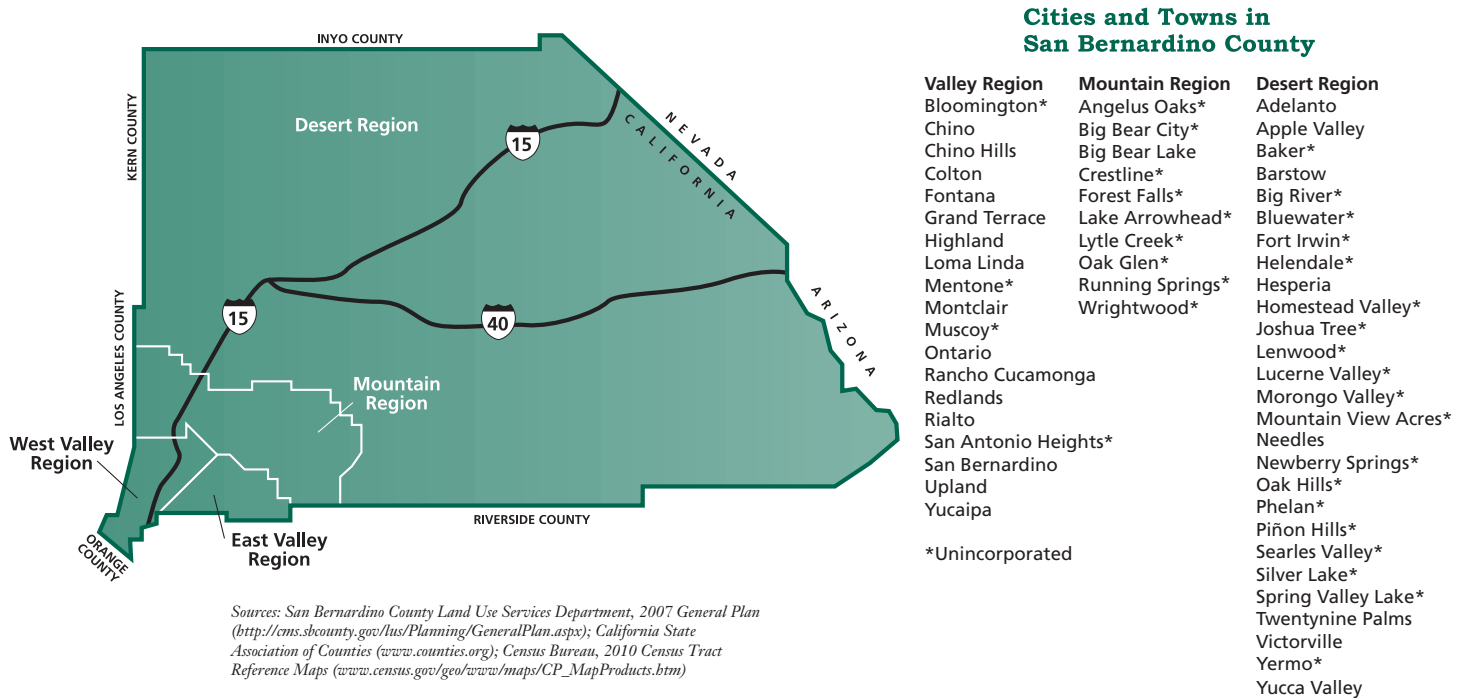


County Profile

San Bernardino County is located in southeastern California, with Inyo and Tulare counties to the north, Kern and Los Angeles counties to the west, and Orange and Riverside counties to the south. The county is bordered on the east by the states of Nevada and Arizona. The county's diverse geography and extensive natural resources, as well as its proximity to major economic and population centers provide unique opportunities for varied industry sectors to thrive, including commerce, education, tourism and recreation.¹ The following information profiles San Bernardino County's geography, land use, population density, demographics, housing, and employment characteristics.



GEOGRAPHY

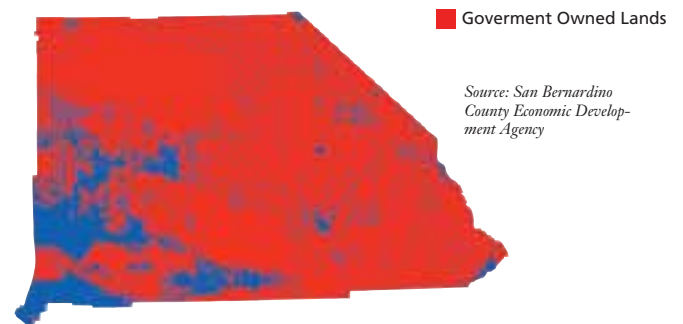
San Bernardino County is the largest county in the contiguous United States:

- The county covers over 20,000 square miles of land.
- There are 24 cities in the county and multiple unincorporated areas.
- 81% of the land is outside the governing control of the County Board of Supervisors or local jurisdictions; the majority of the non-jurisdiction land is owned and managed by federal agencies.²

The county is commonly divided into three distinct areas, including the Valley Region (sometimes divided into East and West Valley), the Mountain Region, and the Desert Region:

- The Valley Region contains the majority of the county's incorporated areas and is the most populous region.
- The Mountain Region is primarily comprised of public lands owned and managed by federal and state agencies.
- The Desert Region is the largest region (approximately 93% of the county's land area) and includes parts of the Mojave Desert.²

Government Owned Land in San Bernardino County



LAND USE

Aside from open or undeveloped land, the largest land use in the county is for military purposes:

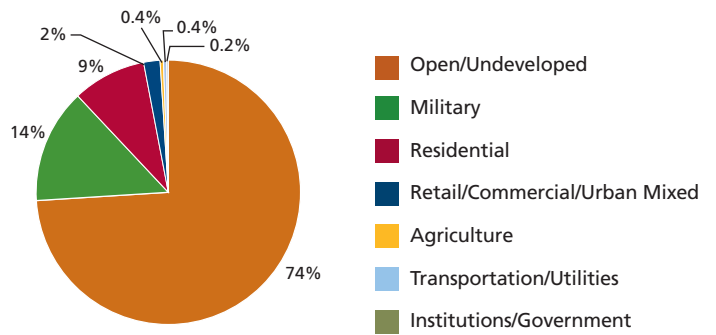
- Almost three-quarters (74%) of San Bernardino County is open or undeveloped land.
- 14% of the land is used for military purposes.
- Residential housing comprises 9% of the land area.
- Retail, commercial, and urban mixed uses make up 2% of the county's land use.
- Agriculture (0.4%), transportation/utilities (0.4%), and government (0.2%) make up the remainder.³

POPULATION DENSITY

Given its vast land area, the county's overall population density is low:

- San Bernardino's population density is estimated at 103 people per square mile, which is substantially lower than the four neighboring counties compared (Riverside, San Diego, Orange, and Los Angeles counties).⁴
- It is also lower than peer regions of Las Vegas, Phoenix, and Miami.
- Within San Bernardino County, the Valley Region is the most densely populated area, with 72% of the population residing in that region, but accounts for only 2.5% of the county's land area.⁵
- Based on these figures, the estimated population density of the Valley Region is approximately 2,949 persons per square mile, which is similar to neighboring Los Angeles and Orange counties.

San Bernardino County Land Uses



Source: Calculated from San Bernardino Associated Governments (SANBAG), GIS Data, General Plan Land Use Data, 2008

Population Density for San Bernardino County, San Bernardino Valley, and Peer and Neighboring Counties, 2011

County (Major City)	Persons per Square Mile
San Bernardino County	103
Clark County	249
Riverside	311
Maricopa (Phoenix)	422
San Diego	748
Miami-Dade (Miami)	1,313
Los Angeles	2,435
San Bernardino Valley Region	2,949
Orange (Santa Ana)	3,811

Note: San Bernardino Valley Region land area is from 2007 and population data is from 2010. The remaining geographies reflect land area data from 2000 and population data from 2011.

Sources: Analysis of data from the U.S. Census Bureau (Census 2010, Census 2000, and Population Estimates Program) and the San Bernardino County Land Use Department, 2007 General Plan

Ranking by Population Growth
County Comparison, 2010-2011

County (Major City)	State	Ranking by Numeric Population Growth (2010-2011)	Ranking by Percent Change in Population Growth (2010-2011)
Los Angeles	CA	2	813
Maricopa (Phoenix)	AZ	3	262
Miami-Dade (Miami)	FL	4	128
Orange (Santa Ana)	CA	6	340
Riverside	CA	7	206
San Diego	CA	8	405
San Bernardino	CA	18	395
Clark (Las Vegas)	NV	31	640

Note: Ranking is among over 3,000 counties in the United States, where one (1) represents the greatest change.

Source: U.S. Census Bureau, Population Estimates Program (www.census.gov/popest/)

POPULATION

San Bernardino County has the fifth largest population in California:

- In January 2012, San Bernardino County’s population was estimated at over two million (2,063,919).
- San Bernardino County is the twelfth largest county in the nation, with more residents than 15 of the country’s states, including Idaho, West Virginia, Nebraska and New Mexico.⁶
- Among all California counties, only Los Angeles County (9,884,632), San Diego County (3,143,429), Orange County (3,055,792), and Riverside County (2,227,577) have more residents.⁷

The county’s population growth has occurred at a moderate but fairly steady rate over the past 50 years:

- Average annual population growth in the 1960s and 1970s was 3%.
- The annual growth rate jumped to 6% in the 1980s, and dropped back to 2% in the 1990s and remained 2% in the 2000’s.
- Most recently (between 2011 and 2012), San Bernardino County’s population grew 0.8% – similar to growth in the state as a whole (0.7%) and in one of the densest bordering counties, Orange County (0.9%).⁸
- Since 2000, San Bernardino County’s population has grown by approximately 20%.⁹

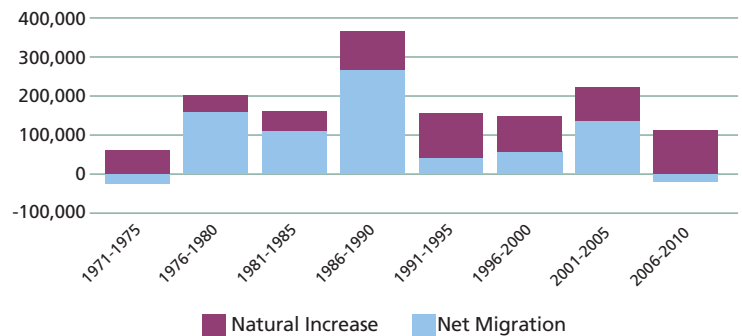
San Bernardino County’s population is expected to reach about 2.75 million by 2035:

- Population growth is projected to continue at an average annual rate of between one and two percent, creating total growth of 36% between 2008 and 2035.
- This rate of growth is in the mid-range among counties in the Southern California Association of Governments (SCAG) region, with Imperial County projected to grow the fastest (69%) and Orange County the slowest (14%).¹⁰

After previously gaining residents primarily through migration, San Bernardino County’s growth since the early 1990’s has come predominately from natural increase (births minus deaths):

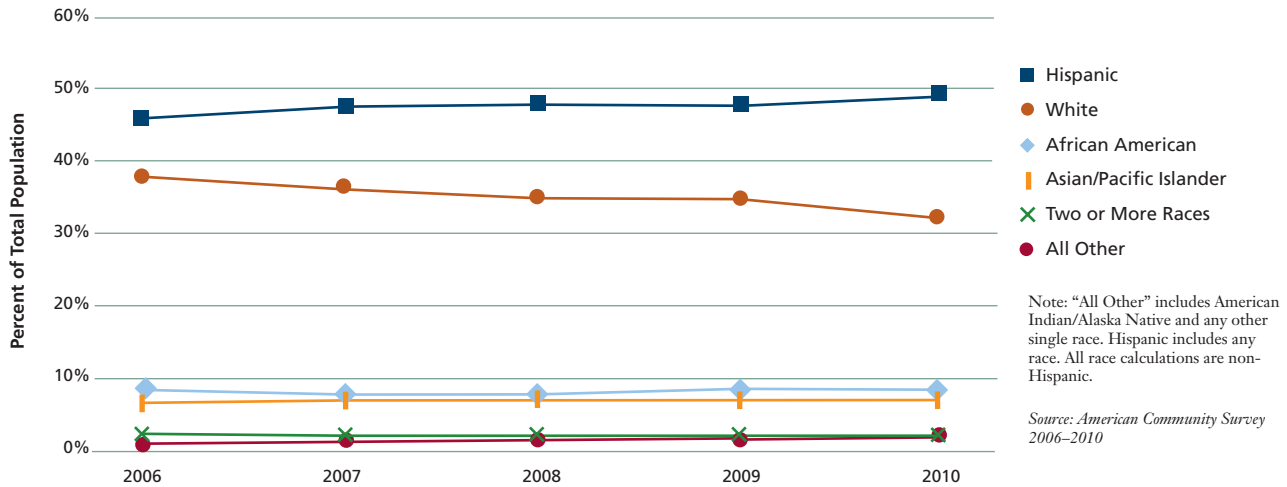
- From 1975 through 2007, the Riverside-San Bernardino metro area had positive net migration, with more people moving into the area than out.
- However, for the three-year period between 2008 and 2010, the county lost population, peaking in 2009 with a loss of approximately 15,000 residents.
- Domestic out-migration (moving out of the county to another location in the United States) was the driver behind the loss during this period, while international immigration (moving to the county from a foreign country) acted to reduce the net loss.
- Most recently, between 2010 and 2011, the county returned to positive net migration, however slight (approximately 600 more people moved into the county than out).
- The county also added just over 20,000 residents through natural increase during this same period, for an overall increase of nearly 21,000.¹¹

Components of Population Change
San Bernardino County, 1970 to 2010



Source: California Department of Finance, Table E-6, 1970-2010 (www.dof.ca.gov/research/demographic/reports/view.php)

Population by Race and Ethnicity
San Bernardino County, 2006-2010



The largest ethnic group reported by San Bernardino County residents is Hispanic:

- Forty-nine percent (49%) of San Bernardino County residents are Hispanic, who may be of any race.
- Among the remaining 51% non-Hispanic residents, 33% are White, 8% are Black or African American, 6% are Asian or Pacific Islander, and 2% report two or more races. Less than one percent of residents are American Indian/Alaska Native (0.4%).¹²

In 2010, 22% of the people living in San Bernardino County were foreign born:

- In 2000, 19% of the population was foreign born.¹³
- The increase in the proportion of foreign-born residents follows legal immigration patterns.
- With some exceptions, legal immigration to San Bernardino County rose relatively steadily from 1984 through 2010.
- In the 1980's, the county was adding approximately 2,000 residents each year from legal immigration. At present, the county adds between 7,000 and 8,000 new immigrants each year.¹⁴
- Among residents over the age of five, 41% speak a language other than English at home.
- Among these, 84% speak Spanish and 16% speak some other language.¹⁵
- As of May 2012, there were 2,572 bilingual county employees who provide interpretation services as a part of their job. This is equivalent to approximately 14% of all county employees, representing nine different languages.¹⁶

San Bernardino County's population is relatively young:

- In 2010, the county's median age was 32, compared to 35 statewide.
- As of 2010, 29% of the population is under age 18, while 9% are 65 years or older.
- Between 2005 and 2010, the county's population grew in all age groups except ages 5 to 14, 25 to 34, and 34 to 44.¹⁷

Native American Indians in San Bernardino County

Approximately 1% of the population in San Bernardino County is comprised of Native Americans (22,689 individuals as of 2010). An additional 17,267 residents self-identify as Native American and some other race. The most common tribal identification is Mexican American Indian, followed by Navajo, Choctaw, Yaqui, and Sioux. Federally recognized tribes within the county include: the Chemehuevi Indian Tribe, the San Manuel Band of Mission Indians, and the Fort Mojave Indian Tribe.

Note: "Native American" includes the Census categories of American Indian and Alaska Native, and both Hispanic and Non-Hispanic. Tribal identification is for Native American alone and no other race.

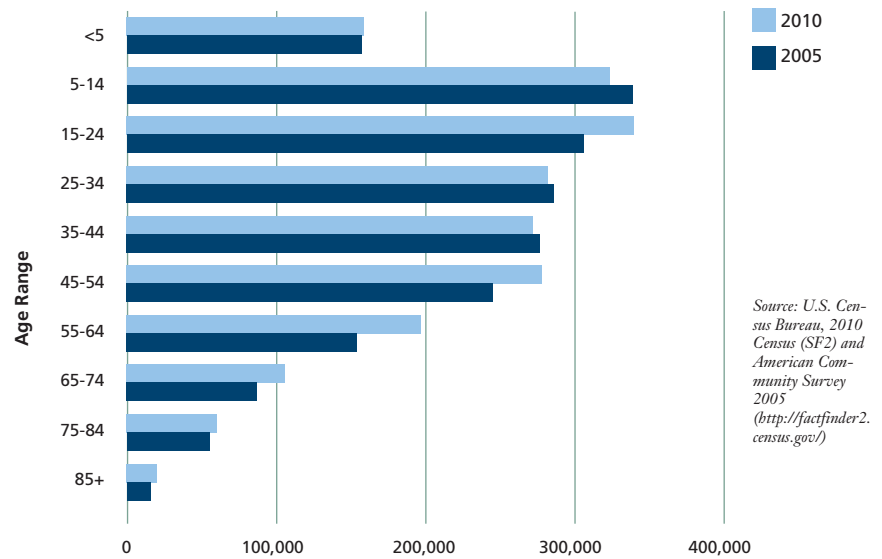
Source: U.S. Census Bureau, Census 2010 SF-1, Tables QT-P7, QT-P4, P-3

HOUSING

Most homes in San Bernardino County are single-family, detached homes (71%):

- There were 701,443 housing units available to county residents in January 2012.
- As of January 2012, San Bernardino County had a housing vacancy rate of 12.6%, largely unchanged from the prior year.¹⁸
- A majority of occupied units are owner-occupied (63%) compared to renter-occupied (37%).¹⁹
- The greatest proportion of homes was built in the 1980's (23%), followed by the 1970's (17%).²⁰
- San Bernardino County was among the top 10 California counties for the largest percent increase in annual construction permits granted (157%) between 2000 and 2005.
- Mirroring decreases elsewhere in the state, however, construction permits in San Bernardino County have fallen 89% between 2006 and 2011 (13,324 and 1,472 permits, respectively).²¹

Population by Age
San Bernardino County, 2005 and 2010



In 2010, there were 594,975 households in the county:

- Families comprise 76% of the households in San Bernardino County, including both married-couple families (52%) and other families (24%).
- 13% of households with children under 18 are led by a single parent (male or female).
- Overall, families with children under age 18 comprise 39% of all households.
- Non-family households made up of one individual, or two or more unrelated individuals, comprise 24% of all households in San Bernardino County.²²
- At an average of 3.3 people per household, San Bernardino County has the third highest household size in California as of 2010.
- The average household size in California is 2.9 and the national average is 2.6.²³

EMPLOYMENT

Labor Market Distribution and Growth

Labor market distribution analysis showcases San Bernardino County's niche as a logistics hub:

- In 2010, the largest labor markets in San Bernardino County were Trade, Transportation and Utilities (26% of total employment), Government (20%), Educational and Health Services (13%), Professional and Business Services (12%), Leisure and Hospitality (9%), Manufacturing (8%), and Construction (4%).
- Employment within the category of Transportation, Warehousing and Utilities (a sub-category of Trade, Transportation and Utilities) is more than twice as concentrated in San Bernardino County as in the whole of California (8% to 3%, respectively).²⁴

Demand Sectors

In their 2011-13 Strategic Plan, the San Bernardino County Workforce Investment Board (WIB) identified the top five sectors that will employ the largest number of residents. These high demand sectors are:

- Health care
- Aviation
- Transportation and Logistics
- Manufacturing
- Green Technology

The WIB has invested funds in training and educating a skilled workforce that will best serve the needs of employers in these sectors, as well as others with demonstrated demand.

Source: San Bernardino County Workforce Investment Board, 2011-13 Strategic Plan

Industry estimates for the Riverside-San Bernardino metro area project that from 2008 to 2018, total non-farm employment will increase by 8%:

- The metro area's fastest growing sectors are projected to be Education Services (+27%), Health Care and Social Assistance (+22%), Administrative and Support and Waste Management and Remediation Services (+13%), Professional, Scientific and Technical Services (13%), and Leisure and Hospitality (+10%).
- Occupations with the fastest projected job growth include Personal and Home Care Aides (+45%), Medical Scientists except Epidemiologists (+42%), Network Systems and Data Communications Analyst (+40%), Physicians Assistants (+38%), Home Health Aides (+36%), Fitness Trainers and Aerobics Instructors (+33%), Physical Therapists Aides (+31%) and Surgical Technicians (+31%).
- Non-farm sectors projected to decline include Management of Companies and Enterprises (-16%), Manufacturing (-9%), Mining and Logging (-8%), Real Estate and Rental and Leasing (-8%) and Financial Activities (-3%).²⁵

Top 5 Fastest Growing Occupations and Top 5 Occupations with the Most Job Openings
 Riverside-San Bernardino, 2008-2018 Projection with 1st Quarter 2010 Wages

Fastest Growing Occupations	Employment Change	Median Hourly	Median Annual	Occupations with Most Job Openings	Total Job Openings	Median Hourly	Median Annual
Personal Care and Service	24%	\$10.06	\$20,924	Office and Administrative Support	6,059	\$15.12	\$31,440
Healthcare Support	22%	\$12.49	\$25,965	Sales and Related	5,518	\$11.42	\$23,757
Healthcare Practitioners and Technical	21%	\$32.95	\$68,532	Food Preparation and Serving Related	5,270	\$9.33	\$19,393
Computer and Mathematical	15%	\$31.99	\$66,541	Transportation and Material Moving	3,506	\$13.80	\$28,698
Life, Physical, and Social Science	14%	\$28.72	\$59,747	Education, Training, and Library	2,972	\$25.39	\$52,800

Source: California Employment Development Department, Projections of Employment by Industry Occupation

Employment and Unemployment

After a steady decline in employment in San Bernardino County since 2006, the number of jobs rose in 2011 and continued to rise into 2012:

- Between the high of 2006 and the low of 2010, employment declined by nearly 82,000 jobs.
- Employment began to rebound in 2011 and by the first quarter of 2012 had reached 760,600 jobs, an increase of 21,700.
- Still, over 110,000 San Bernardino County residents report being unemployed as of March 2012.²⁶

Paralleling unemployment trends nationwide, San Bernardino County’s unemployment rate fell in 2011 and continued falling into early 2012 (according to the latest data available at time of publication):

- During the 10-year period from 2002 to 2012, the unemployment rate in San Bernardino County ranged from a low of 4.8% in 2006 to a high of 14.2% in 2010.
- From its high in 2010, the unemployment rate decreased slightly to 13.2% in 2011 and 12.7% as of March 2012.
- In March 2012, San Bernardino County’s unemployment rate was ranked 25th out of the 58 counties in California, the same ranking as in March 2011.
- San Bernardino County had higher unemployment rates than in the United States as a whole between 2002 and 2012.^{27,28}

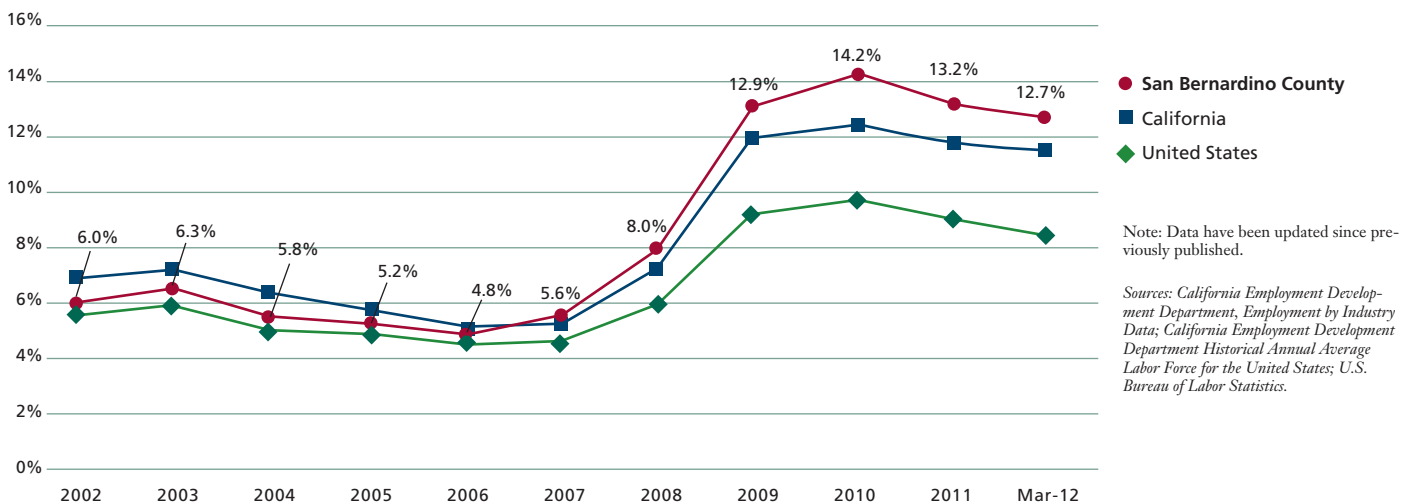
Business Size

Small firms comprise the majority of San Bernardino County’s economy, but large firms remained more stable during the downturn:

- Most businesses in the county have fewer than 100 employees (98%), and 69% of these have between zero and four employees.
- In the third quarter of 2010, 55% of employees worked for businesses with fewer than 100 employees, 26% worked for businesses with 100-499 employees, and the remaining 19% worked for large businesses with 500 employees or more.
- The number of firms with 0-99 employees shrank by 42% and the number of firms with 100-499 employees shrank 51%.
- While there are 37% fewer firms with 500 employees or more since 2006, this size of firm was comparatively more stable.

Unemployment Rate

San Bernardino County, California and United States, 2002 - March 2012



ENDNOTES

- ¹ California Employment Development Department, San Bernardino County Profile (www.labormarketinfo.edd.ca.gov)
- ² San Bernardino County Land Use Department, 2007 General Plan (www.sbcounty.gov)
- ³ San Bernardino Associated Governments GIS Data – Land Use (www.maps.sanbag.ca.gov)
- ⁴ Analysis of data from the U.S. Census Bureau (Census 2010, Census 2000, and Population Estimates Program) and the San Bernardino County Land Use Department, 2007 General Plan
- ⁵ San Bernardino County Land Use Department, 2007 General Plan (www.sbcounty.gov); U.S. Census Bureau, Census 2010 (<http://factfinder2.census.gov>)
- ⁶ Census Population Estimates Program, 2011 Estimates by County (www.census.gov/popest/data/counties/totals/2011/index.html)
- ⁷ State of California, Department of Finance, Table E-1 (www.dof.ca.gov/research/demographic/reports/view.php)
- ⁸ State of California, Department of Finance, Table E-1 (www.dof.ca.gov/research/demographic/reports/view.php)
- ⁹ State of California, Department of Finance, Tables E-1 and E-2 (www.dof.ca.gov/research/demographic/reports/view.php)
- ¹⁰ The SCAG region includes the counties of: Imperial, Los Angeles, Orange, Riverside, San Bernardino, and Ventura. Southern California Association of Governments, 2012 Regional Transportation Plan Growth Forecasts (www.scag.ca.gov/forecast/index.htm)
- ¹¹ California Department of Finance, Table E-6, 1970-2011
- ¹² U.S. Census Bureau, 2010 Census (SF-1)
- ¹³ U.S. Census Bureau, 2010 American Community Survey
- ¹⁴ California Department of Finance, Legal Immigration to California by County, 1984–2010 (www.dof.ca.gov/research/demographic/reports/view.php)
- ¹⁵ U.S. Census Bureau, 2010 American Community Survey
- ¹⁶ San Bernardino County Human Resources
- ¹⁷ U.S. Census Bureau, Census 2010 (SF-2), American Community Survey 2010 (1-Year) and 2005
- ¹⁸ California Department of Finance, Table E-5 State/County Pop and Housing Estimates (www.dof.ca.gov/research/demographic/reports/view.php)
- ¹⁹ U.S. Census Bureau, 2010 American Community Survey, 1-Year
- ²⁰ U.S. Census Bureau, 2010 American Community Survey, 1-Year
- ²¹ Housing and Urban Development Department (<http://socs.huduser.org/permits/index.html>)
- ²² U.S. Census Bureau, 2009 American Community Survey, 1-Year
- ²³ U.S. Census Bureau, 2010 American Community Survey, 5-Year (Table B25010)
- ²⁴ California Employment Development Department, Employment by Industry Data for San Bernardino County (www.labormarketinfo.edd.ca.gov/?pageid=166)
- ²⁵ California Employment Development Department, Projections of Employment by Industry and Occupation (www.labormarketinfo.edd.ca.gov/?pageid=145)
- ²⁶ California Employment Development Department, Employment by Industry Data for San Bernardino County (www.labormarketinfo.edd.ca.gov/?pageid=166)
- ²⁷ U.S. Bureau of Labor Statistics (www.bls.gov/cps/tables.htm#annual)
- ²⁸ California Employment Development Department, Report 400 C, Monthly Labor Force Data for Counties, March 2012 Preliminary (www.labormarketinfo.edd.ca.gov/Content.asp?pageid=164)
- ²⁹ Employment Development Department, Size of Business Data (www.labormarketinfo.edd.ca.gov/?PAGEID=138)