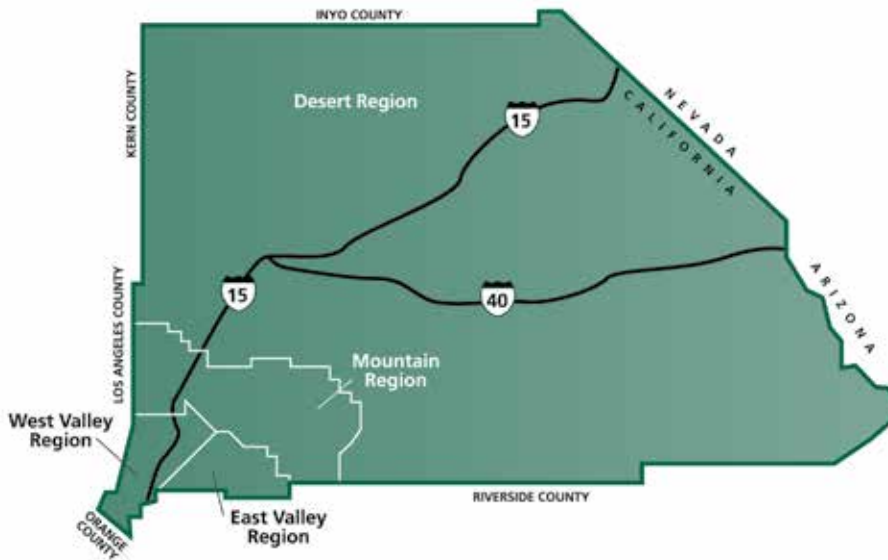


County Profile

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. San Bernardino 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 pages profile San Bernardino County's geography, land use, population density, demographics, housing, and employment characteristics.

Cities, Towns and Communities in San Bernardino County



Sources: San Bernardino County Land Use Services Department, 2007 General Plan (<http://cms.sbcounty.gov/lus/Planning/GeneralPlan.aspx>); California State Association of Counties (www.counties.org); Census Bureau, 2010 Census Tract Reference Maps (www.census.gov/geo/www/maps/CP_MapProducts.htm)

Valley Region	Mountain Region	Desert Region
Bloomington*	Angelus Oaks*	Adelanto
Chino	Big Bear City*	Apple Valley
Chino Hills	Big Bear Lake	Baker*
Colton	Crestline*	Barstow
Fontana	Lake Arrowhead*	Big River*
Grand Terrace	Lytle Creek*	Bluewater*
Highland	Oak Glen*	Fort Irwin*
Loma Linda	Running Springs*	Hesperia
Mentone*	Wrightwood*	Homestead Valley*
Montclair		Joshua Tree*
Muscoy*		Lenwood*
Ontario		Lucerne Valley*
Rancho Cucamonga		Morongo Valley*
Redlands		Mountain View Acres*
Rialto		Needles
San Antonio Heights*		Newberry Springs*
San Bernardino		Oak Hills*
Upland		Phelan*
Yucaipa		Piñon Hills*
		Searles Valley*
		Silver Lake*
		Spring Valley Lake*
		Twentynine Palms
		Victorville
		Yermo*
		Yucca Valley

*Unincorporated

GEOGRAPHY AND LAND USE

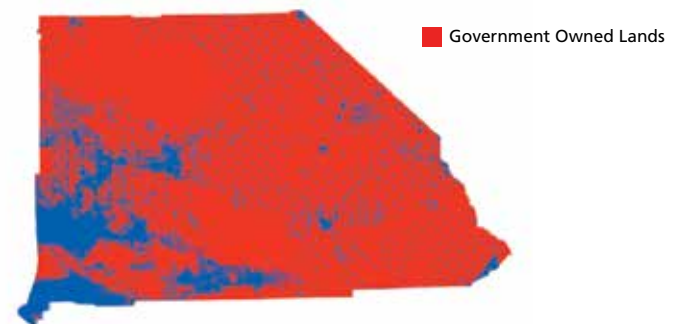
San Bernardino County is the largest county in the contiguous United States:

- 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



San Bernardino County is mostly undeveloped:

- More than three-quarters (80%) of San Bernardino County is vacant land.
- 15% of the land is used for military purposes.
- Residential housing comprises 2.3% of the land area.
- Industrial uses make up 0.8% of the county's land use, followed by utilities (0.5%), agriculture (0.5%), transportation (0.4%), and parks (0.2%).
- Commercial uses, schools, offices, and government buildings each make up 0.1% or less of county land.³

POPULATION DENSITY

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

- San Bernardino's population density is estimated at 104 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 73% of the population residing in that region, but accounting 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 2,977 persons per square mile, which is similar to neighboring Los Angeles and Orange Counties.

POPULATION

San Bernardino County has the fifth largest population in California:

- In July 2013, San Bernardino County's population was estimated at over two million (2,088,371).
- Among all California counties, only Los Angeles County (10,017,068), San Diego County (3,211,252), Orange County (3,114,363), and Riverside County (2,292,507) have more residents.
- San Bernardino County is the twelfth most populous county in the nation, with more residents than 15 of the country's states, including Idaho, West Virginia, and New Mexico.⁶

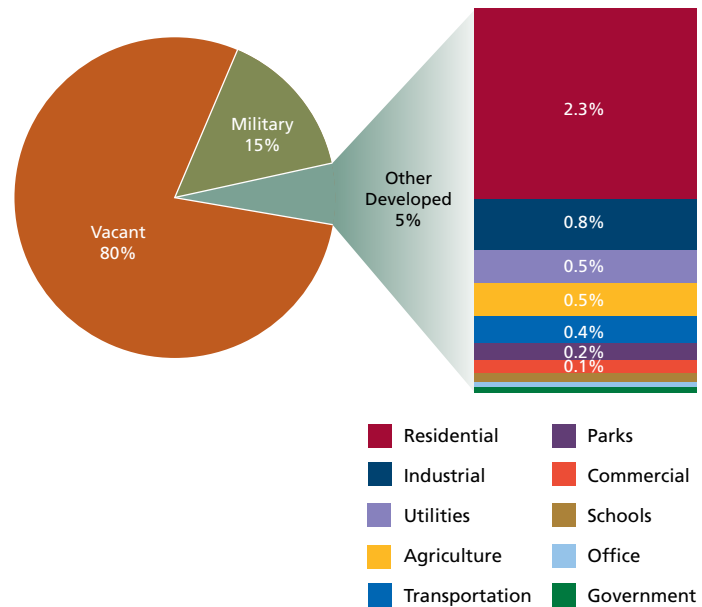
Ranking by Population Growth County Comparison, 2012-2013

County (Major City)	State	Population as of July 1, 2013	Numeric Change	Percent Change	Ranking by Numeric Growth (2012-2013)	Ranking by Percent Change (2012-2013)
Maricopa (Phoenix)	AZ	4,009,412	68,800	1.7%	2	229
Los Angeles	CA	10,017,068	65,378	0.7%	3	718
San Diego	CA	3,211,252	35,114	1.1%	5	454
Clark (Las Vegas)	NV	2,027,868	30,209	1.5%	7	283
Orange (Santa Ana)	CA	3,114,363	29,008	0.9%	9	557
Riverside	CA	2,292,507	27,628	1.2%	10	409
Miami-Dade (Miami)	FL	2,617,176	24,466	0.9%	16	558
San Bernardino	CA	2,088,371	10,918	0.5%	48	921

Note: Ranking is among approximately 3,200 counties in the United States and runs from the largest to the smallest change.

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

San Bernardino County Land Uses



Source: San Bernardino Associated Governments, April 2014

Population Density for San Bernardino County, San Bernardino Valley, and Peer and Neighboring Counties, 2013

County (Major City)	Persons per Square Mile
San Bernardino	104
Clark (Las Vegas)	256
Riverside	318
Maricopa (Phoenix)	436
San Diego	766
Miami-Dade (Miami)	1,345
Los Angeles	2,467
San Bernardino Valley Region	2,977
Orange (Santa Ana)	3,945

Note: San Bernardino Valley land area is from 2007 and population data are from 2012. The remaining geographies reflect land area data from 2000 and population data from 2013.

Sources: Analysis of data from the U.S. Census Bureau (Census 2000, 2012 American Community Survey 5-Year Estimates, and 2013 Population Estimates Program) and the San Bernardino County Land Use Department, 2007 General Plan

San Bernardino County's population growth has occurred at a moderate but fairly steady rate over the past 40 years:

- Average annual population growth in the 1970s was 3%.
- The annual growth rate jumped to 6% in the 1980s, dropped back to 2% in the 1990s and remained 2% in the 2000s.
- Since 2000, San Bernardino County's population has grown by approximately 21%.⁷
- Most recently (between 2012 and 2013), San Bernardino County's population grew 0.5% – slightly slower than growth in the state as a whole (0.9%).⁸

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%).⁹

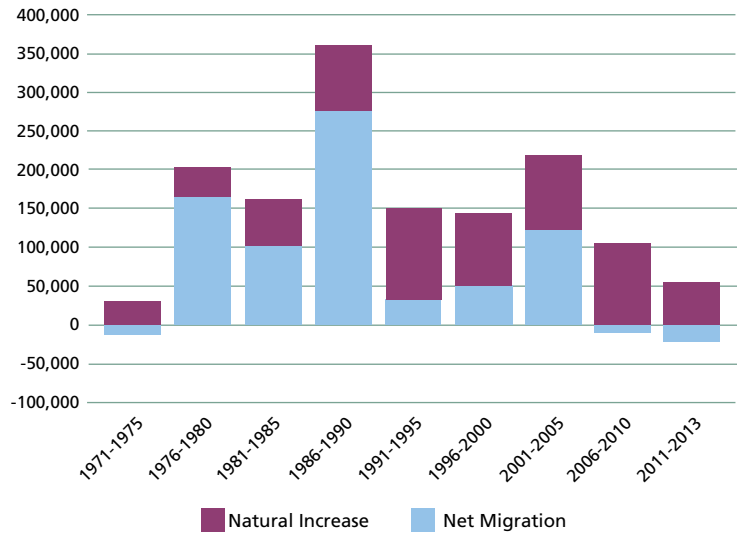
After previously gaining residents primarily through migration, San Bernardino County's growth since the early 1990s has come predominately from natural increase (births minus deaths):

- From 1975 through 2006, San Bernardino County had positive net migration, with more people moving into the area than out.
- However, between 2007 and 2010, the county lost population through migration, with an estimated loss of nearly 50,000 residents in these four years.
- Most recently, between 2011 and 2013, the county continued to experience negative net migration, losing approximately 18,000 residents.
- Domestic out-migration (moving out of the county to another location in the United States) has been the driver behind the loss since 2008, while international immigration (moving to the county from a foreign country) acted to reduce the net loss.
- The county added approximately 56,000 residents through natural increase between 2011 and 2013, which when combined with negative net migration, equals a total of nearly 38,000 new residents during this period.¹⁰

San Bernardino County is racially and ethnically diverse:

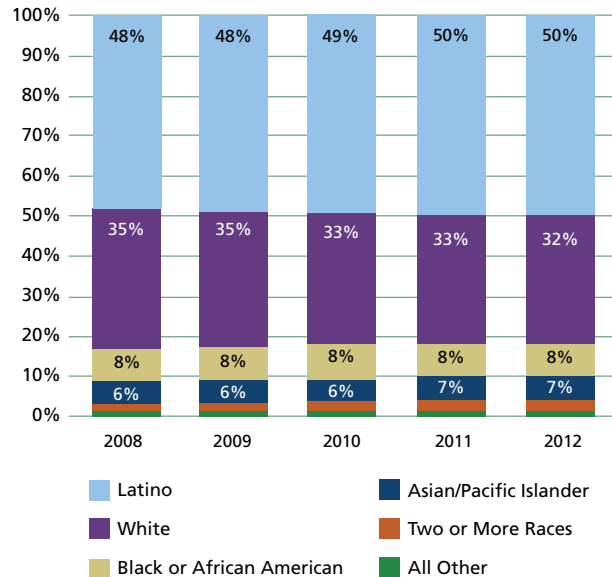
- Half (50%) of San Bernardino County residents are Latino, who may be of any race.
- Among the remaining non-Latino residents, 32% are White, 8% are Black or African American, 7% are Asian or Pacific Islander, and 3% report two or more races. Less than one percent of residents are American Indian/Alaska Native (0.6%).¹¹

Components of Population Change San Bernardino County, 1971-2013



Source: California Department of Finance, Table E-6, 1970-2013 (www.dof.ca.gov/research/demographic/reports/view.php)

Population by Race/Ethnicity San Bernardino County, 2008-2012



Note: "All Other" includes American Indian/Alaska Native and any other single race. Latino includes any race. All race calculations are non-Latino.

Source: U.S. Census Bureau, 2008-2012 American Community Survey 1-Year Estimates

Native Americans in San Bernardino County

Approximately 1% of the population in San Bernardino County is comprised of residents who are Native American alone and no other race (21,023 individuals as of 2012). An additional 14,998 residents self-identify as Native American and White, and 3,056 identify as Native American and Black or African American. 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, both Latino and non-Latino. Tribal identification is for Native American alone and no other race.

Sources: U.S. Census Bureau, 2008-2012 American Community Survey, 5-Year Estimate, and Census 2010 SF-1, Tables QT-P7, QT-P4, P-3

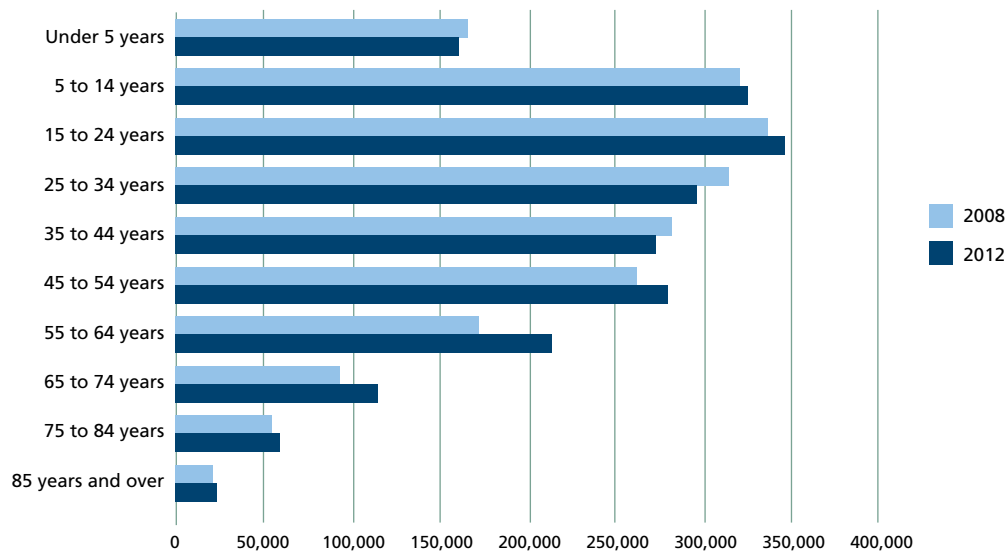
In 2012, 22% of the people living in San Bernardino County were foreign-born:

- By comparison, in 2000, 19% of the population was foreign-born.¹²
- The increase in the proportion of foreign-born residents follows legal immigration patterns.
- In the 1980s, the county was adding an average of 2,800 residents each year from legal immigration. This grew to an average of 4,700 in the 1990s. Since 2000, the county added an average of 8,000 new immigrants each year.¹³
- Among residents over the age of five, 42% speak a language other than English at home.
- Among these, 81% speak Spanish and 19% speak some other language.¹⁴
- As of March 2014, there were 2,746 bilingual county employees who provide interpretation services as a part of their job. This is equivalent to approximately 15% of all county employees and represents at least five different languages.¹⁵

San Bernardino County's population is relatively young:

- In 2012, the county's median age was 33, compared to 37 nationwide.
- As of 2012, 28% of the population was under age 18, while 10% was 65 years or older.
- Between 2008 and 2012, the county's population grew in all age groups except young children under age five and adults ages 25 to 44.¹⁶

Population by Age
San Bernardino County, 2008 and 2012



Source: U.S. Census Bureau, 2008 and 2012 American Community Survey (<http://factfinder2.census.gov/>)

HOUSING

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

- There were 704,540 housing units available to county residents in January 2013.
- As of January 2013, San Bernardino County had a housing vacancy rate of 12.5%, unchanged from the prior year.¹⁷
- A majority of occupied units are owner-occupied (60%) compared to renter-occupied (40%).
- The greatest proportion of homes was built in the 1980s (23%), followed by the 1970s (18%).¹⁸
- In the last 10 years, construction permits peaked in 2004 with 18,017 permits granted, followed by another 16,635 permits granted in 2005 and 13,324 in 2006.
- However, mirroring decreases elsewhere in the state, construction permits in San Bernardino County fell 76% between 2007 and 2012 (7,752 and 1,897 permits, respectively).
- Preliminary data for 2013 show an increase in housing permits granted at approximately 3,400 permits. This is more than double the 20-year low of 1,472 permits granted in 2011.¹⁹

In 2012, there were 600,688 households in the county:

- Families comprise 76% of the households in San Bernardino County, of which 69% are married-couple families and 31% are other families.
- 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.²⁰
- At an average of 3.3 people per household, San Bernardino County has the fifth highest household size among California counties in 2012.
- In comparison, the average household size in California is 2.9 and the national average is 2.6.²¹

EMPLOYMENT

Labor Market Distribution and Growth

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

- In 2012, the largest labor markets in San Bernardino County were Trade, Transportation and Utilities (27% of total employment), Government (19%), Educational and Health Services (14%), Professional and Business Services (12%), Leisure and Hospitality (9%), Manufacturing (8%), Construction (4%) and Financial Activities (4%).²²
- Employment within the category of Transportation and Warehousing (a sub-category of Trade, Transportation and Utilities) is more than twice as concentrated in San Bernardino County than in the United States as a whole (8% to 4%, respectively).²³

The fastest growing sectors in the region are projected to be Construction and Health Care and Social Assistance:

- Employment in the construction industry is anticipated to grow by 3.9% between 2013 and 2016, followed by 3.7% growth in Health Care and Social Assistance.
- The sectors where analysts anticipate the region will have a competitive advantage are Health Care and Social Assistance, Transportation and Warehousing, Wholesale Trade, Retail Trade and Utilities.²⁴

Sector Scorecard

Riverside-San Bernardino, Current (2012/13) and Three-Year Forecast

	Current			Three-Year Forecast	
	Employment	Average Annual Wages	Employment Concentration	Average Annual Percent Growth	Local Competitiveness
Construction	63,293	\$50,325	1.19	3.9%	
Health Care and Social Assistance	149,790	\$46,003	0.87	3.7%	✓
Transportation and Warehousing	71,322	\$42,968	1.54	2.7%	✓
Arts, Entertainment, and Recreation	28,918	\$29,967	1.33	2.6%	
Wholesale Trade	53,635	\$50,595	1.04	2.2%	✓
Retail Trade	165,270	\$28,568	1.21	2.1%	✓
Utilities	9,888	\$84,898	1.35	1.5%	✓
Manufacturing	85,447	\$48,070	0.79	1.3%	

Note: Local competitiveness is an assessment of whether an industry has a regional competitive advantage compared to the nation in terms of generating employment – that is, an industry is outperforming the national average rate of growth or decline. Employment concentration measures whether employment in a particular sector is more or less concentrated than the national average (which is 1.0); values over 1.25 suggest a comparative advantage or specialization in a particular sector.

Source: JobsEQ from the report "The San Bernardino County Economy: Economic Trends and Forecasts, Quarter 1 - Quarter 3, 2013" by Chmura Economics & Analytics for the Workforce Investment Board of San Bernardino County. Current data are third quarter 2012 to third quarter 2013; Forecast data are three-year projections from third quarter 2013.

Business Size

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

- Almost all of the businesses in the county have fewer than 100 employees (98%), and 67% of these have four or fewer employees.
- In terms of how employees are distributed among San Bernardino County businesses, in the third quarter of 2012, 56% of employees worked for businesses with fewer than 100 employees, 25% worked for businesses with 100-499 employees, and the remaining 19% worked for large businesses with 500 employees or more.
- Between 2008 and 2012, the number of firms with 0-99 employees shrank by 47% and the number of firms with 100-499 employees shrank 45%.
- There were 13% fewer firms with 500 employees or more since 2008, making this size of firm comparatively more stable.²⁵

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
- ⁴ U.S. Census Bureau (Census 2000, 2012 American Community Survey 5-Year Estimates, and 2013 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, 2012 American Community Survey 5-Year Estimates (<http://factfinder2.census.gov>). Valley Region includes Ontario Census County Division (CCD), San Bernardino CCD, and Yucaipa CCD.
- ⁶ U.S. Census Bureau, Population Estimates Program, 2013 Estimates by County (www.census.gov/popest/index.html)
- ⁷ California Department of Finance, Tables E-1 and/or E-2
- ⁸ U.S. Census Bureau, Population Estimates Program, 2013 Estimates by County
- ⁹ 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)
- ¹⁰ California Department of Finance, Table E-6, 1970-2012
- ¹¹ U.S. Census Bureau, 2012 American Community Survey, 1-Year
- ¹² U.S. Census Bureau, 2012 American Community Survey (1-Year) and 2000 Census (SF 3)
- ¹³ California Department of Finance, Legal Immigration to California by County, 1984-2012 (www.dof.ca.gov/research/demographic/reports/view.php)
- ¹⁴ U.S. Census Bureau, 2012 American Community Survey, 1-Year
- ¹⁵ San Bernardino County Human Resources
- ¹⁶ U.S. Census Bureau, 2008 and 2012 American Community Survey, 1-Year
- ¹⁷ California Department of Finance, Table E-5 State/County Pop and Housing Estimates (www.dof.ca.gov/research/demographic/reports/view.php)
- ¹⁸ U.S. Census Bureau, 2012 American Community Survey, 1-Year
- ¹⁹ Housing and Urban Development Department (<http://socds.huduser.org/permits/index.html>).
- ²⁰ U.S. Census Bureau, 2012 American Community Survey, 1-Year
- ²¹ U.S. Census Bureau, 2012 American Community Survey, 5-Year (Table B25010)
- ²² California Employment Development Department, Employment by Industry Data for San Bernardino County (www.labormarketinfo.edd.ca.gov/LMID/Employment_by_Industry_Data.html)
- ²³ U.S. Bureau of Labor Statistics (www.bls.gov/cew/cewlq.htm)
- ²⁴ JobsEQ from the report "The San Bernardino County Economy: Economic Trends and Forecasts, Quarter 1 - Quarter 3, 2013" by Chmura Economics & Analytics for the Workforce Investment Board of San Bernardino County
- ²⁵ Employment Development Department, Size of Business Data (www.labormarketinfo.edd.ca.gov/?PAGEID=138)