 6
1819 Auburn Ravine Rd.
Auburn, CA 95603
(530) 888-7829
www.motel6.com

Northstar-at-Tahoe
100 Northstar Drive
Truckee, CA 96161
(530) 562-2267
www.northstarattahoe.com

Olympic Village Inn
1909 Chamonix Place
Olympic Valley, CA 96146
(530) 581-6000
www.olympicvillageinn.com

Orchid Suites
130 North Sunrise Avenue
Roseville, CA 95661
(916) 784-2222
www.orchidsuitesroseville.com

PlumpJack Squaw Valley Inn
1920 Squaw Valley Road
Olympic Valley, CA 96146
(530) 583-1576
www.plumpjacksquawvalleyinn.com

Quality Inn
13490 Lincoln Way
Auburn, CA 95603
(530) 885-7025
www.qualityinn.com

DIRECTORY

Rocklin Park Hotel
5450 China Garden Road
Rocklin, CA 95677
(916) 630-9400
www.rocklinpark.com

Roseville Hampton Inn & Suites
110 North Sunrise Avenue
Roseville, CA, 95661
(916) 772-9900
www.hamptoninn.com

Residence Inn
1930 Taylor Road
Roseville, CA 95661
(916) 772-5500
www.marriott.com

Spring Hill Suites by Marriot
10593 Fairway Drive
Roseville, CA 95678
(916) 782-2989
www.marriot.com

Squaw Valley Lodge
201 Squaw Peak Road
Olympic Valley, CA 96146
(530) 583-5500
www.squawvalleylodge.com

Sunnyside Resort
1850 West Lake Boulevard
Tahoe City, CA 96145
(530) 583-7200
www.sunnysidetahoe.com

Super 8 Motel
140 East Hillcrest Drive
Auburn, CA 95603
(530) 888-8808
www.super8.com

Tahoe Inn
9937 North Lake Boulevard
Kings Beach, CA 96143
(800) 648-2324
<http://www.staynorthtahoe.com/>

The Resort at Squaw Creek
400 Squaw Creek Road
Olympic Valley, CA 96146
(800) 327-3353
www.squawcreek.com

The Ritz-Carlton Highlands, Lake Tahoe
13031 Ritz-Carlton Highlands Court
Truckee, CA 96161
(530) 562-3000
www.ritz-carlton.com

The Village at Squaw Valley
1750 Village East Road
Olympic Valley, CA 96146
(530) 584-1000
www.thevillageatsquaw.com

Business Organizations

Business Advantage Network
145 Fulweiler Avenue, #120
Auburn, CA 95603
(530) 889-4061
www.placer.ca.gov

California Building Industry Association (CBIA)
1215 K Street, Suite 1200
Sacramento, CA 95814
(916) 443-7933
<http://www.cbiam.org/go/cbiam>

DIRECTORY

Contractors Association of Truckee Tahoe (CATT)

P.O. Box 10570
Truckee, CA 96162 (Mailing)
Martis Outlook Professional Offices
12313 Soaring Way, 1B
Truckee, CA 96161
(530) 550-9999
www.ca-tt.com

Golden Sierra Job Training Agency aka Auburn Connections

1919 Grass Valley Highway, #100
Auburn, CA 95603
(530) 823-4635
www.goldensierra.com

Linking Education and Economic Development (LEED)

One Capitol Mall, Suite 300
Sacramento, CA 95814
(916) 552-6800 x 270 (temporary number check website for changes)
www.lead.org

North Tahoe Business Association (NTBA)

P.O. Box 1023 (Mailing)
8645 North Lake Boulevard, #13
Kings Beach, CA 96143
(530) 546-9000
www.ntbamainstreet.org

Northern California World Trade Center

One Capitol Mall, Suite 300
Sacramento, CA 95814
(916) 447-9827
<http://www.norcalwtc.org>

Placer County Association of Realtors (PCAR)

4750 Grove Street
Rocklin, CA 95677
(916) 624-8271
www.pcaor.com

Placer County Contractors Association (PCCA)

Roseville Office
10656 Industrial Ave, Ste 160
Roseville, Ca 95678
(916) 771-7229
www.placerbx.com

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Placer County Contractors Association (PCCA)

Auburn Office
231 Cherry Ave, Ste 101
Auburn, Ca 95603
(530) 889-3953
www.placerbx.com

Sacramento Area Regional Technology Alliance (SARTA)

3801 Power Inn Road
Sacramento, CA 95826
(916) 231-0770
<http://www.sarta.org>

Sierra Gateway Business Association

Kurt Sandoff
13555 Bowman Road, Suite 150
Auburn, CA [95603](#)
(530) 889-8030

Sierra Green Building Association (SiGBA)

P.O. Box 4245
Truckee, CA 96160
(877) 744-2248
www.sigba.org

Tahoe City Downtown Association (TCDA)

P.O. Box 6744 (Mailing)
425 North Lake Boulevard, #3
Tahoe City, CA 96145
(530) 583-3348
www.visittahoeconomy.com

Veterans and Families Foundation

Bobbi Park, Executive Director
395 South Highway 65, Suite A, #167
Lincoln, CA 95648
(916) 409-0462
www.veteransandfamilies.org
bobbi@veteransandfamilies.org

Chambers of Commerce

Auburn Chamber of Commerce

601 Lincoln Way

Auburn, CA 95603

(530) 885-5616

www.auburnchamber.net

Colfax Area Chamber of Commerce

P.O. Box 86 (Mailing)

99 South Railroad Street

Colfax, CA 95713

(530) 346-8888

www.colfaxarea.com

Foresthill Divide Chamber of Commerce

P.O. Box 346 (Mailing)

24600 Main Street, Suite A

Foresthill, CA 95631

(530) 367-2474

www.foreshillchamber.org

Lincoln Area Chamber of Commerce

511 Fifth Street

Lincoln, CA 95648

(916) 645-2035

www.lincolnchamber.com

Loomis Basin Chamber of Commerce

6090 Horseshoe Bar Road

Loomis, CA 95650

(916) 652-7252

www.loomischamber.com/

North Lake Tahoe Chamber of Commerce

P.O. Box 884 (Mailing)

380 North Lake Boulevard

Tahoe City, CA 96145

(530) 581-6900

www.puretahoenorth.com/chamber

Rocklin Chamber of Commerce

3700 Rocklin Road

Rocklin, CA 95677

(916) 624-2548

www.rocklinchamber.com

Roseville Chamber of Commerce
650 Douglas Boulevard
Roseville, CA 95678
(916) 783-8136
www.rosevillechamber.com

Sacramento Area Commerce and Trade Organization (SACTO)
400 Capitol Mall, Suite 2500
Sacramento, CA 95814
(916) 441-2144
www.sactoedc.org

Sacramento Metro Chamber
One Capitol Mall, Suite 300
Sacramento, CA 95814
(916) 552-6800
www.metrochamber.org

Art Galleries

404 Gallery
404 Vernon St
Roseville, CA 95678
(916) 784-9898
www.404artgallery.com

The Arts Council of Placer County
808 Lincoln Way
Auburn, CA 95603
(530) 885-5670
www.placerarts.org

Blue Line Gallery
405 Vernon Street, #100
Roseville, CA 95678
(916) 783-4117

Tuscan Art Gallery
1603 Douglas Blvd., Suite C2
Roseville, CA 95678
(916) 786-2611

Roseville Arts Center
7501 Foothills Boulevard
Roseville, CA 95747
(916) 783-4117
www.rosevillearts.org/index.html

Museums

Bernhard Museum Complex
291 Auburn-Folsom Road
Auburn, CA 95603
(530) 889-6500
www.placer.ca.gov/Home/Facility/Museums/LocalMuseums/bernhard.aspx

Carnegie Museum
557 Lincoln Street
Roseville, CA 95678
(916) 773-3003
www.rosevillehistorical.org

Foresthill Divide Museum
24601 Harrison Street
Foresthill, CA 95631
(530) 367-3988
www.placer.ca.gov/Home/Facility/Museums/LocalMuseums/ForesthillMuseum.aspx

Gatekeeper's Museum
130 West Lake Boulevard
Tahoe City, CA 96145
(530) 583-1762
<http://www.northtaoemuseums.org/gatekeeper.aspx>

Gold Country Museum
1273 High Street
Auburn, CA 95603
(530) 889-6500
www.placer.ca.gov/Home/Facility/Museums/LocalMuseums/goldcountry.aspx

Golden Drift Museum
32820 Main Street
Dutch Flat, CA 95714
(530) 389-2126
www.placer.ca.gov/Home/Facility/Museums/LocalMuseums/golddrift.aspx

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Griffith Quarry Museum
7504 Rock Springs Road
Penryn, CA 95663
(916) 663-1837
<http://www.placer.ca.gov/Departments/Facility/Museums/LocalMuseums/quarry.aspx>

Maidu Interpretive Center
1960 Johnson Ranch Road
Roseville, CA 95661
(916) 774-5934
www.roseville.ca.us/parks/parks_n_facilities/facilities/maidu_indian_museum/default.asp

Mondavi Center
University of California, Davis
One Shields Avenue
Davis, CA 95616
(530) 754-5000
www.mondaviarts.org

Placer County Museum
101 Maple Street
Auburn, CA 95603
(530) 889-6500
www.placer.ca.gov/Home/Facility/Museums/LocalMuseums/courthouse.aspx

Placer High School Auditorium
Agard and High Streets
Auburn, CA 95603
(530) 823-2147

Roseville Telephone Museum
106 Vernon Street
Roseville, CA 95678
(916) 786-1621
www.rosevilletelephonemuseum.org

Tahoe Maritime Museum.
P.O. Box 627 (Mailing)
5205 West Lake Boulevard
Homewood, CA 96141
(530) 525-9253
www.tahoemaritimemuseum.org

Hazardous Waste Removal

Chemical Waste Management
Kettleman Hills Facility
P.O. Box 471 (Mailing)
35251 Old Skyline Road
Kettleman City, CA 93239
(559) 386-9711
www.wm.com
www.kettlemanhillsfacts.com

Hospitals

Kaiser Permanente Roseville Medical Center (Main Campus)
1600 Eureka Road
Roseville, CA 95661
(916) 784-4000
www.kaiserpermanente.org

Sutter Auburn Faith Hospital
P.O. Box 8992 (Mailing)
11815 Education Street
Auburn, CA 95602
(530) 888-4500
www.sutterauburnfaith.org

Sutter Roseville Medical Center
One Medical Plaza
Roseville, CA 95661
(916) 781-1000
www.sutterroseville.org

Tahoe Forest Hospital
P.O. Box 759 (Mailing)
10121 Pine Avenue
Truckee, CA 96160
(530) 587-6011
www.tfhd.com

Newspapers

Auburn Journal
P.O. Box 5910 (Mailing)
1030 High Street
Auburn, CA 95603
(530) 885-5656
www.auburnjournal.com

Colfax Record
P.O. Box 755 (Mailing)
233 South Auburn Road, Suite 205
Colfax, CA 95713
(530) 346-2232
www.colfaxrecord.com

Granite Bay Press-Tribune
188 Cirby Way
Roseville, CA 95678
(916) 786-8746
www.granitebaypt.com

Lincoln News Messenger
533 F Street
Lincoln, CA 95648
(916) 645-7733
www.lincolnnewsmessenger.com

Loomis News
P.O. Box 125 (Mailing)
3550 Taylor Road
Loomis, CA 95650
(916) 652-7939
www.theloomisnews.com

Rocklin Placer Herald
5055 Pacific Street
Rocklin, CA 95677
(916) 624-9713
www.placerherald.com

Roseville Press-Tribune
188 Cirby Way
Roseville, CA 95678
(916) 786-8746
www.rosevillept.com

Sierra Heritage Magazine
P.O. Box 263
Auburn CA, 95604 (Mailing)
1551 Lincoln Way
Auburn, CA. 95603
(530) 823-3986
www.sierraheritage.com

Sacramento Parent Magazine
457 Grass Valley Highway #5
Auburn, CA 95603
(530) 888-0573
www.sacramentoparent.com

The Sierra Sun
P.O. Box 2973 (Mailing)
12315 Deerfield Drive
Truckee, CA 96160
(530) 587-6061
www.sierrasun.com

Postsecondary Educational Institutions

American River College
4700 College Oak Drive
Sacramento, CA 95841
(916) 484-8011
www.arc.losrios.edu

Art Institute of California, Sacramento
2850 Gateway Oaks Drive, Suite #100
Sacramento, CA 95833
(800) 477-1957
<http://www.artinstitutes.edu/sacramento/>

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California State University, Chico
400 West First Street
Chico, CA 95929
(530) 898-4636
www.csuchico.edu

California State University, Sacramento
(Sacramento State)
6000 J Street
Sacramento, CA 95819
(916) 278-6011
www.csus.edu

California State University, Sacramento
(Sacramento State)
College of Continuing Education
3000 State University Drive East
Sacramento, CA 95819
(916) 278-4433
www.cce.csus.edu

Chapman University
One University Drive,
Orange, CA 92866
(714) 997-6815
www.chapman.edu

Cosumnes River College
8401 Center Parkway
Sacramento, CA 95823
(916) 691-7344
www.crc.losrios.edu

Drexel University
Center for Graduate Studies
One Capitol Mall, Suite 260
Sacramento, CA 95814
(916) 325-4600
sacramento.drexel.edu

Folsom Lake College
10 College Parkway
Folsom, CA 95630
(916) 608-6500
www.flc.losrios.edu

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Golden Gate University
7 Sierra Gate Plaza, Suite 101
Roseville, CA 95678
(916) 780-1911
www.ggu.edu/about/Locations/Roseville

Heald College, Rancho Cordova
2910 Prospect Park Drive
Rancho Cordova, CA 95670
(916) 638-1616
www.heald.edu/campus_locations/campus_rancho_cordova.htm

Heald College, Roseville
7 Sierra Gate Plaza
Roseville, CA 95678
(916) 789-8600
www.heald.edu/campus_locations/campus_roseville.htm

High Tech Institute
9738 Lincoln Village Drive #100
Sacramento, CA 95827
(916) 929-9700
www.hightechinstitute.edu

International Academy of Design
& Technology, Sacramento
2450 Del Paso Road
Sacramento, CA 95834
(916) 285-9468
<http://www.iadtsacramento.com/>

ITT Technical Institute
10863 Gold Center Drive
Rancho Cordova, CA 95670
(916) 851-3900
<http://itttech.edu>

Kaplan College
4330 Watt Avenue, Suite 400
Sacramento, CA 95821
(916) 649-8168
<http://getinfo.kaplancollege.com/KaplanCollegePortal/>

DIRECTORY

Kitchen Academy
2450 Del Paso Rd.
Sacramento, CA 95834
(530) 564-0096
<http://www.kitchenacademy.com/sacramento.aspx>

Lake Tahoe Community College
One College Drive
South Lake Tahoe, CA 96150
(530) 541-4660
www.ltcc.cc.ca.us

Lincoln Law School of Sacramento
3140 J Street
Sacramento, CA 95816
(916) 446-1275
www.lincolnlaw.edu

MTI College
5221 Madison Avenue
Sacramento, CA 95841
(916) 339-1500
www.mticollege.edu

National University
9320 Tech Center Drive
Sacramento, CA 95826
(916) 855-4100
www.nu.edu/Locations/NorthernCalifornia/Sacramento.html

Sacramento City College
3835 Freeport Boulevard
Sacramento, CA 95822
(916) 558-2111
www.scc.losrios.edu/

Sierra College
Rocklin Campus:
5000 Rocklin Road
Rocklin, CA 95677
(916) 624-3333
www.sierra.cc.ca.us

DIRECTORY

Sierra College
Roseville Gateway Campus:
333 Sunrise Ave.,
Roseville, CA 95661
(916) 781-6200
<http://www.sierracollege.edu/AboutUs/campuses/rg/index.html>

Sierra College
Tahoe-Truckee Campus:
11001 College Trail
Truckee, CA 96161
(530) 550-2225
<http://www.sierracollege.edu/AboutUs/campuses/tt/index.html>

Saint Mary's College of California
1610 Arden Way, Suite 255
Sacramento, CA 95815
(916) 920-2768
www.stmarys-ca.edu

Trinity Life Bible College
5225 Hillsdale Boulevard
Sacramento, CA 95842
(916) 348-4689
www.tlbc.edu

Union Institute & University
2710 Gateway Oaks Drive,
Suite 310 South
Sacramento, CA 95833
(916) 564-3100
www.tui.edu/centers/sacramento.asp

Universal Technical Institute, Sacramento
4200 Duckhorn Drive
Sacramento, CA 95834
(800) 508-1153
<http://www.uti.edu/Automotive/Schools/Sacramento/tabid/183/Default.aspx>

University of California, Davis
One Shields Avenue
Davis, CA 95616
(916) 752-1011
www.ucdavis.edu

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University of Northern California,
Lorenzo Patiño School of Law
1012 J Street
Sacramento, CA 95814
(916) 441-4485
www.patinolawschool.com

University of the Pacific,
McGeorge School of Law
3200 Fifth Avenue
Sacramento, CA 95817
(916) 739-7191
www.mcgeorge.edu

University of Phoenix
2890 Gateway Oaks Drive, Suite 200
Sacramento, CA 95833
(916) 923-2107
http://www.phoenix.edu/campus_locations/campus_locations.aspx

University of Sacramento
1531 I Street, 2nd Floor
Sacramento, CA 95814
(916) 443-4760
<http://www.universityofsacramento.org/>

University of San Francisco,
Sacramento Regional Campus
2180 Harvard Street, Suite 375
Sacramento, CA 95815
(916) 920-0157
http://www.usfca.edu/acadserv/academic/regions/sac/sac_visit_contact

University of Southern California,
State Capital Center
1800 I Street
Sacramento, CA 95811
(916) 442-6911
www.usc.edu/sacto

Western Career College
8009 Folsom Blvd.
Sacramento, CA 95826
(916) 361-6661
www.westerncollege.edu

Western Seminary
2924 Becerra Way
Sacramento, CA 95821
(916) 488-3720
www.westernseminary.edu

William Jessup University
333 Sunset Boulevard
Rocklin, CA 95765
(916) 577-2200
www.jessup.edu

Woodland Community College
2300 E. Gibson Road
Woodland, CA 95776
(530) 661-5700
www.yccd.edu/woodland

WyoTech, Sacramento
980 Riverside Parkway
West Sacramento, CA 95605
(916) 376-8888
<http://www.wyotech.edu/campus/sacramento>

Yuba College
2088 North Beale Road
Marysville, CA 95901
(530) 741-6700
www.yccd.edu/yuba

Ski Resorts

Alpine Meadows
2600 Alpine Meadows Road
Tahoe City, CA 96145
(530) 583-4232
www.skialpine.com

Homewood Mountain Resort
5145 W. Lake Boulevard
Homewood, CA 96141
(530) 525-2992
www.skihomewood.com

DIRECTORY

Northstar-at-Tahoe
100 Northstar Drive
Truckee, CA 96160
(530) 562-1010
www.northstarattahoe.com

Royal Gorge Cross Country Ski Resort
9411 Hillside Drive
Soda Springs, CA 95728
(530) 426-3871
www.royalgorge.com

Squaw Valley USA
1960 Squaw Valley Road
Olympic Valley, CA 96146
(530) 583-6985
www.squaw.com

Sugar Bowl
629 Sugar Bowl Road
Norden, CA 95724
(530) 426-9000
www.sugarbowl.com

Tourism

Auburn State Recreation Area
El Dorado Street at Old Foresthill Road
Auburn, CA 95602
(530) 885-4527
www.parks.ca.gov/?page_id=502

North Lake Tahoe Resort Association
Visitors and Convention Bureau
P.O. Box 5459
950 North Lake Boulevard, Suite 3
Tahoe City, CA 96145
(530) 581-6900
www.puretahoenorth.com/about_nltra.phtml

Placer County Visitors Bureau
and California Welcome Center
13411 Lincoln Way
Auburn, CA 95603
(530) 887-2111
www.visitplacer.com

Placer Valley Tourism
2204 Plaza Drive, #110
Rocklin, CA 95765
(916) 773-5400
www.placertourism.com/home.cfm

Tahoe National Forest
631 Coyote Street
Nevada City, CA 95959
(530) 265-4531
www.fs.fed.us/r5/tahoe

Transportation

Amtrak
Ticket Office
401 I Street
Sacramento, CA 95814
(800) 872-7245
www.amtrakcalifornia.com

Auburn Airport
13626 New Airport Road, Suite 101
Auburn, CA 95602
(530) 888-8174
www.auburn.ca.gov/dept/dept_airport.html

Greyhound Bus Lines
201 Pacific Street
Roseville, CA 95678
(916) 783-4101
www.greyhound.com

Lincoln Regional Airport
Karl Harder Field
640 Fifth Street
Lincoln, CA 95648
(916) 645-3443
www.ci.lincoln.ca.us/index.cfm?page=244648

Placer County Transit (PCT)
11460 F Avenue
Auburn, CA 95603
(530) 885-2877
<http://www.placer.ca.gov/Departments/Works/Transit/PCT.aspx>

Placer County Transportation Planning Agency
299 Nevada Street
Auburn, CA 95603
(530) 823-4030
www.pctpa.net

Port of West Sacramento
P.O. Box 980070 (Mailing)
1100 West Capitol Avenue, First Floor
West Sacramento, CA 95691
(916) 371-8000
www.portofsacramento.com

Reno-Tahoe International Airport
P.O. Box 12490 (Mailing)
2001 East Plumb Lane
Reno, NV 89502
(877) 736-6359
www.renoairport.com

Sacramento International Airport
6900 Airport Boulevard
Sacramento, CA 95837
(916) 929-5411 general
(916) 874-0719 administration
www.sacairports.org/int

Sacramento Regional Transit
1400 29th Street
Sacramento, CA 95812
(916) 321-2877 general
(916) 321-2800 administration
www.sacrt.com

Tahoe Area Regional Transit (TART)
P.O. Box 909
Truckee, CA 96145 (Mailing)
870 Cabin Creek Road
Tahoe City, CA 96145
(530) 550-1212
www.placer.ca.gov/works/tart/tart.htm

Truckee Tahoe Airport District
10356 Truckee Airport Road
Truckee, CA 96161
(530) 587-4540 airport
(530) 587-4119 operations
www.truckeetahoeairport.com

Utilities

Agate Bay Water Company
706 Agate Road
Carnelian Bay, CA 96140
(530) 546-3337

Alpine Springs County Water District
270 Alpine Meadows Road
Alpine Meadows, CA 96146
(530) 583-2342
www.alpinesprings.org

California American Water
4701 Beloit Drive
Sacramento, CA 95838
(888) 237-1333
www.amwater.com

Christian Valley Park Community
and Water Services District
3333 Christian Valley Road
Auburn, CA 95602
(530) 878-8050
<http://www.christianvalley.org/>

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Donner Summit Public Utility District
P.O. Box 610 (Mailing)
53823 Sheritt Lane
Soda Springs, CA 95728
(530) 426-3456
www.dspud.com

Foresthill Public Utility District
P.O. Box 266 (Mailing)
24540 Main Street
Foresthill, CA 95631
(530) 367-2511
www.foresthillpud.com

Fulton Water Company
P.O. Box 1903 (Mailing)
515 Nightingale Rd
Tahoe City, CA 96145
(530) 583-3644

Meadow Vista County Water District
17000 Placer Hills Road
Meadow Vista, CA 95722
(530) 878-0828

Nevada Irrigation District
1036 West Main Street
Grass Valley, CA 95945
(530) 273-6185
www.nid.dst.ca.us

Northstar Community Service District
P.O. Box 34030 (Mailing)
908 Northstar Drive
Truckee, CA 96161
(530) 562-0747
www.northstarcsd.com

North Tahoe Public Utility District
P.O. Box 139 (Mailing)
875 National Avenue
Tahoe Vista, CA 96148
(530) 546-4212
www.ntpud.org

DIRECTORY

Pacific Gas and Electric Company

1050 High Street

Auburn, CA 95603

(800) 743-5000

www.pge.com

Pacific Gas and Electric Company

151 North Sunrise Avenue, Room 513

Roseville, CA 95661

(800) 743-5000

www.pge.com

Placer County Water Agency

P.O. Box 6570 (Mailing)

144 Ferguson Road

Auburn, CA 95604

(530) 823-4850

www.pcwa.net

Roseville Electric

2090 Hilltop Circle

Roseville, CA 95747

(916) 774-5600

www.rosevilleelectric.org

Sacramento Municipal Utility District

P.O. Box 15830 (Mailing)

Sacramento, CA 95852

6201 S Street

Sacramento, CA 95817

(916) 452-3211

www.smud.org

San Juan Water District

P.O. Box 2157 (Mailing)

9935 Auburn-Folsom Road

Granite Bay, CA 95746

(916) 791-0115

www.sjwd.org

SBC Communications

2700 Watt Avenue

Sacramento, CA 95821

(800) 310-2355

www.sbc.com

DIRECTORY

Sierra Lakes County Water District
PO Box 1039 (Mailing)
7300 Short Road
Soda Springs, CA 95729
(530) 426-7800
www.slcwd.org

Sierra Pacific Power Company
7001 National Avenue
Tahoe Vista, CA 96148
(800) 782-2506
www.sierrapacific.com

South Placer Municipal Utility District
3671 Taylor Road
Loomis, CA 95650
(916) 652-5877
www.spmud.ca.gov

Southwest Gas
218 Incline Court
Incline Village, NV 89451
(775) 882-2126
www.swgas.com

Squaw Valley Mutual Water Company
P.O. Box 2276
Olympic Valley, CA 96146
(530) 583-3674
www.svmutualwater.com

Squaw Valley Public Service District
P.O. Box 2026
305 Squaw Valley Road
Olympic Valley, CA 96146
(530) 583-4692
www.svpsd.org

Surewest Communications
P.O. Box 969 (Mailing)
Roseville, CA 95661
(866) 787-3937
www.surewest.com

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Tahoe City Public Utility District
P.O. Box 5249
221 Fairway Drive
Tahoe City, CA 96145
(530) 583-3796
www.tahoecitypud.com

Tahoe Swiss Village Utility
P.O. Box 102
Homewood, CA 96141

Tahoe Truckee Sanitation Agency
13720 Joerger Drive
Truckee, CA 96161
(530) 587-2525
www.ttsa.net

Tamarack Mutual Company
P.O. Box 34 (Mailing)
9361 Hwy 89
Tahoma, CA 96142
(530) 525-7534

Truckee Donner Public Utility District
11570 Donner Pass Road
P.O. Box 309 (Mailing)
Truckee, CA 96160
(530) 587-3896
www.tdpud.org