2008/09 Inland Empire Annual Survey

Final Report

Submitted by:

CALIFORNIA STATE UNIVERSITY
SAN BERNARDINO
Institute of Applied Research and Policy Analysis

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We would like to thank the following organizations which generously contributed to this survey:

PLATINUM SPONSOR:

San Bernardino Associated Governments

SILVER SPONSORS:

Mojave Water Agency
Riverside County Economic Development Agency

BRONZE SPONSORS:

Coachella Valley Associated Governments
CSUSB College of Business and Public Administration
Omnitrans
San Bernardino Valley Water Conservation District
Western Riverside Council of Governments

CHAPTER 1: INTRODUCTION AND METHODS

INTRODUCTION

The Institute of Applied Research (IAR) is pleased to present the results of its **2008/2009 Inland Empire Annual Survey.** IAR has been conducting an annual survey in San Bernardino County for twelve years and in Riverside County for seven out of the last twelve years.

The purpose of the survey is to provide policy-related research that relates to issues important to both counties. This 2008/2009 Inland Empire Annual Survey provides decision-makers with objective, accurate and current information for:

- **Evaluating key public and private sector services and activities** (e.g., retail services, health care, education, and transportation);
- **Describing the public's current views as well as changes over time** in public perceptions of such issues as: quality of life, the state of the local economy, perceptions of the region as a place to live and work, problems and issues facing both counties (e.g., crime, pollution, immigration, traffic congestion, and promotion of economic development);
- **Providing a regional focus** for the on-going discussion of key local/regional issues; and
- **Disseminating a coherent picture of San Bernardino & Riverside County residents' views, beliefs, and demographic characteristics** to key decision makers within and outside the county, thus enabling comparisons to other counties.

Apart from the objectives listed above, IAR is committed to promoting regionalism and cooperation. Additionally, it is hoped that the work involved in the Annual Survey and other IAR projects will project the Inland Empire onto the radar screen of other "significant actors" in the State. In this sense, IAR seeks to become a valuable resource in the region for initiating community discourse and helping to inform the public, officials, and citizens.

THE QUESTIONNAIRE

Questionnaire items were selected on the following basis: Several questions were incorporated from previous Inland Empire Annual Surveys which were designed to track changes over time in residents' perceptions about their quality of life and economic well-being, their views about the pressing issues of the day, and their ratings of public services and agencies.

In addition, a number of standard demographic questions were included for tracking purposes and for cross-tabulation of findings. Tracking questions, of course, provide public agencies and businesses with trend data often needed in policy making and outcome assessments. These questions are also valuable in comparing the Inland Empire with other regions in the state and nation. A number of sponsors also submitted questions for their proprietary use. Finally, the researchers, in consultation with sponsors, added questions concerning current issues which have policy and research implications.

A draft copy of the questionnaire was submitted to the sponsors for their approval and modified where warranted. A Spanish version of the questionnaire was produced, the survey instrument was then pre-tested (in both languages), and some minor changes to the wording and order of some items were made. The questionnaire is attached as Appendix I.

SAMPLING METHODS

Telephone survey respondents were randomly selected from a comprehensive sample frame consisting of all telephone working blocks which contain residential telephone numbers in Riverside and San Bernardino County. This is a standard random sampling approach for studies of this nature. In order to ensure accuracy of findings, 1,629 residents were surveyed from the two-county area for a 95 percent level of confidence and an accuracy of approximately plus/minus 2.4 percent for overall two-county findings.

Sample size in San Bernardino County was higher than that of Riverside County due to the fact that there was a higher level of funding in San Bernardino County. As a result, 1,035 residents of San Bernardino County were surveyed, for an accuracy of a plus/minus 2 percent and 95 percent level of confidence. The sample size for Riverside County was 594 residents, for an accuracy of plus or minus 4 percent and a 95 percent level of confidence.

Since the inception of the survey, at the request of SANBAG (San Bernardino Associated Governments) IAR has conducted a region-specific analysis within San Bernardino County. The four regions of interest are: **East Valley, West Valley**, **Victor Valley,** and **Desert**, with approximately 250 respondents surveyed per region (95% level of confidence and an accuracy of +/- 6% per region).

The following table lists San Bernardino County survey respondents' community/city of residence, separated by region.

Communities and Cities Mentioned by Respondents, Broken Down By the Four Designated SB County Study Areas

East Valley	West Valley	Victor Valley	Desert Region
Big Bear	Chino	Adelanto	Barstow
Bloomington	Chino Hills	Apple Valley	Earp
Colton	Fontana	Hesperia	Hinkley
Cedar Glen	Montclair	Lucerne Valley	Joshua Tree
Crestline	Ontario	Phelan	Landers
Grand Terrace	Rancho Cucamonga	Victorville	Morongo Valley
Highland	Upland	Wrightwood	Needles
Lake Arrowhead			Trona
Loma Linda			Twentynine Palms
Lytle Creek			Yucca Valley
Mentone			
Redlands			
Rialto			
Running Springs			
San Bernardino			
Twin Peaks			
Yucaipa			

There were two regions within Riverside County designed based on the service area of two of our Riverside County sponsors. The first was the WRCOG region with a sample size of 312 respondents (for a 95% level of confidence and an accuracy of +/- 5.5%). The second was the CVAG (Coachella Valley Associated Governments) region with a sample size of 283 respondents (a 95% level of confidence and an accuracy of +/- 5.8%). These two regions cover approximately 98% of the population of the county.

The following table lists Riverside County survey respondents' community/city of residence, separated by region.

Communities and Cities Mentioned by Respondents,
Broken Down By the Two Designated Riverside County Study Areas

WRCOG Region	CVAG Region
Banning	Blythe
Beaumont	Cathedral City
Calimesa	Coachella
Corona	Desert Hot Springs
Hemet	Indian Wells
Homeland	Indio
Lake Elsinore	La Quinta
Menifee	Palm Desert
Mira Loma	Palm Springs
Moreno Valley	Rancho Mirage
Murrieta	Thermal
Norco	Thousand Palms
Nuevo	
Perris	
Riverside	
San Jacinto	
Sun City	
Temecula	
White Water	
Wildomar	
Winchester	

Telephone interviews were conducted by the Institute of Applied Research at California State University, San Bernardino using computer assisted telephone interviewing (CATI) equipment and software. The San Bernardino County surveys were conducted between January 21 and February 6, 2009. The Riverside County surveys were conducted between March 12 and March 19, 2009.

ORGANIZATION OF THIS REPORT

Chapter two of this report focuses on San Bernardino County respondents' views and opinions (including regional breakdowns within the county). Chapter three addresses Riverside County respondents' views. Chapter four presents some selected differences between the counties and ends with some concluding remarks.

Highlights of the survey data are presented relative to ratings of the county, commuting, other transportation issues, fear of crime and crime-related issues, economic evaluations and future prospects, evaluation of selected private and public services, and confidence in elected officials. Selected data from questions submitted by our sponsors was also included in the report: The San Bernardino section/chapter focuses on baseline quality of life issues of importance to all sponsors, transportation issues of interest to SANBAG and Omnitrans, and questions regarding water use introduced Mojave Water Agency and the San Bernardino Valley Water Conservation District. The Riverside chapter focuses on quality of life issues of interest to WRCOG and CVAG as well as economic development and workforce issues of interest to the Riverside County Economic Development Agency.

CHAPTER 2: SAN BERNARDINO COUNTY FINDINGS

INTRODUCTION

Following are the major San Bernardino County findings from this year's **Inland Empire Annual Survey.** In general, the report is divided by conceptual category (i.e., ratings of the county, commuting, other transportation issues, fear of crime and crime-related issues, economic evaluation and future prospects, evaluations of selected private and public services, and confidence in elected officials). Within each section, we examine significant regional differences within San Bernardino County and possible trends over time (where appropriate) for which 12 years of data are available. A full data display of frequency distributions is shown in Appendix II, and regional breakdowns are presented in Appendix III.

RATINGS OF THE COUNTY

OVERVIEW: ***As in previous surveys, the majority of San Bernardino County residents in each zone continued to rate their county as a good place to live. "General location" continued to be mentioned as the "best" thing about living in the county. Crime was overwhelmingly the most-often mentioned negative in all four zones. Concerns about smog and traffic abated somewhat throughout the county.***

As in previous years, the majority of residents have rated the county as a "fairly good" or "very good" place to live (Question 3). This year is no exception. Table 1 below shows that over two-thirds (69%) of County respondents rated the county as a "very good" or "fairly good" place to live. There has been a slight erosion in ratings since the high point in 2002, yet the ratings of the county still remained relatively high this year.

Table 1. % Respondents Indicating Their County is a "Very Good" or "Fairly Good" Place to Live

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
1997 Survey	50	76	67	63	**63**
1998 Survey	58	76	66	69	**67**
1999 Survey	59	78	71	64	**69**
2000 Survey	55	77	73	63	**67**
2001 Survey	65	77	77	69	**72**
2002 Survey	73		75	68	**74**
2003 Survey	61	81	75	66	**72**
2004 Survey	59	77	75	79	**70**
2005 Survey	56	77	71	72	**69**
2006 Survey	51	77	67	73	**66**
2007 Survey	56	76	66	76	**67**
2008/09 Survey	53	84	66	66	**69**

Over the years, West Valley respondents have given the county the highest ratings as a place to live, (although the Desert respondents gave slightly higher ratings in 2004 and ratings equal to West Valley respondents in the 2007 survey), and this year, residents gave it the highest rating yet. In contrast, the East Valley respondents have consistently given the county the lowest ratings. It is noteworthy that rankings given by Desert respondents have become increasingly positive over time since the report's inception, but dropped slightly this year. Over the last three years, there has also been a drop in Victor Valley region respondents' ratings of life in the county.

To help explain the above ratings, respondents were asked to indicate the one BEST and one MOST NEGATIVE thing about living in the county (Questions 4 and 5). As has been the case over the years, respondents mentioned "good area/location/scenery" as the most positive aspect of living in the county (Table 2). "Climate/weather" and "affordable housing" were also mentioned by a significant group of respondents, as was the fact that the area is "not crowded." It is interesting to note that even though housing prices have dropped precipitously over the past year, significantly fewer respondents mentioned affordable housing as the one best thing about the county than was the case in previous years. This finding suggests that the perception of "affordable housing" is clearly related to one's sense of economic well-being.

Table 2. Positive Factors Mentioned About the County

	East Valley %	West Valley %	Victor Valley %	Desert %	2004 SB County %	2005 SB County %	2006 SB County %	2007 SB County %	2008/09 SB County %
Good area, location, scenery	37	39	28	32	**31**	**29**	**33**	**34**	**36**
Good Climate, weather	20	12	25	23	**16**	**14**	**15**	**11**	**17**
Affordable housing	7	10	6	2	**12**	**10**	**11**	**11**	**8**
Not crowded	4	3	11	11	**8**	**8**	**8**	**8**	**5**

The flip side of the coin is negative factors mentioned about the county (see Table 3). For the sixth year in a row, crime and gang activity was the most-often mentioned negative factor about living in San Bernardino County. Social scientists have often validated the common sense notion that there is a relationship between the economy and crime. Specifically, as the economy declines, criminal activity (and the perception of crime as a significant problem) tends to rise. This year's survey seems to validate this point.

Table 3. % Negative Factors Mentioned About the County

	East Valley %	West Valley %	Victor Valley %	Desert %	2004 SB County %	2005 SB County %	2006 SB County %	2007 SB County %	2008/09 SB County %
Crime, gang activity	43	18	40	14	**22**	**24**	**33**	**24**	**31**
Traffic	4	10	6	5	**14**	**12**	**12**	**10**	**7**
Smog, air pollution	10	12	2	2	**14**	**10**	**8**	**9**	**9**

It is noteworthy that the percentage of Victor Valley respondents mentioning "crime/gang activity" as the number one negative factor about the county has shown an upward trend over the years (see Table 4). This year that number rose significantly (up to 40% this year compared to 25% last year). As will be noted later in this report, Victor Valley respondents' ratings of the economy are also at an all-time low, thus reinforcing our comment about the link between crime and the economy.

As has been the pattern over time, the region with the highest percentage of people mentioning crime/gang activity is East Valley. Last year we noted that the figure had significantly declined in 2007 for both the East and West Valley, but those figures rose again this year.

Table 4. % Mentioning "Crime/Gang Activity" as the Most Negative Factor About Living in the County

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
1997 Survey	39	25	20	9	**26**
1998 Survey	33	22	20	9	**25**
1999 Survey	34	19	20	12	**25**
2000 Survey	32	16	13	15	**22**
2001 Survey	18	11	9	6	**13**
2002 Survey	20		14	9	**19**
2003 Survey	28	16	7	12	**20**
2004 Survey	31	16	20	8	**22**
2005 Survey	40	14	19	8	**24**
2006 Survey	48	23	27	18	**33**
2007 Survey	37	13	25	16	**24**
2008/09 Survey	43	18	40	14	**31**

As important as is the public's concern about crime, smog and traffic are also on the minds of respondents. As shown in Table 5 below, concern about smog remained relatively the same as last year.

Table 5. % Mentioning Smog as a Negative Factor

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
1997 Survey	14	19	5	2	**9**
1998 Survey	11	15	7	3	**11**
1999 Survey	0	2	0	0	**1**
2000 Survey	16	15	3	1	**11**
2001 Survey	17	17	8	6	**15**
2002 Survey	16		7	7	**14**
2003 Survey	14	16	9	5	**14**
2004 Survey	15	17	6	3	**14**
2005 Survey	11	12	4	6	**10**
2006 Survey	8	9	3	3	**8**
2007 Survey	13	9	3	2	**9**
2008/09 Survey	10	12	2	2	**9**

Last year we noted that the percentage of San Bernardino respondents who mentioned traffic as the most important negative factor had held relatively steady since 2002 (see Table 6). Moreover, it has been consistently ranked behind “crime/gang activity” as respondents’ most pressing concern. However, this year showed a decrease in all regions and for the county as a whole, and for the first time, it was ranked lower than smog. This finding has special significance for one of our sponsors: SANBAG. Although in previous years we may have been tempted to explain this decrease based on the rise in the cost of gasoline, this year’s findings may reflect the broader economic slump which may be affecting people’s driving habits.

Table 6. % Mentioning Traffic as a Negative Factor

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
1997 Survey	N/A	N/A	N/A	N/A	**2**
1998 Survey	2	3	1	1	**3**
1999 Survey	4	6	2	4	**4**
2000 Survey	4	11	5	1	**7**
2001 Survey	4	9	2	1	**5**
2002 Survey	12		12	2	**11**
2003 Survey	8	10	16	6	**10**
2004 Survey	11	17	14	4	**14**
2005 Survey	8	15	16	4	**12**
2006 Survey	10	14	16	6	**12**
2007 Survey	6	14	8	7	**10**
2008/09 Survey	4	10	6	5	**7**

COMMUTING

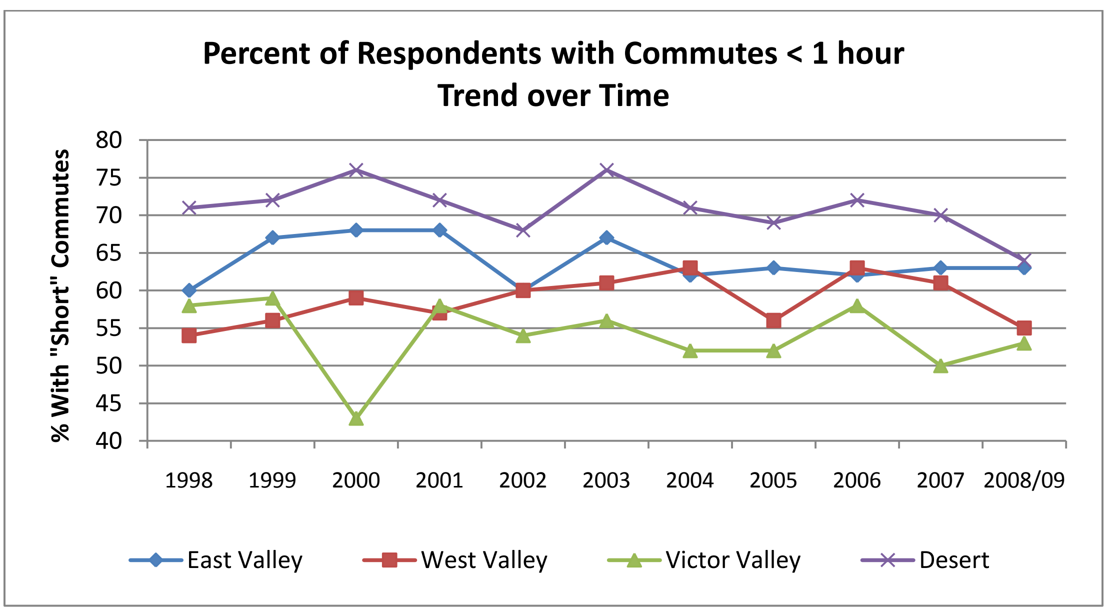
OVERVIEW: For twelve consecutive years, the data from our annual survey have revealed that most respondents from each zone spend less than an hour commuting to and from work, although the median commute time is “inching up.” Most respondents stay in San Bernardino County to work, with West Valley respondents having the highest percentage of respondents commuting outside the County (mainly to Los Angeles County).

As in the past, approximately 6 out of every 10 San Bernardino County respondents reported spending less than an hour each day driving to and from work (Question 25). Although on the face of it, the fact that 58% of County residents have relatively short commutes would appear to be encouraging, the flip side of the statistic is that a significant number (42%) are spending a large portion of their day driving to and from work (see Table 7). As noted in past reports, this takes a personal toll on these individuals and their families.

Table 7. % With Total Round-Trip Commuting Times of Less Than 1 Hour

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %	Median Commute Time
1998 Survey	60	54	58	71	**58**	**38.2 min**
1999 Survey	67	56	59	72	**62**	**37.3 min**
2000 Survey	68	59	43	76	**61**	**37.1 min**
2001 Survey	68	57	58	72	**61**	**38.5 min**
2002 Survey	60		54	68	**60**	**36.6 min**
2003 Survey	67	61	56	76	**63**	**37.4 min**
2004 Survey	62	63	52	71	**62**	**36.0 min**
2005 Survey	63	56	52	69	**59**	**38.2 min**
2006 Survey	62	63	58	72	**62**	**38.4 min**
2007 Survey	63	61	50	70	**61**	**40.2 min**
2008/09 Survey	63	55	53	64	**58**	**39.2 min**

A review of region-specific data suggests that the Victor Valley region maintains its position of having the fewest people with relatively short commute times, and the Desert region has the highest percentage of people with relatively short commute times. However, the Desert region (along with the West Valley region) showed a 6% decrease in the percentage of people with short commute times.



Of course, one of the pressing questions is whether the percentage of drivers with short commutes has significantly changed over time. Our data (Table 7 and graph above) show that for more than a decade there has been a great deal of variability in commuting times for San Bernardino County residents. Based on the median commute time, however, it appears that the commute time has been "inching up," perhaps due to the major freeway work in the Inland Empire.

As in previous surveys, the majority of San Bernardino County respondents reported that they work within San Bernardino County (Question 27), with the percentage remaining remarkably stable over time (see Table 8). Of those respondents who commute outside the county to work, Los Angeles County continued to be the major destination.

Table 8. San Bernardino County Respondents' Commuting Destinations, 1998-2009*

Work Destination (County)	1998 %	1999 %	2000 %	2001 %	2002 %	2003 %	2004 %	2005 %	2006 %	2007 %	2008/09 %
San Bernardino	**73**	**73**	**70**	**69**	**67**	**69**	**71**	**72**	**71**	**70**	**71**
Riverside	8	6	7	8	9	7	5	5	7	7	6
Orange	3	3	4	4	6	5	5	4	4	4	3
Los Angeles	14	15	15	16	16	16	16	17	13	15	16

* NOTE: A small percentage of respondents reported working in areas not listed in the table.

As shown in Table 9, the West Valley region has the highest percentage of commuters traveling to Los Angeles County for work. East Valley and Desert respondents who commute outside San Bernardino County tend to travel to Riverside County.

Table 9. In What County do you Work?*

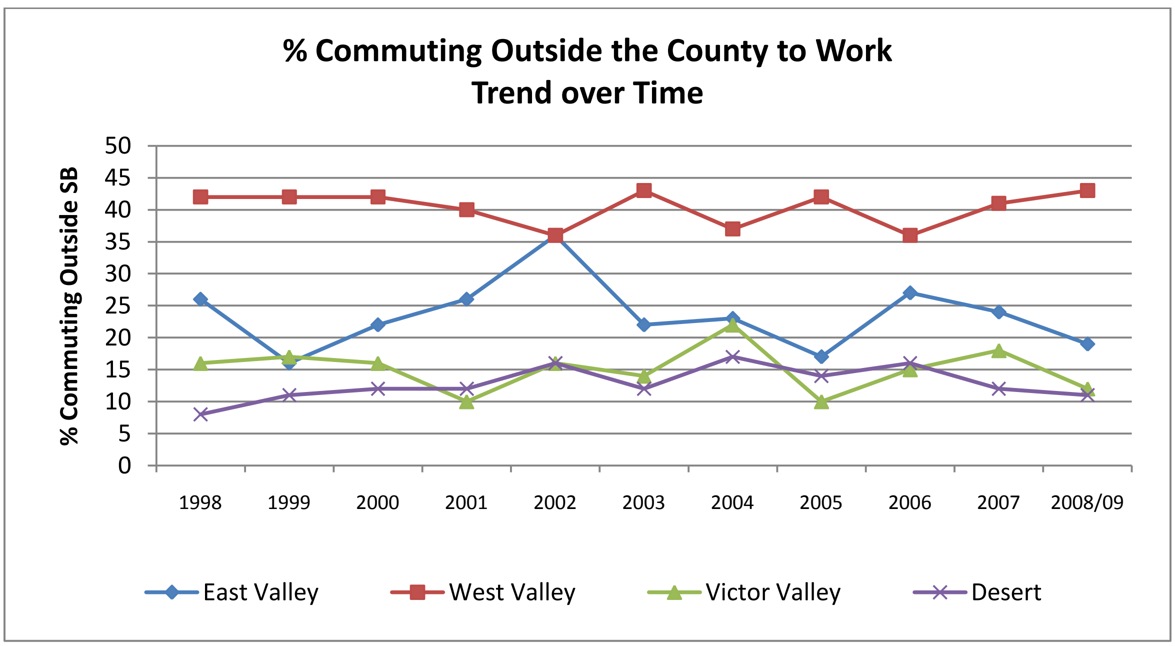
	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
San Bernardino County	**81**	**57**	**88**	**89**	**71**
Riverside County	10	4	4	9	6
Orange County	2	6	<1	<1	3
Los Angeles County	3	32	5	<1	16

* NOTE: A small percentage of respondents reported working in areas not listed in the table.

When looking at trends over time in commuting destinations by region (Table 10), one finds regional differences that have been fairly consistent over time. West Valley tends to have the highest percentage of people traveling outside the county to go to work. Victor Valley and the Desert region have the lowest percentage (which is probably expected given the driving distance from those areas to surrounding counties).

Table 10. % Traveling to Work Outside San Bernardino County

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
1997 Survey	Question was not asked in the 1997 survey				
1998 Survey	26	42	16	8	**31**
1999 Survey	16	42	17	11	**27**
2000 Survey	22	42	16	12	**30**
2001 Survey	26	40	10	12	**31**
2002 Survey	36		16	16	**33**
2003 Survey	22	43	14	12	**31**
2004 Survey	23	37	22	17	**29**
2005 Survey	17	42	10	14	**28**
2006 Survey	27	36	15	16	**29**
2007 Survey	24	41	18	12	**30**
2008/09 Survey	19	43	12	11	**29**



OTHER TRANSPORTATION ISSUES

OVERVIEW:* *Over two-thirds of San Bernardino County respondents reportedly reduced the number of pleasure trips when gas prices were high. Just over one-half of them have used a

California toll road to avoid traffic congestion, but less than half support the development of toll roads in Southern California as a way to help fund transportation improvements. 41% of respondents report having ever taken the Metrolink and 28% of respondents report having ever used the public bus system. Residents in East and West Valley were more likely to have used these modes of transportation than residents in Victor Valley or the Desert region.

San Bernardino Associated Governments (SANBAG) has been a sponsor of the Annual Survey since its inception in 1997. This year, one of SANBAG's interests was to determine if county respondents' made any modifications in their lives due to the spike in gas prices in the summer of 2008. Respondents were asked the following questions (Questions SANBAG1, SANBAG2, SANBAG3) "Did high gas prices cause you to buy a hybrid or more fuel-efficient vehicle", "reduce the number of pleasure trips you took?", or "did you ride the Metrolink or the bus more often?". Over 2/3 of respondents (69%) said they reduced the number of pleasure trips they took due to higher gas prices. Only 16% bought a more fuel efficient vehicle and 9% rode the train more often.

Table 11. % Who Made Changes Due to High Gas Prices

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
Buy a hybrid or more fuel efficient vehicle	16	14	21	16	**16**
Reduce the number of pleasure trips you took	67	66	76	74	**69**
Ride the Metrolink more often	13	8	6	9	**9**

The table above shows that Victor Valley residents were more likely than respondents in other regions to buy a more fuel efficient vehicle, perhaps reflecting the fact that more residents in that region have commute times longer than 1 hour. In addition, Victor Valley and Desert respondents had more people saying that they had reduced the number of pleasure trips they took. East Valley residents were more likely than those in other regions to ride the Metrolink. In addition, a follow-up question asked what other changes they had made:

- 6% said they plan their errands and trips more carefully to save gas
- 5% said they "stay home"

- 5% reported carpooling
- 4% said they shop closer to home
- 4% reportedly cut down on “extras” to be able to afford the gas.

Next, residents were asked a series of questions regarding Southern California toll roads.

- Just over half (54%) said they had used a Southern California toll road (Question SANBAG5);
- 58% said they don’t mind paying to use a toll road so that they can avoid traffic congestion (Question SANBAG6);
- 54% like the idea of having toll lanes adjacent to regular lanes on the freeway (Question SANBAG7);
- 47% support the development of toll roads in Southern California as a way to help fund transportation improvements (Question SANBAG8).
- 35% support a gas tax increase of up to 10 cents a gallon if they knew it would be used on road projects in their region (Question SANBAG9);
- Over one-half of respondents (56%) said they would support a gas tax increase of up to 10 cents a gallon if they knew it would fund road construction projects that would create more jobs in our region (Question SANBAG10).

Table 12. % of Respondent who have ever used the Metrolink and the Public Bus system

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
% who have ever used the Metrolink	48	48	19	12	**41**
% who have ever used the public bus system	34	27	20	26	**28**

Finally, respondents were asked a series of questions regarding their use of the Metrolink Train and the public bus system (see Table 12 above). First, they were asked “Have you ever used the Metrolink?” (Question SANBAG11) and 41% said they have. Not surprising, East Valley and West Valley residents were far more likely to have used the Metrolink (48% each region) that those from Victor Valley (19%) or the Desert Region (12%). Most respondents who use the train report that they use it for entertainment or pleasure trips (75%) or for business or commuting (16%), with an additional 5% indicating that they use it for both. On the other hand, to place these findings in perspective, 86% of those who use the Metrolink indicated that they do so “rarely,” with an additional 6% saying they use it “a few times a month.”

When asked if they have ever used the public bus system (Question SANBAG16), 28% said they have. Again, East Valley, West Valley, and Victor Valley residents were more likely to have used the public bus system than respondents from the Desert region. As with the Metrolink, respondents who use the bus report that they use it mainly for entertainment or pleasure trips (42%) or for business or commuting (22%), with another 12% saying they use it for both, and 12% saying they use it for school.

FEAR OF CRIME AND CRIME RELATED ISSUES

OVERVIEW: ***Fear among San Bernardino County residents of being the victim of a serious crime is down in three of the four zones this year, with Victor Valley being a notable exception. Significantly more Victor Valley residents report being fearful of being the victim of a serious crime than last year, and has surpassed East Valley respondents in expressing a higher fear level.***

Over the years, respondents to the Annual Survey have expressed that crime and gang-related activity is an ever-present concern. As noted earlier, “crime/gang-related activity” was once again overwhelmingly the most often-mentioned “negative factor” about the county for San Bernardino County respondents. This concern about crime was also reflected in answer to the direct question: “How fearful are you that you will be the victim of a serious crime, such as a violent or costly crime?” (Question 9).

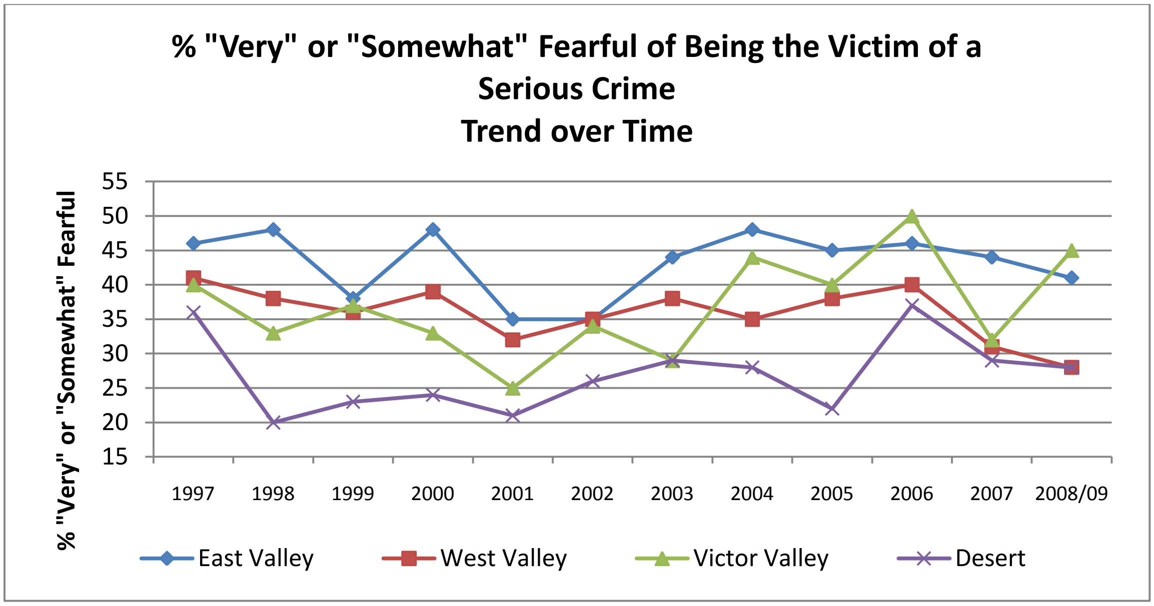
As shown in Table 13 below, there has been some variation over time in respondents’ fear of crime. In 2001 we reported a dramatic decline in the percentage of San Bernardino County residents who reported being “very” or “somewhat” fearful of being the victim of a serious crime. Since that time, however, fear of crime had shown an increase until 2006 when the fear reached the highest level since the inception of the survey in 1997. In 2007, fear was back down to 2002 levels. We noted at that time that it was difficult to determine whether the reason for this decrease was due to an actual change in perceptions about crime, or whether other events accounted for the findings such as decreasing media coverage of high-profile crime in the area.

We said that the 2008/09 report would be especially important in determining whether the 2007 decrease was a byproduct of the time period in which the survey was conducted, or a real decrease. In looking at this year's data, it appears that the decrease may not simply have been not due to the time period in which the survey was conducted.

Table 13. % "Very Fearful" or "Somewhat Fearful" of being the victim of a serious crime

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
1997 Survey	46	41	40	36	**43**
1998 Survey	48	38	33	20	**40**
1999 Survey	38	36	37	23	**36**
2000 Survey	48	39	33	24	**41**
2001 Survey	35	32	25	21	**32**
2002 Survey	35		34	26	**35**
2003 Survey	44	38	29	29	**39**
2004 Survey	48	35	44	28	**41**
2005 Survey	45	38	40	22	**40**
2006 Survey	46	40	50	37	**44**
2007 Survey	44	31	32	29	**36**
2008/09 Survey	41	28	45	28	**35**

Historically East Valley respondents have expressed the most fear of being the victim of a serious crime whereas the Desert respondents have reported the least fear. However, this year there was a significant increase in the percentage of respondents who report being fearful of being the victim of a serious crime in the Victor Valley region (from 32% last year to 45% this year), and they have now surpassed East Valley residents.



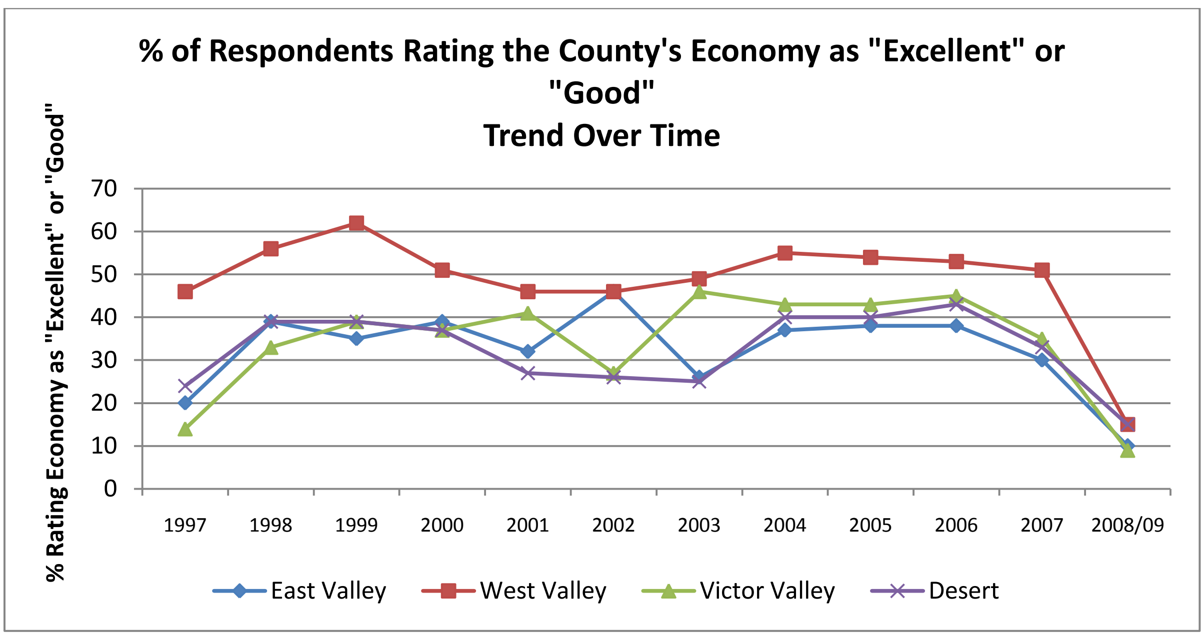
ECONOMIC EVALUATIONS AND FUTURE PROSPECTS

OVERVIEW: Fewer people than last year rated the county's economy as "excellent" or "good," with significant declines in all four regions. Respondents' ratings of their own financial well-being are at an all-time low since the inception of the survey, with only 15% of respondents saying they are "better off" than last year. However, 35% continued to remain optimistic about their financial well-being in the coming year…a figure down from 43% in 2007.

Last year we noted that there was a decrease in the number of people rating the county's economy as "excellent" or "good." This year the ratings plummeted to an all time low in all four regions (see Table 14 below) – down from 40% last year to 12% this year. It would be tempting to blame these findings on the media's reporting of the falling housing market and sharp increases in costs, however given the ongoing recession we now are experiencing, it is clear that there are significant and fundamental problems with the economy that are being perceived by county residents.

Table 14. % Rating the County's Economy as "Excellent" or "Good"

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
1997 Survey	20	46	14	24	**28**
1998 Survey	39	56	33	39	**45**
1999 Survey	35	62	39	39	**47**
2000 Survey	39	51	37	37	**44**
2001 Survey	32	46	41	27	**39**
2002 Survey	46		27	26	**43**
2003 Survey	26	49	46	25	**39**
2004 Survey	37	55	43	40	**46**
2005 Survey	38	54	43	40	**46**
2006 Survey	38	53	45	43	**46**
2007 Survey	30	51	35	33	**40**
2008/09 Survey	10	15	9	15	**12**



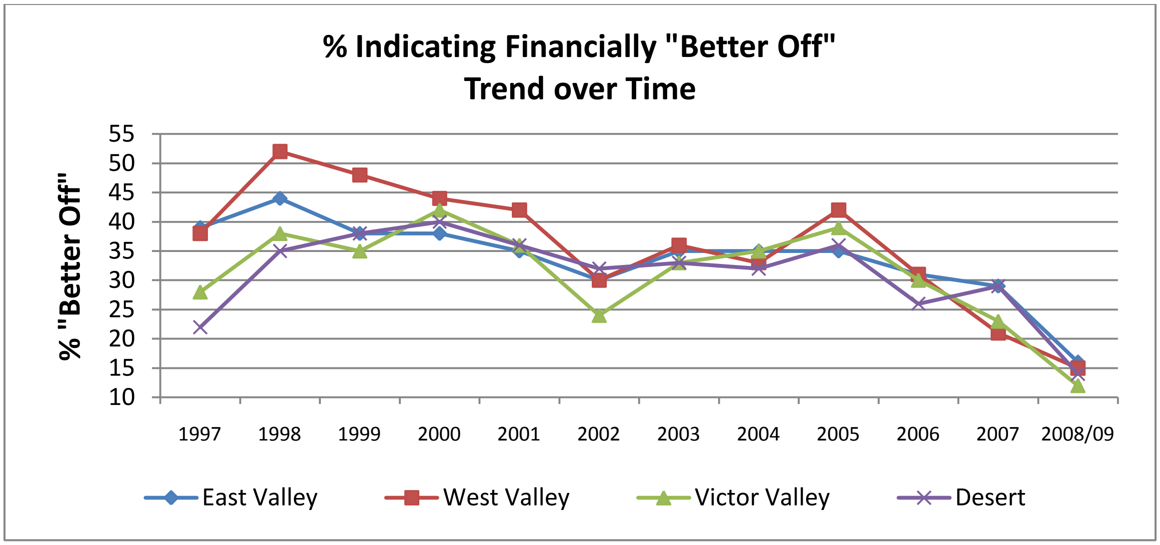
As we have noted in previous reports, there is often a "disconnect" between respondents' ratings of the county's economy and their ratings of their own economic well-being. For the most part, respondents' views of the **county's** economy are shaped by what they have read/heard in the media or by what they have gleaned from conversations with family and friends. In this sense, then, the respondents' view of the county's economy may not accurately reflect what is objectively occurring in the San Bernardino County area. Perhaps a better measure of the state of the county's economy is a measure of their *own* economic well-being, for in this case the respondent is not relying on other people's opinions, but rather on his/her own concrete and objective experience.

Responding to the question, "In comparison to a year ago, would you say that you and your family are better off, worse off, or the same" (Question 6), only 15% of San Bernardino County respondents reported feeling that they are better off. This is a significant decrease from 2007, and reflects the lowest figure since the survey's inception in 1997 (see Table 15).

Table 15. % Indicating Their Finances Are "Better Off" Compared With a Year Ago

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
1997 Survey	39	38	28	22	**34**
1998 Survey	44	52	38	35	**46**
1999 Survey	38	48	35	38	**42**
2000 Survey	38	44	42	40	**41**
2001 Survey	35	42	36	36	**38**
2002 Survey	30		24	32	**30**
2003 Survey	35	36	33	33	**35**
2004 Survey	35	33	35	32	**34**
2005 Survey	35	42	39	36	**39**
2006 Survey	31	31	30	26	**31**
2007 Survey	29	21	23	29	**25**
2008/09 Survey	16	15	12	14	**15**

All four regions showed a significant decline in the percentage of respondents indicating that they are better off financially than last year; however the decline was especially evident among Desert respondents (a 15% decline from 29% to 14%), with East Valley respondents a close second (13% decline from 29% to 16%).



Over the years, it has consistently been the case that respondents are optimistic about their *future* financial condition (regardless of their rating of their *current* condition). When asked: "Now looking ahead, do you think that a year from now you and your family will be better off, worse off, or just about the same as you are now" (Question 7), respondents appeared to be a bit less optimistic than the respondents surveyed in 2007: this year, 35% expect to be better off financially a year from now – that figure was 51% in the 2006 survey and 43% in the 2007 survey (Table 16). The percentage of people expecting their finances to be worse in the coming year doubled from 2007. All four regions share approximately the same level of optimism/pessimism.

Table 16. Now looking ahead, do you think that a year from now you and your family will be better off, worse off, or just about the same you are now?

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County 2006 %	SB County 2007 %	SB County 2008/09 %
Better off	35	34	35	35	51	43	35
Same	48	48	44	45	41	48	47
Worse off	18	18	21	20	8	9	18

*NOTE: figures do not add up to 100% due to rounding differences

EVALUATIONS OF SELECTED PRIVATE AND PUBLIC SERVICES

OVERVIEW: ***Ratings of private and public services have not changed significantly over the past twelve years in the county, with high marks continuing to be given to shopping, police/sheriff services, and parks/recreation services. On the other end of the continuum, street/road maintenance and transportation continue to be problem areas. In the Desert region, shopping continues to be a problem, as well as entertainment and street/road maintenance.***

For the past twelve years the Annual Survey has included questions regarding respondents' evaluations of local services from both the private and public sectors. Over time, there has been remarkable stability in rankings. The following table details the percentage of respondents who indicate that the services are "excellent" or "good" (Questions 14 to 20).

Table 17. Trend -- "Excellent" or "Good" Ratings of Services

SERVICE	1998 %	1999 %	2000 %	2001 %	2002 %	2003 %	2004 %	2005 %	2006 %	2007 %	**2008/09 %**
Police/Sheriff	65	70	64	66	71	69	63	61	61	61	**68**
Shopping	65	68	63	68	70	66	66	65	68	68	**62**
Parks/Recreation	56	60	58	58	58	56	55	56	59	57	**61**
Public Schools	51	46	41	45	51	46	37	43	49	43	**46**
Entertainment	50	49	43	46	49	49	46	44	47	50	**46**
Transportation	N/A	N/A	36	42	40	38	36	37	42	36	**42**
Street/Road Maintenance	35	38	33	34	39	35	25	28	30	32	**32**

Over time, San Bernardino County respondents have consistently given the highest ranking to shopping and police/sheriff services and the lowest ranking to street/road maintenance and transportation. This year is no exception. Perceptions of shopping *have* declined somewhat over the past year (perhaps due to the closure of some shopping areas in this economic downturn). Perceptions of police/sheriff services have dramatically improved in the past year, reversing a trend of decline which had occurred since 2003. On the other hand, perceptions of street/road maintenance have remained at virtually the same consistently low level since the report's inception. Given declining budgets, it is unclear whether more can be done to mitigate problems with transportation and street/road maintenance; however government officials should take note of these ratings.

Table 18 below shows the regional breakdowns of ratings in services, comparing 2007 to 2008/09. As in previous years, ratings by West Valley respondents are higher than those of the respondents in the other 3 zones, with shopping and police/sheriff services ranked at the top of the list.

Table 18. % Rating Local Services as "Good" or "Excellent"

	East Valley %		**West Valley %**		**Victor Valley %**		**Desert %**	
	2007	**2008/09**	2007	**2008/09**	2007	**2008/09**	2007	**2008/09**
Police/Sheriff	54	**63**	70	**78**	52	**55**	56	**56**
Shopping	62	**48**	81	**82**	54	**53**	36	**32**
Parks/Recreation	43	**49**	73	**75**	48	**49**	50	**53**
Entertainment	46	**34**	61	**64**	35	**32**	25	**25**
Public Schools	35	**41**	52	**53**	40	**42**	38	**36**
Local Transportation	30	**38**	45	**51**	25	**31**	39	**39**
Street/Road Maintenance	24	**21**	44	**48**	21	**21**	26	**17**

WATER CONSERVATION ISSUES

OVERVIEW: Most respondents in the Victor Valley area expressed some level of concern about the availability of future water supplies. Two-thirds rate their water quality as "excellent" or "good". The vast majority of respondents reported having personally made a change in their water use habits this past year. Respondents in the East Valley region are more comfortable using recycled water for landscaping and washing their clothes than for drinking. Respondents reported being willing to invest in water-saving technologies (e.g. sprinkler timers that automatically adjust based on the weather, or waterless toilets) if they knew these improvements would pay for themselves in the long run.

In 2007, Mojave Water Agency became a sponsor of the Inland Empire Annual Survey for the first time. This year, the San Bernardino Valley Water Conservation District (SBVWCD) also became a sponsor of the survey. Both agencies were interested to know how concerned respondents in each of its service areas (parts of the Victor Valley and Desert regions for Mojave and parts of the East Valley region for SBVWCD) were about the availability of future water supplies and other issues related to water conservation.

Mojave Water Agency questions

While last year 2/3 of respondents in the Mojave service area were concerned about the availability of future water supplies, this year less the one-half (48%) of respondents said they are “very concerned” (Question Moj1). However, another 40% of respondents said they are “somewhat concerned” (compared to 24% from last year). Only 12% said they are “not at all concerned.” Considering that the drought has not eased in the year between surveys, one can only surmise that other considerations (e.g. the economy) are taking precedence over concerns about water availability. However the important point is that there is still concern about the availability of future water supplies (although the concern may have abated somewhat).

Respondents in the Mojave Water Agency region are not only concerned about water, but also have adjusted their behavior in order to conserve…that is, 75% reported that they have personally made a change in their water use habits in the past year in order to conserve (Question Moj9). When asked what changes they have made, 53% said they are watering their landscaping less often. Another 28% of those who reported making changes said they are taking shorter showers and 23% changed their landscaping to more water resistant plants. These responses, however, should be viewed with some suspicion since it is well-known that respondents are likely to provide socially acceptable answers to “politically correct” questions. On the other hand, it is possible that indeed these respondents have indeed modified their behavior due to concerns about the environment. It will be interesting to track this over time.

Respondents were also asked an open-ended multiple response question: “what, if anything, would motivate you to conserve more water?” (Question Moj10). A large proportion of respondents (41%) said “nothing”…seemingly, they have made all the behavioral changes they desire to make. Another 16% said they would conserve more water if the price increased, and 11% said they would conserve only if “there was a real shortfall of water.”

On another issue, respondents were asked to rate the quality of the water they currently use, and almost two-thirds (62%) rated it as “excellent” or “good” (Question Moj3). Those who rated it “fair” or “poor” were asked “what makes you give the water that rating?” (Question

Moj3a), and the predominant answer given (44%) was "taste." A sizable group (31%) thinks it is "just unhealthy."

Just over half (52%) of respondents are aware that Mojave Water Agency has been bringing in supplemental water to recharge the groundwater basins for the past few years. But regardless of their awareness of Mojave's activities and programs, 54% have "a great deal of confidence" or "some confidence" that the water agency will take steps to make sure that future water supplies will be as good or better than the water is now.

Finally, Mojave Water Agency wanted to find out if respondents were aware of and have participated in the Water Conservation Incentive Program (Questions Moj6 to Moj8). Over half (54%) of respondents said that they were aware of this program before this survey. Of those who were aware, 52% said they have participated in this program. Those who said they have not participated in the Water Conservation Incentive Program were asked "why not?" and very few people chose to respond to the probe. Those people said they are simply "not interested" (perhaps because they already conserve), or "didn't think about it," or "don't have time to deal with it." This leads to the conclusion that Mojave Water Agency might be able to encourage more people to participate in the program by advertising it more and making sure that participation is relatively simple.

San Bernardino Valley Water Conservation District questions

Respondents from SBVWCD's service area were asked a couple of questions related to how comfortable they would feel with using recycled water (Questions SBW1 and SBW3). The table below shows respondents' comfort level in using recycled water for landscaping and for drinking.

Table 19. Respondents Level of Comfort with Using Recycled Water for Landscaping and Drinking

	Landscaping %	Drinking %
Very Comfortable	63	15
Somewhat Comfortable	14	21
Comfortable	16	12
Somewhat Uncomfortable	4	22
Very Uncomfortable	3	30

In addition, respondents were asked "if recycled water was odorless, colorless and clean, would you use it to wash your clothes?" (Question SBW2), and 66% said they would. Not surprisingly, these results show that respondents are much more comfortable with the idea of using recycled water for watering their plants or washing their clothes than they are for drinking.

Respondents were asked if they would be willing to invest in a water saving technology (e.g. sprinkler timers that automatically adjust watering with changes in weather conditions or a waterless toilet) if they knew it would pay for itself in the long run (Question SBW4), and 71% of respondents said they would. Another 13% said they "might." Finally, respondents were asked if they thought that media messages stressing the need for recycled water would make people more open to the idea of using it (Question SBW5). Over two-thirds (69%) said "yes" and another 15% said "maybe".

CONFIDENCE IN ELECTED OFFICIALS

OVERVIEW: Over two-thirds of residents have a "great deal" or "some" confidence in their elected city officials.

Since 1997 the Annual Survey has included a question asking respondents "How much confidence do you have that the elected officials in your city or community will adopt policies that will benefit the general community?" (Question 28). There has been a great deal of variation in ratings over time, with confidence ranging from a high of 66% having a "great deal" or "some" confidence in 2002, to a low of 55% in 2005. This year the figure rose slightly from last year, with 65% of respondents reporting having a "great deal" of confidence or "some" confidence in their city/community elected officials (compared to 63% last year).

The public's enthusiasm for and confidence in their elected officials has always been highest in the West Valley region, and this year's survey is no different. However, ratings for their elected officials increased in the East Valley (from 55% last year to 62% this year) and decreased in the Desert Region (61% last year to 55% this year).

Table 20. % Reporting a "Great Deal" or "Some" Confidence in Their Elected Officials

	East Valley %	West Valley %	Victor Valley %	Desert %	SB County %
1997 Survey	58	78	51	56	**63**
1998 Survey	55	69	57	54	**61**
1999 Survey	56	66	52	49	**59**
2000 Survey	60	71	58	52	**64**
2001 Survey	53	65	54	55	**59**
2002 Survey	69		51	52	**66**
2003 Survey	60	68	65	47	**63**
2004/05 Survey	Question was not asked on this year's survey				
2005 Survey	51	60	53	52	**55**
2006 Survey	50	61	58	58	**56**
2007 Survey	55	74	49	61	**63**
2008/09 Survey	62	73	51	55	**65**

CHAPTER 3: RIVERSIDE COUNTY FINDINGS

INTRODUCTION

In the early years of the Inland Empire Annual Survey (1997 to 2001), the survey was conducted in both Riverside and San Bernardino Counties as a joint project between the Institute of Applied Research at CSUSB and the Center for Social and Behavioral Science Research at UCR (under the direction of Dr. Max Neiman). Between 2002 and 2006, IAR surveyed only San Bernardino County respondents. Last year Riverside County was once again included in the Annual survey. This year Riverside County also participated in the survey, but the entire county was not surveyed due to budgetary constraints. On the other hand, the region surveyed reflects approximately 98% of the population in the county, thus providing a good overall snapshot of the opinions of Riverside County residents.

This section of the report includes the highlights of the Riverside County findings. Where appropriate, we examine significant regional differences within Riverside County and trends over time (where appropriate) for which data are available. A full data display of frequency distributions is shown in Appendix IV, and regional breakdowns are presented in Appendix V.

RATINGS OF THE COUNTY

OVERVIEW: ***As in previous surveys, the majority of residents in Riverside County rate their county as a good place to live. Respondents cited "good area/location/scenery", "good climate", "affordable housing", and "not crowded" as positive aspects of the county. Riverside County respondents (particularly the ones in the WRCOG region) appear to be most concerned about traffic.***

Since the inception of the Annual Survey, there has been a consistent majority of residents in Riverside County who have rated their county as a "very good" or "fairly good" place to live (Question 3 – Table 21).

Table 21. % Respondents Indicating Their County is a “Very Good” or “Fairly Good” Place to Live

1997 Annual Survey	76
1998 Annual Survey	81
1999 Annual Survey	79
2000 Annual Survey	80
2001 Annual Survey	81
2002 – 2006: Data not available	
2007 Annual Survey	77
2008 / 09 Annual Survey	81

As shown in Table 22, residents from the CVAG region are more likely than WRCOG area residents to rate their county as a “very good” place to live (42% vs. 27%). But when combining those who rated it as either “very good” or “fairly good” place to live, the difference between the two regions is not as striking, with those in CVAG giving the county a slightly higher rating (85% of CVAG respondents compared to 79% of WRCOG respondents).

Table 22. % Respondents Indicating Their County is a "Very Good" or "Fairly Good" Place to Live: Regional Differences

	WRCOG %	CVAG %
Very good	27	42
Fairly good	52	43
Neither good nor bad	16	11
Fairly bad	3	4
Very Bad	2	1

To determine the basis for the above ratings, respondents were asked to indicate the one BEST and one MOST NEGATIVE thing about living in the county (Questions 4 and 5). As has been the case in previous years, residents in Riverside have consistently mentioned “good area/location/scenery” as the most positive aspect of living in the county (Table 23). “Climate/weather” and “affordable housing” were also mentioned by a significant group of respondents, as was the fact that the area is “not crowded.”

Table 23. Positive Factors Mentioned About the County

	1997 %	1998 %	1999 %	2000 %	2001 %	2002 - 06 %	2007 %	2008 / 09 %
Good area, location, scenery	24	24	19	25	30	*	29	27
Good climate, weather	17	16	15	17	20	*	19	22
Affordable housing	5	5	6	6	9	*	9	7
Not crowded	7	4	5	5	8	*	10	8

* No Data Available

But it should be noted (Table 24) that residents from the CVAG region (50%) are far more likely to cite "good climate/weather" as the most positive factor about living in the county than are respondents from the WRCOG region (13%).

Table 24. Positive Factors Mentioned About the County: Regional Differences

	WRCOG %	CVAG %
Good area, location, scenery	29	21
Good climate, weather	13	50
Affordable housing	8	3
Not crowded	9	3

When asked "what is the most negative factor about living in the county," the answer given most often by Riverside County respondents was "traffic" (Table 25). This finding is not unexpected considering the amount of freeway construction in the region and, as is discussed in the next section of the report, commute time has increased over the years. Now that some of the major freeway construction has been completed (e.g. 60/91/215 interchange), the figure may decrease somewhat. It will be interesting to monitor this issue in next year's Inland Empire Annual Survey.

Table 25. Negative Factors Mentioned About the County

	1997 %	1998 %	1999 %	2000 %	2001 %	2002 - 06 %	2007 %	2008 / 09 %
Traffic	5	8	9	14	12	*	20	19
Crime, gang activity	14	16	13	14	11	*	11	13
Smog, air pollution	14	9	11	11	16	*	9	13
Weather	9	8	7	8	5	*	9	7

*No data available

There are some regional differences in perspectives of the most negative factor about the county. Residents in the CVAG region are more concerned with crime/gang activity and the weather than traffic, and residents from the WRCOG region (the area with the majority of the freeway construction) are most concerned with traffic and smog (See Table 26).

Table 26. Negative Factors Mentioned About the County: Regional Differences

	WRCOG %	CVAG %
Traffic	22	9
Crime, gang activity	11	21
Smog, air pollution	15	5
Weather	6	11

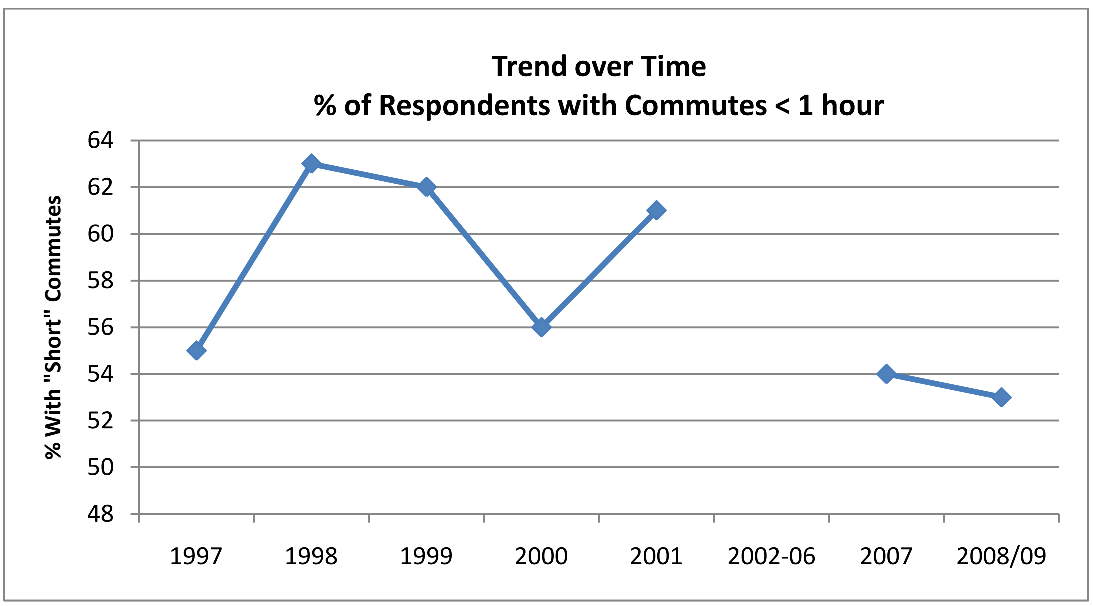
COMMUTING

OVERVIEW: Over time, the Annual Survey data have revealed that most respondents from Riverside County spend less than an hour commuting to and from work, and most respondents reported that they stay in their own county when commuting to work. It is important to note that commute time has been slowly increasing over time. Riverside County commuters working outside the county tend to go to San Bernardino County (11%), Orange County (10%), LA County (3%), or San Diego County (1%) .

In 2001 we noted that the length of reported commuting times had remained fairly constant over time, with approximately 6 out of every 10 respondents reporting spending less than an hour each day driving to and from work (Question 25). Last year we noted that number was down slightly to 54%. In this year's survey, 53% of Riverside County commuters reported having "short" commutes (less than 1 hour), which is the lowest it's been since the survey's inception. In short, Riverside County residents are spending more time in their cars commuting to work than any time previously – a median of 44.1 minutes.

Table 27. Total Round Trip Commute Time of Riverside County Respondents Who Are Employed Outside the Home

Year of Survey	Less than 1 Hour %	1 - < 2 Hours %	2 - < 3 Hours %	3 - < 4 Hours %	4 Hours or More %	Median Commute Time
1997 Annual Survey	55	23	12	6	5	**39.8 min**
1998 Annual Survey	63	22	10	3	2	**35.4 min**
1999 Annual Survey	62	22	9	4	3	**35.7 min**
2000 Annual Survey	56	24	13	5	2	**39.3 min**
2001 Annual Survey	61	21	13	2	3	**37.9 min**
2002 - 2006	No Data Available					
2007 Annual Survey	54	25	14	4	3	**43.7 min**
2008 / 09 Annual Survey	53	31	9	4	3	**44.1 min**



When looking at regional differences, we see that far more respondents from the CVAG region (80%) report having shorter commute times of less than 1 hour compared to 47% of respondents from WRCOG region.

Table 28. Total Round Trip Commute Time of Riverside County Respondents Who Are Employed Outside the Home: Regional Differences

	WRCOG %	CVAG %
Less than 1 hour	47	80
1 - < 2 hours	34	17
2 - < 3 hours	10	4
3 - < 4 hours	5	0
4 or more hours	4	0

The overwhelming majority (approximately 7 out of 10) of those respondents who commute to work reported that they travel to work within their own county (Table 29). This number has remained remarkably consistent over time. Of course, another way of looking at the data is that approximately 3 out of every 10 commuters travel to work destinations that are ***outside*** their own county to work. However, with an increasing population (an estimated 3.5 million residents by 2035), the actual number of commuters leaving the county for work or school continues to grow.

Riverside County commuters who travel outside their county to work appear to be distributed among San Bernardino (11%), Orange (10%), Los Angeles (3%), and San Diego (1%) counties.

Table 29. Riverside County Respondent Commuting Destinations

Work Destination County	1999 %	2000 %	2001 %	2002 – 06 %	2007 %	2008 / 09 %
Riverside	72	72	70	*	72	**72**
San Bernardino	9	9	10	*	8	**11**
Orange	7	7	10	*	7	**10**
Los Angeles	5	5	5	*	5	**3**
San Diego	3	4	3	*	3	**1**
Other	4	2	2	*	5	**3**

*No data available

As noted in Table 30, respondents from CVAG region (91%) are more likely to travel within their own county to work than those from WRCOG region (67%). This coincides with the finding that more respondents from the CVAG region have shorter commute times than those from the WRCOG region.

Table 30. Riverside County Respondent Commuting Destinations: Regional Differences

Work Destination County	WRCOG %	CVAG %
Riverside	67	91
San Bernardino	14	2
Orange	12	0
Los Angeles	3	2
San Diego	1	0
Other (out of state or travel to “various counties”)	3	5

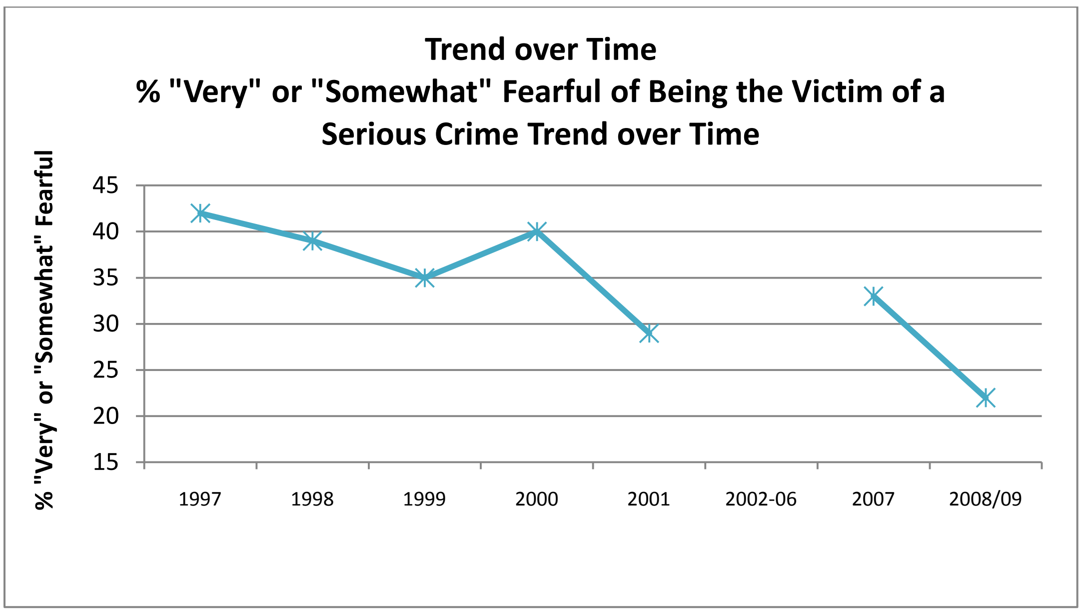
FEAR OF CRIME AND CRIME RELATED ISSUES

OVERVIEW: ***Fear of being the victim of a violent or costly crime is at an all time low in Riverside County.***

In previous reports we noted that fear of being the victim of a violent or costly crime had generally declined for respondents since 1997. As shown in Table 31, the proportion of Riverside respondents indicating they are “somewhat fearful” or “very fearful” of being the victim of a serious crime has decreased to an all-time low of 22%. It is difficult to determine the precise reason for this decrease. Perhaps the decrease in fear of crime is based on objective reality, or perhaps the decrease is due to increasing media coverage of the economy and international affairs rather than local crime. Since these findings have interesting social science as well as practical implications, next year’s survey will include a question probing respondents’ reasons for their rating.

Table 31. Trend - % of Riverside County Respondents Indicating That They Are "Very Fearful" or "Somewhat Fearful" of Being the Victim of a Serious Crime (Such as a Violent or Costly Crime)

Year of Survey	%
1997 Annual Survey	42
1998 Annual Survey	39
1999 Annual Survey	35
2000 Annual Survey	40
2001 Annual Survey	29
2002 – 2006: Data not available	
2007 Annual Survey	33
2008 / 09 Annual Survey	22



Respondents from the CVAG region are slightly more fearful of being the victim of a serious crime than those from the WRCOG region (30% vs. 27%).

Table 32. Fear of Being The Victim of a Serious Crime (Such as a Violent or Costly Crime): Regional Differences

	WRCOG %	CVAG %
Very fearful	3	4
Somewhat fearful	17	26
Not too fearful	51	43
Not at all fearful	30	27

ECONOMIC EVALUATIONS AND FUTURE PROSPECTS

OVERVIEW: Respondents in Riverside County are seemingly feeling the effects of the current economic recession. Ratings of the Inland Empire economy were down significantly among County residents. In addition, there was a significant decline in the number of residents who said that they are better off financially than they were a year ago, and a decline in the number of respondents who expect to be better off next year.

This year's survey was conducted during a period when the newspapers were filled with articles about the falling housing market, the economic downturn, the war (and its related costs), and sharp increases in the price of some everyday commodities. Reflecting the economic weakness in the county, the percentage of respondents rating the economy as "excellent" or "good" (Question 8) showed a sharp decline compared with other years the survey was conducted. This year only 12% of Riverside County respondents rated their county's economy as "excellent" or "good," a statistically significant decrease from the 45% who gave those ratings last year (Table 33).

Table 33: Trend - % of Riverside County Respondents Rating the Economy as "Excellent" or "Good"

Year of Survey	%
1997 Annual Survey	38
1998 Annual Survey	59
1999 Annual Survey	61
2000 Annual Survey	59
2001 Annual Survey	49
2002 – 2006: Data not available	
2007 Annual Survey	45
2008 / 09 Annual Survey	12

There were no major differences between the two regions on their rating of the economy, with both regions giving it a low rating (See Table 34 below).

Table 34. % of Riverside County Respondents Rating the Economy as "Excellent" or "Good": Regional Differences

	WRCOG %	CVAG %
Excellent	1	2
Good	11	14
Fair	42	42
Poor	47	43

Responding to the question, "In comparison to a year ago, would you say that you and your family are financially better off, worse off, or the same?" (Question 6), only 10% of Riverside County respondents (compared to 27% last year) reported feeling that they are better off. This is a significant decrease from previous years, and reflects the lowest figure since the survey's inception in 1997.

Table 35: % of Riverside County Respondents Indicating Their Finances Are "Better Off" Compared With a Year Ago

Year of Survey	%
1997 Annual Survey	33
1998 Annual Survey	39
1999 Annual Survey	43
2000 Annual Survey	40
2001 Annual Survey	34
2002 – 2006:	Data not available
2007 Annual Survey	27
2008 / 09 Annual Survey	10

Over the years, it has consistently been the case that respondents reported being optimistic about their *future* financial condition (regardless of their rating of their *current* condition). Specifically between 1997 and 2001, 54% - 59% of respondents said they expect to be financially better off in a year (Question 7). However, over the past two years this optimism has dramatically declined with only 34% of this year's respondents saying they expect to be better off financially a year from now (Table 36). There were no differences between regions.

Table 36. Now looking ahead, do you think that a year from now you and your family will be better off, worse off, or just about the same as you are now?

Year of Survey	Better Off %	Same %	Worse Off %
1997 Annual Survey	54	41	6
1998 Annual Survey	58	37	4
1999 Annual Survey	59	38	4
2000 Annual Survey	57	39	4
2001 Annual Survey	57	39	4
2002 - 2006	No Data Available		
2007 Annual Survey	49	41	11
2008 / 2009 Annual Survey	34	51	16

QUALITY OF LIFE ISSUES IN WRCOG SERVICE AREA

OVERVIEW: Overall, residents of Western Riverside County are satisfied with the neighborhood they live in. The biggest problem they see in their area of the County is the opportunity for well-paying jobs. Most respondents said they would rather live in a residential-only neighborhood and drive to work or shopping, rather than live in a mixed use neighborhood.

This year the Western Riverside Council of Governments (WRCOG) included a series of questions regarding various quality of life issues in Western Riverside County.

First, respondents were asked how big of a problem each of four issues is within their community (Questions WRCOG1-WRCOG4). The biggest problem, according to respondents, is the lack of well-paying jobs in their part of the county, followed by traffic congestion and population growth (See Table 37 below). Availability of affordable housing is not seen as a significant problem – a not unexpected finding considering that housing costs have plummeted over the past year.

Table 37. Respondents Perceptions of Problems Within Their Community

How big of a problem is….	A Big Problem	Somewhat of a Problem	Not a Problem
Traffic congestion on freeways and major roads?	48%	39%	14%
Population growth and development?	34%	39%	27%
Availability of affordable housing?	19%	26%	55%
Opportunities for well-paying jobs in your part of the county?	54%	38%	8%

Next, respondents were asked “would you prefer to live in a small home with a small backyard if it meant you would have a short commute to work or would you prefer to live in a large house with a large backyard if it means you would have a longer commute to work?” (Question WRCOG5). Slightly more respondents (58%) said they would prefer to live in a small house with a shorter commute than a larger house with a longer commute (42%). They were then asked “Would you prefer to live in a mixed-used neighborhood with multi-story housing where you can walk to shopping, school, entertainment and services or would you prefer to live in a residential-only neighborhood where you have to drive to shops, entertainment, school and services?" (Question WRCOG6). The majority (73%) said they would rather live in a residential-only neighborhood and drive to stores and entertainment, rather than live in multi-story housing (27%) and walk to shopping, school, entertainment and services. This finding is especially interesting in light of the fact that transit-oriented design/development (TOD) is increasingly "in vogue" locally and nationwide.

Finally, respondents were asked "Overall how satisfied are you with the neighborhood you live in?" (Question WRCOG7), and 63% said they are "very satisfied". Only 3.2% said they are "very dissatisfied" with their neighborhood.

RIVERSIDE COUNTY ECONOMIC DEVELOPMENT ISSUES

OVERVIEW: Most Riverside County respondents said they would attend a community college if they needed to upgrade their work skills. Almost two-thirds of them are not aware of one-stop career centers. One-half of them have lost or know someone who has lost their home in the current housing market, but 68% said they are not at all concerned about losing their own home. Most of them said the reason they commute to work instead of working in the area is because they can't find a job in Riverside County.

This year's Riverside County Economic Development Agency/Workforce Development Center (EDAWC) questions focused on Riverside County respondents' views regarding where they would go to upgrade their work skills, knowledge with one-stop career centers, knowledge of someone who has lost their home or fear of losing their own home in the current housing market, the industry they currently work in, and reasons for commuting to work.

First, respondents were asked "If you wanted to upgrade your work skills, which of the following methods would you most likely go to first either for job information or training?" (Question EDAWC1). Most (47.8%) said they would go to a community college, 30.9% said they would turn to the internet, and 12% said they would go to a private proprietary school. Next, respondents were asked "Before this survey, did you know that Riverside County provides job information and training through workforce development centers, sometimes called one-stop career centers?" (Question EDAWC2). Almost two-thirds (62.3%) said they were not aware of this.

In order to determine the effect the current housing market has had on respondents, they were asked "Have you or someone you know lost their home in the current housing market?" (Question EDAWC3) and about one-half said yes. They were then asked "How concerned are you that you might lose your home in the near future?" (Question EDAWC4) and 68.2% said they are "not at all concerned". Only 13.3% said they are "very concerned". More respondents from the WRCOG region said they or someone they know have lost their home than in the CVAG region (52.2% vs. 41.3%), but there were no major differences between the two regions regarding respondents' concern about losing their own home.

Finally, respondents were asked "What is your reason for commuting instead of working in the area?" (Question EDAWC6) and 48.4% said it is because of "job availability" or that they can't find a job in Riverside County. Respondents from the CVAG region were more likely to cite this as the reason for commuting than those from the WRCOG region (57% vs. 48%).

EVALUATIONS OF SELECTED PRIVATE AND PUBLIC SERVICES

OVERVIEW: ***Ratings of private and public services in the county have not changed significantly over the past twelve years, with high marks continuing to be given to shopping, police/sheriff services, and parks/recreation services. On the other end of the continuum, street/road maintenance and transportation continue to be problem areas among Riverside County respondents.***

Each year the Annual Survey has included questions regarding respondents' evaluations of local services from both the private and public sectors. Over time, there has been an increase in ratings of all services except street/roads maintenance. The following table details the percentage of respondents who indicate that the services are "excellent" or "good" (Questions 14 to 20).

Table 38. % of Riverside County Respondents Rating Service as "Excellent" or "Good"

SERVICE	1997 %	1998 %	1999 %	2000 %	2001 %	2002 - 06 %	2007 %	2008 / 09 %
Police/Sheriff	62	69	69	66	72	*	62	**76**
Shopping	*	65	68	66	71	*	69	**69**
Parks/Recreation	58	60	61	63	60	*	63	**67**
Public Schools	45	45	46	46	47	*	47	**52**
Entertainment	*	43	49	41	50	*	51	**52**
Transportation	*	*	*	38	42	*	33	**39**
Street/Road Maintenance	36	44	47	44	43	*	40	**34**

*No data Available

While there has been an increase in ratings of almost all services, respondents continue to give the highest ranking to police/sheriff services and shopping, and the lowest rating to street/road maintenance and transportation. Given declining budgets, it is unclear whether more can be done to mitigate problems with transportation and street/road maintenance; however government officials should take note of these ratings, particularly given respondents' concern about traffic problems mentioned earlier in this report.

Regionally, respondents in CVAG generally gave higher overall ratings for services than respondents in the WRCOG region, with the exception of schools. Only 44% of CVAG respondents rated their public schools as "excellent" or "good" compared to 54% of residents from the WRCOG region. There was also a significant difference between the two regions in their rating of entertainment. Far more respondents from the CVAG region rated entertainment as "excellent" or "good" compared to residents from the WRCOG region (70% vs. 45%).

Table 39. % of Riverside County Respondents Rating Service as "Excellent" or "Good": Regional Differences

SERVICE	WRCOG %	CVAG %
Police/Sheriff	76	78
Shopping	67	74
Parks/Recreation	66	70
Public Schools	54	44
Entertainment	45	70
Transportation	35	52
Street/Road Maintenance	29	48

CONFIDENCE IN ELECTED OFFICIALS

OVERVIEW: Just over one-half of respondents in Riverside county have a "great deal" or "some" confidence in their elected city officials. This is down from previous years.

Since 1997 the Annual Survey has included a question asking respondents "How much confidence do you have that the elected officials in your city or community will adopt policies that will benefit the general community?" (Question 28). While the numbers have remained relatively stable over time, this year, there was a decline in the number of Riverside County respondents who report having a "great deal" of confidence or "some" confidence in their city/community elected officials, and it is down to an all time low of 58%.

Table 40. % of Respondents who have a "Great Deal" or "Some" Confidence in their Elected Officials

Year of Survey	A Great Deal of Confidence	Some Confidence	Not Much Confidence	No Confidence
1997 Annual Survey	10	56	20	14
1998 Annual Survey	10	54	23	13
1999 Annual Survey	10	51	21	12
2000 Annual Survey	12	53	24	11
2001 Annual Survey	11	55	23	11
2002 - 2006	No Data Available			
2007 Annual Survey	12	50	24	13
2008 / 09 Annual Survey	9	49	26	15

Regionally, respondents from CVAG report having more confidence in their elected officials than those from WRCOG region (64% vs. 56%).

Table 41. Confidence in Elected Officials: Regional Differences

	WRCOG %	CVAG %
A Great Deal of Confidence	7	15
Some Confidence	49	49
Not Much Confidence	28	22
No Confidence	16	14

CHAPTER 4: TWO-COUNTY COMPARISONS

INTRODUCTION

In this chapter of the report we present an analysis of important differences between the perceptions of Riverside and San Bernardino County respondents. Differences between counties are described, as are trends over time where sufficient data are available. A full data display of two-county findings is shown in Appendix VI.

RATINGS OF THE COUNTY

OVERVIEW: ***As in previous surveys, the majority of residents in both counties continue to rate their county as a good place to live, with Riverside County residents providing more positive ratings overall. Respondents in the two counties used similar criteria (nice living area, good climate, affordable housing, and "not crowded") to express their positive assessments of their county as a place to live. These findings are consistent with previous surveys. Crime is still overwhelmingly the most-often mentioned negative factor about living in San Bernardino County, whereas Riverside County respondents continue to be most concerned about traffic.***

Since the inception of the Annual Survey, the majority of residents in both counties have rated the county as a "fairly good" or "very good" place to live (Question 3). Table 42 below shows that among Riverside County respondents, 81% indicated that their county is a "very good" or "fairly good" place to live, while only about 69% of the San Bernardino County residents reported feeling that way.

Table 42. % Respondents Indicating Their County is a "Very Good" or "Fairly Good" Place to Live

	Riverside County %	SB County %
Very good	31	20
Fairly good	50	49
Neither good nor bad	15	20
Fairly bad	3	7
Very Bad	2	4

Although residents in both counties expressed very positive ratings, Riverside County residents provided somewhat more positive ratings overall. This is a pattern that has persisted since 1997 (See Table 43).

Table 43. Trend in % Respondents Indicating Their County is a "Very Good" or "Fairly Good" Place to Live

	Riverside County %	SB County %
1997 Annual Survey	76	63
1998 Annual Survey	81	67
1999 Annual Survey	79	69
2000 Annual Survey	80	67
2001 Annual Survey	81	72
2002 – 2006: No comparative data are available		
2007 Annual Survey	77	67
2008 / 09 Annual Survey	81	69

To help explain the above ratings, respondents were asked to indicate the one BEST and one MOST NEGATIVE thing about living in the county (Questions 4 and 5). While respondents in both counties mentioned "good area/location/scenery" as the most positive aspect (Table 44), residents of San Bernardino County are more likely to mention it than are Riverside County residents. More residents from Riverside County mentioned "climate/weather" than respondents from San Bernardino County. Within both counties, "affordable housing" and "not crowded" were also mentioned by a significant group of respondents.

Table 44. Positive Factors Mentioned About the County

	Riverside County %	SB County %
Good area, location, scenery	27	36
Good climate, weather	22	17
Affordable housing	7	8
Not crowded	8	5

Although there are many issues about which respondents in the two counties agree, there are some significant differences in their perceptions about "the most negative thing about living in the county" (Table 45). Within San Bernardino County, respondents perceive crime and gang activity to be the area's predominant negative factor – a finding that has been consistent over time. Riverside County respondents' views are more diverse, with their primary concern focusing on traffic. Some of this concern may stem from recent beautification efforts within the City of Riverside and freeway improvements throughout the county. There are also sizable subgroups of respondents expressing concern with crime/gang activity and smog/air pollution.

Table 45. Negative Factors Mentioned About the County

	Riverside County %	SB County %
Crime, gang activity	13	31
Traffic	19	7
Smog, air pollution	13	9
Weather	7	1

COMMUTING

OVERVIEW: A consistent finding over the past years is that most respondents from each county spend less than an hour commuting to and from work. Most respondents reported that they stay in their own county to work. Riverside County commuters working outside the county tended to go to San Bernardino (11%), Orange (10%), or LA (3%) County. San Bernardino County commuters working outside the county tended to go to LA County (16%), Riverside (6%), or Orange (3%) County.

Last year we noted that the length of reported commuting times had remained fairly constant over time, with most respondents reporting spending less than an hour each day driving to and from work (Question 25). While that has not changed in this year's survey, we are beginning to see a difference in the commute times of residents in the two counties, with slightly fewer residents of Riverside County reporting short commute times (less than 1 hour) as compared to residents of San Bernardino County. This may partially explain why more Riverside County than San Bernardino County respondents mentioned traffic as the most negative factor about living in the county.

Table 46. Total Round Trip Commute Time of People Who Are Employed Outside the Home

	Riverside County %	SB County %
Less than 1 hour	53	58
1 - < 2 hours	31	23
2 - < 3 hours	9	14
3 - < 4 hours	4	3
4 or more hours	3	2

The overwhelming majority (approximately 7 out of 10) of those respondents who commute to work reported that they travel to work within their own county (Table 47). This pattern has been noted in previous Annual Surveys and it continued this year.

Riverside County commuters who travel outside their county to work appear to be distributed among San Bernardino (11%), Orange (10%), Los Angeles (3%), and San Diego (1%) counties. In contrast, the largest proportion of the San Bernardino County commuters who travel outside the county go to Los Angeles County (16%), with the next highest proportion traveling to Riverside County (6%), followed by Orange County (3%). A relatively small proportion of San Bernardino County commuters head for San Diego County to work. Again, these findings are relatively consistent with previous Annual Surveys.

Table 47. Commuting Destinations (County)

Work Destination County	Riverside County Respondent Commuting Destinations*					San Bern. County Respondent Commuting Destinations*				
	1999	2000	2001**	2007	2008/09	1999	2000	2001**	2007	2008/09
Riverside	**72**	**72**	**70**	**72**	**72**	6	7	8	7	6
San Bernardino	9	9	10	8	11	**73**	**70**	**69**	**70**	**71**
Orange	7	7	10	7	10	3	4	4	4	3
Los Angeles	5	5	5	5	3	15	15	16	15	16
San Diego	3	4	3	3	1	<1	<1	<1	<1	<1
Other	4	2	2	5	3	3	3	2	4	3

*Numbers in cells are % of employed respondents.
** No comparative data available for 2002 – 2006.

FEAR OF CRIME AND CRIME RELATED ISSUES

OVERVIEW: ***Fear of being the victim of a serious crime continues to be higher among San Bernardino County respondents than Riverside County respondents. Overall, however, fear of crime is at an all time low in both counties.***

Over the years, Annual Survey respondents have expressed that crime and gang-related activity is an ever-present concern. As noted earlier, "crime/gang-related activity" was once again overwhelmingly the most often-mentioned "negative factor" about the county for San Bernardino County respondents. This concern about crime was also reflected in answer to the direct question: "How fearful are you that you will be the victim of a serious crime, such as a violent or costly crime?" (Question 9).

Table 48. Fear of Being The Victim of a Serious Crime (Such as a Violent or Costly Crime)

	Riverside County %	SB County %
Very fearful	3	8
Somewhat fearful	19	27
Not too fearful	49	42
Not at all fearful	29	23

Fear of being the victim of a serious crime has generally declined for respondents in both counties since 1997. As shown in Table 49, the proportion of Inland Empire respondents indicating they are "somewhat fearful" or "very fearful" of being the victim of a serious crime is at an all time low, with Riverside County respondents being less fearful than San Bernardino County respondents. At this time, it is unclear whether the reason for this decrease is based on objective reality, or whether it is due to increasing media preoccupation with the economy rather than local crime.

Table 49. Trend - % of Inland Empire Respondents Indicating That They Are "Very Fearful" or "Somewhat Fearful" of Being the Victim of a Serious Crime

	Riverside %	SB County %
1997 Annual Survey	42	43
1998 Annual Survey	39	40
1999 Annual Survey	35	36
2000 Annual Survey	40	41
2001 Annual Survey	29	32
2002 – 2006: Combined data are not available		
2007 Annual Survey	33	36
2008 / 09 Annual Survey	22	35

ECONOMIC EVALUATIONS AND FUTURE PROSPECTS

OVERVIEW: Respondents in both counties are feeling the effects of the current recession. There was a sharp decline in residents' ratings of their county's economy, and there were no differences between counties in these ratings. In addition, there are virtually no differences between County residents regarding projections of their financial well-being in the coming year.

With the falling housing market, economic decline and its related costs, and sharp increases in the price of commodities, it is not surprising that ratings of the county's economy dramatically declined (Question 8). This year only 12% of Riverside County and San Bernardino County respondents rated their county's economy as "excellent" or "good," (compared to 45% and 40%, respectively, last year).

Table 50. Trend -- % Rating the County's Economy as "Excellent" or "Good"

	Riverside County %	SB County %
1997 Annual Survey	38	28
1998 Annual Survey	59	45
1999 Annual Survey	61	47
2000 Annual Survey	59	44
2001 Annual Survey	49	39
2002 – 2006: Combined data are not available		
2007 Annual Survey	45	40
2008 / 09 Annual Survey	12	12

Respondents were then asked, "In comparison to a year ago, would you say that you and your family are financially better off, worse off, or the same?" (Question 6). Compared with previous years, far fewer residents in both counties report that they are better off now as compared to a year ago. Residents of Riverside County showed the biggest drop (a 17% drop from last year compared to a 10% drop for San Bernardino County residents). This is a significant decrease from previous years for both counties, and reflects the lowest figures for both counties since the survey's inception in 1997.

Table 51. Trend -- % Indicating Their Finances Are "Better Off" Compared With a Year Ago

	Riverside County %	SB County %
1997 Annual Survey	33	34
1998 Annual Survey	39	46
1999 Annual Survey	43	42
2000 Annual Survey	40	41
2001 Annual Survey	34	38
2002 – 2006: Combined data are not available		
2007 Annual Survey	27	25
2008 / 09 Annual Survey	10	15

When asked: "Now looking ahead, do you think that a year from now you and your family will be better off, worse off, or just about the same as you are now" (Question 7), there were virtually no differences between San Bernardino County respondents and Riverside County respondents: 35% of San Bernardino County respondents expect to be better off financially a year from now, compared to 34% of Riverside County respondents.

Table 52. Now looking ahead, do you think that a year from now you and your family will be better off, worse off, or just about the same as you are now?

	Riverside County %	SB County %
Better off	34	35
Same	51	47
Worse off	16	18

EVALUATIONS OF SELECTED PRIVATE AND PUBLIC SERVICES

OVERVIEW: ***Ratings of private and public services have not changed significantly over the past twelve years, with residents of both counties giving the highest marks to police/sheriff services, shopping and parks/recreation services, and the lowest marks to street/road maintenance and transportation.***

Each year the Annual Survey has included questions regarding respondents' evaluations of local services from both the private and public sectors. Over time, there has been remarkable stability in rankings and remarkably few differences between counties. The following table details the percentage of respondents who indicate that the services are "excellent" or "good" (Questions 14 to 20).

Table 53. % Rating Service as "Excellent" or "Good"

SERVICE	Riverside County %	SB County %
Police/Sheriff	76	68
Shopping	69	62
Parks/Recreation	67	61
Public Schools	52	46
Entertainment	52	46
Transportation	39	42
Street/Road Maintenance	34	32

Respondents in both counties gave the highest ranking to police/sheriff services and shopping. Parks and recreation services also received relatively high marks. On the flip side (and of greatest concern) is the fact that street/road maintenance and transportation continue to be given the lowest ratings among residents from both counties.

CONFIDENCE IN ELECTED OFFICIALS

OVERVIEW: Approximately 6 out of 10 respondents in each county have a "great deal" or "some" confidence in their elected city officials.

Since 1997 the Annual Survey has included a question asking respondents "How much confidence do you have that the elected officials in your city or community will adopt policies that will benefit the general community?" (Question 28). There has been a great deal of variation in ratings over time. This year 65% of San Bernardino County respondents and 58% of Riverside County respondents reported having a "great deal" of confidence or "some" confidence in their city/community elected officials. These figures may have declined somewhat in the period since the survey was taken considering recent well-publicized probes within San Bernardino County.

Table 54. Trend -- % Reporting "A Great Deal" or "Some" Confidence In Their Elected Officials.

Year of Survey	Riverside County %	SB County %
1997 Annual Survey	66	63
1998 Annual Survey	64	61
1999 Annual Survey	61	59
2000 Annual Survey	65	64
2001 Annual Survey	66	59
2002 – 2006: Combined data are not available		
2007 Annual Survey	62	63
2008 / 09 Annual Survey	58	65

FINAL NOTE

In this report we have presented San Bernardino County findings, Riverside County findings and San Bernardino/Riverside County comparative findings from the 2008/09 Inland Empire Annual Survey. The reader is encouraged to review the full data displays for the complete listing of survey results. This report is available on our website:

http://iar.csusb.edu/reports/ie_annual_survey.html

for those who wish to engage in more detailed comparative analysis with previous years' reports.

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